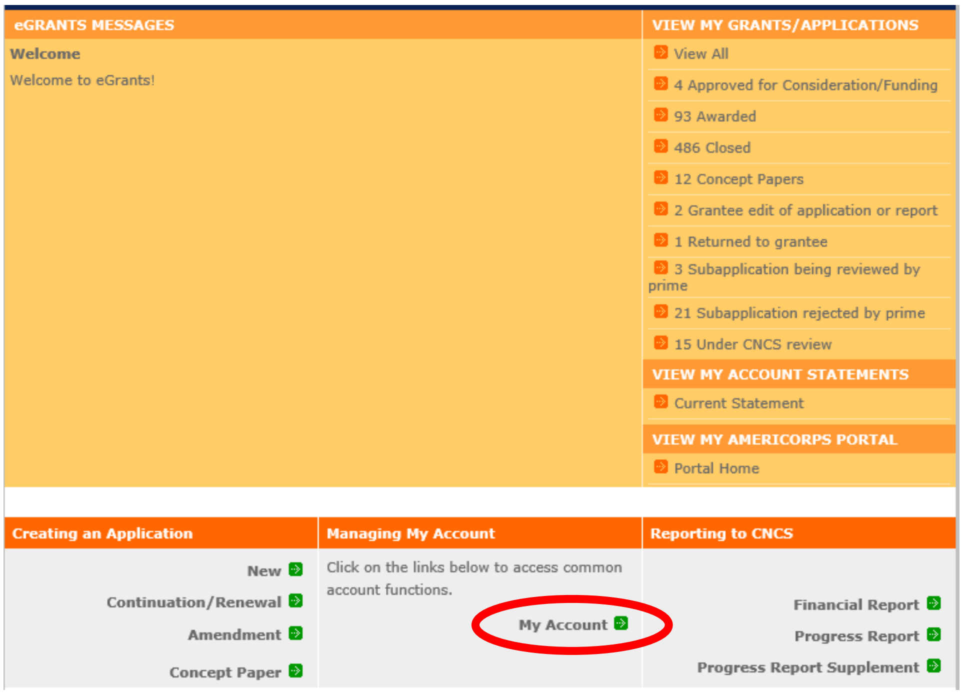
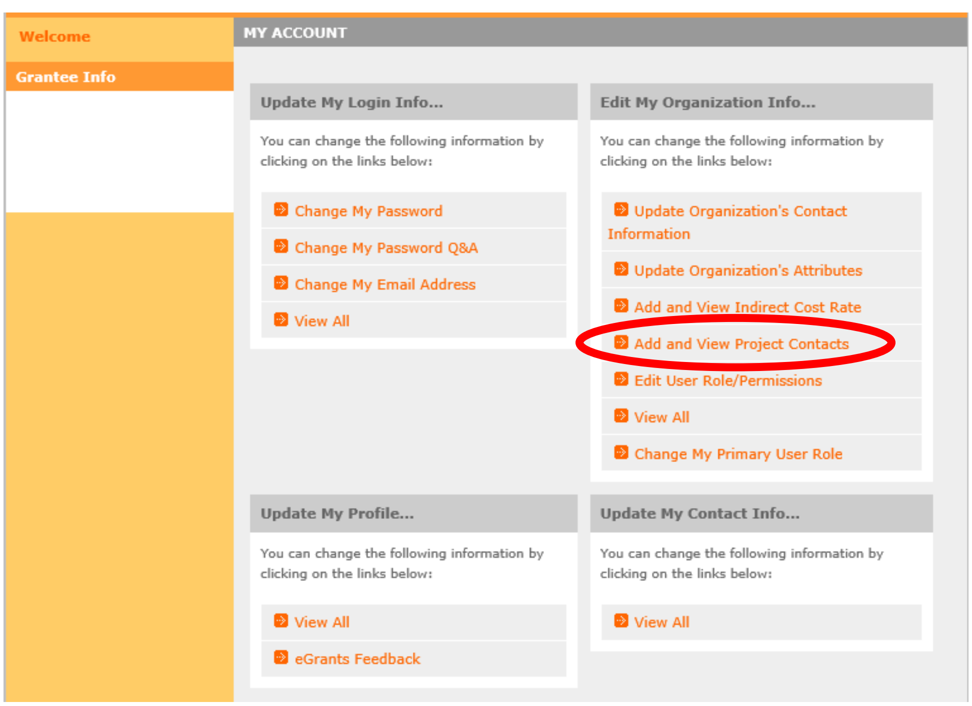
Populating the Contact Information Module in eGrants

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 <u>in addition to</u> 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.

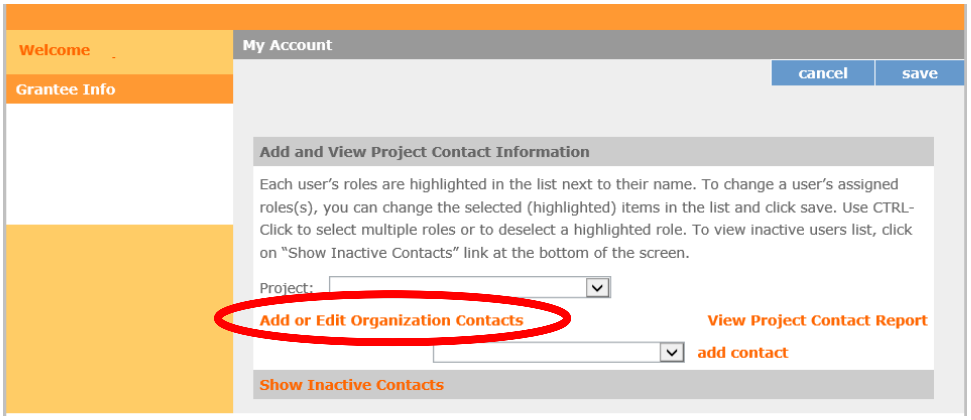
1) Log into your eGrants account and click on the "My Account" link



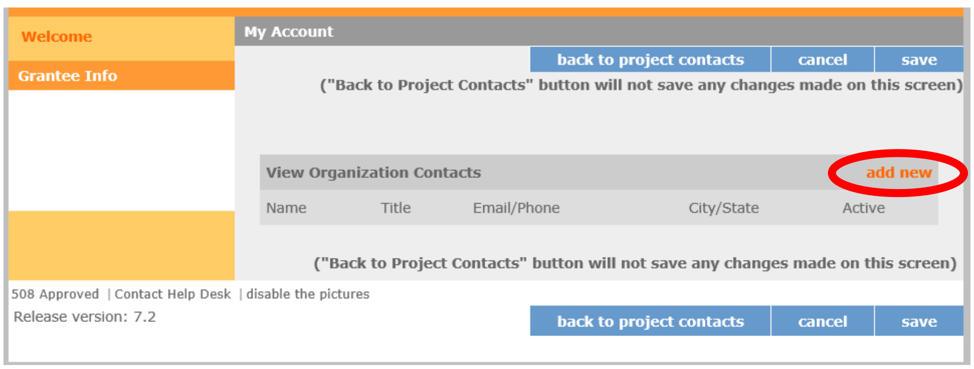
2) Under "Edit My Organization Info…", click on the "Add and View Project Contacts" link



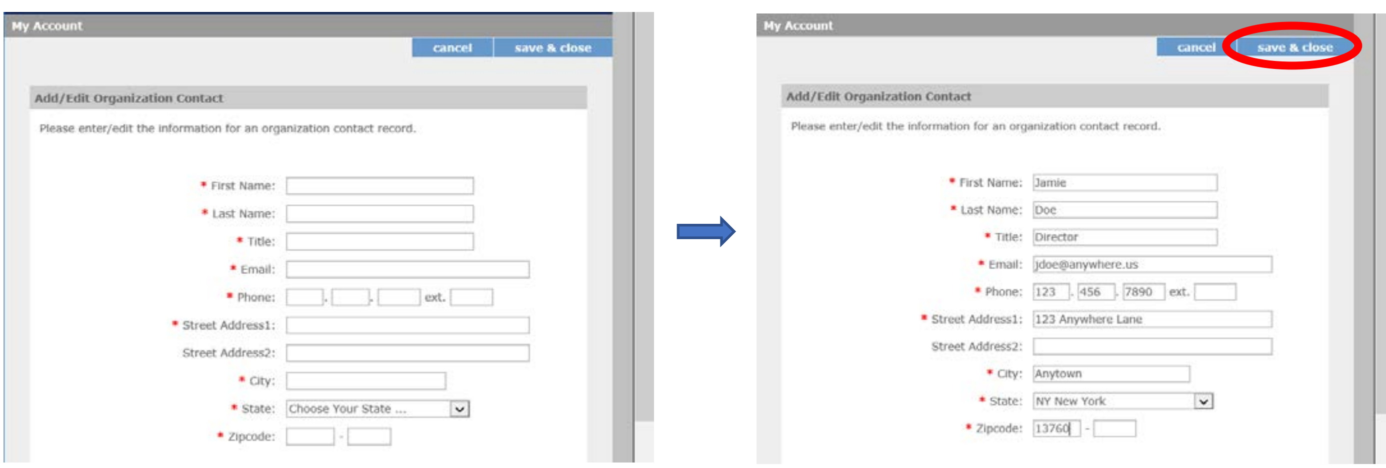
3) You will be taken to the Project Contacts screen. To start adding contact information, click on the “Add or Edit Organization Contacts” link



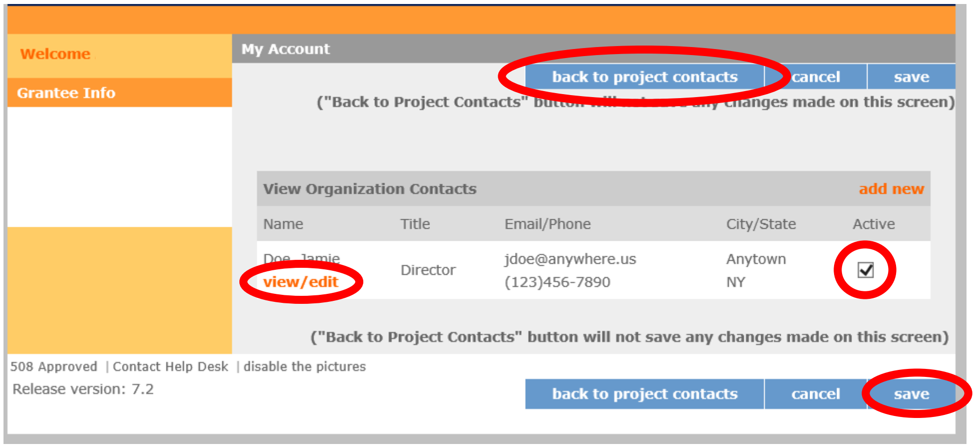
4) This will take you to the Organization Contacts screen. Click “add new” to add a contact to your organization



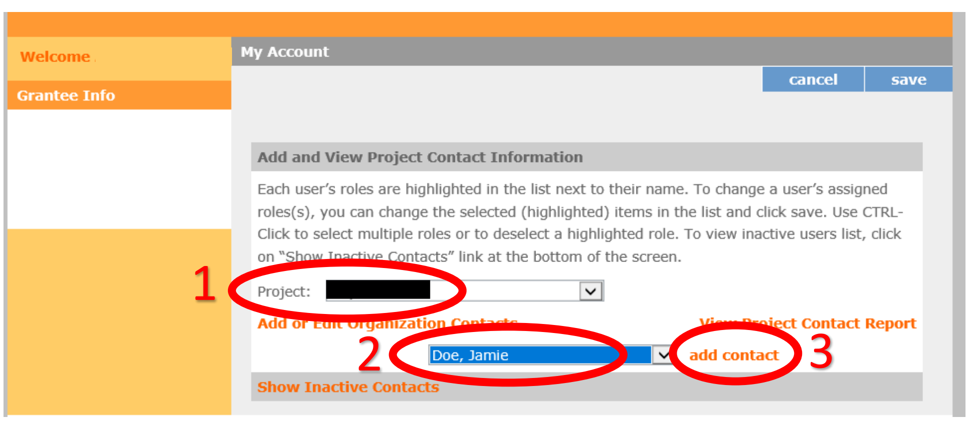
5) Type in all required information for the contact (red asterisk = required), then click “save & close”



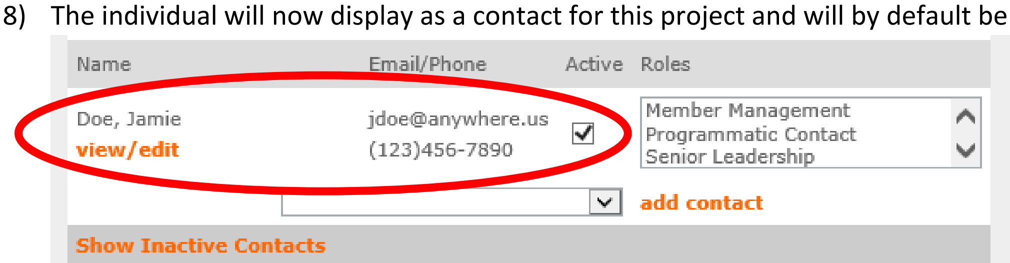
6) You will now be able to see your organizational contact, which by default will be marked as “Active.” You can edit the information for this contact by clicking the “view/edit” link. If an individual later leaves your organization, you can de-select the “Active” checkbox and click “Save” to de-activate 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”

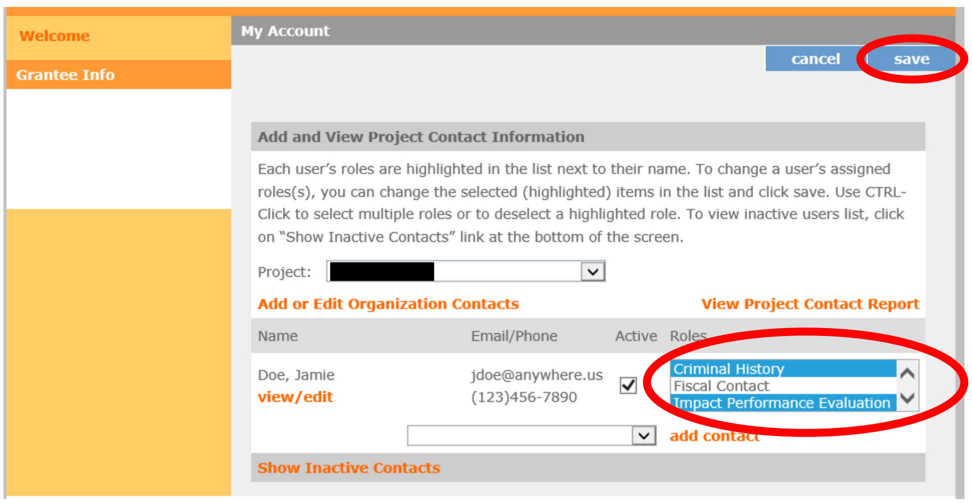


8) The individual will now display as a contact for this project and will by default be marked as “Active”

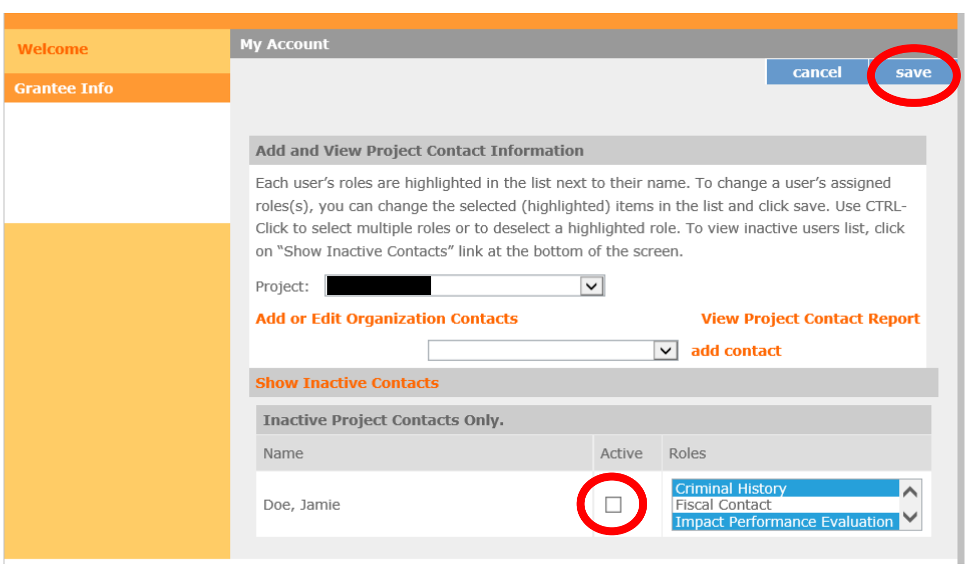


9) Select one or more roles for this individual within this particular project. You can select multiple roles by holding down the CTRL button and clicking on more than one role. Use the up and down arrows in the “Roles” box to see all the available roles:
   - Criminal History
   - Fiscal Contact
  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

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

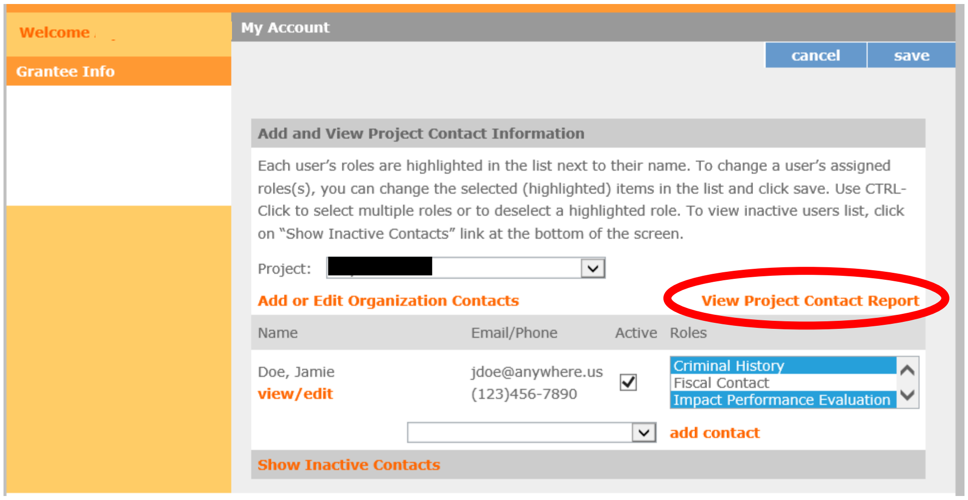


10) If an individual later leaves the project, de-select the “Active” checkbox and click “Save.” This will put the individual in the Inactive Contacts list. The individual can be re-activated on this project at any time by selecting the “Active” checkbox and clicking “Save”



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