



Grant Recipient Portal

Frequently Asked Questions

About the Grant Recipient Portal

1. What is the Grant Recipient Portal, and who is it for?

The Grant Recipient Portal (Portal) is an intuitive, online system for grant recipients to self-manage their grant administration needs with the Community Grants Hub.

2. What can grant recipients do on the Portal?

Grant recipients can:

- access their grant information in one place, anytime
- · view their activities and milestones
- · search and resend copies of their payment advices
- update their organisational details and Portal user access
- update and request changes to their organisation's bank account details
- manage their organisation's contact information
- submit Financial acquittals *
- submit Activity Work Plans *
- submit Child Safety Statements of Compliance *
- manage and accept funding offers and variations *

*currently only available for some programs

1 | Community Grants Hub July 2024

Accessing the Grant Recipient Portal

3. How do grant recipients access the Portal?

The Portal uses the Australian Government Digital Identity System to verify users. Digital Identity is a safe, secure, and convenient way to prove who you are online.

Accessing the Portal is a three-step process:

- ✓ Each user of the Portal will need to set up their own Digital Identity account (<u>myGovID</u> is the Australian Government's Digital Identity app).
- ✓ The Principal Authority of the organisation will be required to link the organisation's ABN and authorise staff in the **Relationship Authorisation Manager**.
- ✓ Once the first two steps are complete, a senior staff member in the organisation will be required to be the Portal Administrator. The person nominated as the Portal Administrator will need to complete a <u>Grant Recipient Portal Access Form</u> and send it to the <u>GRP Helpdesk</u>. When they have access to the Portal, the Administrator can provide access to other staff.

The <u>Grant Recipient Portal – Quick Start Guide</u> details the step-by-step process to getting access to the Portal.

4. What is the Relationship Authorisation Manager?

The Relationship Authorisation Manager is the system allowing a **principal authority** or **authorisation administrator** of an organisation to authorise individuals to work on behalf of the business. It is the principal authority's responsibility to maintain the integrity of the organisation's business records. This is to ensure:

- employees can easily identify who can authorise them
- the correct staff members have been authorised to access government online services on behalf of their business.

For each government online service, the principal authority or authorisation administrator can grant:

- Full access (Administrator)
- Custom access (Editor and Viewer)
- No access (added as a contact in GPS but does not have access to the Portal).

More information can be found on the Australian Taxation Office website.

5. What is the difference between myGovID and myGov?

myGovID is a digital identity system to access government online services targeted to businesses such as the Portal.

myGov is a **personal** digital identity system to access government online services such as the Australian Taxation Office and Centrelink.

6. Can I use the Digital Identity I already have to record my Data Exchange information?

Yes. Once you set up your Digital Identity you can use it to access government online services on behalf of all organisations that you work for.

7. Do I need to complete more than one Portal access form if I receive program funding from more than one government agency?

No. If you receive funding from more than one government agency, you only need to complete the Grant Recipient Portal Access Form once.

8. What are the access levels for the Portal?

There are three levels of access in the Portal:

- Organisation Viewer The staff member can view various screens but will not be able to add details or make any changes
- Organisation Editor The staff member can add details and make changes on selected available screens
- Organisation Administrator (the highest level of access) The staff member can add details and make changes on all available screens.

Note: the access level of **No Access** is to be used for staff members who do not require access to the Portal but need to be added as an Organisation contact so they can be assigned to grant agreements or grant activities.

The table below details the functionality that each access has:

Portal Functionality	Organisation Viewer	Organisation Editor	Organisation Administrator
Update Bank Accounts (certain information only)	No	No	Yes
Give staff access to the Portal	No	No	Yes
Create / edit staff	No	No	Yes
Edit Organisation details	No	No	Yes
Accept funding offers or variations (if set up as a signatory)	No	Yes	Yes
Submit Financial Acquittal Reports	No	Yes	Yes
Submit Activity Work Plan Reports	No	Yes	Yes
Submit Child Safety Statements of Compliance	No	Yes	Yes
Update personal profile	Yes	Yes	Yes

3 | Community Grants Hub

Portal Functionality	Organisation	Organisation	Organisation
	Viewer	Editor	Administrator
View grant information	Yes	Yes	Yes

9. Is there a limitation on how many staff members can have access to the Portal?

No. There are no limits on the number of staff in your organisation that can access the Portal. However, all users will be required to have a Digital Identity to log into the Portal.

10. How many Administrators can there be for an organisation?

There is no limit to the number of Administrators an organisation can have. The first Administrator must submit a Grant Recipient Portal Access Form to the GRP Helpdesk to gain access and then they can create Administrator access for other staff within the organisation.

11. How do we change our Administrator?

The current Administrator can give another staff member **Administrator** access, or the staff member can complete a Grant Recipient Portal Access Form.

12. How can you find out if your organisation is already setup in the Portal?

The GRP Helpdesk can advise if your organisation has already been registered to use the Portal. They can be contacted on 1800 020 283 (option 5) or via email: GRP.Helpdesk@communitygrants.gov.au

13. How can I find out who the principal authority is for my organisation?

The principal authority needs to start the process for their organisation by linking their business to their Digital Identity in Relationship Authorisation Manager (RAM).

The <u>principal authority</u> is generally the person responsible for the business. For example, a sole trader, trustee, director, public officer, or partner.

Generally, the principal authority's details are listed against the ABN on the Australian Business Register (ABR). For security and privacy reasons, this individual's details cannot be divulged.

14. Do I require specific IT applications on my computer to access the Portal?

The Portal does not need any special software and will work on all major internet browser software.

15. Who can see my organisation's information in the Portal?

Only contacts who have been added by your Administrator can see your organisation details in the Portal. Refer to Q8 for further details.

16. Can I access the Portal on mobile devices?

The Portal can be accessed on mobile devices however, this will affect user experience as the screens have been configured for large screen devices. Even though mobile devices can access the Portal, this is not advised.

17. Some of the historical data for my program is not on the Portal.

The Portal displays a grant recipient's Agreements and associated activities. In some circumstances, completed activities may not be displayed in the Portal.

If you have an Agreement transferred to the Community Grants Hub from another government agency system, any completed activities from the Agreement will not be displayed in the Portal.

If your organisation has taken over an Agreement from another organisation, completed grant activities from the Agreement will not be displayed in the Portal.

This also applies if your organisation's GST status changes and a new Agreement is developed. Any completed activities from the previous Agreement will not be displayed in the Portal.

As the Portal only displays current activities associated with an Agreement, grant recipients will need to refer to the hard copies of Agreements to source information on completed activities.

18. Is there any connection between the Portal and the Data Exchange Portal?

No. The two Portals have separate functions, however, they are both designed to benefit grant recipients and are administered by the Community Grants Hub.

The Data Exchange Portal reflects the two-way focus of collecting data from service providers and sharing this information back with them through self-service reports. The Data Exchange Portal allows grant recipients to submit performance information online.

Personal Profile in the Portal

19. Can I update my personal profile on the Portal?

Yes. The Portal allows you to update your personal details. The <u>Update your Personal Profile</u> <u>Task Card</u> can help you through this process.

Contact Management in the Portal

20. How do you add new staff as a contact in the Portal?

You can add staff to the Portal through the *Organisational Profile* tile if you have Organisation Administrator access. For more information refer to the <u>Add Organisation Staff Task Card</u>.

21. Can I inactivate staff that are no longer in the organisation?

Yes. You can inactivate staff under the *Organisational Profile* tile of the Portal. For more information refer to the Reactivate and Inactivate Organisation Staff Task Card.

22. Can I have separate contacts for a Grant Agreement and a Grant Activity?

Yes. To add a contact to a Grant Agreement refer to the <u>Update Grant Agreement Contacts</u> <u>Task Card</u>. To add a contact to a Grant Activity refer to the <u>Update Grant Activity Contacts Task Card</u>.

Organisation details in the Portal

23. Can I update my organisational profile on the Portal?

Yes, if you have Organisation Administrator access. You can view and self-manage your organisational profile details through the *Organisation Profile* tab in the Portal. The <u>Update</u> <u>Organisational Information Task Card</u> provides further information on how to do this.

24. Is the Organisation ID the same as myGovID?

No. The Organisation ID is an identification number given to an organisation and is only used in the Community Grants Hub systems. **myGovID** allows you to verify who you are online and access participating government online services.

25. Is the Organisation ID the same for all grants for the organisation?

Yes. There is one organisation ID but there can be multiple Agreement IDs, Program Schedule IDs, and Variation IDs.

Bank Account Details on the Portal

26. What changes can an Administrator make to an organisation's bank account details?

An Administrator can only update a bank account name in the Portal. If changes are required to the BSB and/or account number, an administrator can request this through the Portal.

27. My bank account is not approved. How long will it take for my bank account to be approved?

The Hub will verify your bank account documents. If the Hub has any concerns with the submitted evidence, you will be contacted directly by the Hub to request further information.

28. How many bank accounts can an organisation have in the Portal?

An organisation can have as many bank accounts as it needs. However, an **Activity** can only have one bank account linked to it at a time. One bank account can be used to receive grants for multiple activities.

29. How do I change a bank account on an Activity in the Portal?

You can change a bank account against an **Activity** by logging into the Portal and selecting a previously approved bank account.

This will send an email notification to all Administrators and the Financial Delegate for your organisation.

Additional information is available on the Update Bank Account Information Task Card.

30. Will I receive a notification when bank account updates are actioned or rejected?

All Administrators receive a notification when an update to a bank account is made through the Portal. Hub staff will contact users if there is an issue updating details.

Grant Information in the Portal

31. Can I access my grant information on the Portal?

Yes. You can access your grant information on the Portal. To find out how, please refer to the View Grant Information Task Card for more information.

32. Can I view my applications on the Portal?

Yes. The Portal enables you to view information about your submitted applications. The <u>View Applications Task Card</u> shows you how to view this information in the Portal. A Grant Recipient can request a copy of a submitted Grant Application by contacting the Community Grants Hub Hotline on 1800 020 283 or emailing support@communitygrants.gov.au.

33. How do I view my milestones in the Portal?

To view your milestones in the Portal you need to access this information through the Milestone tab in the Portal. The View Milestones Task Card guides you through this process.

34. Can I download agreement payment advice from the Portal?

No. You cannot download your payment advice. You can search and resend your payment advice (also called a Recipient Created Tax Invoice or RCTI) in the Portal. The <u>Search and Resend Payment Advice Task Card</u> shows you how to do this in detail.

35. How many contacts can you have for each grant?

There is no limit to the number of contacts identified for each grant agreement or grant activity. However, one primary contact must be nominated for each grant record and this contact will generally be used for correspondence relating to the grant.

Report Submission through the Portal

36. Can I submit a Financial Acquittal or my Activity Work Plan in the Portal?

The Portal allows you to submit some of your reporting milestones (Financial Acquittals and Activity Work Plan Reports) online. Currently only some programs have been set up to accept online submission of reports.

37. How do I know if I can submit an Activity Work Plan Report through the Portal?

If you can submit your Activity Work Plan Report through the Portal, the option to submit a report will be available next to your Activity in the Portal. For more information, refer to the Submit Reports Task Card.

38. Who can submit an Activity Work Plan Report in the Portal?

Administrators and Editors are the only staff who can access and submit reporting milestones. The <u>Submit Reports Task Card</u> provides detailed information on how you complete this process in the Portal.

39. Does the Portal generate automatic emails to remind you of upcoming milestones?

Yes. The Hub system, which is linked to the Portal, sends out reminder emails to organisations for Activity Work Plan, Financial Acquittal and Child Safety Statements of Compliance reporting milestones.

40. Can I submit an application through the Portal?

No. Applications cannot be submitted directly through the Portal. The Portal will have a link to the Community Grants Hub website where applicants will be guided on how to apply for open grant rounds.

For assistance, please call the Community Grants Hub Hotline on 1800 020 283 (Option 1).

41. Can I submit my Child Safety Statement of Compliance through the Portal?

Yes. You can submit your Child Safety Statement of Compliance for DSS grants through the Portal.

42. Will we be able to upload Working with Vulnerable People (WWVP) Statements of Compliance in the Portal at some stage?

If you are required to submit a WWVP Statement of Compliance the process will remain the same.

You will be provided with details on how to submit the Statement either during the application process or by your Funding Arrangement Manager.

Where to get help

43.If I have any issues with the Portal or would like more information, who do I contact?

You can get support for the Portal from the GRP Helpdesk at GRP.Helpdesk@communitygrants.gov.au. A range of Information sheets on the Portal is available on the Grant Recipient Portal page of the Hub website.