Add Organisation Staff

Grant Recipient Portal Task Card

**Portal Access required**: Administrator

The Grant Recipient Portal (Portal) enables grant recipients to add staff from their Organisation to the Portal.

This task card describes the process of adding Organisation staff as contacts to the Portal including system validations to assist with reducing duplicate contacts from being added.

# Access levels for the Portal

* Organisation **Viewer** – The staff member can view various screens but will not be able to add details or make any changes
* Organisation **Editor** – The staff member can add details and make changes on selected available screens
* Organisation **Administrator** (the highest level of access) – The staff member can add details and make changes on all available screens.

**Note**: the access level of **No Access** is to be used for staff members who do not require access to the Portal but need to be added as an Organisation contact so they can be assigned to grant agreements or grant activities.

The table below details the functionality for each access level:

| **Portal Functionality** | Organisation **Viewer** | Organisation **Editor** | Organisation **Administrator** |
| --- | --- | --- | --- |
| Update Bank Accounts  (certain information only) | No | No | Yes |
| Give staff access to the Portal | No | No | Yes |
| Create / edit staff | No | No | Yes |
| Edit Organisation details | No | No | Yes |
| Accept funding offers or variations  (if set up as a signatory) | No | Yes | Yes |
| Submit Reporting Obligations | No | Yes | Yes |
| Update personal profile | Yes | Yes | Yes |
| View grant information | Yes | Yes | Yes |

# Adding Staff in the Portal

| **Step** | **Action** |
| --- | --- |
|  | From the Home screen, select the **Organisation Profile** tile. Alternatively, select the **Organisation Profile** link from the Navigation menu.  This screenshot is of the Home page for the Grant Recipient Portal. It shows tiles for different areas of the Portal such as Grant Agreements, Grant Activities, Milestones, Applications, Payment Advice, Organisation Profile, Personal Profile and Acceptances. The Organisation Profile is highlighed. |
|  | The Organisation Profile screen will display. Select **Staff** from the Organisation profile menu to display the Organisation’s Staff screen.  Screenshot of the Organisation details screen with the Staff button on the left hand side menu highlighted. |
|  | The Organisation’s Staff screen will display. This screen displays Active Staff for the organisation by default. The Staff list can be filtered using the **drop down** menutochoose one of the following:   1. Active Staff 2. Inactive Staff 3. All Staff   **Note:** All staff records display a unique Contact ID. This ID can be very helpful for identification purposes in various areas and assisting with duplicate contacts.  You can view the **Contact ID** from the Staff screen**.**  Screenshot of the Organisation details > Staff screen with the Contact ID column highlighted. |
|  | To add a new staff member select **Add staff**.  Screenshot of the Organisation details > Staff screen with the Add staff button highlighted. |
|  | The Add staff details screen will display.  Enter the staff member’s details in the required fields including the Portal system access level required. Mandatory fields are marked with a red asterisk.  Screenshot of the Organisation details > Staff > Add staff details screen. |
|  | Select **Save and return** when complete.  Screenshot of the Organisation details > Staff > Add staff details screen with the Save and return button highlighted. |
|  | If the change is successful, a message will temporarily display on screen confirming the staff member was successfully added as a contact for your Organisation. The added contact will now be listed on the Staff screen under the Organisation Profile.  Staff member successfully added popup  Your Staff member has now been added as a contact.  Screenshot of the Organisation details > Staff screen showing the new contact has been added.  The following system validations are set up to prevent duplicate contacts being added:   1. **First Name, Last Name and Email Address matches an existing contact for the Organisation.**   If the staff member already exists for your Organisation with the exact combination of First Name, Last Name and Email Address, the following error will occur. The system will not allow the staff member to be added. Showing the error message displayed if the contact you are trying to add already exists in this contacts list.   1. **Email Address matches an existing contact for the Organisation.**   If the email address entered matches an existing contact for your Organisation but the First Name/Last Name is different, a warning message will appear on screen. To proceed select **Continue** or to cancel the request select **Discard changes and return**.  Showing the warning error message received if the email address entered matches an exisiting contact for the organisation. |

Need Help?

For further assistance, contact the Grant Recipient Portal Helpdesk:

**Email**: [GRP.Helpdesk@communitygrants.gov.au](mailto:GRP.Helpdesk@communitygrants.gov.au)

**Phone**: 1800 020 283 (Option 5)

**Operating Hours:** Monday to Friday 9:00am – 5:00pm (AEST/AEDT)