Australian Government

Community Grants Hub
Improving your grant experience



Update Grant Agreement Contacts

Task Card

This task card explains how to view, add, and remove Grant Agreement Contacts in the Grant Recipient Portal (Portal).

You can manage Grant Agreement Contacts in two ways:

- Through the **Organisation Profile**, or
- Through the **Grant Agreements** section

Portal access required: Administrator or Editor.

Quick Links

Manage Contacts through Organisation Profile

Add a Contact through Organisation Profile

Remove a Contact through Organisation Profile

Manage Contacts through Grant Agreements

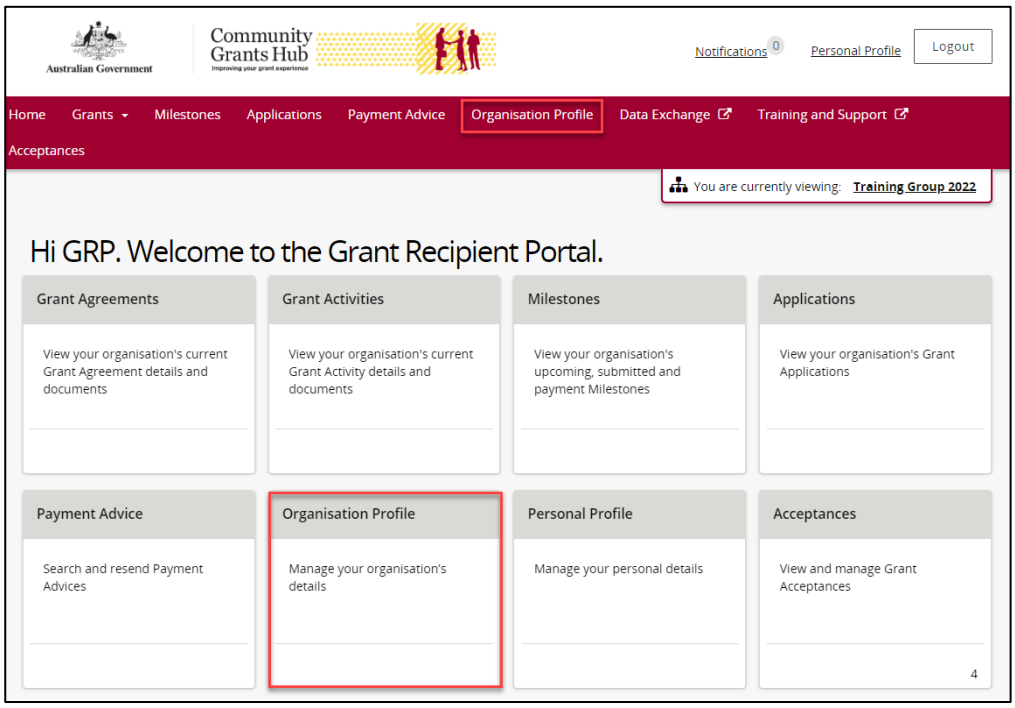
Add a Contact through Grant Agreements

Remove a Contact through Grant Agreements

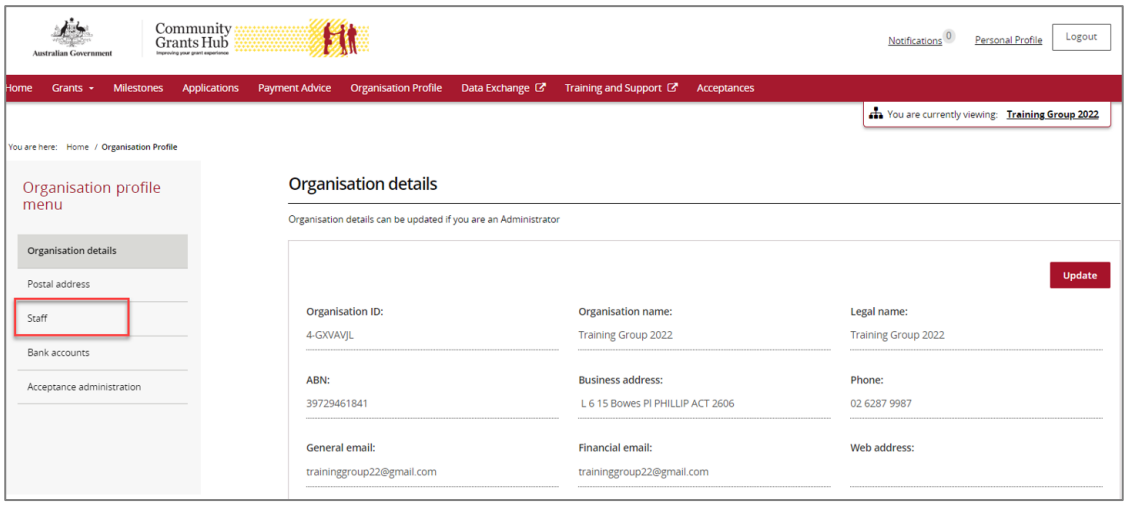
Need help?

Manage Contacts through Organisation Profile

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



From the Organisation Profile menu, select **Staff**.

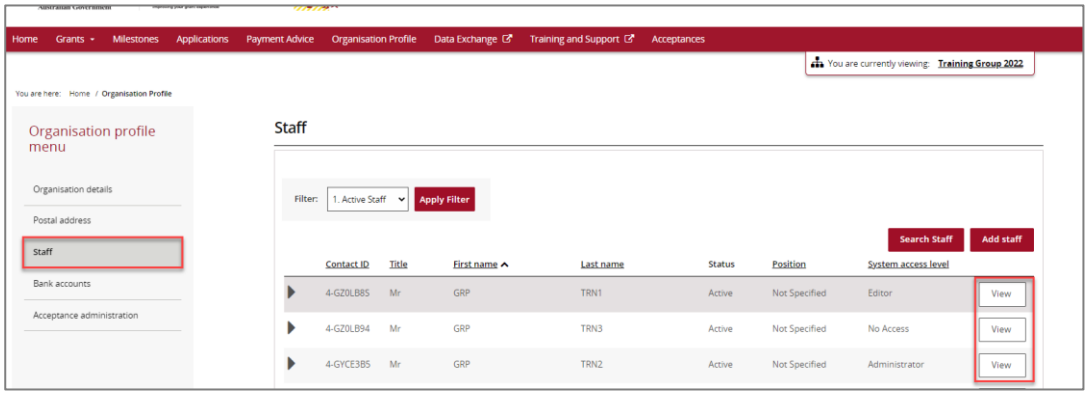


The Staff screen will display.

You can:

- View active staff
- View inactive staff
- View all staff

Select **View** next to the staff member whose Grant Agreement contacts you want to manage.

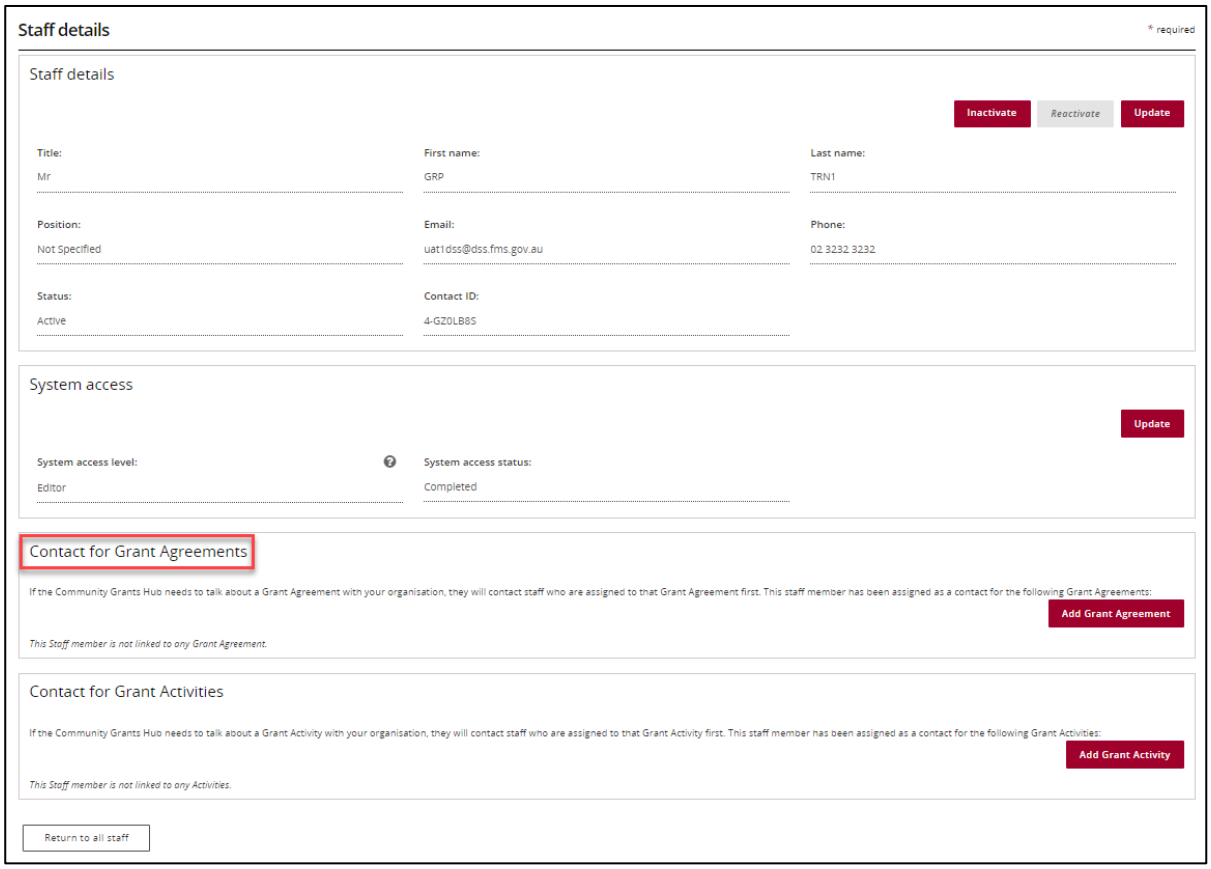


The Staff Details screen opens.

This screen contains:

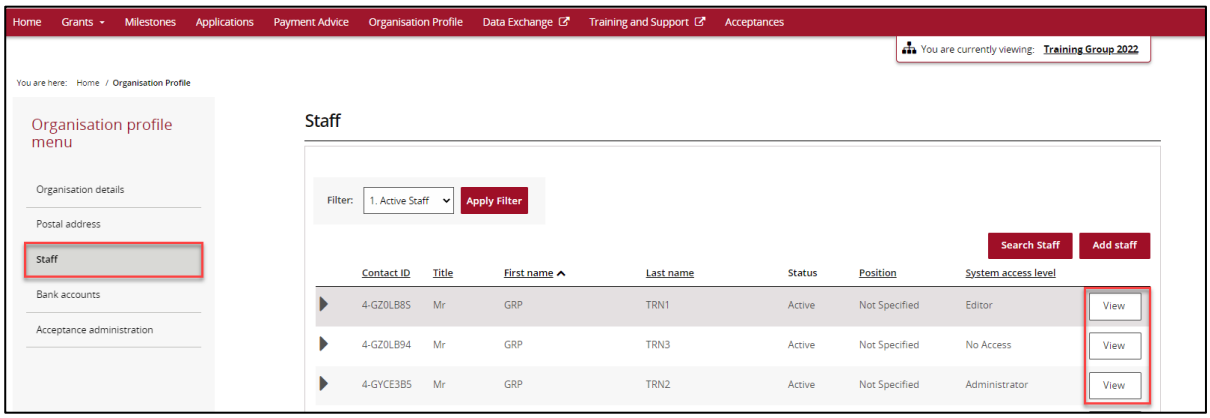
- Staff Details
- System Access
- Contact for Grant Agreements
- Contact for Grant Activities

Grant Agreement Contacts are listed under **Contact for Grant Agreements**.

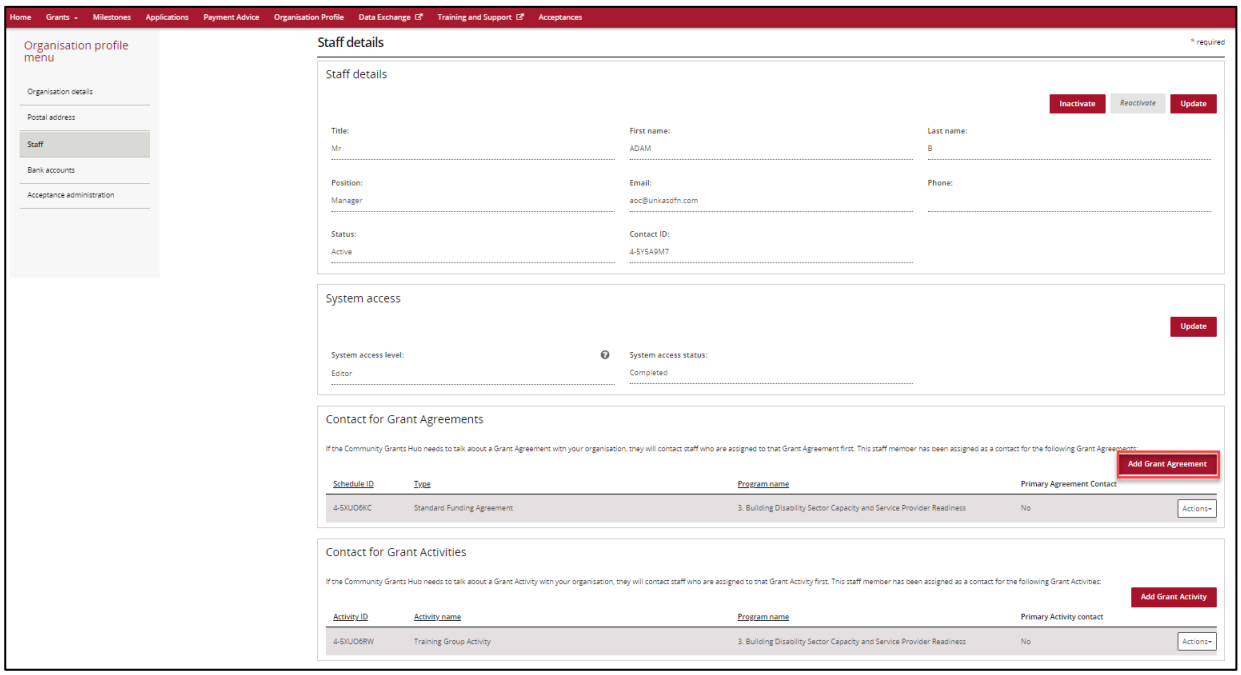


Add a Contact through Organisation Profile

Go to **Staff** and select **View** beside the staff member you want to add as a contact.



On the Staff Details screen, select **Add Grant Agreement**.

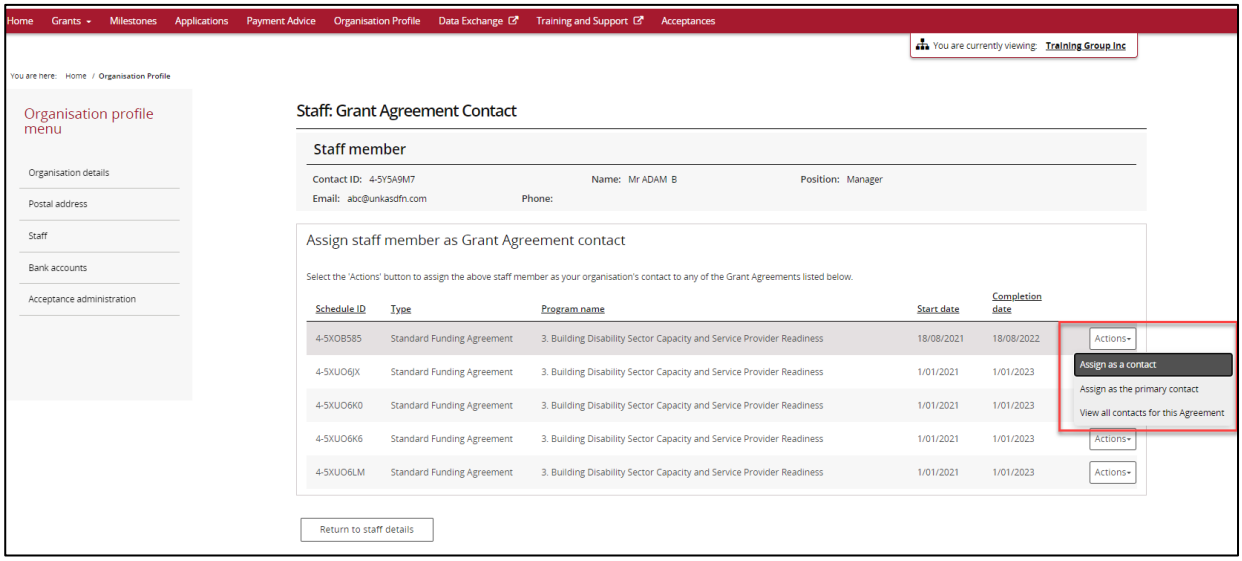


A list of Grant Agreements will appear.

Select **Actions** beside the relevant agreement.

Available options are:

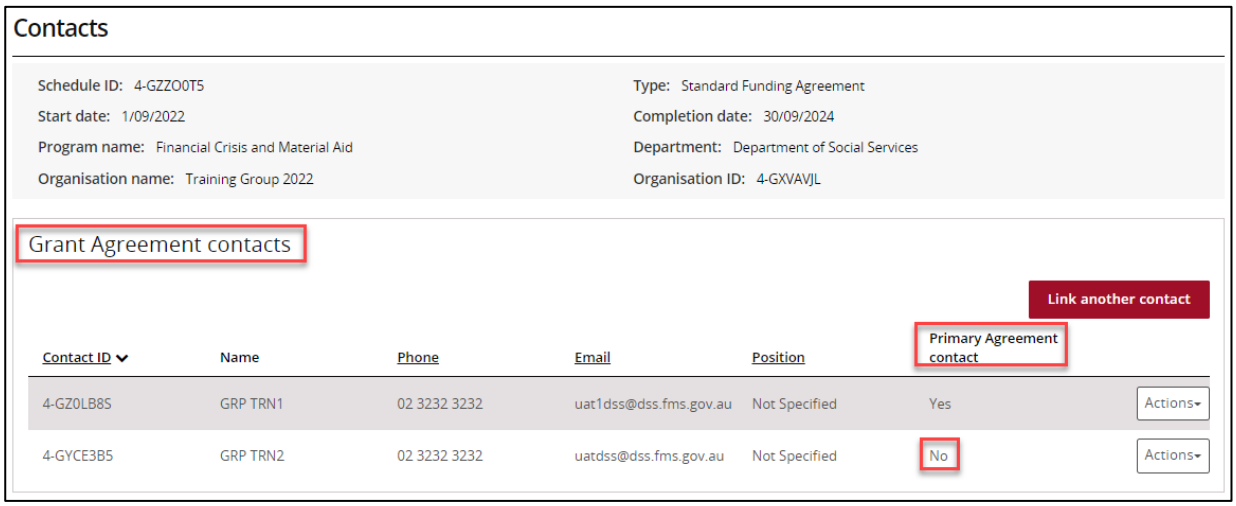
- Assign as a contact.
- Assign as the primary contact.
- View all contacts for the agreement.



To add the person as a standard contact, select **Assign as a contact**.

A success message will appear.

The agreement will show under Contact for Grant Agreements with **Primary Agreement Contact** as **No**.

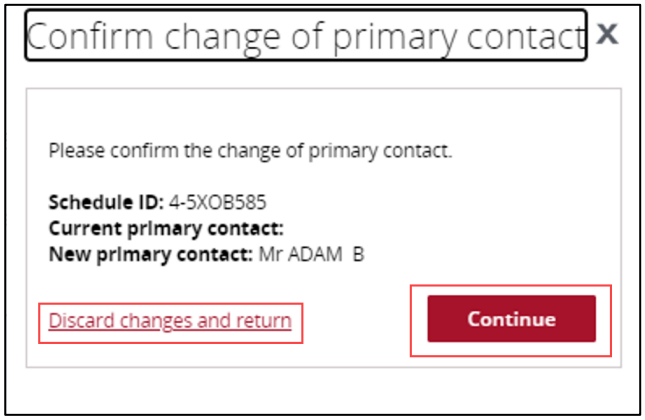


To add the person as the primary contact, select **Assign as the primary contact**.

A confirmation message will appear.

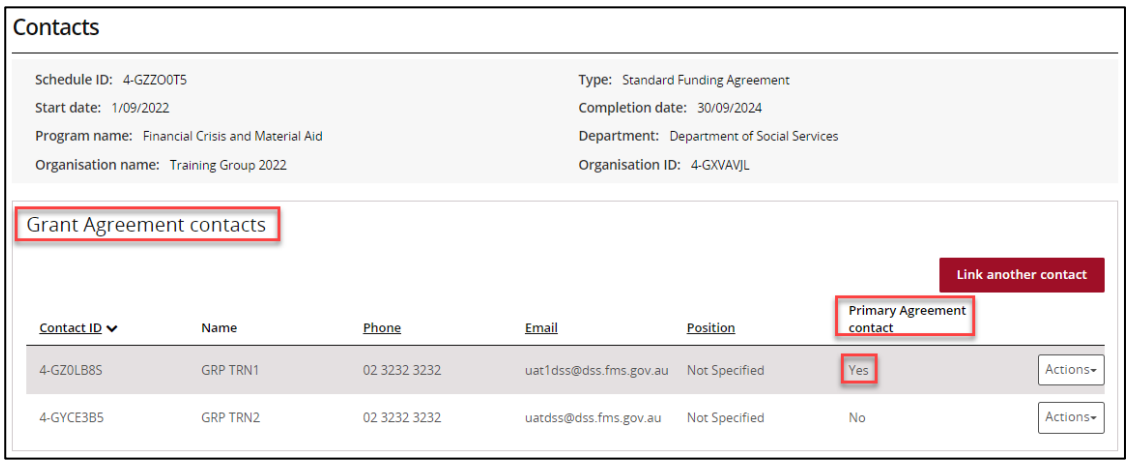
Select **Continue** to proceed.

You can select **Discard changes and return** if you do not wish to continue.



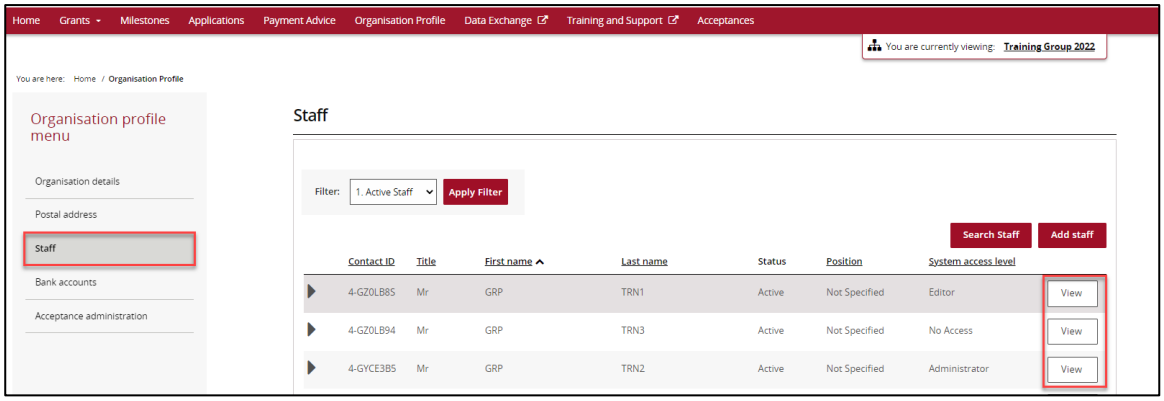
A success message will appear.

The contact will now show under Contact for Grant Agreements with **Primary Agreement Contact** as **Yes**.



Remove a Contact through Organisation Profile

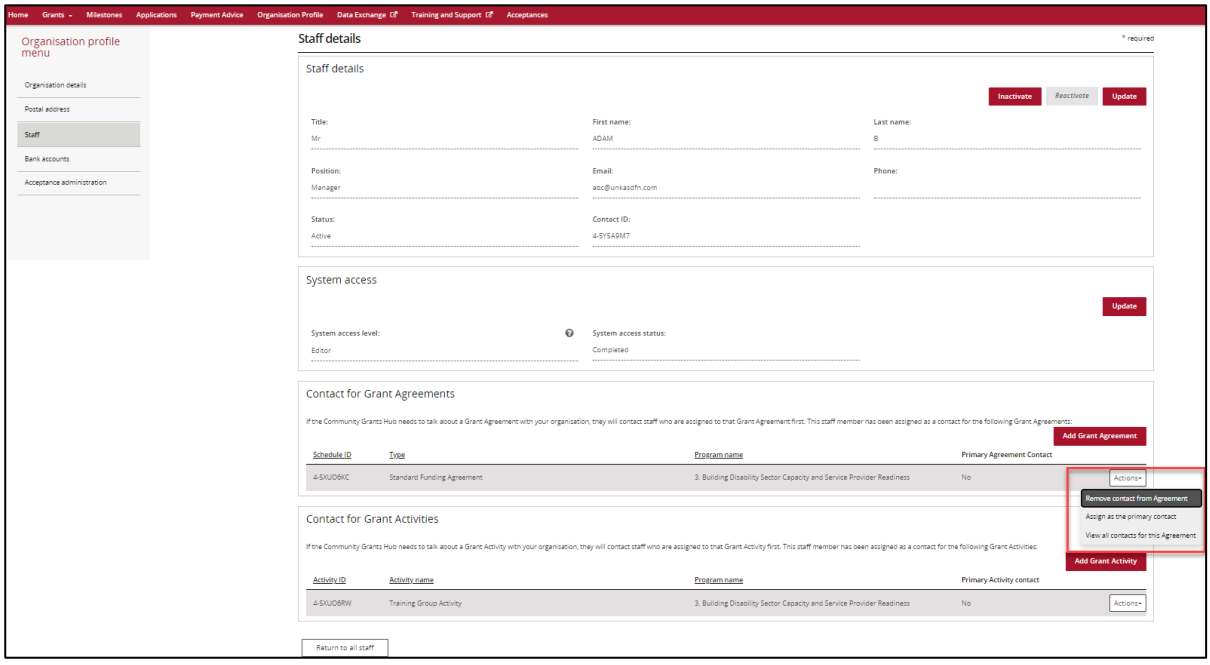
Go to **Staff** and select **View** beside the staff member you want to remove.



Go to the Contact for Grant Agreements section.

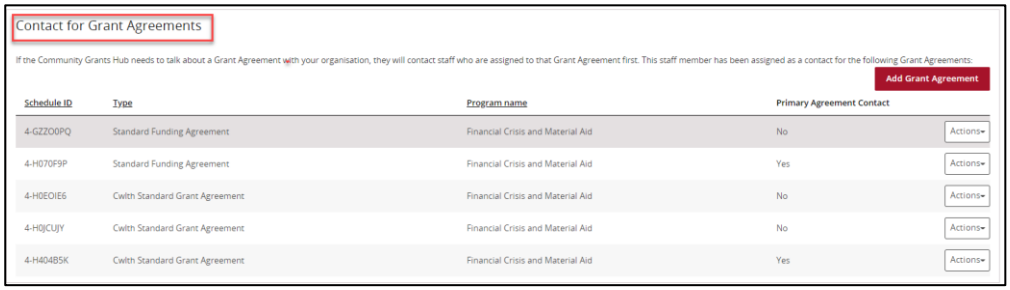
Select **Actions** beside the agreement and choose **Remove contact from Agreement**.

Note: You cannot remove a person who is currently the primary contact. A new primary contact must be assigned first.



If successful, a confirmation message will appear, and the agreement will no longer be listed for that staff member.

If the contact is the current primary contact, an error message will display advising that a new primary contact must be assigned before removal.

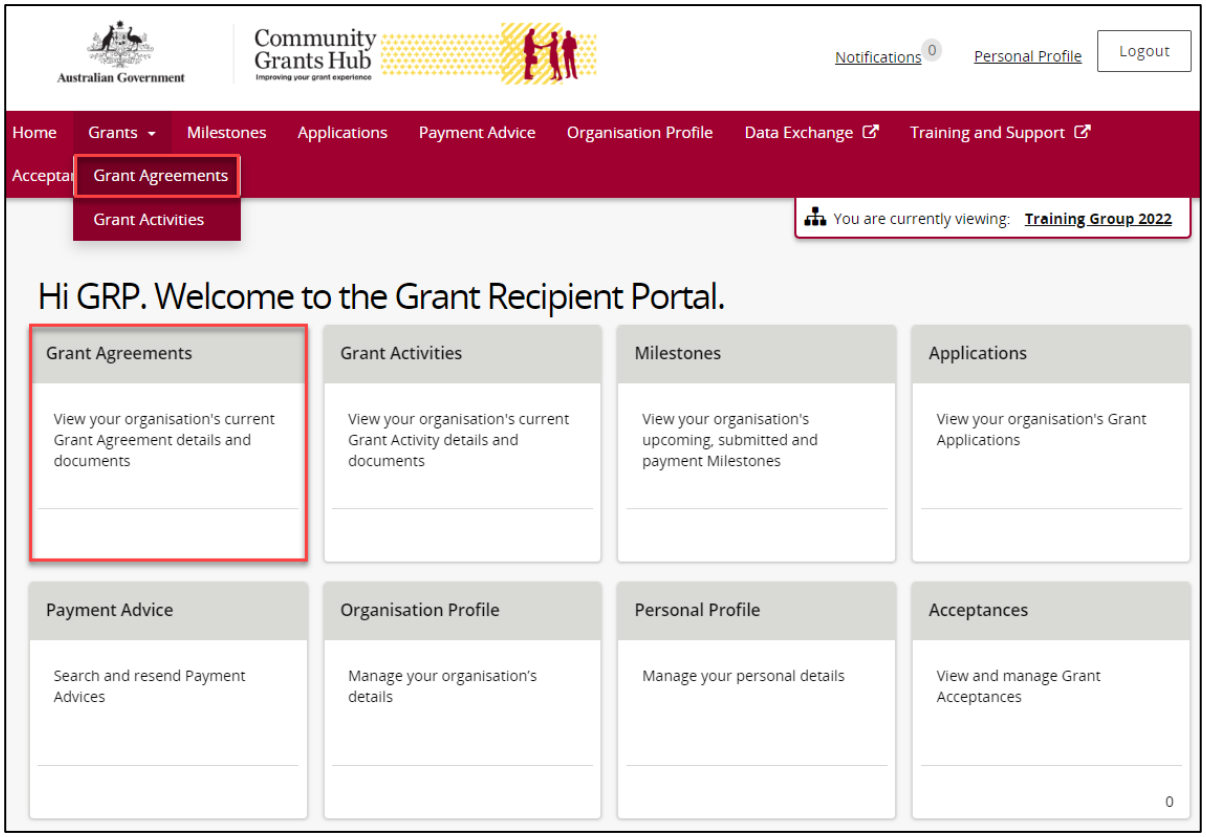




Manage Contacts through Grant Agreements

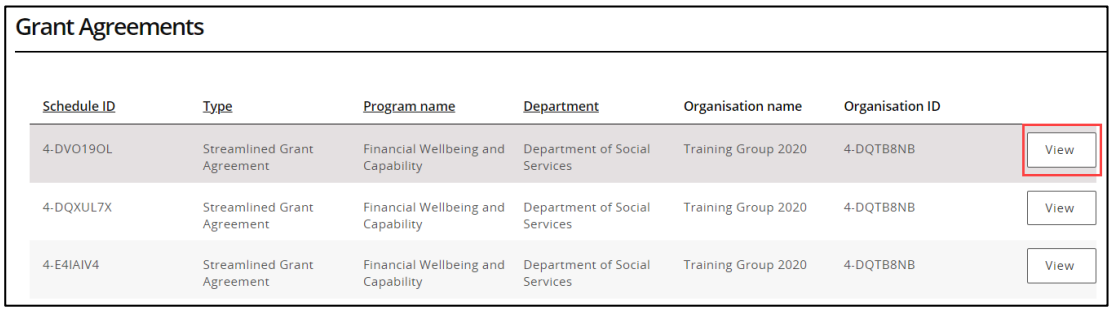
From the Portal home page:

- Select the **Grant Agreements** tile, or
- Select **Grants** from the menu and then select **Grant Agreements**.



The Grant Agreements screen will display.

Find the agreement you want to manage and select **View**.



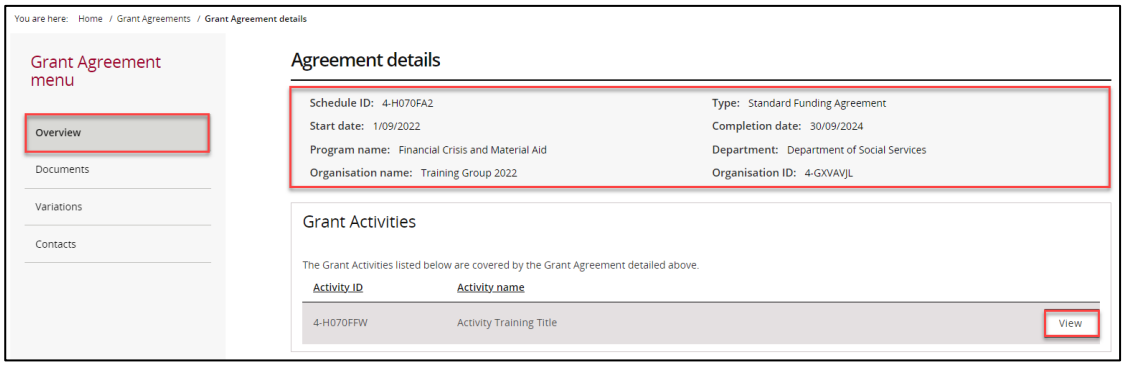
The Agreement Details screen will open.

You can view information including:

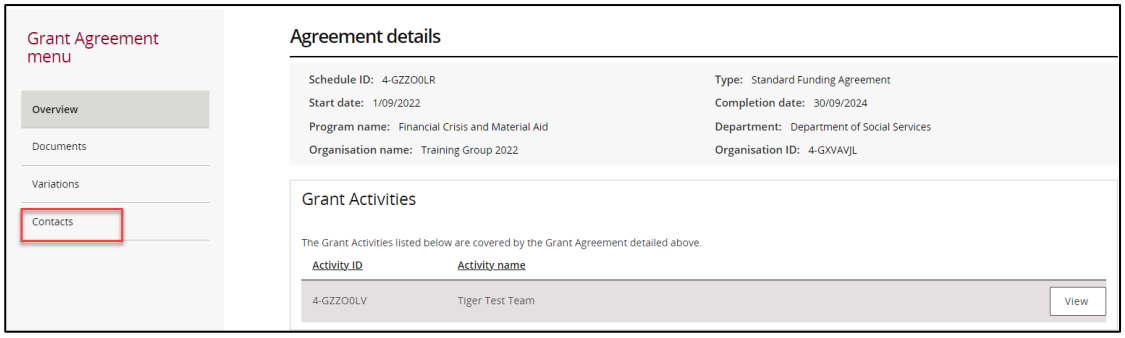
- Schedule ID
- Agreement type
- Start date
- Completion date
- Program name
- Department
- Organisation name

- Organisation ID

You can also see any linked Grant Activities.

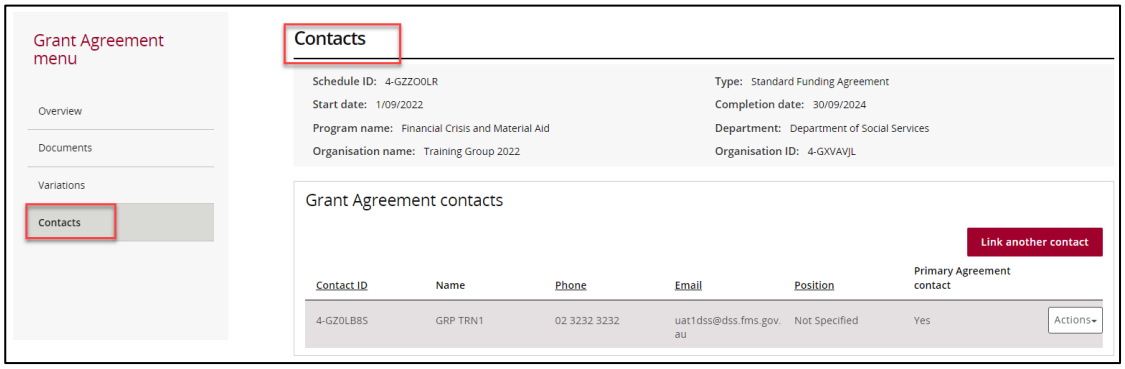


Select **Contacts** from the Grant Agreement menu.



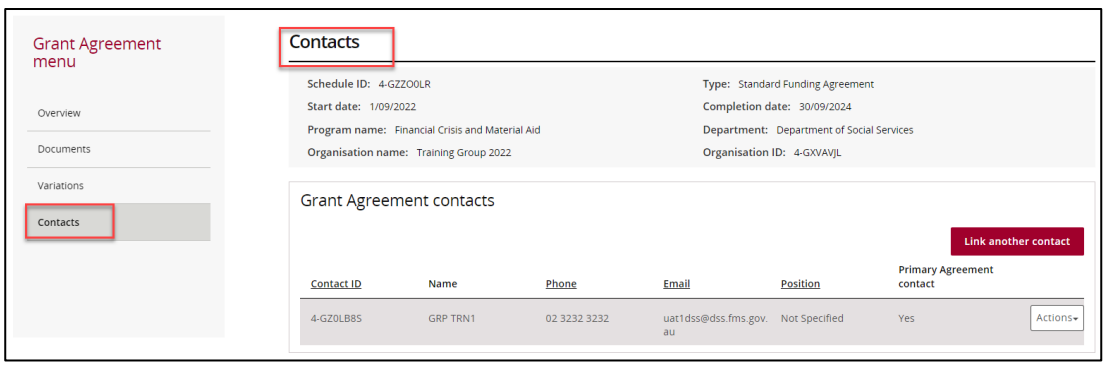
The Contacts screen will display all contacts linked to the agreement.

- To add a contact, continue to the next section.
- To remove a contact, skip to **Remove a Contact through Grant Agreements** task card section.



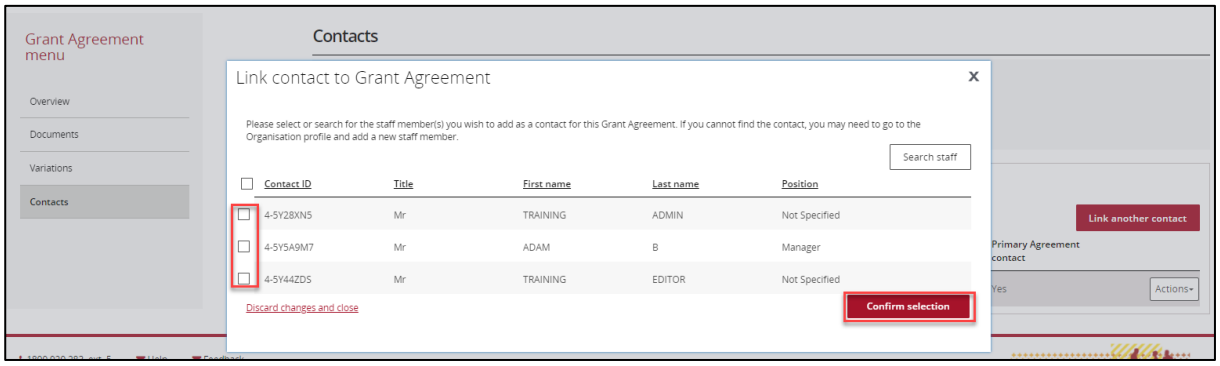
Add a Contact through Grant Agreements

Select **Link another contact**.



A list of staff members will appear.

Select the checkbox beside the person you want to add, then select **Confirm selection**.



A success message will appear.

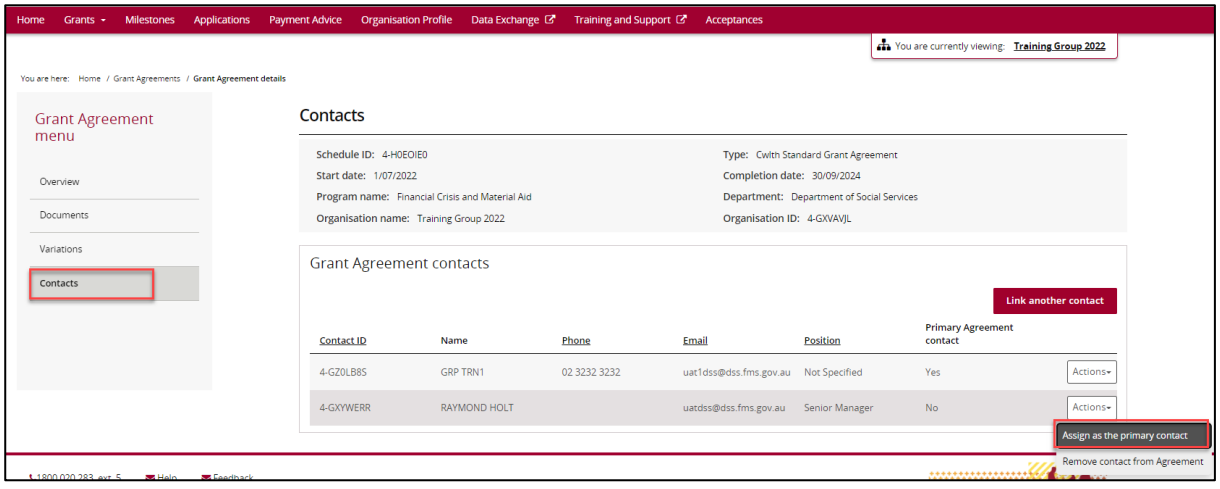
The person will now appear under **Grant Agreement Contacts**.



To make the contact the primary contact:

- Select **Actions**
- Select **Assign as the primary contact**

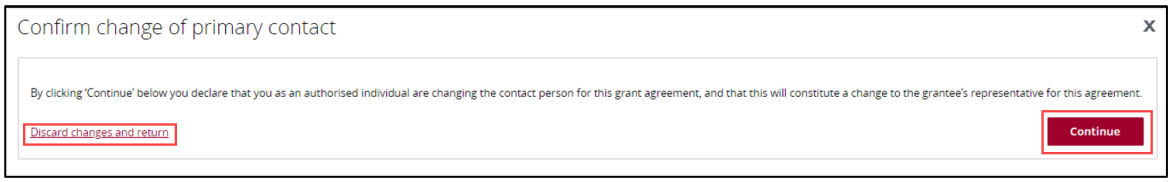
The current primary contact is identified by **Yes** in the **Primary Agreement Contact** column.



A confirmation window will appear.

Select **Continue** to make the change.

Select **Discard changes and return** if you do not want to proceed.



A success message will appear.

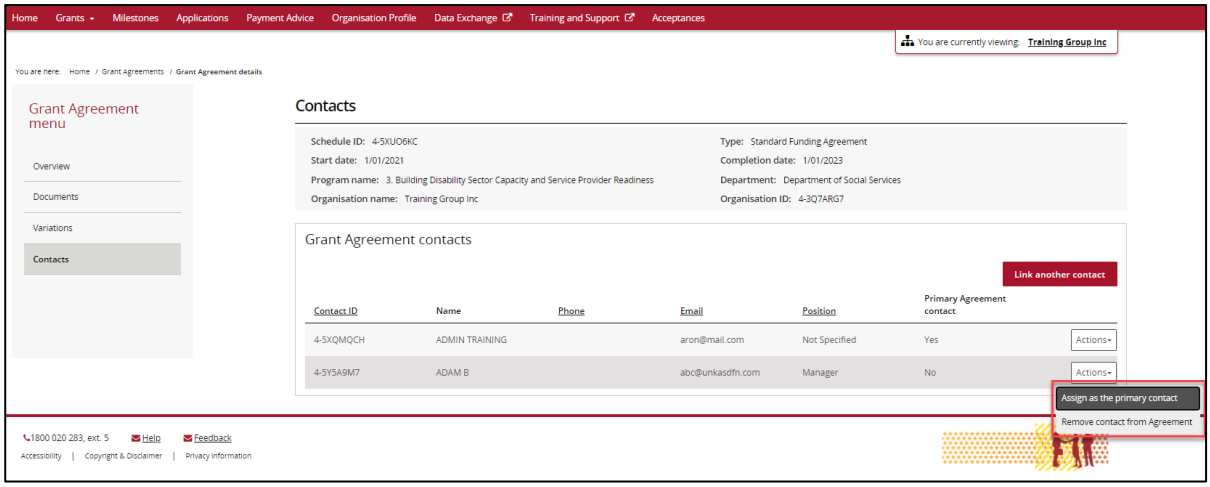
The contact will now show **Yes** under **Primary Agreement Contact**.



Remove a Contact through Grant Agreements

From the Contacts screen:

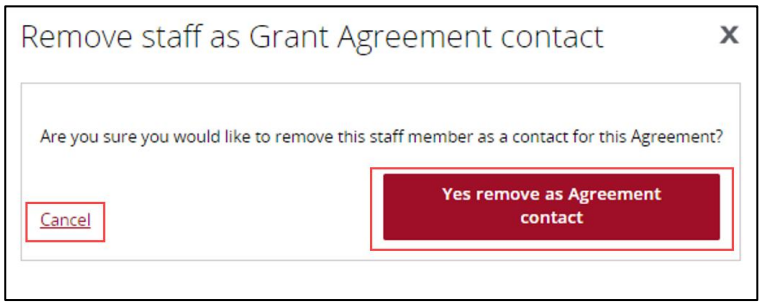
- Select **Actions** beside the contact.
- Select **Remove contact from Agreement**.



A confirmation window will appear.

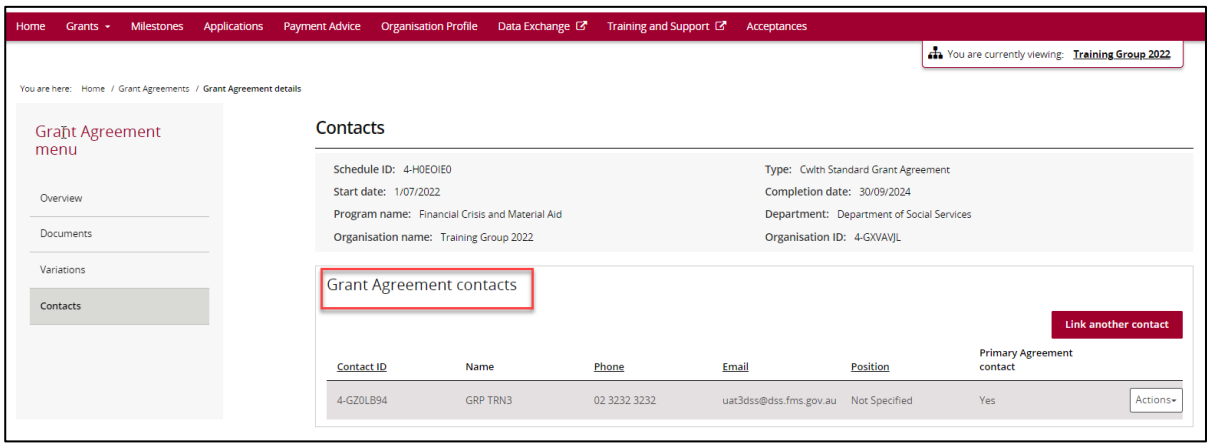
Select **Yes remove as Agreement contact**.

Select **Cancel** if you do not wish to proceed.



A success message will appear, and the contact will be removed from the agreement.

If the contact is currently the primary contact, an error message will display advising that another primary contact must be assigned first.





Need help?

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