Update Grant Agreement Contacts

Grant Recipient Portal Task Card

**Portal Access required**: Administrator or Editor

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

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

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

# Navigating to Grant Agreement 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 Agreement Contacts are listed under the **Contact for Grant Agreements** 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 Profile > Staff > View screen with the Contact for Grant Agreement heading highlighted. |

# Adding a Grant Agreement Contact through the Organisation Profile

| **Step** | **Action** |
| --- | --- |
|  | To add a contact to a Grant Agreement, select **Staff** from the Organisation profile menu. Click **View** next to the staff member you want to add as a Grant Agreement Contact.  Screenshot of the Organisation Profile > Staff screen with the Staff button and View buttons highlighted. |
|  | The Staff details page will display. Select **Add** **Grant Agreement**.  Screenshot of the Organisation Profile > Staff > View > Staff details screen with the Add Grant Agreement button highlighted. |
|  | The list of Grant Agreements will display which you can assign the contact to. Select the **Actions** button next to the Grant Agreement 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 Agreement.  Select **Assign as a contact** if you want to assign the contact to the Grant Agreement (but not as the primary contact).  Select **Assign as the primary contact** if you want to assign the contact to the Grant Agreement as the primary contact.  **Note:** If you want to see all contacts assigned to the Grant Agreement, select **View all contacts for this Agreement**.  Screenshot of the Organisation Profile > Staff >  View  > Staff: Grant Agreement conatct screen with the Actions drop down highlighted. The drop down menu includes: Assign a contact, Assign as the primary contact and View all contacts for this agreement |
|  | 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 Agreement will be listed on the Staff details screen under **Contact for Grant Agreements** with a **No** for **Primary Agreement 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 Agreement contact(s).  Your contact has now been added to the Grant Agreement.  Screenshot of the Grant Agreement contacts with the Primary Agreement 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 **Continue**.  Select **Continue** to confirm the change of 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 Schedule Id, 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 Agreement will be listed on the Staff details screen under **Contact for Grant Agreements** with a **Yes** for **Primary Agreement 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(s) successfully added as Grant Agreement contact(s).  Your contact has now been added to the Grant Agreement as the primary contact.  Screenshot of the Grant Agreement  > Contacts screen with the Grant Agreement contacts heading highlighted. This screenshot is to show that the contact has been added as a primary contact to the Grant Agreement. |

# Removing a Grant Agreement Contact through the Organisation Profile

| **Step** | **Action** |
| --- | --- |
|  | To remove a contact from a Grant Agreement, select **Staff** from the Organisation profile menu. Click **View** next to the staff member you want to remove as a Grant Agreement Contact.  Screenshot of the Organisation details > Staff screen with the Staff button and View button highlighted. |
|  | The Staff details page will display. To remove a staff member as a contact for a Grant Agreement, go to the **Contact for Grant Agreements** section. Click on the **Actions** button next to the Grant Agreement you want to remove the contact from and select **Remove contact from Agreement**.  **Note:** you are unable to remove a contact from a Grant Agreement 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 Contact for Grant Agreement Actions drop down displayed. The drop down shows the Remove contact from Agreement, Assign as the primary contact and View all contacts for this Agreement. |
|  | If the change is successful, a message will temporarily display on screen confirming the change was successful and the Grant Agreement will be removed from the Staff details screen under **Contact for Grant Agreements.**  *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 Agreements screen. This screenshot is to display that the contact has been removed frrom the grant agreement contacts.  The following error message will appear on the top of the page if the contact is a primary contact for the Grant Agreement. You will need to assign a new primary contact to the Grant Agreement 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 Agreement Contacts through the Grant Agreements link/tile

| **Step** | **Action** |
| --- | --- |
|  | From the Home screen, select the **Grant Agreements** tile. Alternatively, select **Grants** in the Navigation menu and select **Grant Agreements** from the drop down menu.  Screenshot of the home page with the grant agreement tab and tile highlighted. |
|  | The Grant Agreements screen will display a list of your organisation’s Grant Agreements.  To view a particular Grant Agreement, select the Grant Agreement’s **View** button.  Screenshot of the grant agreements page with the view button highlighted. |
|  | | The Agreement details screen will display an overview of the Agreement by default. The below information related to the Grant Agreement can be viewed: | | | --- | --- | | * Schedule ID | * Agreement Type | | * Start date | * Completion date | | * Program name | * Department | | * Organisation name | * Organisation ID |   A list of Grant Activities associated with the Grant Agreement are displayed below.  Screenshot of the Grant Agreement details page. The overview button under the Grant Agreement menu button is highlighted as well as the agreement details and the view button. |
|  | From the Grant Agreement menu, select **Contacts**.  Screenshot of the Grant Agreement menu with the Contact options from the left-hand menu highlighted. |
|  | The Contacts screen will display. This screen displays all contacts linked to the Grant Agreement.  To add a contact through the Grant Agreements link/tile, proceed to step 19.  To remove a contact through the Grant Agreements link/tile, proceed to step 25.  Screenshot of the Grant Agreement > Contact screen with the Contact options from the left-hand menu and the Contacts heading highlighted. |

# Adding a Grant Agreement Contact through the Grant Agreements link/tile

| **Step** | **Action** |
| --- | --- |
|  | To add a contact to a Grant Agreement, select **Contacts** from the Grant Agreement menu, then click on **Link another contact**.  Screenshot of the Grant Agreement > Contact screen with the Contact options from the left-hand menu  heading highlighted and 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 Agreement and then click on the **Confirm selection** button.  Screenshot of the Grant Agreement > Contacts > Link contact to Grant Agreement screen with the check boxes next the the available contact Ids highlighted  and the Confirm selection button 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 Agreement contacts.**  *Successful message – adding contact to Grant Agreement*  Screenshot of the successful message displayed to grant recipient when the change is successful. The popup says Staff member(s) successfully added as Grant Agreement contact(s).  Your contact has now been added to the Grant Agreement.  Screenshot of the Grant Agreement > Contacts screen with the Grant Agreement contacts heading highlighted. This screenshot is to show that the contact has been added to the Grant Agreement. |
|  | 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 Agreement contact** column for the contact who is listed as the primary contact.  Screenshot of the Grant Agreement > Contacts screen with the Actions drop down highlighted. The drop down shows Assign as primary contact highlight 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 By clicking 'Continue' below you declare rgar you as an authorised indivdual are changing the contact person for this grant agreement, and that this will constitute a change to the grantee's representative for this agreement.  The user has the option to Discard changes and return or                Continue. |
|  | 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 Agreement contacts** with a **Yes** for **Primary Agreement 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 Agreement > Contacts screen with the Grant Agreement Contacts heading and the Primary Agreement contact column showing yes highlighted. |

# Removing a Grant Agreement Contact through the Grant Agreements link/tile

| **Step** | **Action** |
| --- | --- |
|  | To remove a contact from a Grant Agreement, select **Contacts** from the Grant Agreement menu, then select the **Actions** button next to the contact and select **Remove contact from Agreement**.  Screenshot of the Grant Agreement Contacts screen with the action drop down is displayed and the Remove contact from Agreement highlighted. |
|  | The message box below will display asking for confirmation to remove the contact from the Grant Agreement. Click on **Yes remove as Agreement contact** to remove the contact.  **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 Agreement?  The user has the option to Cancel or select Yes remove as Agreement Contact. |
|  | If the change is successful, a message will temporarily display on screen confirming the change was successful and the Grant Agreement will be removed from the Contacts screen under **Grant Agreement contacts.**  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 Agreement.  Screenshot of the Grant Agreement Contacts screen with the Grant Agreement 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 Agreement. You will need to assign a new primary contact to the Grant Agreement 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)