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. The website works best in 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 and being logged into a user account: Submit Complaints.

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

6. 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 can add delegates (other authorized users) to the licenses and will decide on the security/permissions of those delegates. Delegates will be able to see all linked licenses, records, and submissions within the account.

7. Important Agent Card Notes**: <u>Employees must register for their own user account and submit their own agent card application online.</u>** The application contains certifications and attestations that the employee must complete. The employee will be able to access their own account and provide any needed documentation or follow up on their own card within the system. If needed, 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 to submit things on behalf of the main account holder.

8. Security and Data Integrity: During use of the Accela system, private security and protection of data is essential. To ensure information is kept confidential a few steps can be taken such as working in a secure location, logging out completely after each session, and not sharing private login information. To help prevent unauthorized access, always log out of the account when ready to end the session.

9. When a user is having difficulty signing into the Accela system, attempt to reset the password, by clicking on "Forgot Password". **<u>Do not</u>** create another user account. If additional assistance is needed, users can email programsupport@ccb.nv.gov.

If users still have system issues or system questions after reviewing this Written Tutorial document, the user can email programsupport@ccb.nv.gov.

How to Register for an Account

1. First time users will "Register for an Account". Returning customers must login with their existing credentials.

2. Go to https://aca-prod.accela.com/NVCCB/. To Register for an Account or Login, the hyperlinks are located on the top right corner of the screen. An additional hyperlink is available to Register for an Account by selecting "Create An Account".

3. When a user is having difficulty signing into the Accela system, attempt to reset the password, by clicking on "Forgot Password". **Do not** create another user account. If additional assistance is needed, users can email programsupport@ccb.nv.gov.

4. Complete login information fields. It is important to remember the account details entered as they will be used to access the Accela Cannabis Customer Portal for future actions. Once the account details have been completed and are accurate, read through the Terms of Service. They can be accessed by selecting the Terms of Service hyperlink. After the Terms of Service has been read and accepted, check the box "I have read and accept the above terms". Click Continue.

5. Select "Individual" as the contact type if applying for an agent card, as an employee, as an Establishment Point of Contact, as an Owner, Officer, Board member, or an Agent Card Designee. Otherwise select "Organization". Once selection is made, complete the additional fields.

Select Contact Type

STEP 2 OF 2: CONTACT DETAILS

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.

○ Individual

○ Organization

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6. Enter contact details and mailing address. A mailing address is required to register an account. Once contact information has been submitted, the information cannot be changed. Required fields will reflect a red asterisk.

Select Contact Type

STEP 2 OF 2: CONTACT DETAILS

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.

● Individual

○ Organization

*Required Fields

FIRST: *

MIDDLE:

LAST: *

WORK PHONE:

MOBILE PHONE:

E-MAIL: *

ADDRESS | Delete

COUNTRY/REGION:
Select

ADDRESS TYPE:
Select
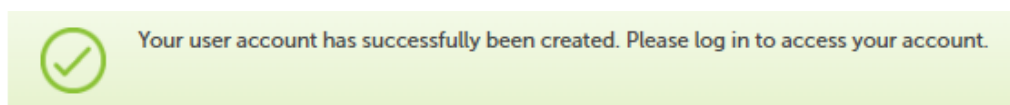
ADDRESS LINE 1:

ADDRESS LINE 2:

CITY:

STATE:
Select

ZIP CODE:

+ Add Address

[Submit]

[Back]

7. Once information has been reviewed for accuracy, click "Submit". The following notification will appear confirming the account has been successfully created, proceed to log in.

Your user account has successfully been created. Please log in to access your account.
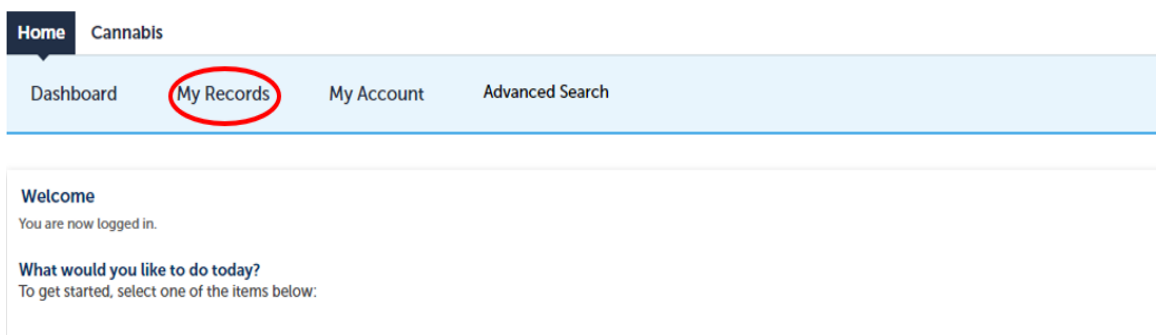
General Navigation Information

1. Once logged in, the first screen will display the Dashboard. The "My Collections" section is where submitted records can be saved. "My Collections" will remain empty until a submitted record and/or application is added to a collection. Once added, click on "View Collections" to see the record details. Options are also available under the "My Records" section.
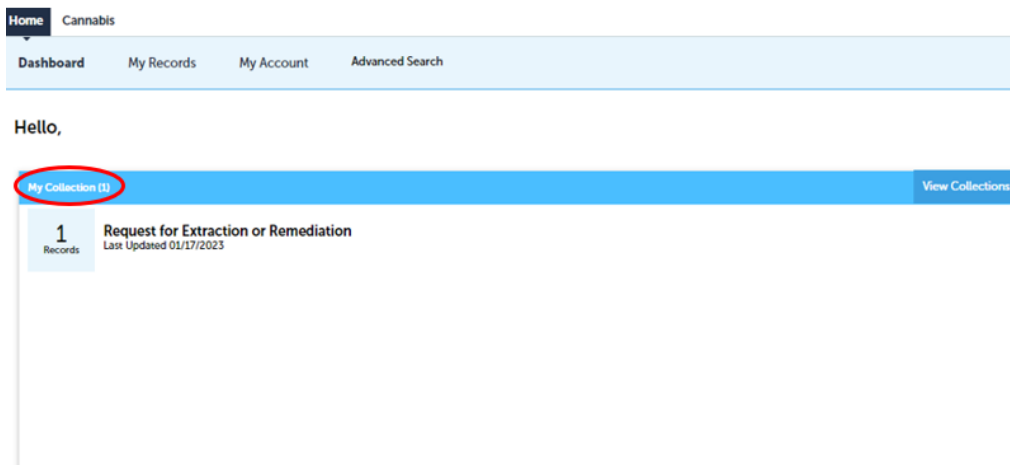
2. Collections are like virtual folders and are only visible by the person who created them. There are two (2) methods to create a Collection: selecting an individual Record Number hyperlink or by selecting multiple Record Numbers at one time.

   Method one: Creating a Collection with an individual Record Number hyperlink:

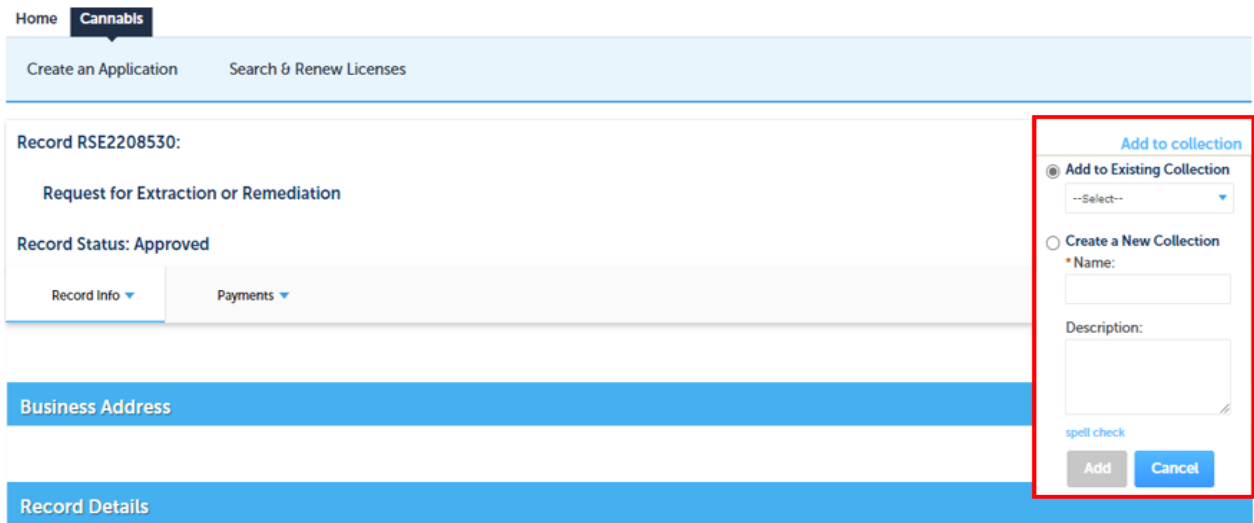   ▪ To create a Collection by selecting an individual record, one at a time, click on "My Records.

   ▪ Select the Record Number hyperlink.

- Click on "Add to collection". A pop-up window will generate allowing the record to be added to an Existing Collection or a New Collection.


Method Two: Creating a Collection with multiple Record Numbers at one time:

- To select multiple records at one time, checkmark the boxes next to the record numbers that are being added to a Collection. Once all records have been check marked, click on "Add to collection". The record numbers can be added to an Existing Collection or a New Collection. Once the user has selected "Add to an Existing Collection" or "Create a New Collection", click on the "Add" button.
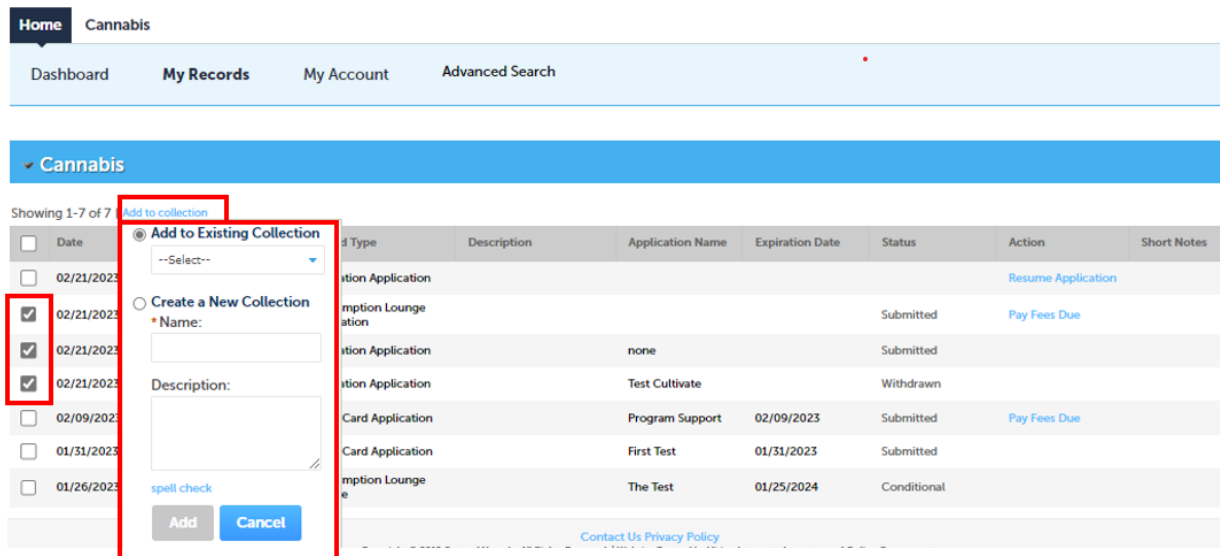
3. When a collection is selected, the record detail screen will reflect the date the record is added to a collection, name, description, number of records and provide the option to delete the file from the collection. Deleting a collection does not delete the records from the user account, it only deletes the virtual collection folder.
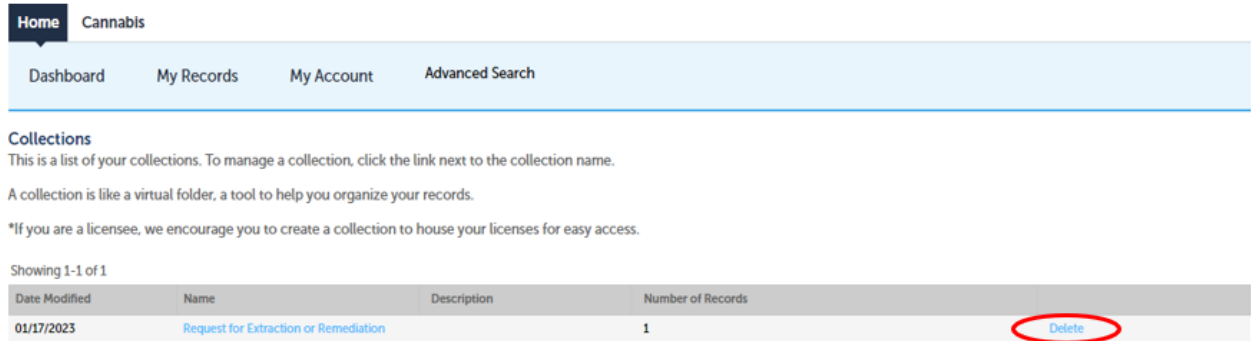

4. On the Dashboard, a "Work in Progress" field will display incomplete applications. A "Work in Progress" record will have 'TMP' within the Record ID. These records will automatically be deleted several days after they are created unless they are completed and fully submitted before then. *Every submission is considered an "Application" in the Cannabis Customer Portal.

5. "Advanced Search" allows users to search records within their own account. Users can also access "Account Management" which is the same as the "My Account" option.

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

7. "+New" allows users to file a Complaint. Users can submit a complaint without being logged into an account.

8. "?Help" will take users to the CCB Frequently Asked Questions.

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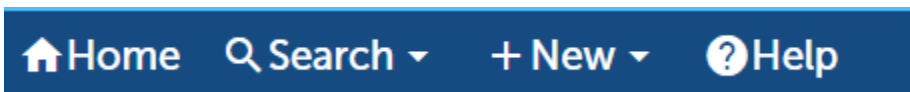
9. To reset a password, click on "Forgot Password". If additional assistance resetting a password is needed, users can email programsupport@ccb.nv.gov.
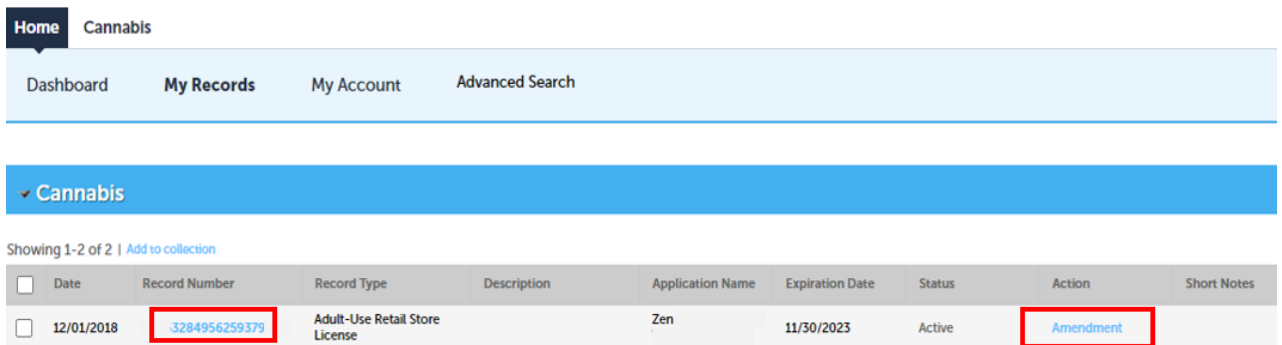
How to Access My Records List

1. Once logged in, the first screen will display the Dashboard. From the Dashboard screen, "My Records" can be obtained by selecting "My Records" or "Cannabis".
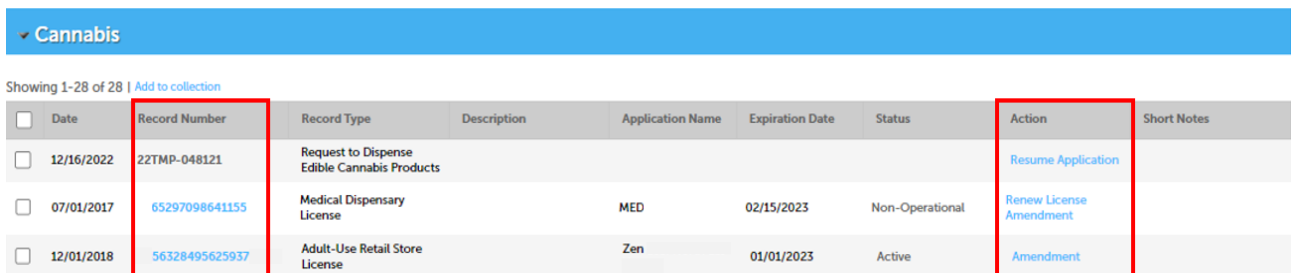

2. The "My Records" or "Cannabis" screen, displays licenses linked to individual accounts, license renewals, submitted amendments, applications, and pending amendments/applications.

3. To view a PIN linked license, click "Home" then click "My Records". The "Date" for a license record will be the date it was opened, depending on the license, it could be towards the end of a record list. By selecting the blue hyperlink record number, the user will be directed to detailed information about the record submission. The blue "Amendment" hyperlink will allow any type of application amendment such as a menu request, facility modification, etc. to be submitted. The blue "Renew License" hyperlink allows a renewal application to be submitted up to 60 days before the license expiration date.


4. To initiate a License Amendment, the user must click on the Record Number or Amendment hyperlinks for the actual license.

5. Depending on the Action hyperlink that is selected (i.e., Renew License, Amendment, or Resume Application) the individual user will be routed to the screen that is specific to the hyperlink that was selected. For example: When the Renew License hyperlink is clicked on, the individual user will be routed directly to the License Renewal Application.

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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 can add Delegates (other authorized users) to the licenses and will decide on the security/permissions for those Delegates. Delegates may be able to see all linked licenses in the account. For example: A delegate cannot be given permission for only one (1) Medical Cultivation License, they would be given permission on all medical cultivation licenses within the account.

2. If the Establishment Point of Contact (POC) on record with the CCB, and would like to gain access to a license, a PIN request needs to be sent via email to the programsupport@ccb.com. In the email request, list the 20-digit license number for every license a PIN is being requested for. Once the PIN is received, it can be used to attach the license to a user account. Every license has its own PIN number. Before a license can be linked to an account, make sure a user account has been set-up.

3. Log into Accela, click "Cannabis".

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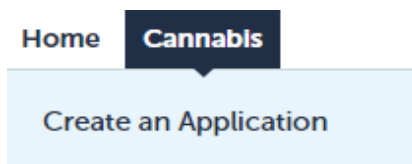
5. After the terms of use have been read and agreed to, check the box "I have read and accept the above terms" and click "Continue".

6. Click the arrow next to "Registration", select "Link to Your License" and then click "Continue".
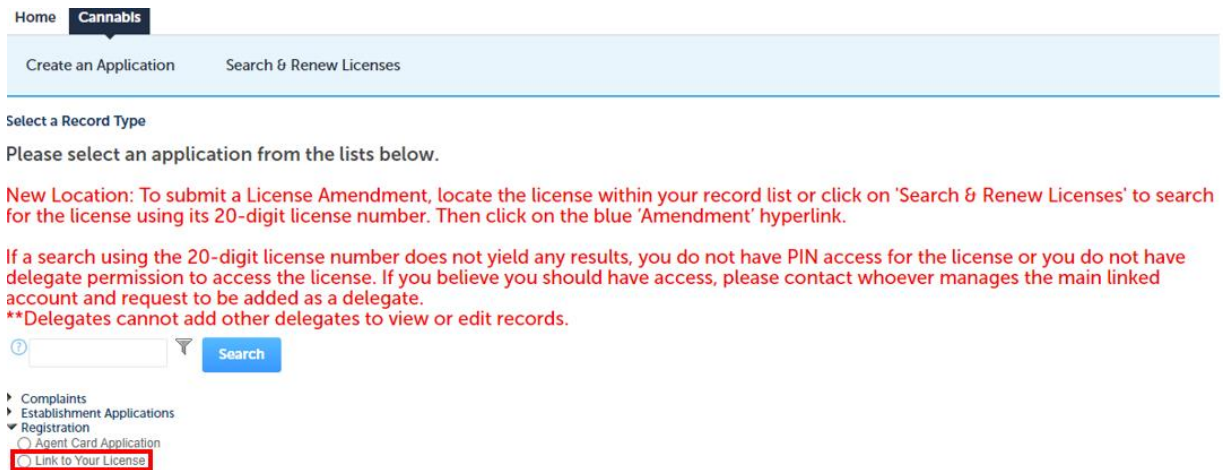
7. Enter the 20-digit license number and key in the PIN code received from the CCB. Click "Continue". *When an accurate PIN and license number is entered, "PIN validated" will populate in **Red**.

8. Confirm the information entered is correct. If a mistake has occurred, click "Edit". If the entry is correct, click "Continue".

9. After clicking "Continue", a notification will appear advising "You have successfully linked your license to your Accela user account."
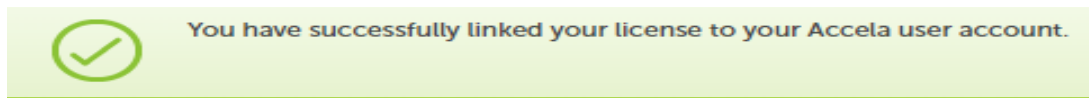
10. To return to the My Records list, click on the "Cannabis" button.
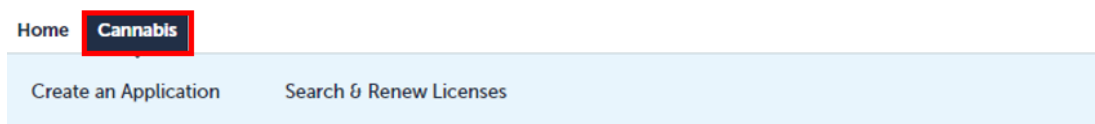
11. Licenses are added to the record list based on the date the license was initiated, not when it was PIN connected. Older licenses may be at the end of the records list.

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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 can add delegates (other authorized users) to the licenses and will decide on the security/permissions of those delegates. There is no limit on how many delegates that can be added to an account.

2. A delegate is someone that can be assigned access to work on or view records within the account based on allowed permissions. To add an individual as a delegate they must already have an existing user account.
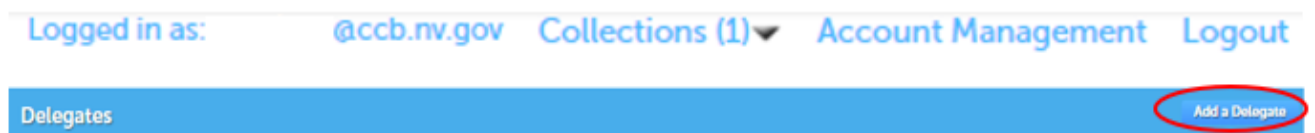
3. Depending on permissions given, delegates may be able to see all linked licenses in the account. For example, A delegate cannot be given permission for only one (1) Cultivation License, they would be given permission on all cultivation licenses within the account.

4. Under "Account Management" scroll down to "Delegates" and click "Add a Delegate".

5. Type in their Name and Email Address.

   a. Check or uncheck boxes based on the permissions that will be given to the delegate.
   b. Click on "Change" when a delegate's access needs to be limited or changed for record/application types. Select or deselect the appropriate record types and select the permissions that the delegate is allowed to have access to. A personal note can be added to the automated email.
   c. The following are allowable permissions that can be granted to the delegate to access and view Cannabis records.

      ▪ Create an Application in Cannabis: Submissions of a variety of record types such as Complaints, Incident Reports, Link a License, Applications for Cannabis Licenses, and Agent Card Applications.

      ▪ Renew Records in Cannabis: To initiate a License Renewal Application for an existing Cannabis Establishment License.

      ▪ Amend Records in Cannabis: To submit a License Amendment. Some examples of License Amendments are: Menu Request, Request for Laboratory Retesting, Transfer of Interest.

      ▪ Manage Inspections in Cannabis: Unavailable at this time.

      ▪ Manage Documents in Cannabis: The capability to upload requested and required documents into the Accela system on existing and newly submitted records.

      ▪ Make Payments in Cannabis: To authorize payments for existing invoices and fees for various record types.

6. Once an invitation has been sent, a user can view and manage invited delegates.

7. The delegate that was 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 the invite.

8. Once they accept, they will now have access to the permissions that have been granted. The permissions can be changed or removed at any time. The delegate can also remove themselves from being a delegate on an account at any time.

9. Based on the permission(s) assigned, delegates can do actions such as:

   ▪ View records, licenses, and applications

   ▪ Create applications from the account

   ▪ Renew and Amend records

   ▪ Upload documents

   ▪ Pay Fees

## How to Submit an Agent Card Application

Important Notes:

Employees must register for their own user account and submit their agent card application online.

The application contains certifications and attestations that the employee must complete. The employee will be able to access their own account in the future and provide any needed documentation or follow up on their own card within the system. If needed, 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 to submit actions or payments on behalf of the main account holder.

1. Login to an existing user account. At any time while completing the application, the "Save and resume later" button can be selected. This will save the information that has been entered, and it will be available to complete the submission later. Incomplete/unsubmitted records will automatically be deleted several days after they are created unless they are completed and fully submitted before then.

2. Once logged in, click on the "Cannabis" button.
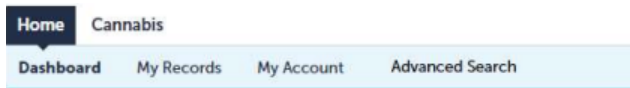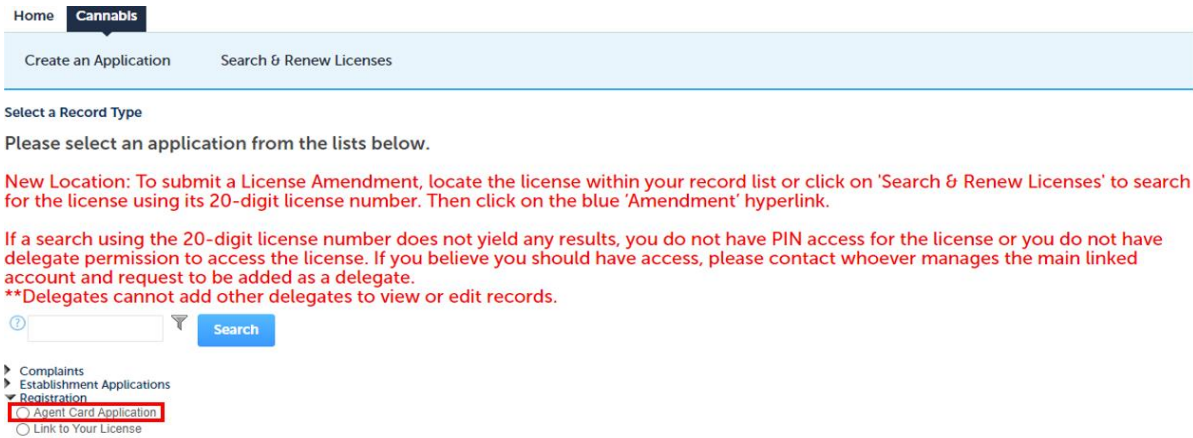

3. Click on the "Create an Application" button.
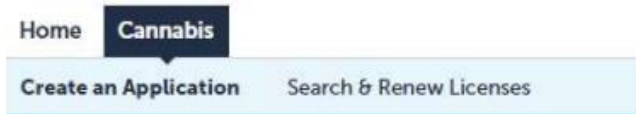
4. Read the Disclaimer, check the box and press "Continue".

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

6. Thoroughly read and complete each section of the Agent Card Application with requested information.

7. Upload any relevant documentation (For example, valid government ID, passport quality photo, etc.).

8. To upload attachments/documents, click on the "Add" button.
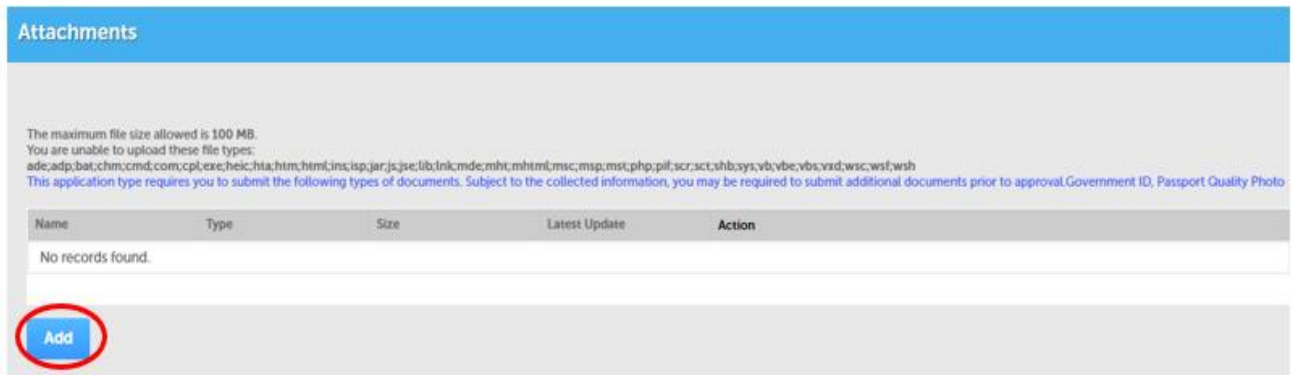
9. A File Upload window will pop up. Select the "Add" button to upload all required documents. To upload several documents, continue to click on the "Add" button until all documents have been uploaded. Then click on the "Continue" button.
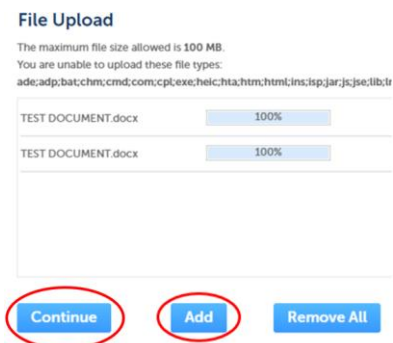
10. Documents that have been uploaded in Accela must have a document type selected via the drop-down menu. Description field allows additional information to be notated regarding uploaded document. When additional documents need to be added, click on the "Add" button. To remove a document, click on the "Remove" blue hyperlink. If all documents need to be removed, click the "Remove All" button. Once all documents have been uploaded and the types have been selected, click the "Save" button.
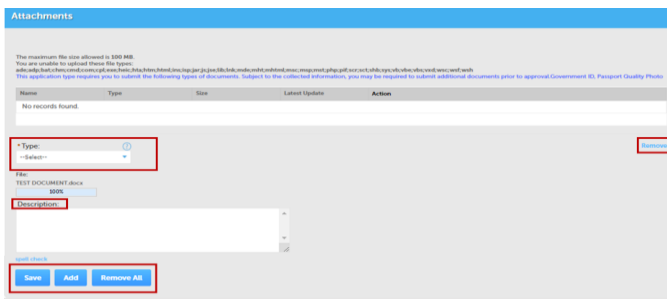
Note: Once documents have been saved, they cannot be removed. If a document is uploaded in error, simply upload the correct document, and add a note in the description field that it is the correct document.

11. In the Review Section, review entered information for accuracy. If anything needs to be edited, do so from this screen. **Once submitted, the Agent Card Application cannot be altered.**

12. Acceptable forms of payment for Agent Card fees are either ACH payment, by check, or money order.
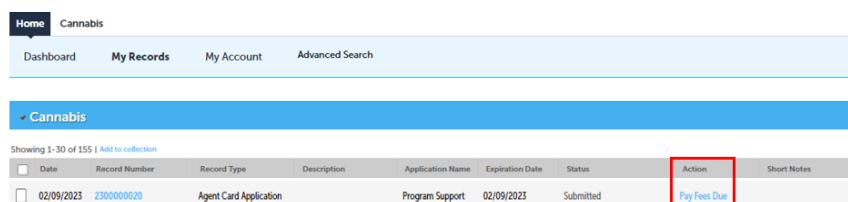
13. To make an ACH payment, click on the "Submit Application" button. The system will re-route the user to the third-party payment page to complete the ACH payment. Once payment is successfully submitted, a receipt from CyberSource will be sent to the email address the applicant entered on the payment screen.
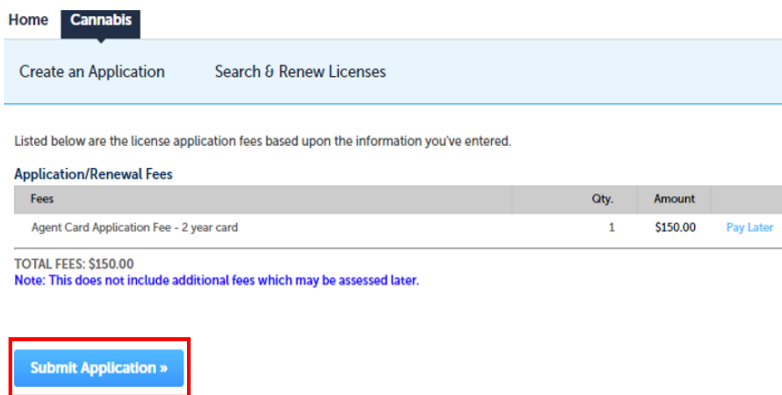
14. If the user intends to make an ACH payment at a later time, the ACH payment option can be bypassed by selecting "Pay Later". Once "Pay Later" has been selected, click on the "Submit Application" button. The confirmation page "Record Issuance" will generate. The user can access the required fees by accessing the submitted record via "My Records" or "Cannabis". To ensure fees are being paid on the correct Record, review the specific row the record is reflecting, then click on the blue hyperlink Pay Fees Due under the Action column.

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15. When making a payment via check or money order, the ACH payment option must be bypassed by selecting "Pay Later". Next, click on the "Submit Application". The confirmation page "Record Issuance" will generate, providing detailed instructions for check payments and the mailing address where checks are to be mailed. As a reminder, allow 7-10 business days for CCB to receive and process payments received via mail.

**Note:** All fees collected by the CCB are non-refundable.
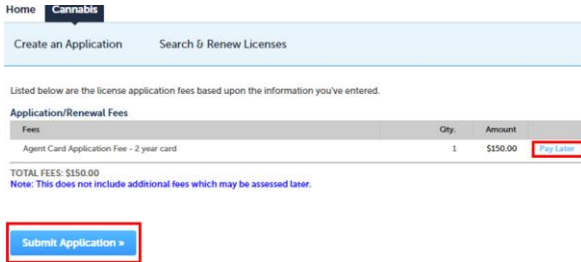
16. The Record Issuance page is the confirmation that the Agent Card Application was successfully submitted into the Accela Cannabis Customer Portal. This is not an approval of any kind but notifies the applicant that CCB did receive the submission. The applicant will also be sent a confirmation email.
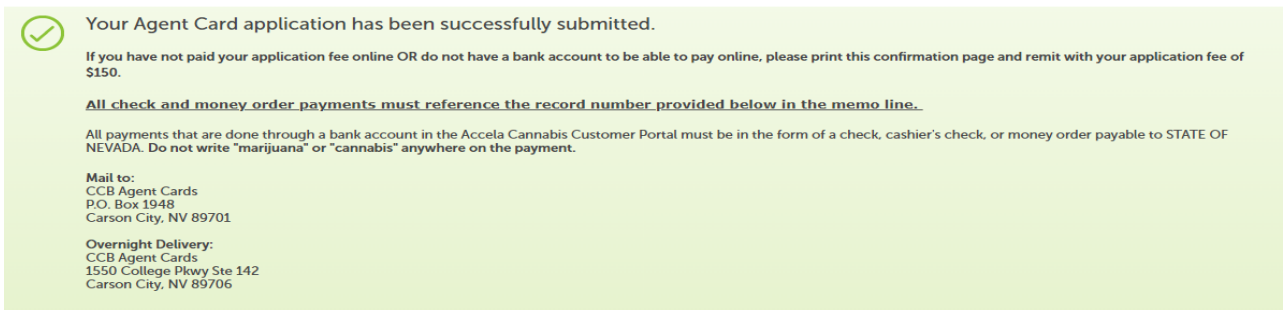
17. To view the status of each submission, click on "Home" and "My Records". If the user is a delegate to an account, the submissions will be visible as well. Click on the blue "Record Number" to view the submission. The status will update in real-time as it is processed through the CCB internal workflow.

18. The expiration date does not apply until the application has been fully processed to card issuance.
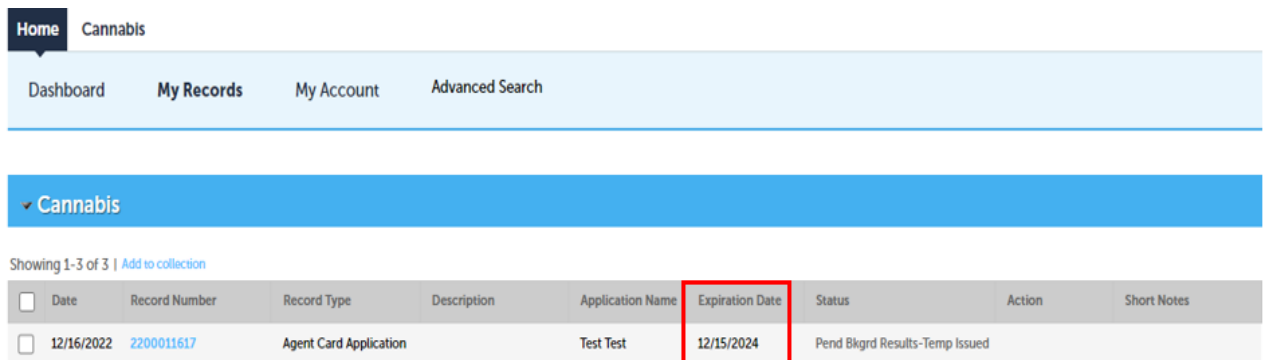
Note: Currently a Renewal Agent Card Application is not available for users. Applicants must submit a new Agent Card Application by clicking on the "Create an Application" button.

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How to Submit a License Amendment

1. Amendment submittals are only available to users that are either:

   a. Linked to the license with the PIN
   b. A delegate to the main PIN linked account with "Amend" permissions

2. Once a license has linked to an account, the following license Amendments can be submitted:

   - 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 Packaging Request
   - Submit a Request for Extraction or Remediation
   - 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

3. The user must login to their existing account, click on the "Home" button, then select "My Records". At any time while completing an Amendment record, the "Save and resume later" button can be selected. This will save the information that has been entered. Incomplete/unsubmitted records will automatically be deleted several days after they are created unless they are completed and fully submitted before then.

4. To ensure Amendments are submitted on the correct license, review the specific row the license is reflecting, then click on the blue hyperlink Amendment under the Action column.

	Date	Record Number	Record Type	Description	Application Name	Expiration Date	Status	Action	Short Notes
☐	12/06/2021	3270953225	Adult-Use Distribution License		WELLNESS LLC	03/17/2023	Active Renewal In Progress	Pay Fees Due Amendment	
☐	12/06/2021	3270953225	Adult-Use Cultivation License		MILLER LLC	02/15/2023	Conditional	Renew License Amendment	
☐	09/19/2020	3270953225	Adult-Use Retail Store License		TEST ADULT USE DISPENSARY	06/30/2021	Active	Renew License Amendment	

5. Once the blue hyperlink Amendment has been clicked on, the user will be routed to the selection screen.

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6. Complete the requested information for the selected Amendment. Attach any relevant documentation. Submit the Amendment. Click save, then click Continue to move to the review page.

7. If the Amendment request was initiated under the incorrect license, the user should exit the Amendment request by selecting the "Home" or "Cannabis" buttons. If the Amendment request has only been saved and not submitted, this will create an incomplete/unsubmitted record. Incomplete/unsubmitted records will automatically be deleted several days after they are created.

8. The review page will populate information that was entered in the Amendment request. Review the information for accuracy. If anything needs to be edited, do so from this screen. If the information is correct, click "Continue".

9. After clicking "Continue" the user will be redirected to the Record Issuance page. The confirmation will reflect, advising the Amendment information was successfully submitted into the Accela Cannabis Customer Portal. This is not an approval of any kind but notifies the applicant that CCB did receive the submission. The confirmation will indicate the record number for the Amendment Request. The record number may be needed to check the status of the submission.

10. To review the status of the Amendment, click on "Home", "My Records", or "Cannabis". Click on the blue "Record Number" to view the submission. The status will update in real-time as it is processed through the CCB internal workflow.
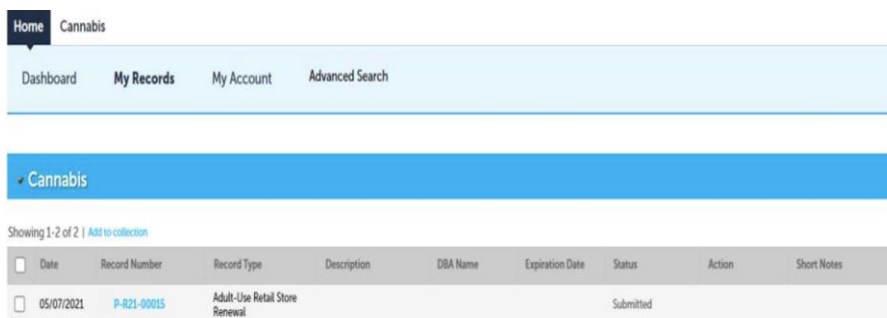
How to Submit an Establishment License Renewal

1. Once a user account has been created (or a user is added as a delegate) the ability to submit a license renewal will be available. At any time while completing a License Renewal Application, the "Save and resume later" button can be selected. This will save the information that has been entered. Incomplete/unsubmitted records will automatically be deleted several days after they are created unless they are completed and fully submitted before then.

2. Login to the user account, click on the "Home" button, then select "My Records" or "Cannabis".

3. Renewals will become available in the Accela Cannabis Customer Portal sixty (60) days prior to the license's expiration date.

4. To ensure the Renewal is submitted on the correct license, click the blue words Renew License under the Action column. To ensure the renewal is submitted on the correct license, review the specific row the license is reflecting, then click on the blue hyperlink Renew License under the Action column.

5. Complete the requested information for the Renewal. Attach any relevant documentation. Prior to submitting the license Renewal, review the information entered thoroughly, then select Continue. Once renewal has been submitted the renewal cannot be altered.

6. Return to the "My Records" or "Cannabis" screen to see the Renewal and the status of the submission. Click on the blue "Record Number", to view the submission.


7. When an ACH payment is made, a receipt from CyberSource is sent to the email address the applicant entered on the payment screen for each payment submitted. A stamped invoice copy is provided for in-person payments and the Accela Cannabis Customer Portal will then show "Total Fee Paid".

How to Add Documentation to a Submission

1. On the "My Records" or "Cannabis" page, users can view all the submissions made within the account or an account that a user is a delegate for. Click on the blue hyperlink record number of the submission to upload a document and attach it to that record.
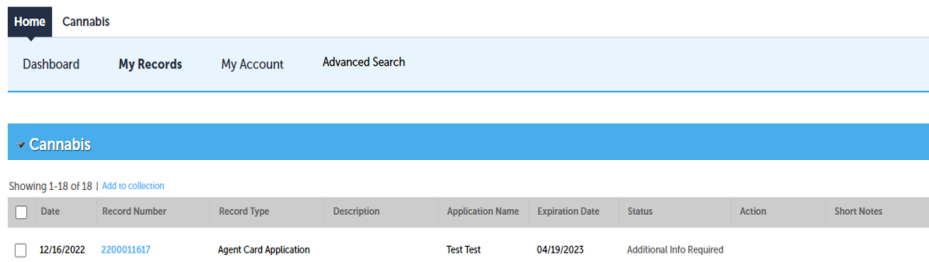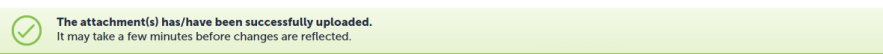

2. Click the blue triangle next to "Record Info". Select "Attachments".
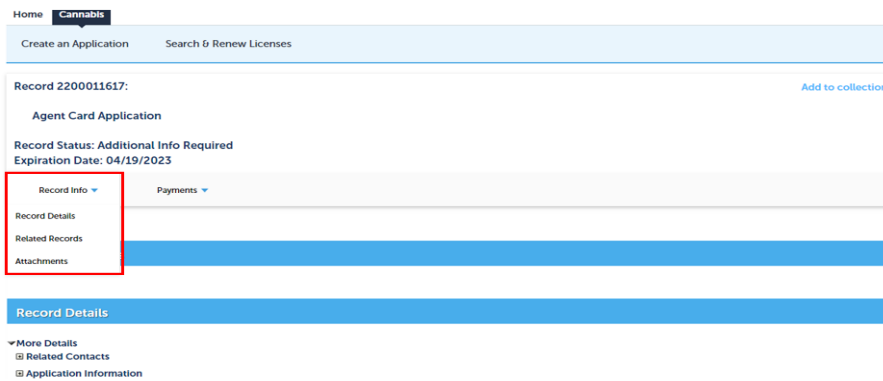
3. Click on the "Add" button to upload additional attachments to the selected record submission.
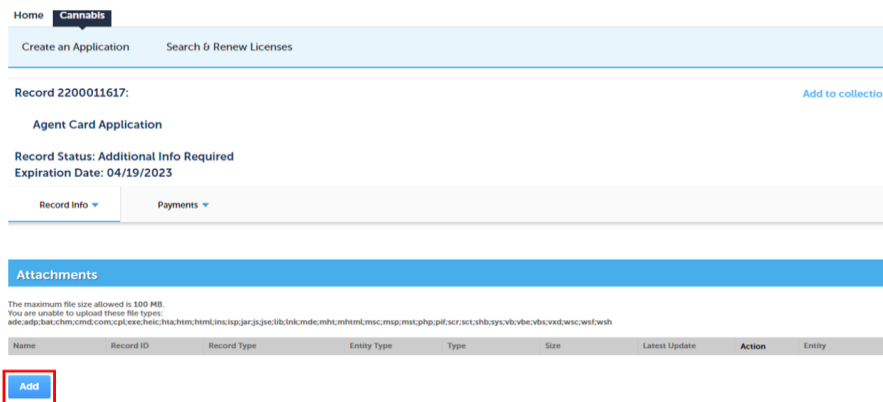
4. After the attachment(s) have been added, a message will appear stating "The attachment(s) has/have been successfully uploaded. It may take a few minutes before changes are reflected."

Note: Once documents have been saved, they cannot be removed. If a document is uploaded in error, simply upload the correct, document and add a note in the description field that it is the correct document.