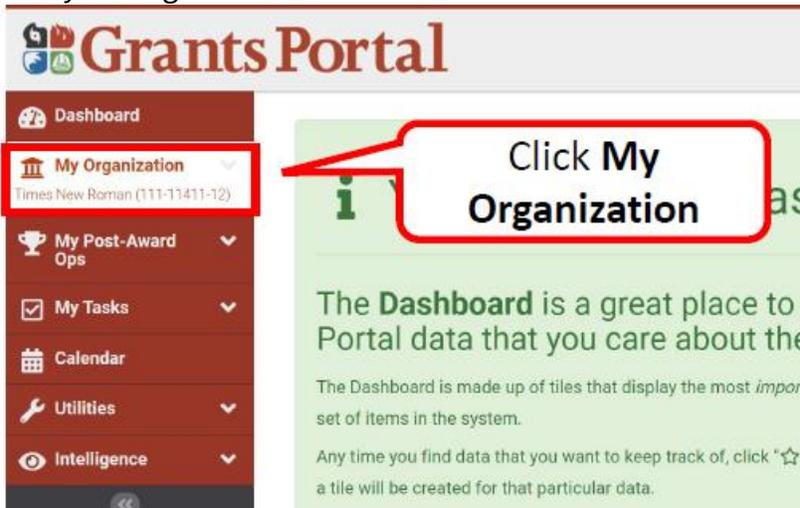
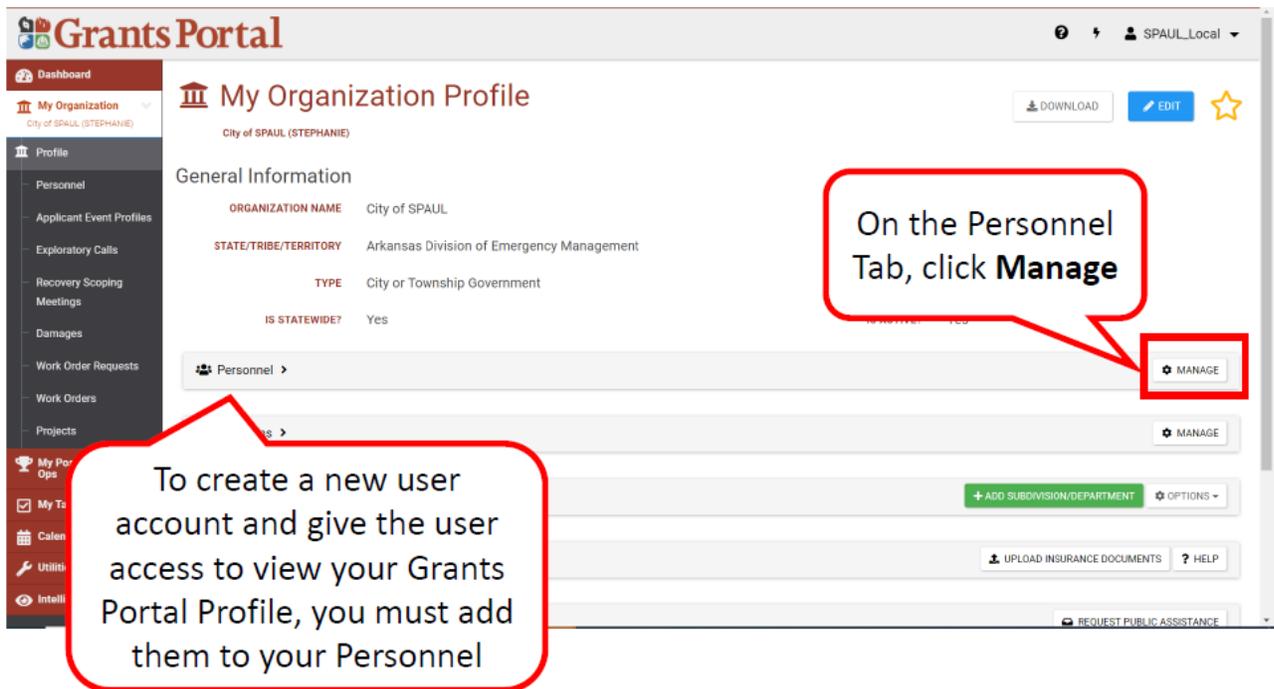


Grants Portal: Adding and Updating Personnel

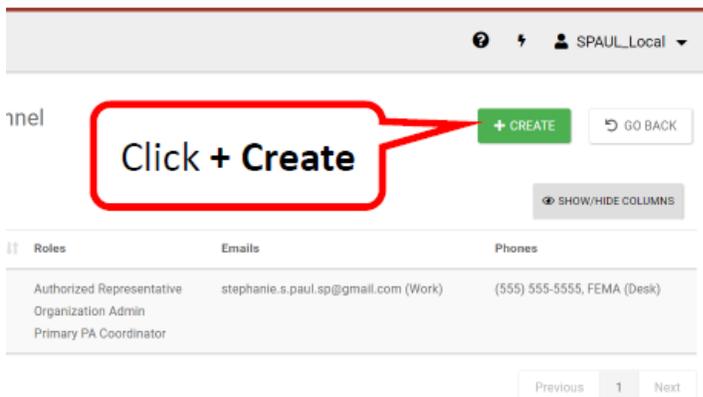
1. Log in to your Grants Portal account (grantee.fema.gov)
2. Go to your Organization Profile



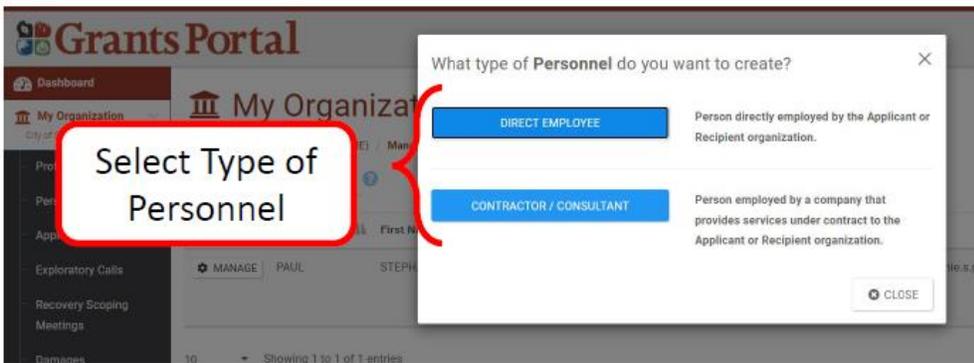
3. On the Personnel drop down, click the Manage button on the right hand side:



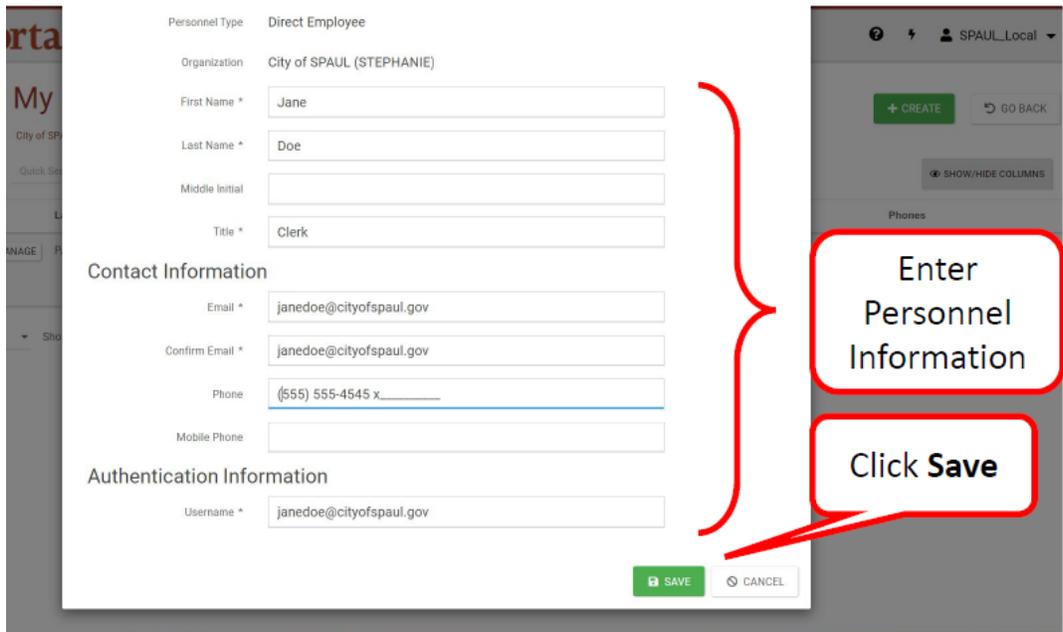
4. To Add new personnel, click the green +CREATE button:



5. When a pop comes up, select the type of Personnel you are adding:

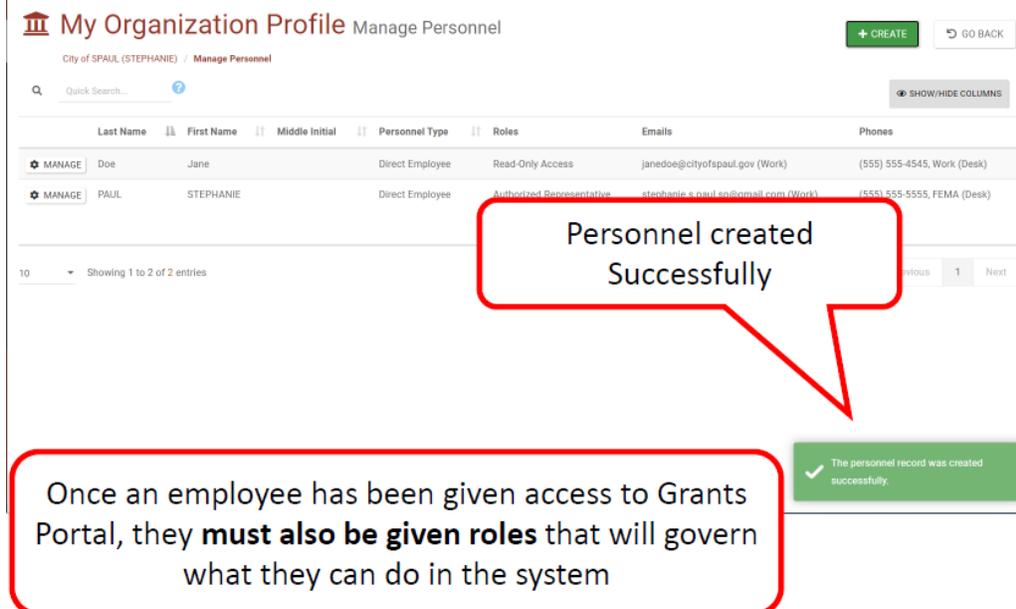


6. To add a direct employee, you will need to enter their contact information, then click SAVE:

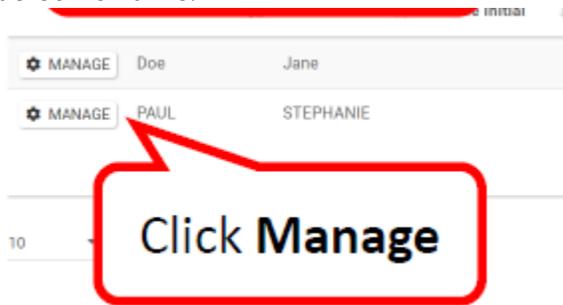


All personnel must have a valid e-mail address in order to be added to Grants Portal.

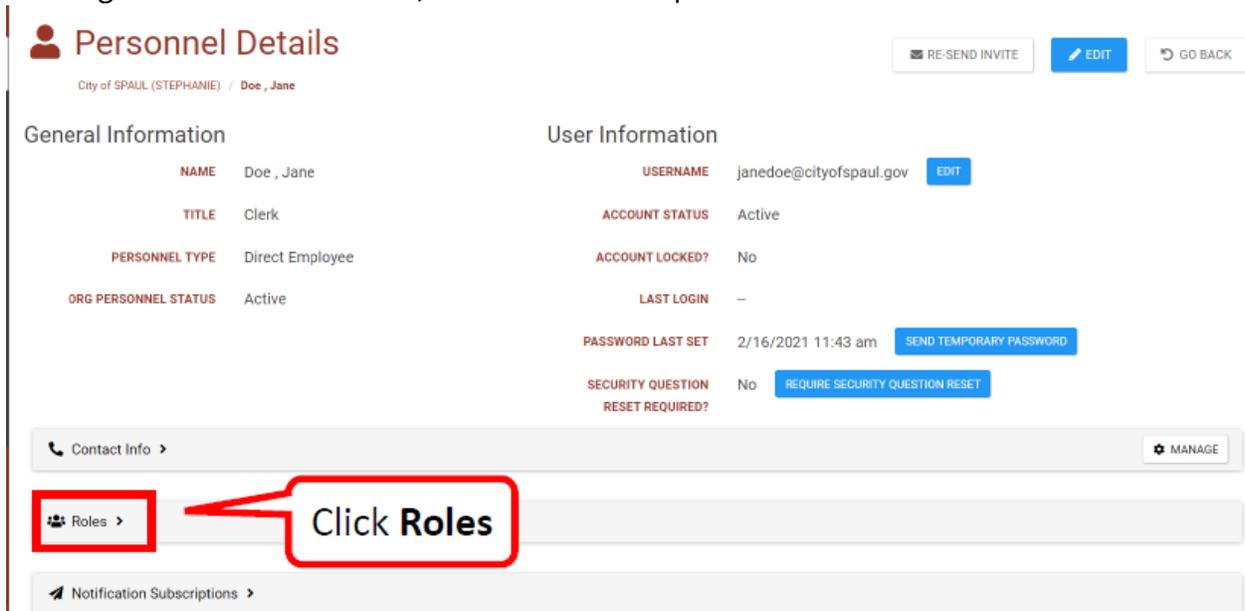
7. After you click SAVE, you will be taken back to the Manage Personnel screen:



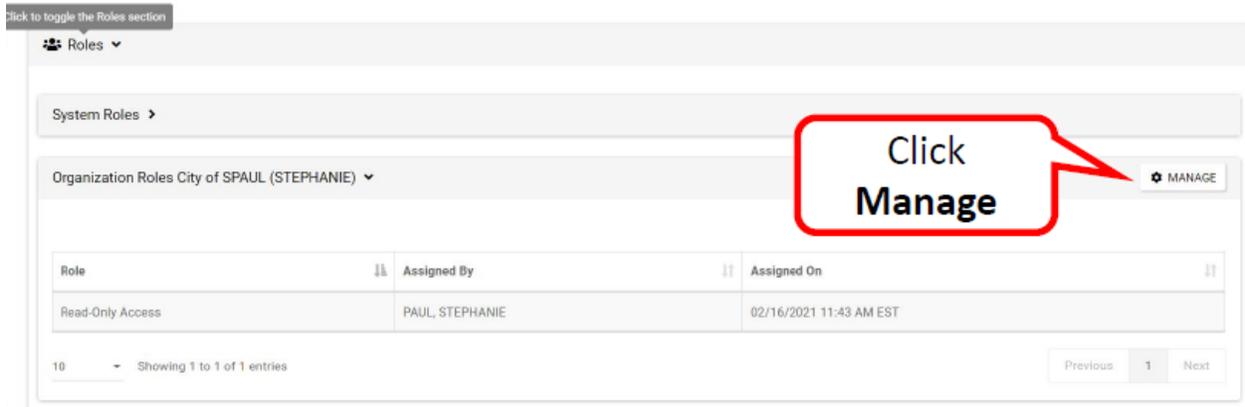
- New users will receive an e-mail from Grants Portal that contains their temporary password and instructions for logging in.
- New users have 48 hours to log in to the system and update their temporary password.
- To edit existing personnel, or assign roles, you will need to click the MANAGE icon to the left of the person's name:



- To assign roles in Grants Portal, click the Roles drop down:



- Then click the MANAGE icon on the left-hand side of the Roles drop down:



13. All personnel are granted Read Only access as a default role. To give personnel access and permission to make changes to your organization, you must select their roles:

Assigned Roles

APPLICANT ROLES

- Primary PA Coordinator ?
- Alternate PA Coordinator ?
- Authorized Representative ?
- Project POC ?

ADMINISTRATIVE ROLES

- Account Manager ?
- Personnel Manager ?
- Organization Admin ?
- Read-Only Access ?

Permissions Preview

ORGANIZATION

- Create Requests for Public Assistance (RPAs)
- Edit Organization Details
- Manage Locations
- Manage Organization Counties List
- Manage Documents
- Manage Staff

APPLICANT

- Create Comment
- Create Discussion
- Reply to Discussion
- Manage Damage Inventory
- Manage Documents

PERSONNEL

- Send Password Reset
- View Login History
- Lock Account
- Disable Account
- Edit Personnel Record
- Manage Contact Info
- Manage Organization Roles
- Create New Staff

DAMAGE INVENTORY

- Edit
- Manage Documents

PROJECT

- Sign DDD
- Sign Scope & Cost

No indicated permissions

Read Only access is Default Role Assigned by the system when Personnel is added

Assigned Roles

APPLICANT ROLES

- Primary PA Coordinator ?
- Alternate PA Coordinator ?
- Authorized Representative ?
- Project POC ?

ADMINISTRATIVE ROLES

- Account Manager ?
- Personnel Manager ?
- Organization Admin ?
- Read-Only Access ?

Permissions Preview

ORGANIZATION

- Create Requests for Public Assistance (RPAs)
- Edit Organization Details
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- Send Password Reset
- View Login History
- Lock Account
- Disable Account
- Edit Personnel Record
- Manage Contact Info
- Manage Organization Roles
- Create New Staff

DAMAGE INVENTORY

- Edit
- Manage Documents

PROJECT

- Sign DDD
- Sign Scope & Cost

Click Box for Desired Roles

Click Save

Note: Multiple Roles can be assigned to the Personnel

- ? The question mark describes responsibilities of the assigned role
- ✓ The green check mark indicates permissions based on assigned role

Once you've checked the boxes next to the roles you want to assign, click the green SAVE icon at the bottom right of the screen.

14. You will be taken back to the Personnel profile screen and should see the roles you just assigned under that person's roles:

Roles

System Roles >

Organization Roles City of SPAUL (STEPHANIE) > MANAGE

Role	Assigned On
Alternate PA Coordinator	02/16/2021 11:46 AM EST
Authorized Representative	02/16/2021 11:46 AM EST

Showing 1 to 2 of 2 entries

Previous 1 Next

Notification Subscriptions >

Password Reset Requests >

Login History >

The assigned roles for this user were updated successfully.

15. You can also edit existing personnel's information by clicking the MANAGE icon next to their name on the Personnel tab:

MANAGE Doe Jane

MANAGE PAUL STEPHANIE

Click Manage

16. Then click the blue EDIT button on the upper right side of the screen:

Personnel Details

City of SPAUL (STEPHANIE) / Doe, Jane

RE-SEND INVITE EDIT GO BACK

General Information

NAME Doe, Jane

TITLE Clerk

PERSONNEL TYPE Direct Employee

ORG PERSONNEL STATUS Active

User Information

USERNAME janedoe@cityofspaul.gov

ACCOUNT STATUS Active

ACCOUNT LOCKED? No

LAST LOGIN -

PASSWORD LAST SET 2/16/2021 11:43 am SEND TEMPORARY PASSWORD

SECURITY QUESTION No REQUIRE SECURITY QUESTION RESET

Click EDIT

17. On the next screen you can edit the person's Name, Title and Status:
For personnel who are no longer with your organization, click the Org Personnel Status drop down and select Removed:

Edit Profile

South Dakota Office of Emergency Management (000-UOTJ7-00) / VanderPlaats, Amanda / Edit Personnel

SAVE CHANGES CANCEL

General Information

Personnel Type * Direct Employee

First Name * Amanda

Last Name * VanderPlaats

Middle Initial

Title * PA Coordinator

Org Personnel Status * Active

Active

Removed

Click SAVE CHANGES

Choose Removed

18. To change e-mail address and phone numbers, go to the Personnel Details page and click the MANAGE icon to the right of the Contact Info drop down:

Personnel Details

City of SPAUL (STEPHANIE) / Doe, Jane

RE-SEND INVITE EDIT GO BACK

General Information

NAME Doe, Jane

TITLE Clerk

PERSONNEL TYPE Direct Employee

ORG PERSONNEL STATUS Active

User Information

USERNAME janedoe@cityofspaul.gov EDIT

ACCOUNT STATUS Active

ACCOUNT LOCKED? No

LAST LOGIN -

PASSWORD LAST SET 2/16/2021 11:43 am

SECURITY QUESTION No REQUIRE SECURITY QUESTION RESET REQUIRED?

Contact Info >

Click MANAGE

19. Then click the blue EDIT icon next to the phone number or e-mail address that you want to change:

Personnel Details Manage Personnel Contact Information GO BACK

South Dakota Office of Emergency Management (000-UQTJ7-00) / VanderPlaats, Amanda / Contact Info

Phone Numbers + ADD PHONE NUMBER

	Phone Number	Phone Type	Receive Text?
EDIT REMOVE	(605) 773-3231	Work (Desk)	No

Email Addresses + ADD EMAIL ADDRESS

	Email Address	Email Type
EDIT REMOVE	amanda.vanderplaats@state.sd.us	Work

Click EDIT **Click EDIT**

20. Make changes on the pop-up after you click EDIT, then click SAVE to save the changes:

Edit Phone Number ×

Phone

Phone Type

Receive Text?

Click SAVE SAVE CANCEL

21. All personnel must have at least one valid phone number and e-mail address.

22. If you change or update an e-mail address under a person’s contact information, this DOES NOT update their log in e-mail address.

23. To update their log in e-mail address, go to the Personnel Details page and click the blue EDIT button next to their USERNAME:

Personnel Details RE-SEND INVITE EDIT GO BACK

City of SPAUL (STEPHANIE) / Doe, Jane

General Information

NAME Doe, Jane

TITLE Clerk

PERSONNEL TYPE Direct Employee

ORG PERSONNEL STATUS Active

User Information

USERNAME janedoe@cityofspaul.gov [EDIT](#)

ACCOUNT STATUS Active

ACCOUNT LOCKED? No **Click EDIT**

LAST LOGIN –

PASSWORD LAST SET 2/16/2021 11:43 am SEND TEMPORARY PASSWORD

SECURITY QUESTION RESET REQUIRED? No REQUIRE SECURITY QUESTION RESET

Contact Info MANAGE

24. If you need assistance making personnel changes, please contact the Public Assistance staff at SDOEM, 605-773-3231