GCIMS Quick Reference for Recipient Users

Accessing GCIMS

❖ Connecting to Access Portal

1. [Open] your internet browser.
2. [Enter] the following link in the address box: https://pa-ap.sac-isc.gc.ca

   The Access Portal page will be displayed.

   [Click] the I HAVE READ AND ACCEPT THE CONDITIONS button.
3. [Enter] your ISC/CIRNAC (Citrix) LAN account Username and [Click] the SUBMIT USERNAME button.
4. You will receive a One Time Password (OTP) in your email address (Inbox). Please check you Junk Email Box if you have not promptly received it in your Inbox. The OTP code expires in 5 minutes.
5. Enter most recent OTP code and press submit OTP Code.
6. [Enter] your Password and [Click] the LOG ON button. The Portal page will be displayed with the **GCIMS icon** to access the system.

❖ Logging in to GCIMS

1. [Click] the **GCIMS icon** from the Portal page. The GCIMS login screen will be displayed.
2. [Enter] your GCIMS Username and Password and [Click] the button FRANÇAIS or ENGLISH depending on your language preference. The GCIMS Home screen will be displayed.

Changing your Password

To change your password, [Select] menu: System Administration > System Security > User Password.

The **Change Password** screen will be displayed

1. [Enter] your Old Password, New Password and Confirm New Password.
2. [Click] the SAVE button.
3. Your password will expire every 90 days and GCIMS will prompt you to change your password after 90 days. You can change your password every 24 hours.

Funding Allocation Summary

To view your allocation summary, [Select] menu: Financial Management > Recipient Allocation Summary. The **Recipient Allocation Summary** screen will be displayed.

1. Enter your search criteria in the **Recipient Allocation Summary** screen and [Click] the SEARCH button.
2. [Browse] through your funding allocation summary information using the +, ++, -, - - icons.

Funding Arrangements

To view your funding arrangements, [Select] menu: Arrangements Management > Funding Arrangements > Arrangements. The **Search Arrangements** screen will be displayed.

1. Enter your search criteria in the **Search Arrangements** screen and [Click] the SEARCH button.
2. If only one funding arrangement is found, the **Funding Arrangement** screen will automatically open. If there is more than one, [Click] from the results grid the Arrangement # of the arrangement you wish to view. This will open the **Funding Arrangement** screen.
3. [Select] a fiscal year and [Browse] through the different information tabs:
   - *General Information*: to view key dates and total funding (initial, adjusted).
   - *Programs & Budget*: to view details of your funding (amount, vendors/ payees, financial coding).
   - *Recipient Reports*: to view your reporting requirements (reports, frequencies, due dates).
   - *Terms & Conditions*: to view the parts that make up the funding arrangement.
   - *Adjustments*: to view the adjustments made to your funding arrangement (amendments, NOBAs, cash flow changes, etc.).
   - *Financial History*: to view the payments made.

Arrangement Adjustments Details

To view the details of your funding arrangement adjustments, [Select] menu: Arrangements Management > Funding Arrangements > Amendments or NOBAs or Cash Flow Changes (depending on which type of adjustment you want to view). The corresponding **Search** screen will be displayed.

1. Enter your search criteria in the **Search** screen and [Click] the SEARCH button.
2. If only one adjustment is found, the corresponding adjustment (Amendment, NOBA or Cash Flow Change) screen will automatically open. If there is more than one, [Click] from the results grid the reference # of the adjustment you wish to view. This will open the adjustment screen.
3. [Browse] through the different applicable information tabs:
   - *General Information*
   - *Programs & Budget*
   - *Recipient Reports*
   - *Terms & Conditions*

Reporting Requirements

To view and submit your reporting requirements, [Select] menu: Recipient Reports Management > Recipient Services > Recipient Report Status. The **Recipient Report Status** screen will be displayed.

❖ View Reporting Requirements

1. Enter your search criteria in the **Recipient Report Status** screen and [Click] the SEARCH button.
2. Your reporting requirements meeting the search criteria will be grouped and displayed by status (Due, Overdue, …).
3. [Browse] through your reporting requirements using the +, ++, -, - - icons.
4. You can view the details of a specific report using the *Document* icon, History link, and Information icon.

   A dollar sign ($) beside a report name indicates that the report has a financial impact and may be halting funds if it is overdue.

❖ Submit a Report

1. While viewing the details of a specific report you want to submit, [Click] the associated ADD document icon of this report. The **Document Management window** will open.
2. [Browse] the driver/folder that contains the report to upload. [Click] the report and [click] the OPEN button.
3. [Click] the SUBMIT button to upload the report to GCIMS.

   Note:

   [Clicking] the ADD document icon again allows you to add additional document(s) related to the submitted report.

Reporting Requirements Statistics

To view your reporting requirements statistics, [Select] menu: Recipient Reports Management > Recipient Services > Recipient Report Statistics. The **Recipient Report Statistics** screen will be displayed.

1. [Click] the SEARCH button to display your statistics.
2. [View] your statistics, which are grouped by status.

System Reports

To run recipient system reports, [Select] menu: System Reports > Recipient Reports. The **Recipient Reports** main screen will be displayed.

1. [Click] the system reports below you want to run. The screen to run the selected system report will be displayed:
   - *Recipient Notification of Reporting Requirements Report*: to monitor and manage your upcoming and overdue reporting requirements.
   - *Recipient Reporting Requirements Status Report*: to monitor and manage your upcoming and overdue reporting requirements of any status.
   - *Recipient Expenditures Report*: to assist in managing and tracking your payments.
   - *Recipient Financial Profile Report*: to provide a five-year comparison of recipient revenue and expenditures.
2. If not already defaulted, [Select] you recipient number. Then [Enter] other mandatory and optional report parameters.
3. [Click] the button of your preferred way to produce/receive the report: DISPLAY REPORT, EMAIL PDF, EMAIL EXCEL, EMAIL EXCEL DATA or EMAIL WORD. The report will be produced as per your selection.

Hints & Notes

Access to the Portal

To make the access to the Portal easier each time you want to access GCIMS, you can add the link https://pa-ap.sac-isc.gc.ca to your FAVORITES.

Username and Password

Your GCIMS Username and Password are NOT the same as the Access Portal (Citrix) Username and Password.

If your GCIMS Username and/or Password are entered incorrectly five (5) consecutive times, your account will be locked. The system administrator must be contacted to either unlock your account or reset your password.

Technical Support

If you have problems with your access to the Portal (via Citrix), you may contact the Department's ITS Help Desk via email at:

sti-its@sac-isc.gc.ca or via

phone at: 1-866-795-6465.

If you have problems with your access to GCIMS or encounter any issues with the use of GCIMS, you may contact the GCIMS Help Desk via email at bureaudaidesgiscontario-ontariogcimshelpdesk@sac-isc.gc.ca

For any other problems, you may contact your regional Funding Services Officer.