



Managing Staff Contacts in the Grant Recipient Portal

Video Transcript

Welcome to the Community Grants Hub Grant Recipient Portal.

In this video, you will learn how to add, update, and manage staff contacts in the Portal.

Where can you manage staff contacts?

There are three places in the Portal where you can manage staff contacts:

- Grant Agreements
- Grant Activities
- Organisation Profile

Most contact management is completed through the Organisation Profile section.

Viewing your organisation's staff

To view your organisation's staff contacts:

1. Open **Organisation Profile**.
2. Select **Staff** from the menu on the left.

You will see a list of staff linked to your organisation.

Understanding staff status

You can filter the list to show:

- **All staff**
- **Active staff**: people who are currently recorded as contacts for your organisation.
- **Inactive staff**: people who are no longer contacts and have an end date recorded against their profile.

You can also search for a specific staff member using the **Search Staff** function.

Adding a new staff member

To give a staff member access to the Portal:

1. Select **Add Staff**.
2. Enter the staff member's details.
3. Choose the level of Portal access they require.
4. Save the record.
5. Assign the staff member to grant agreements and grant activities.

Portal access levels

There are four access levels available:

No Access

The person is recorded as a contact but cannot access the Portal.

View Only

The person can view information in the Portal but cannot make changes.

Editor

The person can view and update information, including grant activity details.

Administrator

The person has full access and can make changes across the organisation's Portal records, including managing users.

Updating staff details

To view or update a staff member's information:

1. Find the staff member in the Staff list.
2. Select **View** beside their name.

From this screen, you can:

- Update personal details
- Change Portal access
- Make a staff member inactive
- Reactivate a staff member
- View the grant agreements and activities they are linked to

Adding a staff member to a Grant Agreement

You can link a staff member to a Grant Agreement in two ways.

Option 1: From the Staff Record

1. Open the staff member's profile.
2. Select **Add Grant Agreement**.
3. Choose the relevant Grant Agreement.

4. Select one of the available actions:
 - Assign as a contact
 - Assign as the primary contact
 - View existing contacts for the agreement

Option 2: From the Grant Agreement

1. Open **Grant Agreements**.
2. Select **View** for the relevant agreement.
3. Select **Contacts** from the menu.
4. Select **Link Another Contact**.
5. Choose the staff member from the list.
6. Select **Confirm Selection**.

A confirmation message will appear when the contact has been added successfully.

Managing Grant Agreement contacts

From the Contacts screen you can also:

- Set a contact as the primary contact
- Remove a contact from the agreement

Use the **Actions** button beside the contact's name.

Adding a staff member to a Grant Activity

You can also link staff members to individual Grant Activities.

Option 1: From the Staff Record

1. Open the staff member's profile.
2. Select **Add Grant Activity**.
3. Choose the relevant activity.
4. Select one of the available actions:
 - Assign as a contact
 - Assign as the primary contact
 - View all contacts for the activity

Option 2: From the Grant Activity

1. Open **Grant Activities**.
2. Select **View** beside the activity.
3. Select **Contacts** from the left-hand menu.
4. Select **Link Another Contact**.
5. Tick the staff member you want to add.
6. Select **Confirm Selection**.

A confirmation message will appear when the contact has been added successfully.

Managing Grant Activity contacts

From the Contacts screen you can:

- Assign a primary contact
- Remove a contact

Use the **Actions** button next to the contact's name.

Training and Support

The **Training and Support** section contains guidance materials, quick links, and resources to help you use the Portal.

For more information, visit the **Grant Recipient Portal** page on the Community Grants Hub website and review the available information sheets and support resources.

Need help?

For further assistance with the **Grant Recipient Portal**, please contact the Community Grants Hub at GRP.Helpdesk@communitygrants.gov.au.