



Add Organisation Staff

Task Card

This guide explains how an Organisation Administrator can add staff members to the Grant Recipient Portal (Portal) and assign the appropriate access level.

Portal access required: Administrator.

Quick Links

[Understanding Access Levels](#)

[Add Staff in the Portal](#)

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Understanding Access Levels

Before adding a staff member, decide what level of access they need.

Administrator

Administrators have the highest level of access. They can:

- Manage staff access
- Create and edit staff records
- Update organisation details
- Update their personal profile
- Request bank account updates
- Submit reports and acquittals
- View grant information
- View and resend payment advice

Editor

Editors can:

- Submit reports and acquittals
- Update their personal profile

- View grant information
- View and resend payment advice

Viewer

Viewers cannot make changes to organisation information or submit reports. They can:

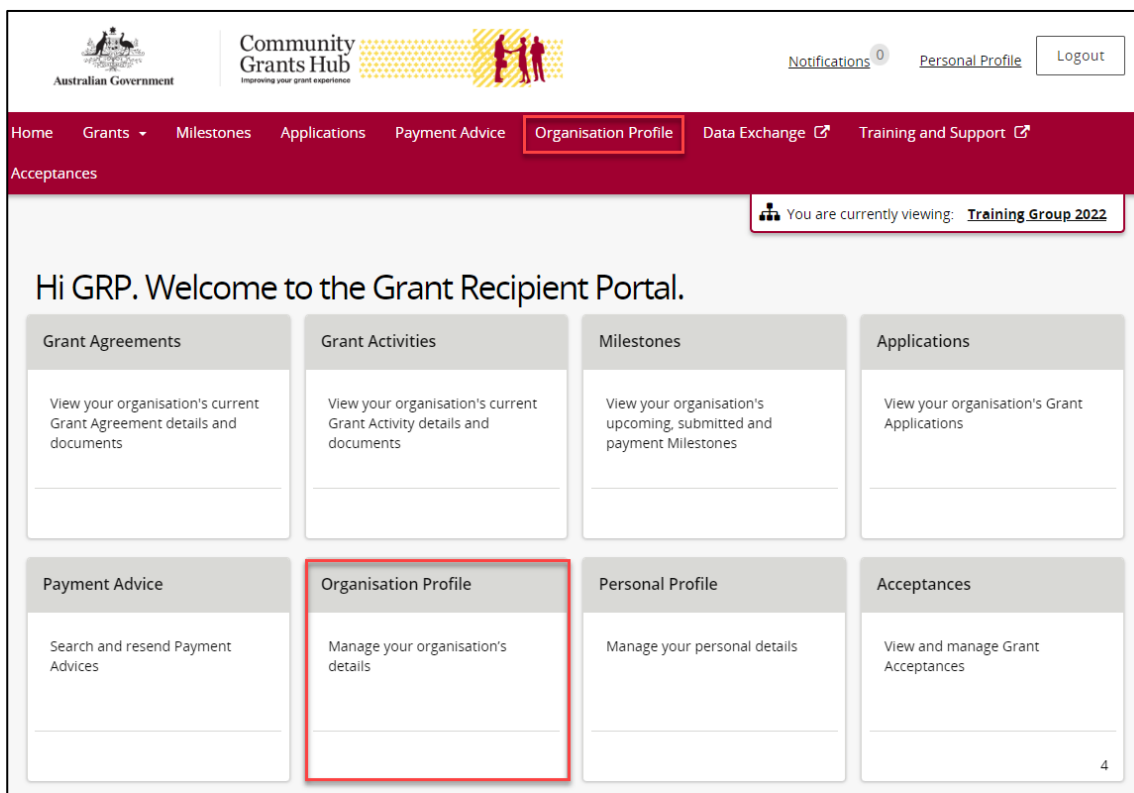
- View grant information
- Update their personal profile
- View and resend payment advice

No Access

Use **No Access** for staff who do not need Portal access but still need to be recorded as an organisation contact and assigned to grants or activities.

Add Staff in the Portal

From the Portal home page, select the **Organisation Profile** tile, or link from the navigation menu.



The Organisation Profile page opens.

Select **Staff** from the Organisation Profile menu.

Home Grants Milestones Applications Payment Advice Organisation Profile Data Exchange Training and Support Acceptances

You are currently viewing: Training Group 2022

You are here: Home / Organisation Profile

Organisation profile menu

- Organisation details
- Postal address
- Staff
- Bank accounts
- Acceptance administration

Organisation details

Organisation details can be updated if you are an Administrator

Update

Organisation ID: 4-GXVAVJL	Organisation name: Training Group 2022	Legal name: Training Group 2022
ABN: 39729461841	Business address: L 6 15 Bowes PI PHILLIP ACT 2606	Phone: 02 6287 9987
General email: traininggroup22@gmail.com	Financial email: traininggroup22@gmail.com	Web address:

The Staff page displays active staff members by default.

You can filter the list to view:

- Active Staff
- Inactive Staff
- All Staff

Each staff member has a unique Contact ID that can help identify records and avoid duplicate contacts.

Home Grants Milestones Applications Payment Advice Organisation Profile Data Exchange Training and Support Acceptances

You are currently viewing: Training Group 2026

You are here: Home / Organisation Profile

Organisation profile menu

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Staff

Filter: 1. Active Staff Apply Filter

Search Staff Add staff

Contact ID	Title	First name	Last name	Status	Position	System access level	
4-GZOLB94	Mr	GRP	TRN3	Active	Not Specified	View only	View
4-GYCE3B5	Mr	GRP	TRN2	Active	Not Specified	Administrator	View
4-GZOLB85	Mr	GRP	TRN1	Active	Not Specified	Editor	View
4-GZOLBK0	Mr	JAMES	RED	Active	Not Specified	Administrator	View

Select Add staff.

Home Grants Milestones Applications Payment Advice Organisation Profile Data Exchange Training and Support Acceptances

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4-GZOLBK0	Mr	JAMES	RED	Active	Not Specified	Administrator	View

Complete the required details for the new staff member.

Required fields are marked with a red asterisk (*).

Enter:

- Title
- First name
- Last name
- Position
- Email address
- Phone number (if applicable)
- Required system access level

Choose the most appropriate access level based on the staff member's role.

When all information has been entered, select **Save and return**.

The system automatically checks for duplicate contacts before saving.

Exact Match Found

If the First Name, Last Name and Email Address match an existing contact for your organisation, the system will display an error, and the contact cannot be added.

Matching Email Address Found

