Update Grant Activity Contacts

Grant Recipient Portal Task Card

**Portal Access required**: Administrator or Editor

The Grant Recipient Portal (Portal) enables grant recipients to update their Grant Activity Contacts.

This task card describes the process of viewing, adding and removing Grant Activity Contacts.

There are two pathways for a user to add and remove a contact for a Grant Activity in the Portal, either through the **Organisation Profile** of through the **Grant Activities** link/tile on the Home screen.

# Navigating to Grant Activity Contacts through the Organisation Profile

| **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   Select **View** to display additional information about a particular contact.  Screenshot of the Organisation details > Staff screen with the Staff button and View buttons highlighted. |
|  | The Staff details screen will display. This screen has four sections:   * Staff details * System access * Contact for Grant Agreements * Contact for Grant Activities   Grant Activity Contacts are listed under the **Contact for Grant Activities** section.  To add a contact through the Organisation Profile, proceed to step 5.  To remove a contact through the Organisation Profile, proceed to step 11.  Screenshot of the Organisation details > Staff > View > Staff details screen with the Contact for Grant Activities heading highlighted. |

# Adding a Grant Activity Contact through the Organisation Profile

| **Step** | **Action** |
| --- | --- |
|  | To add a contact to a Grant Activity, select **Staff** from the Organisation profile menu. Click **View** next to the staff member you want to add as a Grant Activity Contact.  Screenshot of the Organisation details > Staff screen with the Staff button and View button highlighted. |
|  | The Staff details page will display. Select **Add** **Grant Activity**.  Screenshot of the Organisation details > Staff >View > Staff details screen with the Add Grant Activities button highlighted. |
|  | The list of Grant Activities will display which you can assign the contact to. Select the **Actions** button next to the Grant Activity you want to add the contact to. The Actions button provides you with three options:  1. Assign as a contact  2. Assign as the primary contact  3. View all contacts for this Activity.  Select **Assign as a contact** if you want to assign the contact to the Grant Activity (but not as the primary contact).  Select **Assign as the primary contact** if you want to assign the contact to the Grant Activity as the primary contact.  **Note:** If you want to see all contacts assigned to the Grant Activity, select **View all contacts for this Activity**.  Screenshot of the Organisation details > Staff > View  > Staff: Grant Activity contact screen with the Actions drop down highlighted. The drop down menu includes: Assign a contact, Assign as the primary conatct and View all contacts for this activity |
|  | To assign as a contact, select **Assign as a contact.**  If the change is successful, a message will temporarily display on screen confirming the change was successful and the Grant Activity will be listed on the Staff details screen under **Contact for Grant Activities** with a **No** for **Primary Activity contact**.  Screenshot of the successful message displayed to grant recipient when the change is successful. The popup says Staff member(s) successfully added as Grant Activity contact(s).  Screenshot of the Contact for Grant Activities with the Primary Activity contact heading and column showing a contact that isn't a primary contact highlighted. |
|  | To assign as the primary contact, select **Assign as the primary contact.**  A confirmation message will display asking you to confirm the change by selecting **Confirm**.  Select **Confirm** to proceed with changing the primary contact.  **Note:** you can select **Discard changes and return** to cancel the change.  Screenshot of popup asking to confirm change of primary contact.  The popup says Please confirm the change of primary contact.  It includes the Activity name, current primary contact and new primary contact details. The user has two options available to them 1. discard changes and return or                2. Continue. |
|  | A message will temporarily display on screen confirming the change was successful and the Grant Activity will be listed on the Staff details screen under **Contact for Grant Activities** with a **Yes** for **Primary Activity contact**.  *Successful message - changing primary contact*  Screenshot of the successful message displayed to grant recipient when the change is successful. The popup says Staff member successfully added as primary contact.  Screenshot of the Contact for Grant Activities with the Primary Activity contact heading and column showing contact primary contact highlighted. |

# Removing a Grant Activity Contact through the Organisation Profile

| **Step** | **Action** |
| --- | --- |
|  | To remove a contact from a Grant Activity, select **Staff** from the Organisation profile menu. Click **View** next to the staff member you want to remove as a Grant Activity Contact.  Screenshot of the Organisation details > Staff screen with the Staff button and View column highlighted. |
|  | The Staff details page will display. To remove a staff member as a contact for a Grant Activity, go to the **Contact for Grant Activities** section. Click on the **Actions** button next to the Grant Activity you want to remove the contact from and select **Remove contact from Activity**.  **Note:** you are unable to remove a contact from the Grant Activity if they are listed as the primary contact. You will need to assign a new primary contact before removing the existing primary contact.  Screenshot of the Organisation details > Staff > View > Staff details screen with the Actions drop down highlighted. The drop down includes: Remove contact from Activity, Assign as the primary contact and View all contacts for this Activity |
|  | If the change is successful, a message will temporarily display on screen confirming the change was successful and the Grant Activity will be removed from the Staff details screen under **Contact for Grant Activities**.  *Successful message - removing contact*  Screenshot of the successful message displayed to grant recipient when the change is successful. The popup says Staff member successfully removed as  a contact.  Screenshot of the Contact for Grant Activities with the Primary Activity contact heading highlighted. This screenshot is to display the removal of a contact.  The following error message will appear on the top of the page if the contact is a primary contact for the Grant Activity. You will need to assign a new primary contact to the Grant Activity before removing the existing primary contact. The system will not allow the removal of the primary contact without a replacement.  Screenshot of the error message displayed to grant recipient if the contact is a primary contact. The error message says There are error(s) on the page. Primary contacts cannot be removed. To remove the staff member as a contact for this Activity, change the primary conact to another staff member first. |

# Navigating to Grant Activity Contacts through the Grant Activities link/tile

| **Step** | **Action** |
| --- | --- |
|  | From the Home screen, select the **Grant Activities** tile. Alternatively, select **Grants** in the Navigation menu and select **Grant Activities** from the drop down menu.  Screenshot of the home page with the grant activities tab and tile highlighted. |
|  | The Grant Activities screen will display a list of your organisation’s Grant Activities.  To view a particular Grant Activity, select the Grant Activity’s **View** button or use the **Search Activities** button to help navigate to your Grant Activity.  Screenshot of the Grant Activities page with the Search Activities and View button highlighted. |
|  | | The Activity detailsscreenwilldisplay an overview of the Grant Activity by default. The below information related to the Grant Activity can be viewed: | | | --- | --- | | * Activity name | * Activity ID | | * Program name | * Schedule ID | | * Organisation name | * Organisation ID | | * Activity start date * Department | * Activity end date * Funding Arrangement Manager |   Screenshot of the activity details page. The overview button under the Grant Agreement menu button is highlighted. The Activity details and the Funding Arrangement Manger details are also highlighted. |
|  | From the Grant Activity menu, select **Contacts**.  Screenshot of the Grant Activity menu with the contacts option highlighted. |
|  | The Contacts screen will display. This screen displays all contacts linked to the Grant Activity.  To add a contact through the Grant Activities link/tile, proceed to step 19.  To remove a contact through the Grant Activities link/tile, proceed to step 25.  Screenshot of the Grant Activities > Contacts screen with the contacts option from the left-hand side menu and the Contacts heading highlighted. |

# Adding a Grant Activity Contact through the Grant Activities link/tile

| **Step** | **Action** |
| --- | --- |
|  | To add a contact to a Grant Activity, select **Contacts** from the Grant Activity menu, then click on **Link another contact**.  Screenshot of the Grant Activities > Contacts screen with the Link another contact button highlighted. |
|  | A list of contacts for the organisation will display. Click on the **box** next to the staff member(s) you want to add as a contact for the Grant Activity and then click on the **Confirm selection** button.  Screenshot of the Grant Activities > Contacts > Link contact to Grant Activity screen with the check boxes next the the available contact Ids highlighted. |
|  | If the change is successful, a message will temporarily display on screen confirming the change was successful and the contact will be listed on the Contacts screen under **Grant Activity contacts.**  *Successful message – adding contact to Grant Activity*  Screenshot of the successful message displayed to grant recipient when the change is successful. The popup says Staff member(s) successfully added as Grant Activity contact(s).  Your contact has now been added to the Grant Activity.  Screenshot of the Grant Activities > Contacts screen with the Grant Activity contacts heading highlighted. This screenshot is to show that the contact has been added to the Grant Activity. |
|  | To update the contact as the primary contact, select **Actions** and thenselect **Assign as the primary contact**.  **Note:** There will be a **Yes** under the **Primary Activity contact** column for the contact who is listed as the primary contact.  Screenshot of the Grant Activities > Contacts screen with the Actions drop down highlighted. The drop down shows Assign as primary contact highlighted and the Remove contact from Activity not highlighted. |
|  | When you select **Assign as the primary contact** a confirmation message will display asking you to confirm the change of the primary contact by selecting **Continue**.  Select **Continue** to confirm the change of primary contact.  **Note:** you can select **Discard changes and return** to cancel the change.  Screenshot of the Confirm change of primary contact popup. This popup says Please confirm the change of primary contact.  It includes the Activity name, Current primary contact and the  New primary contact details.  The user has the option to discard changes and return or Continue with the change. |
|  | If the change is successful, a message will temporarily display on screen confirming the change was successful and the contact will be listed on the Contacts screen under **Grant Activity contacts** with a **Yes** for **Primary Activity Contact.**  A message will temporarily display on screen confirming the change was successful.  *Successful message - changing primary contact*  Screenshot of the successful message displayed to grant recipient when the change is successful. The popup says Staff member successfully added as primary contact.  Your contact has now been updated as the primary contact.  Screenshot of the Grant Activities > Contacts screen with the Grant Activity Contacts heading and the Primary Activity contact column showing yes highlighted. |

# Removing a Grant Activity Contact through the Grant Activities link/tile

| **Step** | **Action** |
| --- | --- |
|  | To remove a contact from a Grant Activity, select **Contacts** from the Grant Activity menu, then select the **Actions** button next to the contact and select **Remove contact from Activity**.  Screenshot of the Grant Activities Contacts screen with the contacts option in the left-hand side menu and the Grant Activity contacts head highlighted. The action drop down is displayed with the Remove contact from Activity highlighted. |
|  | The message box below will display asking for confirmation to remove the contact from the Grant Activity. Click on **Yes remove as contact to continue**.  **Note:** you can select **Cancel** to not progress with the change.  Screenshot of the popup message displayed. This popup says Are you sure you would like to remove this staff member as a contact for this Activity?  The user has the option to Cancel or select Yes remove as Contact. |
|  | If the change is successful, a message will temporarily display on screen confirming the change was successful and the Grant Activity will be removed from the Contacts screen under **Grant Activity contacts**.  *Successful message - removing contact*  Screenshot of the successful message displayed to grant recipient when the change is successful. The popup says Staff member successfully removed as a contact.  Your contact has now been removed from the Grant Activity.  Screenshot of the Grant Activities Contacts screen with the Grant Activities contacts heading highlighted.  The following error message will appear on the top of the page if the contact is a primary contact for the Grant Activity. You will need to assign a new primary contact to the Grant Activity before removing the existing primary contact. The system will not allow the removal of the primary contact without a replacement.  Screenshot of the error message displayed to grant recipient if the contact is a primary contact. The error message says There are error(s) on the page. Primary contacts cannot be removed. To remove the staff member as a contact for this Activity, change the primary conact to another staff member first. |

# 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)