

Update & Review Organisation Details, Officers and Contacts

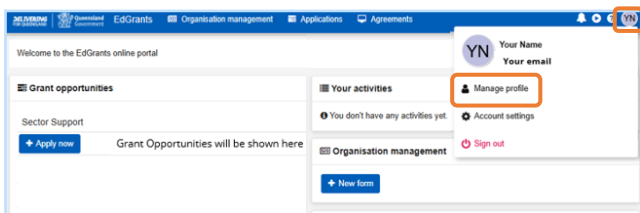
This guide will help you to validate your organisation’s important information; and invite your team so they can access and manage relevant tasks.

How to verify and update your organisation details

Follow these steps to review and update your organisation’s details in EdGrants Online. This is an important step to ensure the information is accurate and up to date.

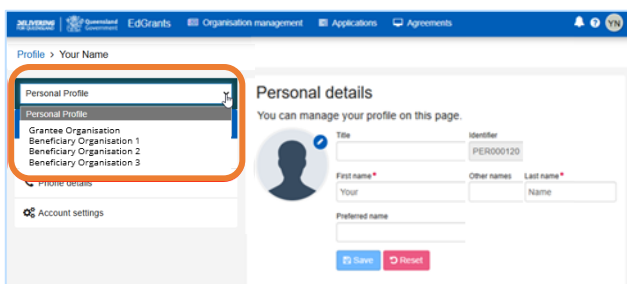
1. Access Your Profile

- Click on your avatar (a circle with your initials) in the top-right corner of the screen.
- Select ‘Manage profile’ from the dropdown menu.



2. View Your Organisations

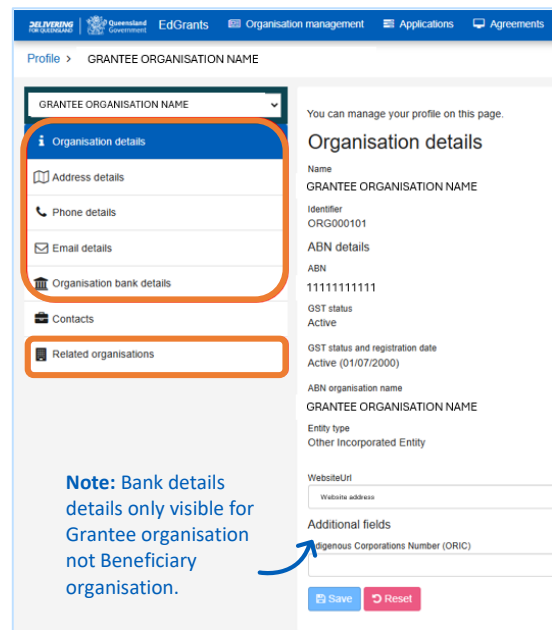
- In the Personal Profile section, click the dropdown arrow to view the organisations for which you are an authorised person.



3. Review Organisation Details

Once the relevant Organisation Profile is selected, use the links on the left-hand menu to validate and update each of the details below.

- Organisation details
- Address details
- Phone details
- Email details
- Organisation Bank details
- Related Organisations



Did you know?

Grantees as the legal entity, hold the ABN and bank account to receive and manage funding. Every Grantee has an Authorised person.

Beneficiary organisations operate under the Grantee, delivering services and have no ABN or bank account details. Beneficiary organisations must have one or more responsible person.

Manage officers and contacts in your organisation

You will need to determine the role your staff need before beginning this process.

Authorised Person is the designated representative who has full authority to act on behalf of the organisation. This includes signing agreements, approving, and completing applications and having full access to EdGrants. They are accountable for approvals and compliance. Importantly, the Authorised Person is the **only** role that can view and complete the Declaration section at the end of each application in EdGrants.

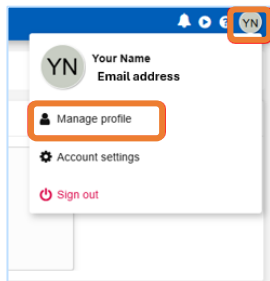
Responsible Person is added by the Authorised Person using the Update & Review Organisation Details, Officers and Contacts Quick Reference Guide. Their responsibilities often overlap with those of the Authorised Person, however, they cannot see the declaration, agree to the Terms and Conditions, or submit the application. They can complete the application up to the declaration section on behalf of the Authorised Person. They can also add contacts to the organisations or services in EdGrants.

Finance Contact or Other Contact Role will **not** have access to EdGrants. They can receive communications via email generated by EdGrants but cannot log in or interact with the system.

Follow these steps in EdGrants Online to add or update responsible officers and manage contacts.

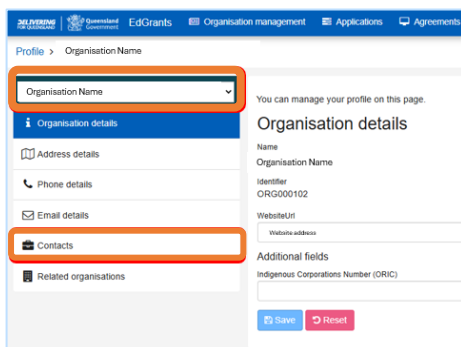
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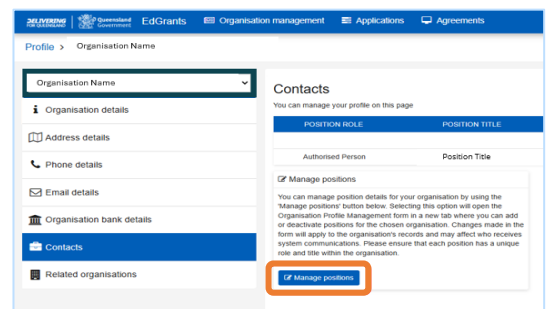
2. Select the Organisation and contacts

- On the left-hand menu bar, select the correct organisation
- Click on 'Contacts'.



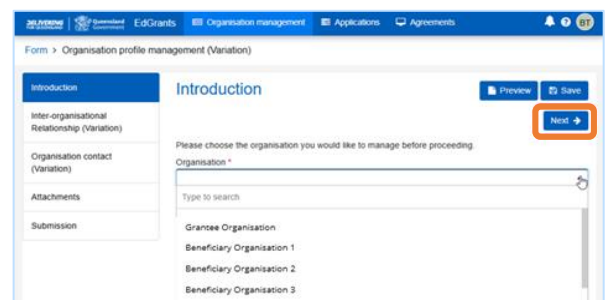
3. Manage Positions

- On the Contacts page, click 'Manage Positions'. Note: This will open the Organisation Profile Management form in a new tab.
- In this form, you can add or deactivate positions for the selected organisation.
- Changes made here will update the organisation's records and may affect who receives system communications.
- Ensure that each position has a unique role and title within the organisation.



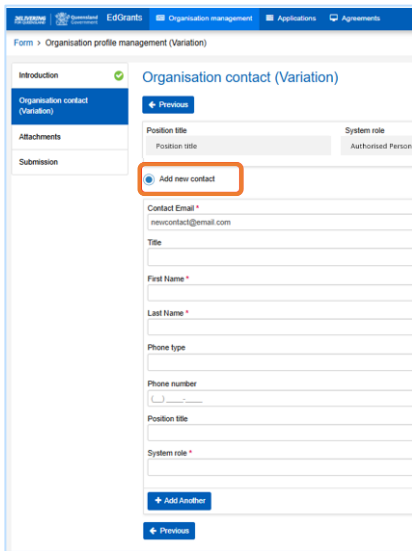
4. Select the Organisation

- Choose the organisation you want to manage.
- Click 'Next'.



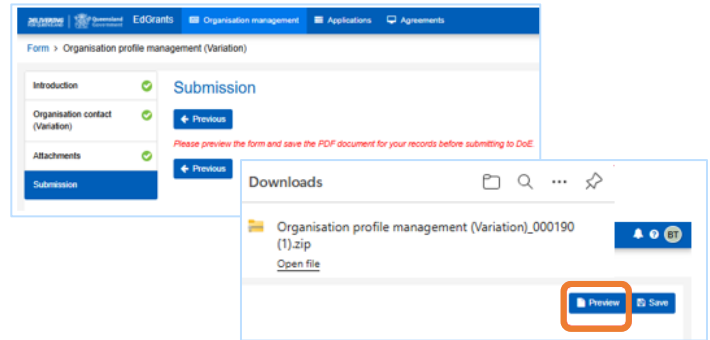
5. Add a New Contact

- Click 'Add New Contact'.
- Complete the required details for the new contact.
- Click 'Next'.
- For **System Role**, select one of the following:
 - Authorised Person, Responsible Person, Finance Contact, Other Contact



7. Preview the Form

- Click 'Preview' to generate a zip file.
- Download and open the zip file to view the PDF document.



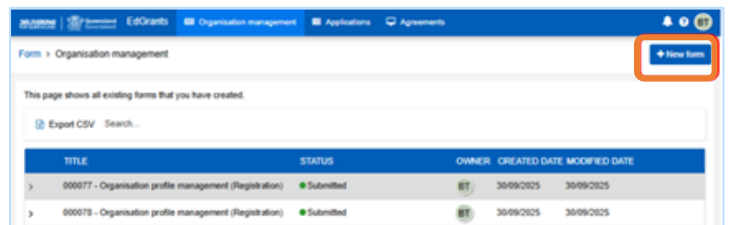
8. Review the Details

- Check the PDF to ensure all details are correct. If correct, return to the system and click Submit.
- If any details are incorrect, click Previous to edit, then review and click Submit.

Note: An email will be sent to each new Authorised person or Responsible person added, inviting new system users to set up a password to access EdGrants Online.

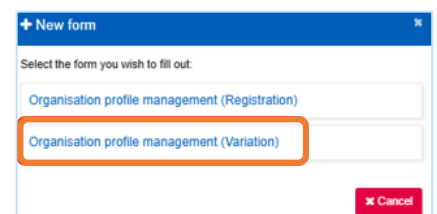
9. Submission Confirmation

- Once submitted, you will be redirected to a page showing the forms you have submitted with the title, status, date created and modified.



10. Add Contacts for Other Beneficiary Accounts

- Click **New Form** in the top-right corner.
- Select **Organisation Profile Management (Variation)**.
- Repeat steps 4 to 8 to add contacts for other Beneficiaries.



Need to know more?

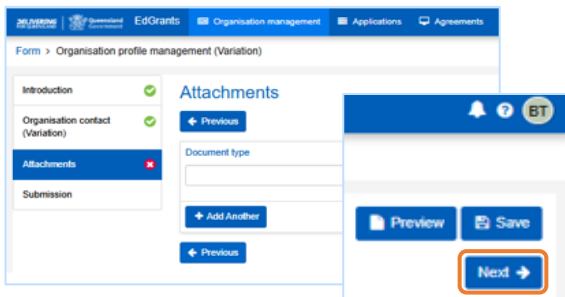
Email: EdGrantshelp@ged.qld.gov.au
 Ph: (07) 3035 2244

Replacing yourself as an Authorised Person

You must provide a supporting document. Under **Attachments**, select '**Authorised Person Supporting Document**' and upload it to confirm the change.

6. Attachments

- No attachments are required to add organisation contacts, so click 'Next' (unless changing authorised person)



Note: You can continue through this screen without including an attachment by selecting 'Next'

Website: <https://earlychildhood.qld.gov.au/grants-and-funding/grants-management/edgrants-online>