

## Populating the Contact Information Module in eGrants

The instructions below describe how to fill out the eGrants Contact Information Module. In order to receive relevant communications from AmeriCorps State and National (ASN), all ASN National Direct and Tribal grantees and State Commissions must fill out the Contact Information Module for all of their active and closing projects. Please note that these contacts are in addition to the Project Director and Authorized Representative listed on the most recent grant award, which are managed via a different process and also need to be kept current.

1) Log into your eGrants account and click on the “My Account” link

The screenshot shows the eGrants dashboard. At the top, there are two main sections: 'eGRANTS MESSAGES' and 'VIEW MY GRANTS/APPLICATIONS'. The 'eGRANTS MESSAGES' section includes a 'Welcome' message. The 'VIEW MY GRANTS/APPLICATIONS' section lists various grant statuses: View All, 4 Approved for Consideration/Funding, 93 Awarded, 486 Closed, 12 Concept Papers, 2 Grantee edit of application or report, 1 Returned to grantee, 3 Subapplication being reviewed by prime, 21 Subapplication rejected by prime, and 15 Under CNCS review. Below this, there are sections for 'VIEW MY ACCOUNT STATEMENTS' (Current Statement) and 'VIEW MY AMERICORPS PORTAL' (Portal Home). At the bottom, there are three main navigation categories: 'Creating an Application', 'Managing My Account', and 'Reporting to CNCS'. Under 'Managing My Account', the 'My Account' link is circled in red. Other links in this section include 'New', 'Continuation/Renewal', 'Amendment', 'Concept Paper', 'Financial Report', 'Progress Report', and 'Progress Report Supplement'.

2) Under “Edit My Organization Info...”, click on the “Add and View Project Contacts” link

The screenshot shows the 'MY ACCOUNT' page. On the left, there is a 'Welcome' message and a 'Grantee Info' section. The main content area is divided into four sections: 'Update My Login Info...', 'Edit My Organization Info...', 'Update My Profile...', and 'Update My Contact Info...'. The 'Edit My Organization Info...' section is highlighted, and the 'Add and View Project Contacts' link is circled in red. Other links in this section include 'Update Organization's Contact Information', 'Update Organization's Attributes', 'Add and View Indirect Cost Rate', 'Edit User Role/Permissions', and 'View All'. The 'Update My Profile...' section has 'View All' and 'eGrants Feedback' links. The 'Update My Contact Info...' section has a 'View All' link.

- 3) You will be taken to the Project Contacts screen. To start adding contact information, click on the “Add or Edit Organization Contacts” link

The screenshot shows the 'My Account' interface. On the left, there is a navigation menu with 'Welcome' and 'Grantee Info'. The main content area is titled 'Add and View Project Contact Information'. It contains a paragraph of instructions: 'Each user's roles are highlighted in the list next to their name. To change a user's assigned roles(s), you can change the selected (highlighted) items in the list and click save. Use CTRL-Click to select multiple roles or to deselect a highlighted role. To view inactive users list, click on "Show Inactive Contacts" link at the bottom of the screen.' Below this text are two dropdown menus, one labeled 'Project:'. A red circle highlights the link 'Add or Edit Organization Contacts' in orange text. Other links include 'View Project Contact Report' and 'add contact'. At the bottom, there is a 'Show Inactive Contacts' link. Buttons for 'cancel' and 'save' are visible at the top right.

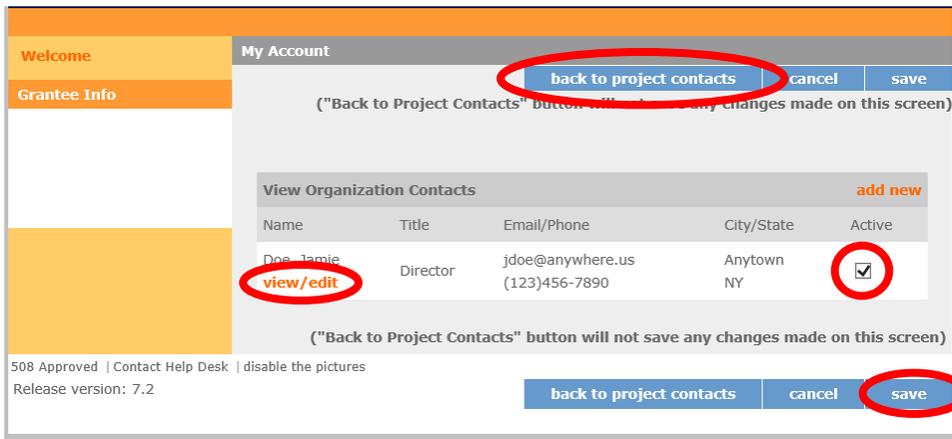
- 4) This will take you to the Organization Contacts screen. Click “add new” to add a contact to your organization

The screenshot shows the 'My Account' interface for 'View Organization Contacts'. At the top, there are buttons for 'back to project contacts', 'cancel', and 'save'. A warning message states: '("Back to Project Contacts" button will not save any changes made on this screen)'. Below this is a table with columns: Name, Title, Email/Phone, City/State, and Active. The table is currently empty. A red circle highlights the 'add new' button in orange text. At the bottom, there is another warning message: '("Back to Project Contacts" button will not save any changes made on this screen)'. Footer text includes '508 Approved | Contact Help Desk | disable the pictures' and 'Release version: 7.2'. Buttons for 'back to project contacts', 'cancel', and 'save' are at the bottom right.

- 5) Type in all required information for the contact (red asterisk = required), then click “save & close”

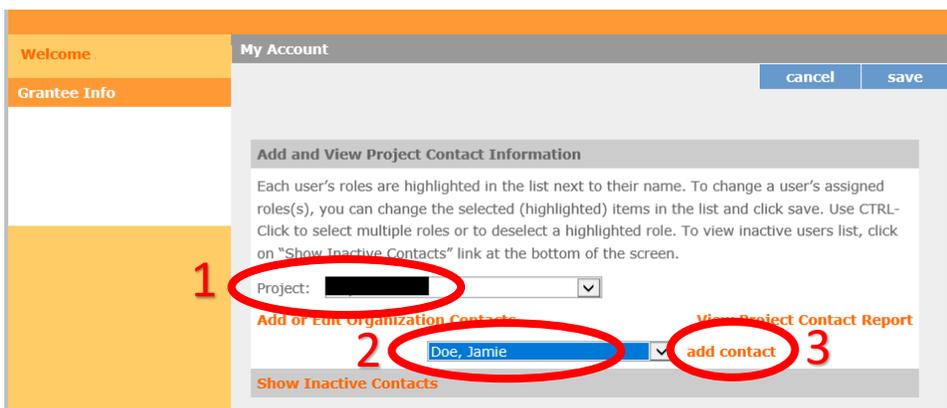
The first screenshot shows the 'Add/Edit Organization Contact' form with empty input fields. The fields are: First Name, Last Name, Title, Email, Phone (with separate boxes for area, number, and extension), Street Address1, Street Address2, City, State (dropdown menu), and Zipcode. Red asterisks indicate required fields. The second screenshot shows the same form filled out with example data: First Name: Jamie, Last Name: Doe, Title: Director, Email: jdoe@anywhere.us, Phone: 123-456-7890, Street Address1: 123 Anywhere Lane, Street Address2: (empty), City: Anytown, State: NY New York, Zipcode: 13760. A red circle highlights the 'save & close' button in the top right corner. A blue arrow points from the first screenshot to the second.

- 6) You will now be able to see your organizational contact, which by default will be marked as “Active.” You can edit the information for this contact by clicking the “view/edit” link. If an individual later leaves your organization, you can de-select the “Active” checkbox and click “Save” to de-activate that individual from your organization contacts (the individual will also be de-activated from all projects to which he/she had been assigned). For now, click the “back to project contacts” button to return to the Project Contacts screen.

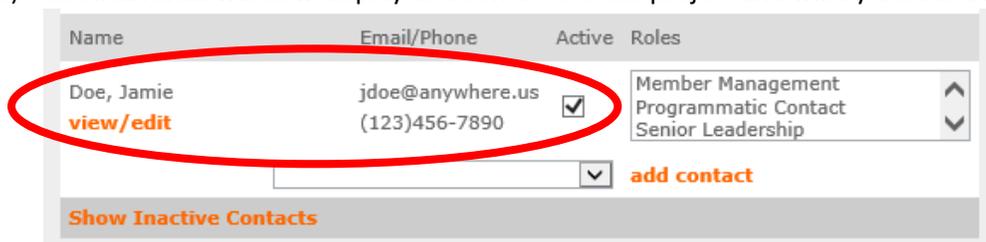


- 7) On the Project Contacts screen:

1. Select the name of one of your current projects
2. Select a contact name from the drop-down list on the screen (this list is populated by the organization contacts you have entered). If you don’t see the name you want, click the “Add or Edit Organization Contacts” link to ensure the individual has been entered and marked as “Active” on the Organization Contacts screen
3. Click “add contact”



- 8) The individual will now display as a contact for this project and will by default be marked as “Active”



- 9) Select one or more roles for this individual within this particular project. You can select multiple roles by holding down the CTRL button and clicking on more than one role. Use the up and down arrows in the “Roles” box to see all the available roles:
- Criminal History
  - Fiscal Contact
  - Impact Performance Evaluation
  - Member Management
  - Programmatic Contact
  - Senior Leadership

Click “Save” to save the role(s) you have selected for that individual

The screenshot shows the 'My Account' page with the 'Add and View Project Contact Information' section. The 'Roles' dropdown menu is open, showing 'Criminal History', 'Fiscal Contact', and 'Impact Performance Evaluation' selected. The 'save' button is circled in red.

Name	Email/Phone	Active	Roles
Doe, Jamie <a href="#">view/edit</a>	jdoe@anywhere.us (123)456-7890	<input checked="" type="checkbox"/>	<ul style="list-style-type: none"><li>Criminal History</li><li>Fiscal Contact</li><li>Impact Performance Evaluation</li></ul>

- 10) If an individual later leaves the project, de-select the “Active” checkbox and click “Save.” This will put the individual in the Inactive Contacts list. The individual can be re-activated on this project at any time by selecting the “Active” checkbox and clicking “Save”

The screenshot shows the 'My Account' page with the 'Inactive Project Contacts Only' section. The 'Active' checkbox for 'Doe, Jamie' is unchecked and circled in red. The 'save' button is also circled in red.

Name	Active	Roles
Doe, Jamie	<input type="checkbox"/>	<ul style="list-style-type: none"><li>Criminal History</li><li>Fiscal Contact</li><li>Impact Performance Evaluation</li></ul>

- 11) Repeat steps 7-9 to add contacts for all active and closing projects managed by the organization. Please note that a single organizational contact can be assigned to multiple projects under different roles, and each role can be assigned to more than one individual within a project.

12) To view the contact(s) assigned to each role in a particular project, click the “View Project Contact Report” link

13) This will generate a CSV report showing all active and inactive contacts for this project along with the role(s) to which they are assigned. Use this report to check that all role types have been assigned to active contacts within the project. If any roles are not yet assigned, add additional project contacts and/or assign additional roles to existing active contacts.

Name	Title	Phone	Email	Address 1	Address 2	City	State	Zip code	Active Contact	Criminal History	Fiscal Contact	Impact Performance
Doe Jamie	Director	(123)456-7890	jdoe@anywhere.us	123 Anywhere Lane		Anytown	NY	13760	Yes	Active	Inactive	Active