

Engage Platform Registration

Instructions for Small Business Participants

1. *If not already done: Download and install the **Zoom Host application** from <u>https://zoom.us/download</u> for the best experience.

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If you have issues with the steps above, please follow the instructions here: <u>https://support.zoom.us/hc/en-us/sections/200704559-Installation</u>

2. Create your user account by clicking "Create Your Engage Account" to login into the **Engage dashboard** (<u>https://engage.hhs.gov/</u>).

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or event registration, eMatchmaking and information exchange/data collection-all powered by Engage.	SACH IN
	Don't have an Engage account?
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	CREATE YOUR INGAGE ACCOUNT
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Create Your Engage Account	
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CREATE ACCOU	NT

SIGN IN

3. Verify your email by entering 6-digit verification code sent to your mailbox. You may need to wait up to five minutes to receive the code. Be sure to check your junk/spam folder.



Verify your email address

We have sent a six-digit code to samhsa.otpq@gmail.com

Please keep this window open while you check your inbox, then enter the code



Be sure to keep this window open while you check your inbox. Please note that it may take a few minutes for the code to be delivered to your email address. If you have not received the code within a few minutes, please check your spam folder. To request a new code, please click Resend Code and a new one will be generated and sent to you.

Resend code



4. Complete the user registration process by following all prompts as outlined below.



Please select what describes you the best.





DISCLAIMER / CONSENT

By entering an organization's information into this platform, you certify that you agree to abide by any listed policies and regulations. You also agree that you are legally permitted to represent the organization. Users are responsible for accurately entering information. HHS OSDBU does not bear any responsibility for inaccurately entered information or any negative impact from the entering of inaccurate information. HHS OSDBU is collecting information voluntarily submitted (such as your email address, name, or organization). Submitted information is only used for the express purposes for which it is provided and will not be made available to an unauthorized third party. Electronically submitted information is maintained and destroyed according to the principles of the Federal Records Act and the regulations and records schedules of the National Archives and Records Administration, and in some cases may be covered by the Privacy Act and subject to the Freedom of Information Act.

I AGREE



	Small Business Account Admin Add your account admin details
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	your business. By registering on behalf of your company, you will be designated as the account admin. You will be gistering attendees and managing the matchmaking process if you choose to participate.
First Name	Last Name
Jane	Doe
Title	Mobile Number
Ms	(123) 322-3222
City	State
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	* All fields are required
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Let's get your Small Busi	ness registered. Please p	rovide the following information about your business.		
Is Your Business Registered in HHS Vendor Database, Small Busines		Is this your first HHS outreach event?		
(SBCX)?		Ves O No		
• Yes O No				
Do you utilize social media to market or promote your business? An	d which one(s)?			
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5. You will also receive an email confirming that you have successfully registered for the event. Upon completing the user and event registration, you will move on to matchmaking registration by clicking "I'm ready. Let's match" as shown below and following the prompts.

Ge osoau ∎Engage	samhsa.otpq@gmail.com Bign ountra.otpq@gmail.com Dout
Event Registration Complete	
Thank you for registering for the Engage Event. An email confirmation of your registration will be sent to all user em registration. See you there!	nail addresses provided during
March 01 2023 Internal Testing Event dummy testing event Type: Virtual 🔁 includes Matchmaking	
Are You Interested In Matchmaking? General attendees are not obligated to participate in Matchmaking, unless interested NO. NOT THIS TIME.	i.
GO TO THE DASHBOARD	
@ CEELU # Engage + Hild Ower Hild Reserved	

6. You will then be shown a list of your top matches. Click the name to proceed with scheduling an appointment.

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۲ ۲	Your Top Matches!
	These are your top matches.
	mation and capabilities, you qualify for to meet with listed matches. of your matches you would like to the meet with.
Nation	I Institutes of Health (NIH) - 95.83 % match
	* at least one is mandatory to continue
	EVIOUS NEXT
	skip and select matches later
COMUL Engage #3150 year All Reformered.	



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	국산 Your Appointment Slots		
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You Have Su	ccessfully Registered For Matchmaking!		
An email confirmation of your registration w	vill be sent to the email address provided during registration. Have a great Matchmakin	g session!	
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	GET READY FOR MATCHMAKING		
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In addition to the above system notification, you will receive an email confirming that you have successfully registered for Matchmaking.



7. At this point, your appointments are scheduled. You can confirm this by navigating to your Dashboard, where you will be able to see all upcoming appointments.

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Samhsa.otpq@gmail.com samhsa.otpq@gmail.com	Home - Dashboard Upcoming Event	Available Events		My Matchmaking	
My Profile My Favorites My Favorites My Attendees View Matches My Events All Events Login Details Help	O1 MARCH	O1 MARCH Internal testing event #2 internal testing event Type: Virtual Matchmaking: YES Learn more Register Now	O9 MARCH	Congrats! You are almost there. Click below to learn more how to prepare and get ready for Matchmaking LEARN MORE	
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<	12:20PM EST National Institutes of Health (
anna Engage •	313 Grappe. All Rafris Reserved.				

8. On the day of the event, scroll down to the "My Matchmaking: Scheduled Appointments"

section of the testing event and click on the "**Enter the meeting**" icon $\xrightarrow{}$ when it is time for your scheduled appointment.

Samhsa.otpq@gmail.com samitsa.otpq@gmail.com	Home - Dashboard						⊖ Sign Out
Dashboard	Upcoming Event	Available Events		Му	Matchmaki	ng	
My Profile My Favorites My Favorites My Favorites My Events My Events All Events Login Details Help Help	O1 MARCH	O1 MARCH	O9 MARCH		almos Click below how to prepa for Mat	S! You are t there. to learn more re and get ready chmaking N MORE	
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K	12:20PM EST National Institutes of Health (NIH	0 95.83% https://www.nih.gov	2 🛇 🖻	+	Ø	-1	



- 9. Wait until the host starts the Zoom meeting and admits you into the room.
- 10. Repeat Step 8 for all appointments.
- 11. [Optional step] Alternatively you can navigate to "**View Matches**" on the left in your sidebar and view appointments, enter the meetings, view organization profile, and enter and save notes.

If you need assistance, please contact us at engagesupport@strategixmanagement.com

Additional Tip:

Ideally, have Engage opened on another display, or use the split screen view. Your login session is limited, and you will be asked if you are still there. You will have a 60-second window to confirm. If the session ends, you will need to log in again.