Accela Cannabis Customer Portal Tutorial

**Nevada Cannabis Compliance Board (CCB)**

https://aca-prod.accela.com/NVCCB/

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Account Management

Before You Start

1. Please use the following browser: Google Chrome

2. Website address: https://aca-prod.accela.com/NVCCB/

3. Frequently Asked Questions and Video Tutorials are available on our website www.ccb.nv.gov

4. Available functions without creating an account: Complaints

5. "Search" and "Search & Renew Licenses" only allows users to search within their own records.

6. For Accela system support questions, email ProgramSupport@ccb.nv.gov

7. Linking License Note: Whomever registers for the account first and links the license(s), will have administrator privileges in the Accela Cannabis Customer Portal. They will add Delegates (other authorized users) to the licenses and will decide on the security of those Delegates. Delegates will be able to see all linked licenses and submissions within the account.

8. Important Agent Card Notes:
   - If an employee registers for their own user account and submits their agent card application online, then the employee will be able to access their account in the future to provide any needed documentation to the Board or follow up on their own card within the system. The employee can add someone from the licensed establishment as a delegate to their account to see the status of the application and agent card. A delegate can also be given permission access to submit things on behalf of the main account holder.
   - If a representative from the license wants to submit an agent card application on behalf of the agent card applicant through the licensee representative account, the agent card holder will not be able to log in and provide any needed documentation to the Board or follow up on their own card within the system. It is not recommended that agent card holders be added as delegates to the licensee representative account because they will then be able to see information on all agent cards and other submissions made within that account. If a representative from the license will be submitting the applications through their account, they will need to complete each application as though they are the agent card applicant. It is suggested that the licensee representative have written permission from the applicant to act on their behalf.

9. To prevent unauthorized access, always log out of your account when you are ready to end your session.

How to Register for an Account

1. First time users please "Register for an Account". Returning customers please continue to login with your existing credentials.

2. Go to https://aca-prod.accela.com/NVMED/. At the top right you can Login or Register for an Account. You can also register for an account in the grey Login window.
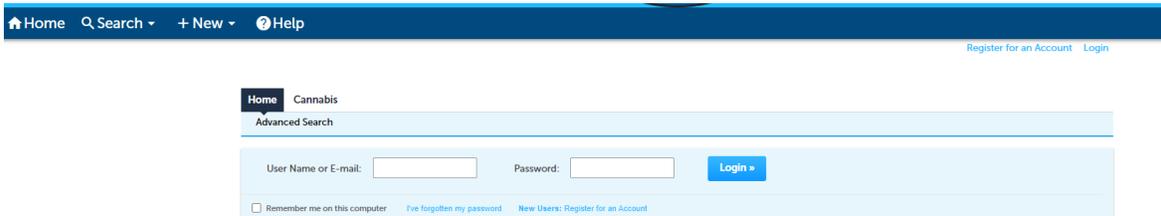
3. After you have read and agree to the terms of use, check the box "I have read and accept the above terms" and click "Continue to Registration".
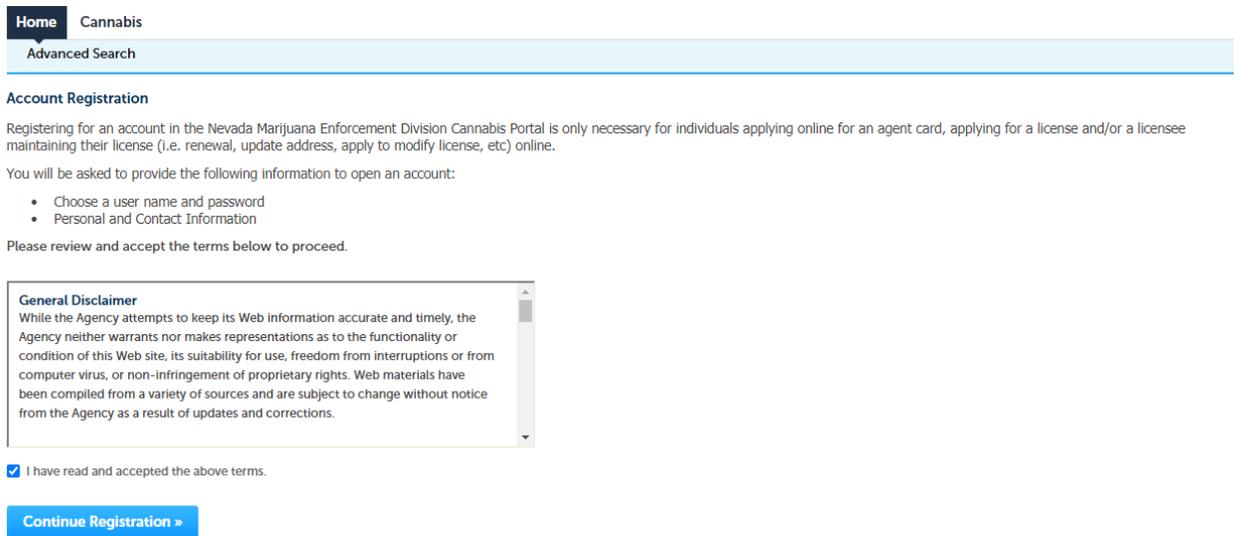
4. Next, fill out the information you would like to use to login. You will need to remember this information to use Accela Cannabis Customer Portal in the future. After your information is complete and accurate, under "Contact Information" click "Add New". This is required to register your account.

Account Registration Step 2:
Enter/Confirm Your Account Information

* indicates a required field.

Login Information

Enter your User Name and Password. You must also enter a unique email address.

* User Name: ⑦

* E-mail Address:

* Password: ⑦

* Confirm Password

* Enter Security Question: ⑦

* Answer: ⑦

Contact Information

Please add your personal contact and identification information.

Add New

Continue Registration »

5. Select Contact Type and hit "Continue". Select "Individual" if you are: applying for an agent card, an employee, an Establishment Point of Contact, an Owner, Officer, or Board member, or an Agent Card Designee.

Select Contact Type ✕

Please select "Individual" if you are: applying for an agent card, an employee, an Establishment Point of Contact, an Owner, Officer, or Board member, or an Agent Card Designee.

* Type: ⑦
Individual ▼

Continue **Discard Changes**

6. Enter your Contact Information. Under "Contact Addresses", click "Add Contact Address". A mailing address is required to register your account. After your information is complete and accurate, click "Continue".

7. You should get a message displaying that your "Contact was added successfully". From there you can edit or delete your profile. When all information is entered, click "Continue Registration".

8. You should get another notification that your account was added successfully, and you can now proceed to login.
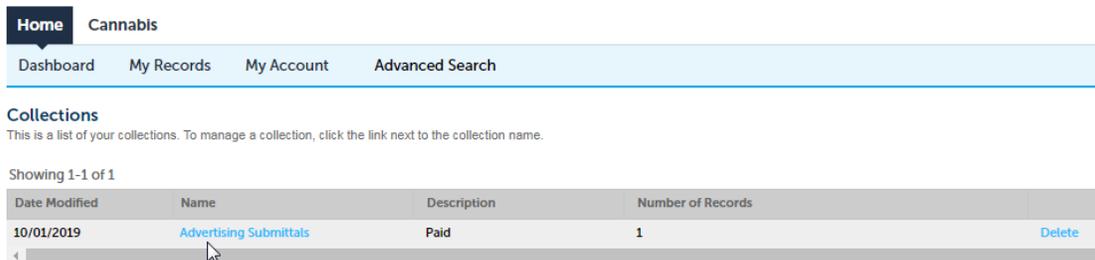
General Navigation Information

1. After logging in, the first screen you will see is the Dashboard. The "My Collections" section is where you can save documents that have been submitted. It will be empty until you submit documents. Once you have submitted documents, you can click "View Collections" to see the record details. Options are also available under the "My Records" section.

Hello, Marijuana Nevada

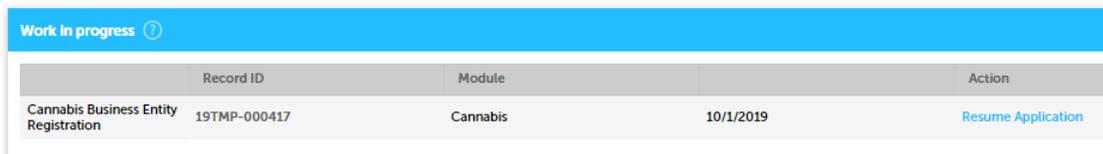| My Collection (1)		View Collections
1 Records	Advertising Submittals Last Updated 10/01/2019	

2. The record detail screen will show you the date submitted, name, description, number of records and provide you the option to delete the file from your collection.

Home   Cannabis

Dashboard   My Records   My Account   Advanced Search

Collections
This is a list of your collections. To manage a collection, click the link next to the collection name.

Showing 1-1 of 1

Date Modified	Name	Description	Number of Records	
10/01/2019	Advertising Submittals	Paid	1	Delete

3. Return to Dashboard and you will see a "Work in Progress" field that will display saved and unsaved applications.

   *Every submission is considered an "Application" in the Cannabis Customer Portal.

Work in progress ⓘ				
	Record ID	Module		Action
Cannabis Business Entity Registration	19TMP-000417	Cannabis	10/1/2019	Resume Application

4. "My Records" includes all licenses, applications, and amendments submitted to the CCB and shows the status.

5. "My Account" allows users to manage their login, contact information and delegates (other people who can access their account). Delegates are individuals you have given access to. Delegates will have access to every record/license that you have access to.

6. "Advanced Search" allows users to search within their own records.

7. "FAQ" will take users to the CCB Frequently Asked Questions.

8. "+New" allows users to file a complaint against a cannabis establishment. Users can submit a complaint without being logged into an account. Users can also access "Account Management" which is the same as the "My Account" option.

9. "Search" allows users to search within their own records.

How to Link a License to Your Account

1. Whomever registers for the account first and links the license(s), will have administrator privileges in the Accela Cannabis Customer Portal. They will add Delegates (other authorized users) to the licenses and will decide on the security of those Delegates. Delegates will be able to see <u>all</u> linked licenses in the account.

2. If you are the Establishment Point of Contact (POC) on record with the CCB, you will receive a PIN number to attach your license to your account. If you are the POC for more than one license, you will receive one PIN for each license. Before you can link a license to your account, make sure you have set up an individual user account.

3. Once you log into Accela, click "Cannabis".

4. Then click "Create an Application".

*Note: Every submission is considered an "Application" in the Cannabis Customer Portal.
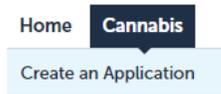
5. After you have read and agree to the terms of use, check the box "I have read and accept the above terms" and click "Continue Application".

6. Click the arrow next to "Registration", select "Link to Your License" and click "Continue".

7. Enter the 20-digit license number. Enter the PIN code you received from the CCB. Click "Continue".

8. Confirm the information you entered is correct. If you made a mistake, click "Edit". If your entry is correct, click "Continue".

9. After clicking "Continue", you will receive a message that "Your application has been successfully submitted."

Step 3 : Record Issuance

✓ Your application has been successfully submitted

10. To view the linked license, click "Home" then click "My Records". You will be able to click on anything that has a blue hyperlink. The blue record number will take you into the record details. The blue "Amendment" will allow you to submit any type of application amendment, such as a menu request, facility modification, etc. The blue "Renew License" will allow you to submit your renewal application up to 60 days before the license expiration date.

	Home	Cannabis							
	Dashboard	**My Records**	My Account	Advanced Search					

⌄ Cannabis

Showing 1-1 of 1 | Download results | Add to collection

	Date	Record Number	Record Type	Description	DBA Name	Expiration Date	Status	Action	Short Notes
☐	02/11/2020	MED00016DKVTXFJAL1C3	Medical Dispensary License		Mystery Inc	03/31/2020	Active	Renew License Amendment	

How to Add a Delegate to Your Account

1. Whomever registers for the account first and links the license(s), will have administrator privileges in the Accela Cannabis Customer Portal. They will add Delegates (other authorized users) to the licenses and will decide on the security of those Delegates.

   Delegates will be able to see all linked licenses and all other submission within the account.

2. A Delegate is someone that you can assign to have access to work on your account or view your account based on the certain permissions you allow them to have.

3. Under "Account Management", scroll down to "Delegates" and click "Add Delegate".
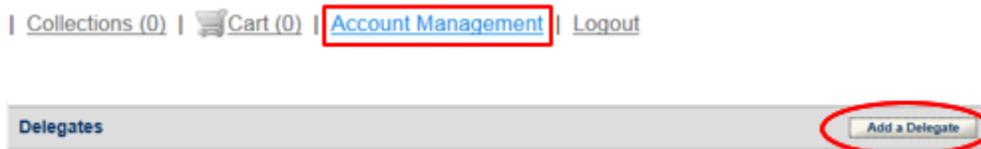
4. Type in their Name and Email Address and select the "Permissions" you wish them to have access to. Click "Invite a Delegate".

5. Once you have invited them, you can see and manage who you have invited as a delegate.

Delegates   Add a Delegate

People who can access my account
Testing Purposes (MetrcPM@tax.state.nv.us)
Invitation sent on 06/23/2020   View Invitation
Add a Delegate
People whose account I can access
None

6. The delegate you requested will receive an email that notifies them that they will need to log into their Accela Cannabis Customer Portal Account to Accept or Reject.

Appoint A Public User as A Delegate of Another Public User

DN   Do Not Reply <donotreply@ccb.state.nv.us> (Do Not Reply via email.merchanttransact.com)
     To   Metrc PM

ⓘ The actual sender of this message is different than the normal sender. Click here to learn more.

Dear Testing Purposes

        would like to add you as a delegate to their Citizen Access account.

'I am adding you as a delegate to my account to have access to all of the permissions. Please note that I can delete you as a delegate on my account as well as change the permissions as I choose.'

As a delegate, you will be able to create application(s), manage documents, renew and amend records on the behalf of afountain, based on the permission(s) that have been granted to you.

Please log into your Citizen Access account and access Account Management null; Delegates to accept or reject the request.

7. Once they accept, they will now have access to the permissions that you have granted them. You can change the permissions or remove them at any time. They can also remove themselves from being a Delegate of your account at any time.

8. As the Delegate, they can now do things such as:
   - View your records, licenses and applications
   - Create applications from your account
   - Renew and Amend your records
   - Manage your Inspections and other Documents

How to Submit an Agent Card Application

Important Notes:
- If an employee registers for their own user account and submits their agent card application online, then the employee will be able to access their account in the future to provide any needed documentation to the Board or follow up on their own card within the system. The employee can add someone from the licensed establishment as a delegate to their account to see the status of the application and agent card. A delegate can also be given permission access to submit things on behalf of the main account holder.
- If a representative from the license wants to submit an agent card application on behalf of the agent card applicant through the licensee representative account, the agent card holder will not be able to log in and provide any needed documentation to the Board or follow up on their own card within the system. It is not recommended that agent card holders be added as delegates to the licensee representative account because they will then be able to see information on all agent cards and other submissions made within that account. If a representative from the license will be submitting the applications through their account, they will need to complete each application as though they are the agent card applicant. It is suggested that the licensee representative have written permission from the applicant to act on their behalf.

1. You must have registered for a user account to submit an agent card application.

2. Once you login using your existing credentials, click on the "Cannabis" button.
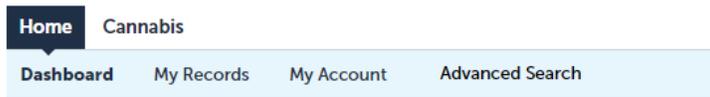
3. Click on the "Create an Application" button.
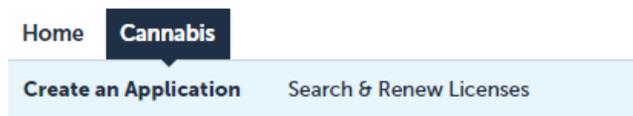
4. Read the Disclaimer, check the box and press "Continue Application".

5. Click the triangle next to "Registration". Then click the bubble next to "Agent Card Application" and press "Continue".

6. Start completing the requested information and going through the online submission process.

   ** If you are a licensee designee submitting the application on behalf of the agent card holder, be sure to enter the information as though you are the individual applying for an agent card. It is suggested that the licensee representative/designee have written permission from the applicant to act on their behalf.

7. At any time, you can select the "Save and resume later" button. This will save the information you entered, and it will be available for you to complete your submission within 30 days.

8. On the Step 2: Documentation page, you will upload the documentation to applicable to your situation. The only one that is required for everyone is "Completed Agent Card Application". The paper application file can be found on our website at www.ccb.nv.gov under Industry - Forms. Once you have uploaded your documents, click "Continue".

9. On Step 3: Review page, review your information for accuracy. If anything needs to be edited, do so from this screen. If the information is correct, click "Continue".

10. On Step 4: Record Issuance, this is your confirmation page that the agent card application was successfully submitted into the Accela Cannabis Customer Portal. This is not an approval of any kind, but let's you know that we did receive it. ==Print this page, write the applicant name and category on the page. Send the page in with your payment.==

The Accela Cannabis Customer Portal is not able to accept payments. All agent card payments must follow the payment guidelines described on our website at www.ccb.nv.gov under Industry – Cannabis Agent Card. You will need to include the record number in the memo section of any checks that you submit.

Agent Card Application

| 1 Disclosures | 2 Documentation | 3 Review | 4 Record Issuance |

Step 4 : Record Issuance

✓ Your application has been successfully submitted

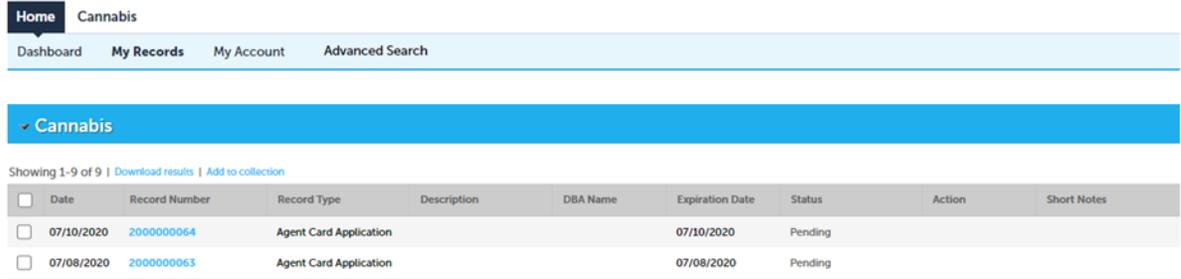Thank you for using our online services.
Your Record Number is 2000000064.

You may need this number to check the status of your submission.

Your submission may not be complete until you have provided all necessary information and documents.

11. If you click on "Home" and "My Records", you can see the submissions you have made on your account and the status. If you are a delegate to an account, you will be able to see those submissions as well. If you click on the blue "Record Number", you can view the submission. You will be able to see the status in real-time as it is processed through our internal workflow.

** The expiration date does not apply until the application has been fully processed to card issuance. Once a card is issued, the "Expiration Date" column will reflect the expiration date of the issued card.

Home	Cannabis			
Dashboard	**My Records**	My Account	Advanced Search	

⌄ Cannabis

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	Date	Record Number	Record Type	Description	DBA Name	Expiration Date	Status	Action	Short Notes
☐	07/10/2020	2000000064	Agent Card Application			07/10/2020	Pending		
☐	07/08/2020	2000000063	Agent Card Application			07/08/2020	Pending		

How to Submit a License Amendment

1. Once you have created your account and linked your license (or been added as a delegate), you can submit any of the following license amendments:
   - Submit an Advertising/Packaging Request
   - Submit a Change of Location Request
   - Submit a Distributor Temporary Storage Notice
   - Submit an Equipment Request
   - Submit a Facility Modification Request
   - Submit a Menu Request
   - Submit a Request for Extraction
   - Submit a Request for Laboratory Retesting
   - Submit a Request to Dispense Edible Cannabis Products
   - Submit a Request to Perform Research and Development
   - Submit a Request to Review Stamp or Mold
   - Submit a Transfer of Interest
   - Submit an Incident Report

2. Once you login using your existing credentials, click on the "Home" button, then select "My Records".
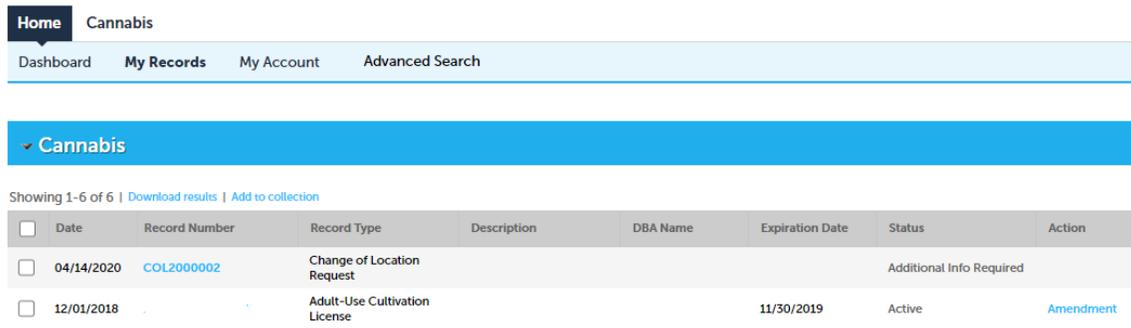
3. To ensure your amendments are submitted on the correct license, click the blue word Amendment under the Action column.

4. On the next screen, select the license type and the amendment type.

5. Complete the requested information for the selected amendment. Attach any relevant documentation. Submit the amendment.

6. At any time, you can select the "Save and resume later" button. This will save the information you entered, and it will be available for you to complete your submission within 30 days.

7. If you go back to the "My Records" screen, you can see the amendment   and the status of the submission. If you click on the blue "Record Number", you can view the submission.
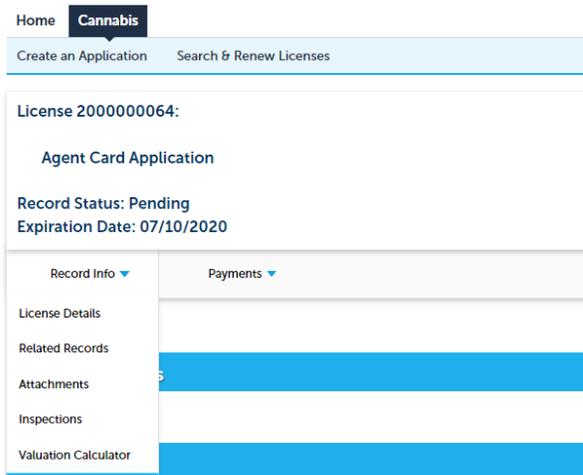
How to Add Documentation to a Submission

1. On the "My Records" page, you will see all of the submissions made within your account or an account you are a delegate for. Click on the blue hyperlink record number of the submission you are wanting to upload a document to.

2. Click the blue triangle next to "Record Info". Select "Attachments".

3. "Add" the attachments you wish to upload to that record submission.
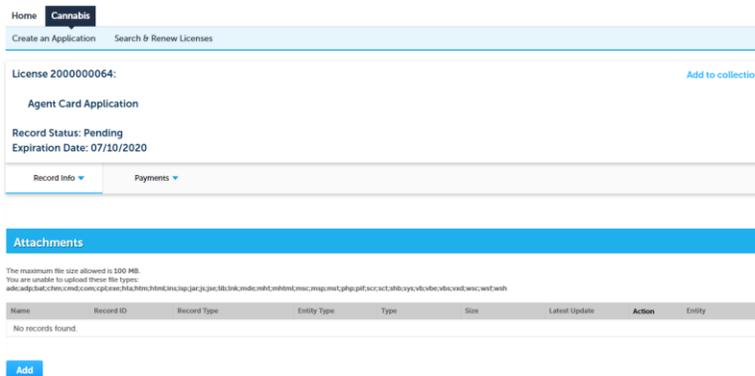
4. After you have added the attachment(s), you should see a message that states "The attachment(s) has/have been successfully uploaded. It may take a few minutes before changes are reflected."

** At this time, you need to email your CCB contact person and let them know a document has been uploaded. If you do not have the direct contact information for that individual, you can email the appropriate team. The team email addresses can be found at https://ccb.nv.gov/contact-ccb/.