



UPDATING PERSONNEL IN OKGRANTS

PURPOSE: To provide information on activating or deactivating personnel on a grant in OKGrants.

The OKGrants has simplified the processes for updating personnel – forms are no longer required and personnel changes **MUST** be made within OKGrants by the subgrantee.

Prior to the establishment of OKGrants, subgrantees had to complete an A-9 - Change in Project Director / Fiscal Officer Form in order to change personnel. If a subgrantee did not notify the Program Specialist that changes in personnel had occurred, sometimes the only way we would know was if we received a bounce back on an email. Remember, email is our primary form of communication. If an email address changes or personnel are not current, then potentially important emails will be missed.

TIPS

- ✓ **Only an Agency Administrator can add a new user or deactivate personnel within the organization; however, an Agency Administrator cannot deactivate another Agency Administrator. This must be completed by DAC, Federal Grants Division. See SECTION 3: Deactivating An Agency Administer for more information.**

SECTION 1: Adding New Users

To add a new user to an organization, the Agency Administer should follow the steps indicated.

1. Go to <https://grants.ok.gov>
2. Click “My Organization”, and then click “Organization Members”.

Organization - Grantee Test Org

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

Organization Members

Administrators with the authority to add members to your organization can follow these steps:
To add a member to your organization, select the **Add Members** link below.
If a member has already added his/her information in the system, you can search for the member.
If you need to add a member's information into the system, select **New Member**.
For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

| <input type="checkbox"/> | Person | Role | Active Dates | Assigned By | Modified By |
|-------------------------------------|--------------------------------------|---|----------------------------------|------------------------------|-----------------------------|
| <input checked="" type="checkbox"/> | Admin, Grantee | Agency Administrator | 6/7/2011 - <input type="text"/> | Tkaczyk, Joshua 6/7/2011 | Tkaczyk, Joshua 6/7/2011 |
| <input checked="" type="checkbox"/> | OrgAdd, Testing | Agency Administrator <input type="text"/> | 9/21/2011 - <input type="text"/> | OCAST, SysAd 9/20/2011 | Admin, Grantee 10/7/2011 |
| <input checked="" type="checkbox"/> | Domains, Testing | Authorized Official <input type="text"/> | 9/21/2011 - <input type="text"/> | OCAST, SysAd 9/20/2011 | Admin, Grantee 10/7/2011 |
| <input checked="" type="checkbox"/> | Domains, Testing | Authorized Official <input type="text"/> | 9/20/2011 - <input type="text"/> | OCAST, SysAd 9/20/2011 | |
| <input checked="" type="checkbox"/> | Grantee, Test | Authorized Official <input type="text"/> | 6/7/2011 - <input type="text"/> | Tkaczyk, Joshua 6/7/2011 | |
| <input checked="" type="checkbox"/> | new message, testing | Authorized Official <input type="text"/> | 9/20/2011 - <input type="text"/> | Tkaczyk, Joshua 9/20/2011 | |
| <input checked="" type="checkbox"/> | Notifications, Test | Authorized Official <input type="text"/> | 9/16/2011 - <input type="text"/> | Tkaczyk, Joshua 9/16/2011 | |

3. Click "Add Members", and a person search field appears.
4. Type the first or last name of the person to add and select "Search."
5. If the person's name appears, place a check in the box next to the person to add. Select a role, enter an active date (beginning), and "Save." Then select "Current Members" and the person added should show with the rest of the organization's member names. Click "Save".
6. If the person's name does not come up in the search results, then select "New Member."

Organization Members

Administrators with the authority to add members to your organization can follow these steps:
To add a member to your organization, select the **Add Members** link below.
If a member has already added his/her information in the system, you can search for the member.
If you need to add a member's information into the system, select **New Member**.
For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

Person Search

7. Enter information for the new user and “Save & Add To Organization.”

Note: “Save and Add to Organization” MUST be selected to add the new user to the organization.

Organization - Grantee Test Org

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

Add/Edit Members

Administrators with the authority to add members to your organization can follow these steps:
Please complete the information below. All required fields are marked with an *.

| | | | | | |
|-------------|-----------------------|-------|------------------|-----------|--------|
| Name | Prefix | First | Middle | Last | Suffix |
| | ▼ | DAC * | | Grantee * | ▼ |
| Title | | | | | |
| Email | dac@dac.ok.gov * | | | | |
| Username | dacuser * | | | | |
| Password | ***** * | | Confirm Password | ***** * | |
| Date Active | 10/7/2011 | | Date Inactive | | |
| Role | Authorized Official * | | | | |

NOTE: An Agency Administrator can deactivate a member of an organization; however, one Agency Administer cannot deactivate another Agency Administrator. To deactivate an Agency Administer, see the instructions below. A deactivated user cannot access, view, or edit OKGrants information. To deactivate a user:

SECTION 2: Deactivating Users

To deactivate someone who has left your organization, the Agency Administer should follow the steps indicated.

1. Go to <https://grants.ok.gov>
2. Click “My Organization”, and then click “Organization Members”.
3. Uncheck the box next to the person’s name and add in the date for deactivation date.
4. Select "Save"

SECTION 3: Deactivating An Agency Administer

To deactivate an Agency Administrator, contact the Program Specialist or the Federal Grants Division Director for further instructions.