



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.

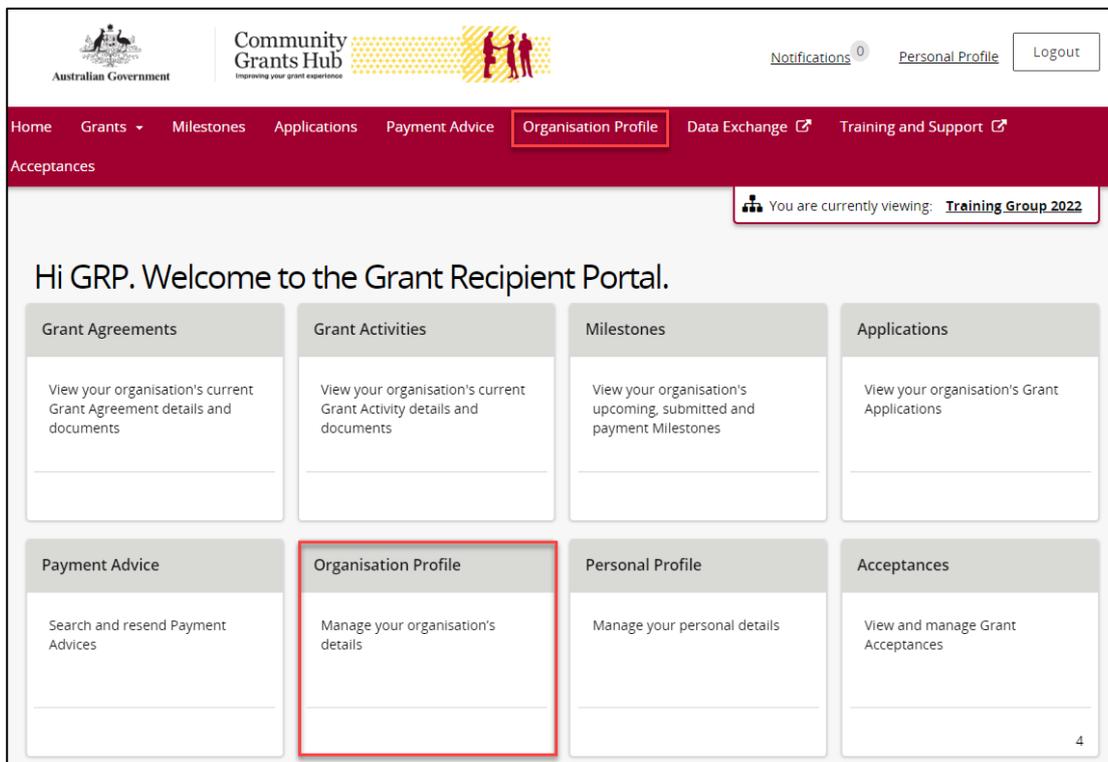
This task card describes the process of viewing, adding and removing Grant Agreement Contacts.

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 1

From the Home screen, select the **Organisation Profile** tile. Alternatively, select the **Organisation Profile** link from the Navigation menu.



Step 2

The Organisation Profile screen will display. Select **Staff** from the Organisation profile menu to display the Organisation's Staff screen.

Organisation details

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

Step 3

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** menu to choose one of the following:

1. Active Staff
2. Inactive Staff
3. All Staff

Select **View** to display additional information about a particular contact.

Staff

Filter: 1. Active Staff Apply Filter

Contact ID	Title	First name	Last name	Status	Position	System access level	
4-GZ0LB85	Mr	GRP	TRN1	Active	Not Specified	Editor	View
4-GZ0LB94	Mr	GRP	TRN3	Active	Not Specified	No Access	View
4-GYCE3B5	Mr	GRP	TRN2	Active	Not Specified	Administrator	View

Step 4

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.

The screenshot displays the 'Staff details' page for a staff member. The page is titled 'Staff details' and includes a '* required' indicator. The page is divided into four main sections:

- Staff details:** This section contains a form with the following fields:
 - Title: Mr
 - First name: GRP
 - Last name: TRN1
 - Position: Not Specified
 - Email: uat1dss@dss.fms.gov.au
 - Phone: 02 9232 9232
 - Status: Active
 - Contact ID: 4-GZ0LB85Buttons for 'Inactivate', 'Reactivate', and 'Update' are located in the top right corner of this section.
- System access:** This section contains a form with the following fields:
 - System access level: Editor
 - System access status: CompletedAn 'Update' button is located in the top right corner of this section.
- Contact for Grant Agreements:** This section is highlighted with a red box. It contains the text: 'If the Community Grants Hub needs to talk about a Grant Agreement with your organisation, they will contact staff who are assigned to that Grant Agreement first. This staff member has been assigned as a contact for the following Grant Agreements:'. Below this text is an 'Add Grant Agreement' button. A note below the button states: 'This Staff member is not linked to any Grant Agreement.'
- Contact for Grant Activities:** This section contains the text: 'If the Community Grants Hub needs to talk about a Grant Activity with your organisation, they will contact staff who are assigned to that Grant Activity first. This staff member has been assigned as a contact for the following Grant Activities:'. Below this text is an 'Add Grant Activity' button. A note below the button states: 'This Staff member is not linked to any Activities.'

A 'Return to all staff' button is located at the bottom left of the page.

Adding a Grant Agreement Contact through the Organisation Profile

Step 5

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.

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

Staff

Filter: 1 Active Staff [Apply Filter](#)

[Search Staff](#) [Add staff](#)

Contact ID	Title	First name	Last name	Status	Position	System access level	
4-GZ0LB85	Mr	GRP	TRN1	Active	Not Specified	Editor	View
4-GZ0LB94	Mr	GRP	TRN3	Active	Not Specified	No Access	View
4-GYCE3B5	Mr	GRP	TRN2	Active	Not Specified	Administrator	View

Step 6

The Staff details page will display. Select **Add Grant Agreement**.

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

Staff details

[Inactivate](#) [Reactivate](#) [Update](#)

Title: Mr First name: ADAM Last name: B

Position: Manager Email: aoc@unika20fm.com Phone:

Status: Active Contact ID: 4-S15A9M7

System access

[Update](#)

System access level: Editor System access status: Completed

Contact for Grant Agreements

If the Community Grants Hub needs to talk about a Grant Agreement with your organisation, they will contact staff who are assigned to that Grant Agreement first. This staff member has been assigned as a contact for the following Grant Agreements:

Schedule ID	Type	Program name	Primary Agreement contact	Actions
4-S1U0B8C	Standard Funding Agreement	3. Building Disability Sector Capacity and Service Provider Readiness	No	Add Grant Agreement Actions

Contact for Grant Activities

If the Community Grants Hub needs to talk about a Grant Activity with your organisation, they will contact staff who are assigned to that Grant Activity first. This staff member has been assigned as a contact for the following Grant Activities:

Activity ID	Activity name	Program name	Primary Activity contact	Actions
4-S1U0BRW	Training Group Activity	3. Building Disability Sector Capacity and Service Provider Readiness	No	Add Grant Activity Actions

Step 7

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**.

The screenshot shows the 'Staff: Grant Agreement Contact' page in the Community Grants Hub. The page header includes the Australian Government logo, Community Grants Hub logo, and navigation links like 'Notifications', 'Personal Profile', and 'Logout'. The main content area is titled 'Staff: Grant Agreement Contact' and shows a 'Staff member' profile for Mr ADAM B, Manager. Below this is a section 'Assign staff member as Grant Agreement contact' with a table of Grant Agreements. The table has columns for 'Schedule ID', 'Type', 'Program name', 'Start date', and 'Completion date'. The 'Actions' dropdown menu is open, showing three options: 'Assign as a contact', 'Assign as the primary contact', and 'View all contacts for this Agreement'. A 'Return to staff details' button is at the bottom.

Schedule ID	Type	Program name	Start date	Completion date	Actions
4-SX0B585	Standard Funding Agreement	3. Building Disability Sector Capacity and Service Provider Readiness	18/08/2021	18/08/2022	Actions*
4-SXU06JX	Standard Funding Agreement	3. Building Disability Sector Capacity and Service Provider Readiness	1/01/2021	1/01/2023	Assign as a contact Assign as the primary contact View all contacts for this Agreement
4-SXU06K0	Standard Funding Agreement	3. Building Disability Sector Capacity and Service Provider Readiness	1/01/2021	1/01/2023	Actions*
4-SXU06K6	Standard Funding Agreement	3. Building Disability Sector Capacity and Service Provider Readiness	1/01/2021	1/01/2023	Actions*
4-SXU06LM	Standard Funding Agreement	3. Building Disability Sector Capacity and Service Provider Readiness	1/01/2021	1/01/2023	Actions*

Step 8

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**.



Your contact has now been added to the Grant Agreement.

Contacts

Schedule ID: 4-GZZ00T5 Type: Standard Funding Agreement
Start date: 1/09/2022 Completion date: 30/09/2024
Program name: Financial Crisis and Material Aid Department: Department of Social Services
Organisation name: Training Group 2022 Organisation ID: 4-GXVAVJL

Grant Agreement contacts

[Link another contact](#)

Contact ID	Name	Phone	Email	Position	Primary Agreement contact	Actions
4-GZ0LB85	GRP TRN1	02 3232 3232	uat1dss@dss.fms.gov.au	Not Specified	Yes	Actions-
4-GYCE3B5	GRP TRN2	02 3232 3232	uatdss@dss.fms.gov.au	Not Specified	No	Actions-

Step 9

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.

Confirm change of primary contact

Please confirm the change of primary contact.

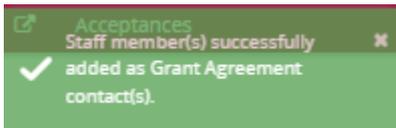
Schedule ID: 4-5XOB585
Current primary contact:
New primary contact: Mr ADAM B

[Discard changes and return](#) **Continue**

Step 10

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



Your contact has now been added to the Grant Agreement as the primary contact.

Contacts

Schedule ID: 4-GZZ00T5 Type: Standard Funding Agreement
Start date: 1/09/2022 Completion date: 30/09/2024
Program name: Financial Crisis and Material Aid Department: Department of Social Services
Organisation name: Training Group 2022 Organisation ID: 4-GXVAJL

Grant Agreement contacts

[Link another contact](#)

Contact ID	Name	Phone	Email	Position	Primary Agreement contact	Actions
4-GZ0LB85	GRP TRN1	02 3232 3232	uat1dss@dss.fms.gov.au	Not Specified	Yes	Actions
4-GYCE3B5	GRP TRN2	02 3232 3232	uatdss@dss.fms.gov.au	Not Specified	No	Actions

Removing a Grant Agreement Contact through the Organisation Profile

Step 11

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.

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

Staff

Filter: 1 Active Staff [Apply Filter](#)

[Search Staff](#) [Add staff](#)

Contact ID	Title	First name	Last name	Status	Position	System access level	View
4-GZ0LB85	Mr	GRP	TRN1	Active	Not Specified	Editor	View
4-GZ0LB94	Mr	GRP	TRN3	Active	Not Specified	No Access	View
4-GYCE3B5	Mr	GRP	TRN2	Active	Not Specified	Administrator	View

Step 12

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.

The screenshot displays the 'Staff details' page. On the left is a navigation menu with 'Staff' selected. The main content area is divided into sections: 'Staff details' (with fields for Title, First name, Last name, etc.), 'System access' (with System access level and status), 'Contact for Grant Agreements' (a table listing contacts for various Grant Agreements), and 'Contact for Grant Activities' (a table listing contacts for various Grant Activities). A red box highlights the 'Actions' button for a specific Grant Agreement, with a dropdown menu showing 'Remove contact from Agreement' as the selected option.

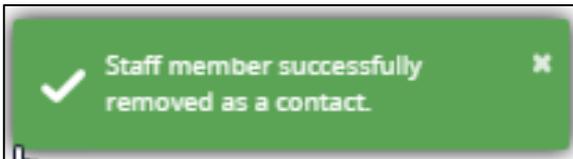
Schedule ID	Type	Program name	Primary Agreement Contact	Actions
4-SUS089C	Standard Funding Agreement	3. Building Disability Sector Capacity and Service Provider Readiness	No	Actions+ Remove contact from Agreement Assign as the primary contact View all contacts for this Agreement

Activity ID	Activity name	Program name	Primary Activity contact	Actions
4-SUS089W	Training Group Activity	3. Building Disability Sector Capacity and Service Provider Readiness	No	Actions+

Step 13

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



Contact for Grant Agreements

If the Community Grants Hub needs to talk about a Grant Agreement with your organisation, they will contact staff who are assigned to that Grant Agreement first. This staff member has been assigned as a contact for the following Grant Agreements:

[Add Grant Agreement](#)

Schedule ID	Type	Program name	Primary Agreement Contact	
4-GZZ00PQ	Standard Funding Agreement	Financial Crisis and Material Aid	No	Actions-
4-H070F9P	Standard Funding Agreement	Financial Crisis and Material Aid	Yes	Actions-
4-H0EOIE6	CwIth Standard Grant Agreement	Financial Crisis and Material Aid	No	Actions-
4-H0JCUJY	CwIth Standard Grant Agreement	Financial Crisis and Material Aid	No	Actions-
4-H404B5K	CwIth Standard Grant Agreement	Financial Crisis and Material Aid	Yes	Actions-

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.



Navigating to Grant Agreement Contacts through the Grant Agreements link/tile

Step 14

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.

The screenshot shows the Community Grants Hub portal. At the top, there is a header with the Australian Government logo, the Community Grants Hub logo, and navigation links for Notifications, Personal Profile, and Logout. Below the header is a main navigation menu with options: Home, Grants (expanded to Grant Agreements and Grant Activities), Milestones, Applications, Payment Advice, Organisation Profile, Data Exchange, and Training and Support. A user notification indicates 'You are currently viewing: Training Group 2022'. The main content area features a welcome message 'Hi GRP. Welcome to the Grant Recipient Portal.' and a grid of eight tiles. The 'Grant Agreements' tile is highlighted with a red box and contains the text: 'View your organisation's current Grant Agreement details and documents'. Other tiles include Grant Activities, Milestones, Applications, Payment Advice, Organisation Profile, Personal Profile, and Acceptances.

Step 15

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.

Schedule ID	Type	Program name	Department	Organisation name	Organisation ID	
4-DVO190L	Streamlined Grant Agreement	Financial Wellbeing and Capability	Department of Social Services	Training Group 2020	4-DQT88NB	View
4-DQXUL7X	Streamlined Grant Agreement	Financial Wellbeing and Capability	Department of Social Services	Training Group 2020	4-DQT88NB	View
4-E4IAIV4	Streamlined Grant Agreement	Financial Wellbeing and Capability	Department of Social Services	Training Group 2020	4-DQT88NB	View

Step 16

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.

The screenshot shows the 'Grant Agreement details' page with the 'Overview' tab selected in the left-hand menu. The main content area displays the following details:

Schedule ID: 4-H070FA2	Type: Standard Funding Agreement
Start date: 1/09/2022	Completion date: 30/09/2024
Program name: Financial Crisis and Material Aid	Department: Department of Social Services
Organisation name: Training Group 2022	Organisation ID: 4-GXAVJL

Below the details, there is a 'Grant Activities' section with a table listing activities:

Activity ID	Activity name
4-H070FFW	Activity Training Title

A 'View' button is located to the right of the activity row.

Step 17

From the Grant Agreement menu, select **Contacts**.

The screenshot shows the 'Grant Agreement details' page with the 'Contacts' tab selected in the left-hand menu. The main content area displays the following details:

Schedule ID: 4-GZZ00LR	Type: Standard Funding Agreement
Start date: 1/09/2022	Completion date: 30/09/2024
Program name: Financial Crisis and Material Aid	Department: Department of Social Services
Organisation name: Training Group 2022	Organisation ID: 4-GXAVJL

Below the details, there is a 'Grant Activities' section with a table listing activities:

Activity ID	Activity name
4-GZZ00LV	Tiger Test Team

A 'View' button is located to the right of the activity row.

Step 18

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.

Contacts

Schedule ID: 4-GZZOOLR Type: Standard Funding Agreement
Start date: 1/09/2022 Completion date: 30/09/2024
Program name: Financial Crisis and Material Aid Department: Department of Social Services
Organisation name: Training Group 2022 Organisation ID: 4-GXVAVJL

Grant Agreement contacts

Contact ID	Name	Phone	Email	Position	Primary Agreement contact	Actions
4-GZ0LB85	GRP TRN 1	02 3232 3232	uat1dss@dss.fms.gov.au	Not Specified	Yes	Actions

[Link another contact](#)

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

Step 19

To add a contact to a Grant Agreement, select **Contacts** from the Grant Agreement menu, then click on **Link another contact**.

Contacts

Schedule ID: 4-SKU06KC Type: Standard Funding Agreement
Start date: 1/01/2021 Completion date: 1/01/2023
Program name: 3. Building Disability Sector Capacity and Service Provider Readiness Department: Department of Social Services
Organisation name: Training Group Inc Organisation ID: 4-3Q7ARG7

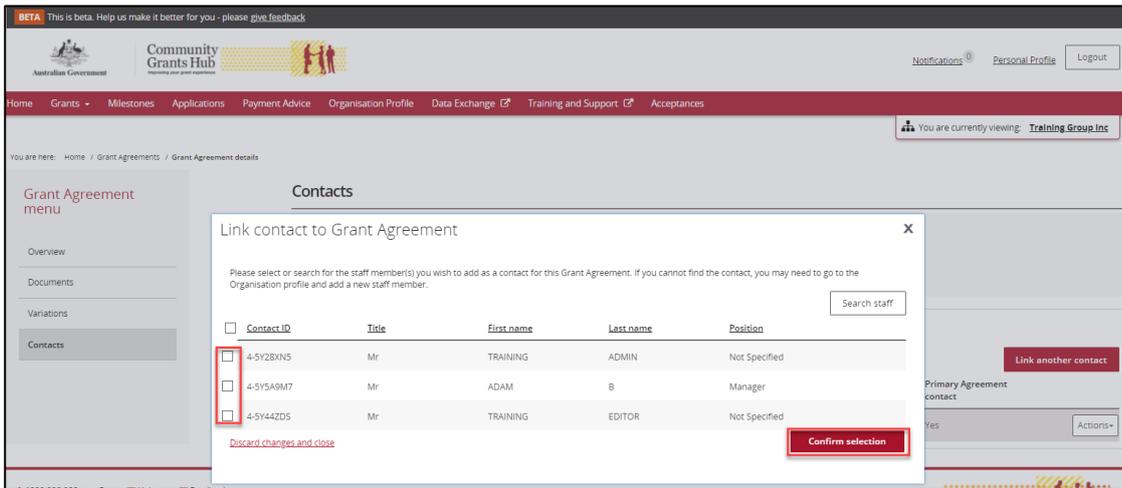
Grant Agreement contacts

Contact ID	Name	Phone	Email	Position	Primary Agreement contact	Actions
4-SXQMQCH	ADMIN TRAINING		aron@mail.com	Not Specified	Yes	Actions

[Link another contact](#)

Step 20

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.



Step 21

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



Your contact has now been added to the Grant Agreement.



Step 22

To update the contact as the primary contact, select **Actions** and then select **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.

The screenshot shows the 'Grant Agreement details' page for 'Training Group 2022'. The 'Contacts' section is active, displaying a table of 'Grant Agreement contacts'. The table has columns for Contact ID, Name, Phone, Email, Position, and Primary Agreement contact. Two contacts are listed: GRP TRN1 (Primary Agreement contact: Yes) and RAYMOND HOLT (Primary Agreement contact: No). The 'Actions' dropdown for RAYMOND HOLT is open, and the 'Assign as the primary contact' option is highlighted. Other buttons like 'Link another contact' and 'Remove contact from Agreement' are also visible.

Contact ID	Name	Phone	Email	Position	Primary Agreement contact	Actions
4-GZ0LB85	GRP TRN1	02 3232 3232	uat1dss@dss.fms.gov.au	Not Specified	Yes	Actions
4-GYWERR	RAYMOND HOLT		uatdss@dss.fms.gov.au	Senior Manager	No	Actions

Step 23

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.

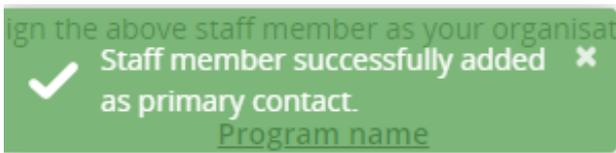
The dialog box contains the following text: 'By clicking 'Continue' below you declare that you as an authorised individual are changing the contact person for this grant agreement, and that this will constitute a change to the grantee's representative for this agreement.' At the bottom, there are two buttons: 'Discard changes and return' and 'Continue'.

Step 24

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



Your contact has now been updated as the primary contact.

Contacts						
Schedule ID: 4-H40485K		Type: Cwith Standard Grant Agreement				
Start date: 1/07/2022		Completion date: 30/11/2023				
Program name: Financial Crisis and Material Aid			Department: Department of Social Services			
Organisation name: Training Group 2022			Organisation ID: 4-GXAVJL			
Grant Agreement contacts						
Link another contact						
Contact ID	Name	Phone	Email	Position	Primary Agreement contact	Actions
4-GZ0LB8S	GRP TRN1	02.3232.3232	uat1dss@dss.fms.gov.au	Not Specified	Yes	

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

Step 25

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**.

The screenshot shows the 'Community Grants Hub' interface. The main content area is titled 'Contacts' and displays details for a 'Standard Funding Agreement' (Schedule ID: 4-5XU06K). Below this, a table lists 'Grant Agreement contacts' with the following data:

Contact ID	Name	Phone	Email	Position	Primary Agreement contact	Actions
4-5XQM0CH	ADMIN TRAINING		aron@mail.com	Not Specified	Yes	Actions
4-5Y5A9M7	ADAM B		abc@unkasdfn.com	Manager	No	Actions

The 'Actions' dropdown for 'ADAM B' is open, showing options: 'Assign as the primary contact' and 'Remove contact from Agreement'.

Step 26

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.

The dialog box contains the following text:

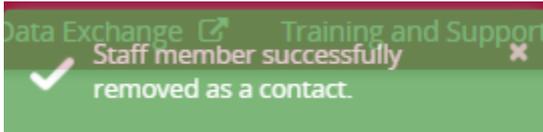
Remove staff as Grant Agreement contact

Are you sure you would like to remove this staff member as a contact for this Agreement?

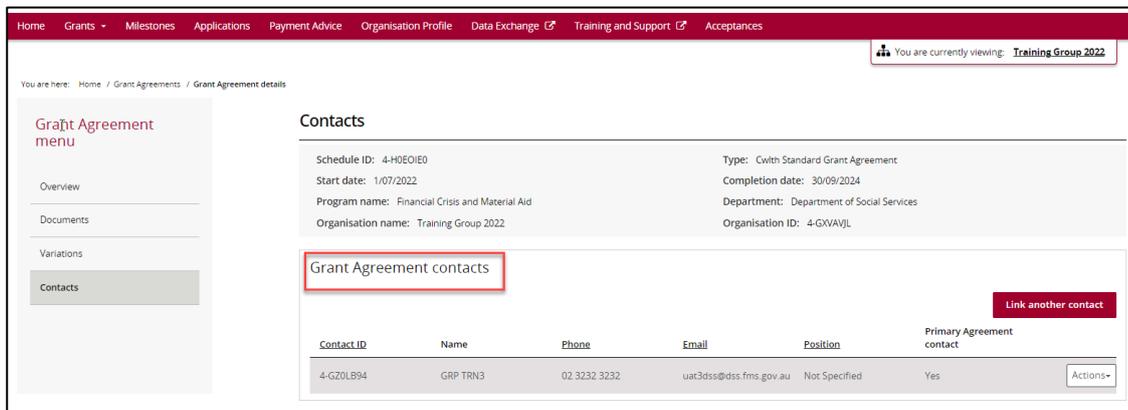
Buttons: [Cancel](#) and **Yes remove as Agreement contact**

Step 27

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**.



Your contact has now been removed from the Grant Agreement.



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.

! There are error(s) on the page

Primary contacts cannot be removed. To remove the staff member as a contact for this Agreement, change the primary contact to another staff member first.

Need Help?

For further assistance, contact the Grant Recipient Portal Helpdesk:

Email: GRP.Helpdesk@communitygrants.gov.au

Phone: 1800 020 283 (Option 5)

Operating Hours: Monday to Friday 9:00am – 5:00pm (AEST/AEDT)