Assigning Grant Contacts User Manual

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ASSIGNING GRANT CONTACTS

The Agency Primary Contact must assign those agency representatives responsible for Activity and Financial reporting within the Grant Record section. The Finance and Program Contacts must be registered as ACJC Grants Portal users prior to being assigned to the grant.

In order to access the contacts section of the grant record, click on the "View Records" button of the main user page.

NOTE: New grantees must first establish their agency contact list in order to populate the activity and financial contact dropdown options. Both processes are accessible within the same section of the grant record.

MANAGE AGENCY CONTACT LIST

To access contact list information, simply select the program, agency and grant number in the dropdown lists and click "Select."

Once a grant record has been selected, there is a section called "Grant Contacts." Alongside the header to this section, the primary contact will find the "Manage Contacts List" link to access the agency contact list. Select this link to add or deactivate contacts from this master agency list.

The primary contact will be directed to the "Contact List" page where the contact will search for the email of the contact they wish to add. If the grantee is wishing to deactivate an existing contact, the "Deactivate" link next to the contact's name in the Agency Active Contacts list will allow the grantee to remove the contact from future dropdown lists.

At this time, the grantee will search by email address to add a contact to the agency list. When the grantee has identified the proper contact in the Search Results section, click on "Add" to add the contact to the Agency Active Contacts list.

NOTE: The grantee's Primary Contact is the only individual allowed to manage the contact list and assign contacts for the grant. Once an agency contact has been added, the contact will remain under Agency Active Contacts until the contact is deactivated by the Primary Contact.

Click on the "Back to Grant Record" link at the top right side to return to the grant record for contact assignment.

ASSIGN ACTIVITY AND FINANCIAL CONTACTS

Once the agency list is complete, the grantee may now click on the "Edit Contacts" link in the Grant Contacts section of the grant record. When the link is clicked, a popup appears directing the grantee to select up to four (4) contacts from the agency contact list dropdowns.

At this time, the Primary Contact will select up to four contacts for assignment. Once all contacts have been selected, then click the blue "Save Changes" button at the bottom of the popup to officially assign individuals to the grant.

NOTE: Only the Primary Contact has the ability to assign contacts and manage the agency contact list. Alternate contacts will have the same rights and access as Program or Financial Contacts. Alternate contacts are not required.