EdGrants Online

Quick Reference Guide

## Organisational details review and managing responsible 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.
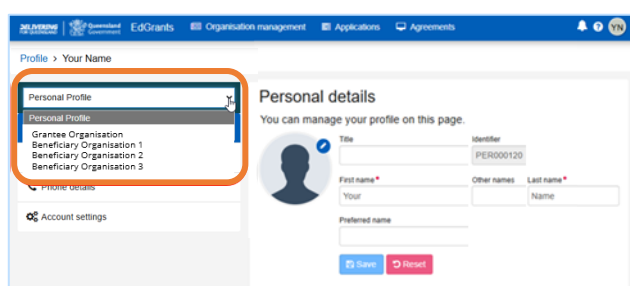
1. Access Your Profile

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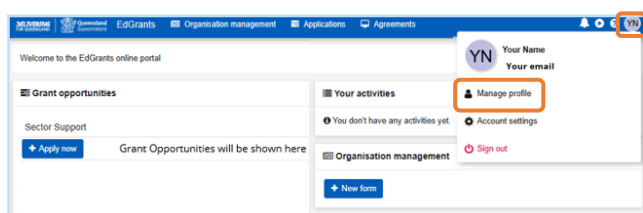

2. View Your Organisations

- 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

Note: Bank details details only visible for Grantee organisation not Beneficiary organisation.
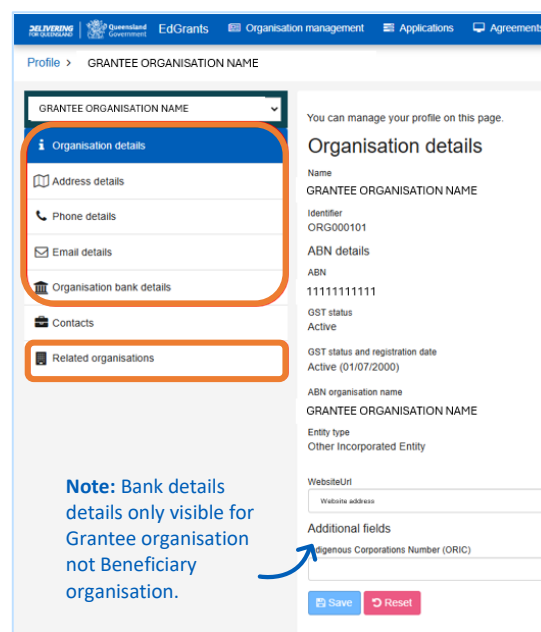
Did you know?

Grantees as the legal entity, hold the ABN and bank account to receive and manage funding. **Beneficiary organisations** operate under the Grantee, delivering services without separate ABNs or accounts. This structure clarifies responsibilities and streamlines funding management.

Authorised Person is the designated person with full authority to act on behalf of the organisation, including signing agreements, approving and completing applications and has full access to EdGrants. The Authorised Person is accountable for approvals and compliance.
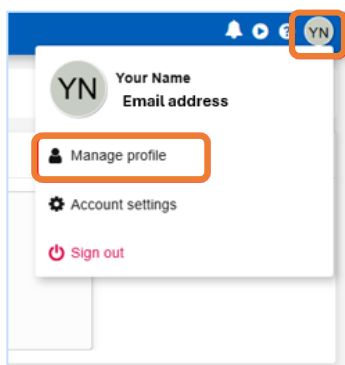
Responsible Person is linked by the Authorised Person during registration. Their duties often overlap with the Authorised Person, but only the Authorised Person can submit applications and agree to Terms & Conditions.

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Managing responsible officers and other contacts in your organisation or beneficiary organisations

Follow these steps add or update responsible officers and manage contacts, granting them system permissions to perform their tasks in the system.
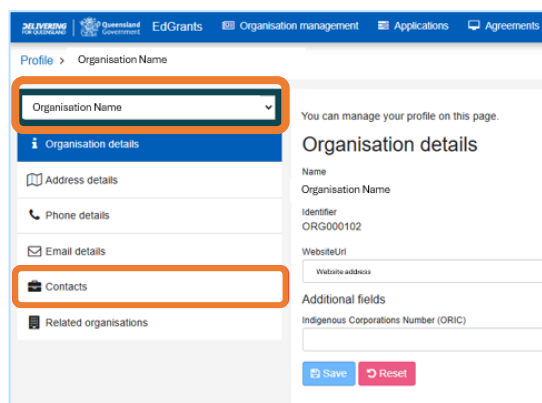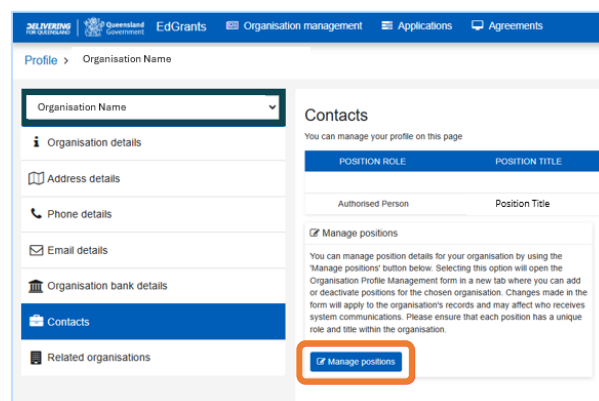
Contacts

Finance Contacts and Other Contacts **will not** be granted access to EdGrants Online. These roles will receive communication updates as an email from EdGrants.
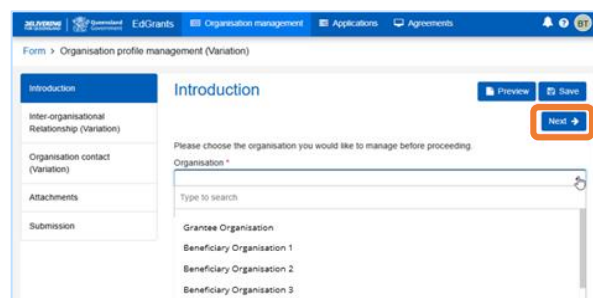
1. **Access Your Profile**
   - Click on your avatar (the circle with your initials) in the top-right corner of the screen.
   - Select 'Manage profile' from the dropdown menu.

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.

2. **Select the Organisation and contacts**
   - On the left-hand menu bar, select the correct organisation
   - Click on 'Contacts'.

4. **Select the Organisation**
   - Choose the organisation you want to manage.
   - Click 'Next'.

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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

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'

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

Need to know more?

Email: EdGrantshelp@qed.qld.gov.au

Ph: (07) 3035 2244

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

EdGrants QRG Org Details and linking contacts

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