GATE Front Office User Guide

Historic Resource Conservation Grants

GATE Front Office User Guide | Arts, Culture and Status of Women

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GATE Front Office User Guide

Historic Resource Conservation Grants

This is a guide on how to submit an application for a Historic Resources Conservation Grant (HRCG) through the Front Office portal of the Grants Application Tracking and Evaluation (GATE) system. HRCG is a funding opportunity offered by the Heritage Preservation Partnership Programs. The GATE Front Office is a secure, electronic method of applying for grants administered by the Ministry of Arts, Culture and Status of Women.

1 Plan Before Applying

2 Register to Get a GATE Account

3 Log in to GATE Front Office

4 Complete Applicant Profile

5 Create and Submit Application

See Detailed Guides

PLAN BEFORE APPLYING

1. Read the guidelines https://www.alberta.ca/historic-resource-conservation-grants.
2. Consult with your Heritage Conservation Adviser.
3. Prepare a project budget and schedule.
   - Collect estimates from contractors.
   - Determine how much you are contributing. This is the applicant contribution that may include cash contribution, in-kind donations and grant funding from non-Government of Alberta sources.
   - Determine your funding request.
4. Prepare information and supporting documents for upload to GATE.
   - Invoices/Receipts of completed work
   - Estimates of proposed work
   - For Municipal Historic Resources: municipality's written approval of the proposed work.
   - If the applicant is not the legal owner of the historic resource: authorization for applicant to do the work
   - For organizations (except municipalities): incorporation document, list of executives / Board of Directors
5. If the applicant is not yet registered in GATE, prepare to register in GATE. See information in Register section.

REGISTER

Individuals or organizations may apply for Historic Resource Conservation grants. These are referred to as the Applicant. Registrants are individuals that are linked to the applicant's account. Each registrant has a user name and password. They will have access to their application records in GATE.

IF THE APPLICANT DOES NOT HAVE A GATE ACCOUNT

To register, the applicant shall register with the grant program office at least 10 working days before the application submission deadline.

Applicant is an Organization	Applicant is an Individual
Organizations may have up to three registrants, one of which must have legal signing authority. The individual with the legal signing authority may designate up to two additional registrants. Registrants must have unique email addresses. Download and complete the registration form: https://formsmgmt.gov.ab.ca/Public/AD13119.xdp A designated member of the organization shall email the following to acsw.registration.hppp@gov.ab.ca : • completed registration form • name and location of the historic resource	For applicants applying as an individual, the individual is also the registrant. The individual shall email the following to acsw.registration.hppp@gov.ab.ca : • legal name • email address • name and location of the historic resource

Program staff will create an applicant account, email the username, temporary password and confirmation question and answer to the registrant(s). When the registrant is ready to access GATE, the next step is to log in (next page).

IF THE APPLICANT HAS A GATE ACCOUNT

Applicant is an Organization	Applicant is an Individual
The organization's registrants will use their existing login information. To update the list of users, complete and email the registration form.	If the individual is already registered as an individual-applicant, the individual does not need a new username.

If you are not sure if you already have an applicant account in GATE, email acsw.registration.hppp@gov.ab.ca .

If you forgot your password, click login, then click **Forgot your password**.

To change password, see steps in Log In section (next page).

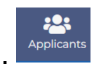
LOG IN

1. Access the GATE Front Office portal. Click https://gate.alberta.ca/gate/frontOffice.xhtml
2. Click login.
3. Enter your username and password. For new users, this is the temporary password emailed by program staff.
4. On the welcome/home page (My Work icon is automatically selected), the bottom left side of the navigation bar, click the icon with your username.
5. Click Change Password. Enter Old Password (for new users, this is the temporary password), new password, personal confirmation question and personal confirmation answer.

   Password: minimum of 7 characters, maximum of 20 characters, any character, case-sensitive

6. Click **Save**. Message appears: “Your password has been changed successfully”.

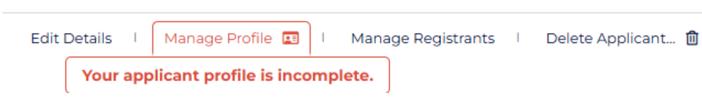
COMPLETE APPLICANT PROFILE (for the first time)

On the welcome / home page, navigation bar on the left, click **Applicant**s icon. 

*Tip: Selecting **My Work** icon will take you to the welcome/home page.*

The applicants associated with your user account will show up. Click to select the applicant.

On the top right, note the message “Your applicant profile is incomplete”. Click **Manage Profile.**



On the left side of the page, click **Applicant Type**. Select from drop-down list: Organization or Individual

Respond to each set of questions (list below). You need to respond to mandatory fields. These are identified with a red asterisk.

Applicant is an Organization	**Applicant is an Individual**
Organization Registration Address Contact List: Click + to enter a contact. Submission Summary	Individual Address Contact List: Click + to enter a contact. Submission Summary

Click **Next Page** to go from one page to the next. When you get to the Submission Summary, this message in red will show up, as well as “This e.Form has been marked as complete.”

NOTE: You have completed your profile only and not the application. You must complete your application form separately.

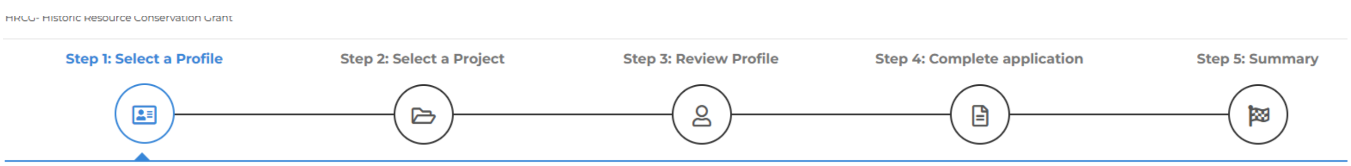
See Detailed Guide: How to manage your applicant profile on page 6.

CREATE AND SUBMIT APPLICATION

Select the Funding Opportunity

1. Click **Funding Opportunities**. All funding programs of the Ministry that use GATE will show up here.
2. Click the program tile **HER–Historic Resource Conservation Grant (HRCG)**.
3. Click **Apply Now**.

This shows up. Each step will be highlighted as you go from one step to the next.



Step 1: Select a Profile

1. Click on the name of the applicant. If you are associated with more than one applicant, those applicants will show up here.
2. Click **Save and Next**.

Step 2: Select a Project

Create a new project or select an existing project (if to continue with an application that you already started).

1. To create a new project, enter the project name in the **Applicant Project Name.** Use the name of the historic resource and the year of the intake. For example: Brown Residence 2026.
2. Click **Save and Next**.

Step 3: Review Profile

1. If you have already completed your profile, this message will show up “This e.Form has been marked as complete.” This message in red will also show up.

   NOTE: You have completed your profile only and not the application. You must complete your application form separately.

2. If an edit / update is not needed, click **Save and Nex**t. Proceed to Step 4 Complete Application.

   If an edit / update is needed, go to Submission Summary. Click **Edit**. Edit information as needed. When done, click **Save & Next**. See Detailed Guide: How to manage your applicant profile on page 6.

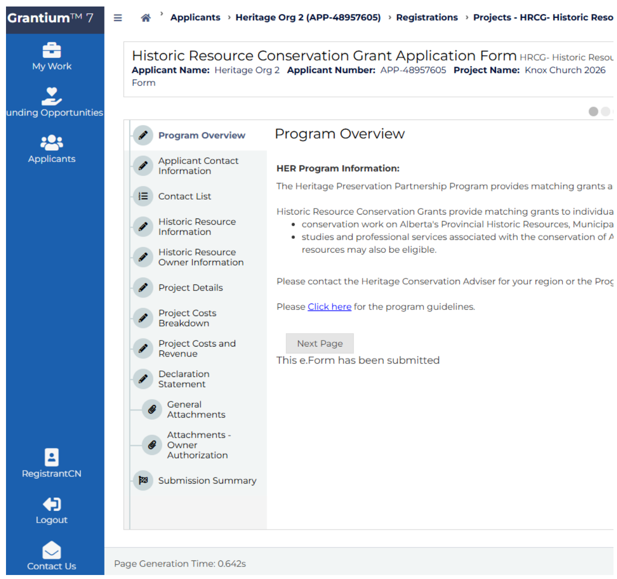
Step 4: Complete Application

The Historic Resource Conservation Grant Application Form shows up.

1. Click each section on the left and enter information (see screenshot below). You have to enter information in mandatory fields. These are marked with a red asterisk.
2. Click **Save & Next** to go to next page.
3. Towards the end is the Declaration Statement, Terms & Conditions. Read and click check boxes.
4. In General Attachments page, attach supporting documents.

See Detailed Guide: How to complete your application on page 8.

5. Proceed to Step 5 Summary.



*Tip: If you wish to stop at any point during Step 4, click **Save & Exit**. To return and continue working on your application, click My Work to go back to the welcome / home page. On the Recent Submissions, click the tile for this project. The project will show as "in-progress". See Detailed Guide: How to return to an application that you started (page 14).*

Step 5: Summary

1. Review Submission Summary. Complete any missing information.
2. Review your application for completeness and accuracy. Click the section to review and make any changes. Once submitted, the system will not let you make changes (amendments). Contact your Heritage Conservation Adviser or Program Coordinator to inquire.
3. To keep a copy of your application, click **Export to PDF**. Save the PDF file in your computer.
4. When ready, click **Submit Application**.

You will receive an email confirming that your application has been submitted.

In the welcome /home page, Recent Submissions, the project's status will change from "in-progress" to "complete". This means your application was submitted.

Detailed Guide: How to manage your applicant profile

Tips: To save time, review and update your Applicant Profile before starting or submitting your application.

If you already submitted an application and information needs to be changed in the Applicant Profile, contact the Program Coordinator or Heritage Conservation Adviser.

Creating your applicant profile for the first time. Enter information mandatory information (identified with red asterisk).

If the applicant is an organization

*Applicant Type: Select drop-down list. Click the appropriate organization type.

Organization

- *Is your organization registered under a Provincial/Federal Act or has a similar status? Answer Yes or No.
- *Are you a CRA registered charity?
- Common Name (if different from Legal Entity Name)
- *Legal Entity Name
- Previous Legal Entity Name: Answer if changed in the last 5 years
- Vision/Mission Statement

Registration

- *Registration Type: Select from drop-down list
- *Registered Name
- *Registration Number
- *Registration Date (yyyy/mm/dd)

Address

- *Applicant Address – This is the Street Address.
- *Mailing/Delivery Address

If the applicant is an individual

*Applicant Type: Select from drop-down list. Select “individual”

Address

*Applicant Address – This is the Street Address.

*Mailing/Delivery Address

Contact List

To add a contact, click the **plus sign icon**. A contact form will open. Enter the contact details. Must complete mandatory fields (identified with red asterisk).

- Contact Type: Select from drop-down list (Primary Contact, Authorized Rep, Other)
- *Salutation, *First Name, Middle Name, *Last Name
- Title: If this individual is the owner, enter “owner”.
- *Phone number

Email address: This is not a mandatory field but please do provide this information.

Contact is on the Board of Directors; Title

To add additional contacts, click **Save & Add Another**. This will bring you back to the Contact List page. Contacts added will show here.

To remove any of the contact, click the Garbage icon 🗑 under Actions column.

Submission Summary

This page will show an overview of the sections you have completed. A checkmark means the information entered for that page, is complete.

Once all pages are checked off, click **Complete** (located on top of the page).

Your applicant profile is now complete.

These messages will show up

This e.Form has been marked as complete.

NOTE: You have completed your profile only and not the application. You must complete your application form separately.

Updating / Editing your Applicant Profile

If you already created your applicant profile and a change/edit is needed, follow these steps.

1. On the welcome/home page, click **Applicants,** click the name of the applicant.
2. On the top right, click **Manage Profile.**
3. Go to Submission Summary. On the top right corner, click **Edit.**
4. Edit the information you want to edit. Click **Save & Next**.
5. Back to Submission Summary. If an item is missed on a previous tab, an X appears. Click the underlined item beside the X, then complete the page.

Detailed Guide: How to complete your application

Tip: Review and update your Applicant Profile before starting or submitting an application.

Program Overview Read program overview. Click **Next Page**.

Applicant Contact Information

*Type of applicant: Select from drop down list, Individual or Organization.

If Organization, enter Type of Organization and Brief Description of Organization. *Note: Complete these fields again.*

*Applicant Contact Information: This is the street address. Note the message in red (see screenshot below).

Mailing / Delivery Address

Applicant Contact Information

Updates to this information will not be reflected in the Applicant Profile.

Update the Applicant Profile if required.

Contact List

*Primary Contact Name and *Primary Email Address: Choose from down-down list. This is the primary contact person for this application. The names and email address are pulled from the Applicant Profile. If the contact name is not in the list, add the name in the contact list in your Applicant Profile.

Historic Resource Information

*Name of Historic Resource: Name of historic resource as registered in the Alberta Register of Historic Places

*Location: Location of historic resource as registered in the Alberta Register of Historic Places. Usually the street address.

*Legal description or Postal Code: Legal description and/or postal code of the historic resource. Must enter one of this information.

If the postal code is entered, municipality and constituency will auto-populate after hitting save.

If only the legal description is entered, municipality and constituency will not auto-populate.

Municipality and Constituency: These will auto-populate when postal code is entered.

*Designation Status: Select from drop-down list. If the historic resource is both a Provincial and Municipal Historic Resource, select Provincial and Municipal Historic Resource.

*Is this registered on the Alberta Register of Historic Places? Select yes or no.

If no: What is its status on the registration process? Enter status. Refer to the Alberta Register of Historic Places.

Click **Save & Next.**

Historic Resource Owner Information

*What is the name of the legal owner as registered on the Land Title? Enter the legal name of owner.

*Is the applicant the legal owner? Select Yes or No.

If no: “Is the applicant authorized by the legal owner to undertake this project and apply for a grant?” Select yes or no.

If yes: You will be asked to attach an authorization from the legal owner in Attachments.

If no: You won’t be able to submit the application.

Project Details

*What is the scope of the project? Why is this project being undertaken? Up to 2000 characters

*Type of Project: Select from drop-down list, Conservation Work or Studies/Professional Services

*Overall Project Status: Select from drop-down list.

Not Started: Entire project has not started

In-progress: At least one work item of the project has started or complete

Complete: Project is 100% complete.

*Start Date and End Date: Actual or estimated start and end date of the project. Pick date from pop-up calendar. *Tip: An error message will show-up if end date is earlier that start date: “End date cannot be earlier than start date.”*

*What’s the current and/or future use of the historic resource? Up to 2000 characters.

*How is the applicant going to obtain any pending/unconfirmed cash contribution? Up to 2000 characters.

*How will the applicant address any funding shortfall (that is, if the grant program is unable to provide full eligible funding of it funds from other sources cannot be obtained)? Up to 2000 characters.

*If there is a funding shortfall, will the project go ahead? Up to 2000 characters.

Click **Save & Next.**

Project Costs Breakdown

Cash Costs

Based on your estimates (for proposed work) and invoices/receipts (for completed work), enter the following information for each work.

Work description: Brief description of the work

Status: Select from the drop-down list - Not started, In Progress, Complete

Start Date: Click on the date on the pop-up calendar.

Completion Date: Click on the date pop-up calendar.

Contractor's Name

Invoice/Receipt No. or Estimate No.

Amount (excluding GST)

Total Cash Costs: Will auto-calculate, sum of all Amounts

Click **Save**.

In-kind Costs

Enter any donated labour, materials, services, equipment

Work Description: Brief description of the work associated with the donated labour, materials, services, equipment

Status: Select from drop-down list - Not Started, In Progress, Complete

Start Date: Pick date from the pop-up calendar.

Completion Date: Pick date from the pop-up calendar.

Source of Donation: Name of organization or individuals providing the in-kind donation

Quantity: Number of hours, units, pieces etc.

Unit rate: Rate per hour, unit, piece etc.

Total value of donation: Will auto-calculate. Quantity multiplied by Unit Rate.

Total Costs: Will auto-calculate. Sum of all in-kind costs.

Click **Save & Next.**

Project Costs and Revenue

PROJECT COSTS

This will auto-calculate the Total Project Cost. You will not be able to enter anything here.

1. Total Cash Costs and Total In-kind Costs are from the Project Costs Breakdown.
2. Total project cost is auto-calculated as the sum of total cash costs and eligible in-kind costs.

PROJECT REVENUE

This consists of Applicant Contribution and Government of Alberta contribution.
On this table, you will tell us the following:

- How much you are contributing to the project?
- If you have applied or approved for other Government of Alberta sources and how much ?
- How much are you requesting?

Applicant Contribution

1. **In-kind contribution:** Enter funding status only. This is the Eligible in-kind costs from the Project Costs table.

2. **Municipal grants, Federal Grants, Other non-Government of Alberta sources:** Enter funding status and amounts. Enter the amount allocated to this project.

   Total funding from non-Government of Alberta sources: This will auto-calculate. Sum of municipal grants, federal grants and other non-Government of Alberta sources

3. **Applicant's cash:** Enter the amount of cash that you plan to contribute from sources such as savings, donations and fundraising proceeds that are allocated to this project.

4. **Total applicant contribution:** This will auto-calculate. Sum of all applicant contribution amounts. Minimum of 50% of Total Project Cost.

Government of Alberta Contribution

1. **Funds from other Government of Alberta sources:** Enter name of funding source such as Community Facility Enhancement Program, funding status and amount. Enter amount allocated to this project.

2. **Grant amount requested:** Enter the amount of Historic Resource Conservation Grant you are requesting. *Important: See notes pertaining to determining grant amount to request.*

Total Revenue

Total Revenue: This is the sum of Applicant Contribution and Government of Alberta Contribution. Must be equal to Total Project Cost.

Click **Save & Next.**

Declaration, Terms & Conditions

Read these carefully. Click all boxes to agree.

Clauses 20 and 21: Enter all the information pertaining to the name and contact information of the individual representing the applicant.

> *Important: The individual submitting the application is a registrant, which means they are authorized to submit the application on behalf of the applicant.*
>
> *If the applicant is an individual and is the owner of the historic resource, enter "Owner" on Title/Position.*

Date: Defaults to the date when application was first created. *Tip: Before submitting the application, this can be updated to the current date.*

Click **Save & Next.**

General Attachments

Upload your supporting documents.

Under the Document Type column, click on individual names.

> Cost estimates/Quotes Cost estimates/Quotes are identified as required (also known as mandatory). You will not be able to submit the application if you did not attach any.
>
> *Tips: Maximum size of each files in 4 MB. You may submit in one file or submit individually.*
>
> Incorporation Document: For non-profit organizations, businesses
>
> List of current executives or Board of Directors: Includes name, position/title
>
> Copy of designation by-law and Statement of Significance: If the Municipal Historic Resource is not yet registered in the Alberta Register of Historic Places
>
> Municipality's written approval for work: For Municipal Historic Resources.
>
> Other Supporting Documents: Such as photos, Terms of Reference, documents pertaining to other grant funding, additional invoices/receipts

On the Attachment details

> Document Description: Enter a short description of the document.
>
> File Name: Click **Choose File**. Locate the file in your computer. Click on your file to upload. Allowable formats are Word, Excel, PDF, JPG documents.

Repeat until all documents have been uploaded. Click **Next Page**

Attachment-Owner Authorization

If the applicant is not the legal owner, Attachment-Owner Authorization will show up under General Attachments. Under the Document Type column, click "Written authorization from the owner".

On the Attachment details page, Document Description, enter a short description of the document. Click **Choose File**. Locate the file in your computer. Click on your file to upload. Allowable formats are Word, Excel, PDF, JPG documents. Click **Next Page**.

Submission Summary

This will show items that needed to be completed. Mandatory items are marked as x in the Complete column.

If all complete and you are ready to submit, click **Submit Application.**

Click **Finished**.

On the bottom of each page, a message shows up: “This e.Form has been submitted”. Applicant cannot make any changes to the application at this point.

On the welcome/home page, Recent Submissions, the submitted project will show up as Complete.

To save a PDF copy of your application, on the top-right hand corner, click **Export to PDF**.

You will receive an email notification saying that the application was successfully submitted.

Tip: Go to My Work> Recent Submissions – This will show the application submitted as “complete”.

If you want to log off now, click **Logout.**

Detailed Guide: How to navigate the dashboard

Log-in. Read the tips on the welcome / home page. See navigation bar on the left.

1. My Work: Considered as the home page, shows the Recent Submissions tile.
2. The Recent Submissions tile shows your applications and reports (submission of reports is not covered by this guide).
3. Applications that you have started but not yet submitted will show as “In Progress”. Applications that have been successfully submitted will show as “Complete”.
4. Funding Opportunities: The Funding Opportunities available for receiving applications on Front Office
5. Applicant: Shows the applicants that the user is registered with. Clock the applicant to view and update your applicant profile.
6. Username icon: Shows the username of the registrant. When clicked, will take you to:

   My Account where you can find user account information, change your password, logout.
7. Logout: You can log off from here.
8. Contact Us: Lists the email addresses of the grant program offices

Detailed Guide: How to return to an application that you started

1. Log-in. On the navigation bar on the left of the page, click **My Work**.
2. Scroll down to the Recent Submissions.
3. Select the application that you wish to complete. This is the application that you have started. The status is in-progress.
4. On the left menu, click the information that you want to work on or go to Submission Summary page to see what’s missing. Completed information are marked with an ✓ and those are not yet completed are marked with an x.
5. Once you have a selected the information to complete, enter your information. Click Save & Next.
6. To exit the application before you are ready to submit, scroll down, click **Save and Exit**. This will mark you project as in-progress.

Detailed Guide: How to edit a project name

1. Log-in. On the navigation bar on the left of the page, click Applicants. Select the applicant.
2. You will see the list of active projects. On the Project Name column, select the project name (application) you wish to edit.
3. A window will pop up. Enter the new project name.
4. Click save. A message “Project updated” will show. The new project name will appear on the Projects table.

Detailed Guide: How to delete an application that has not been submitted

1. Log-in. On the navigation bar on the left of the page, click **Applicants** icon. Select the applicant.
2. You will see the list of active projects. On the Project Name column, find the project (application) that you wish to delete.
3. Select the blue folder icon (to the right). You can only delete projects that are in-progress.
4. A prompt will appear asking “Are you sure you want to delete this project”? Click yes to confirm.