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Salesforce Grant Contact Management

Access and General Contact Management Information

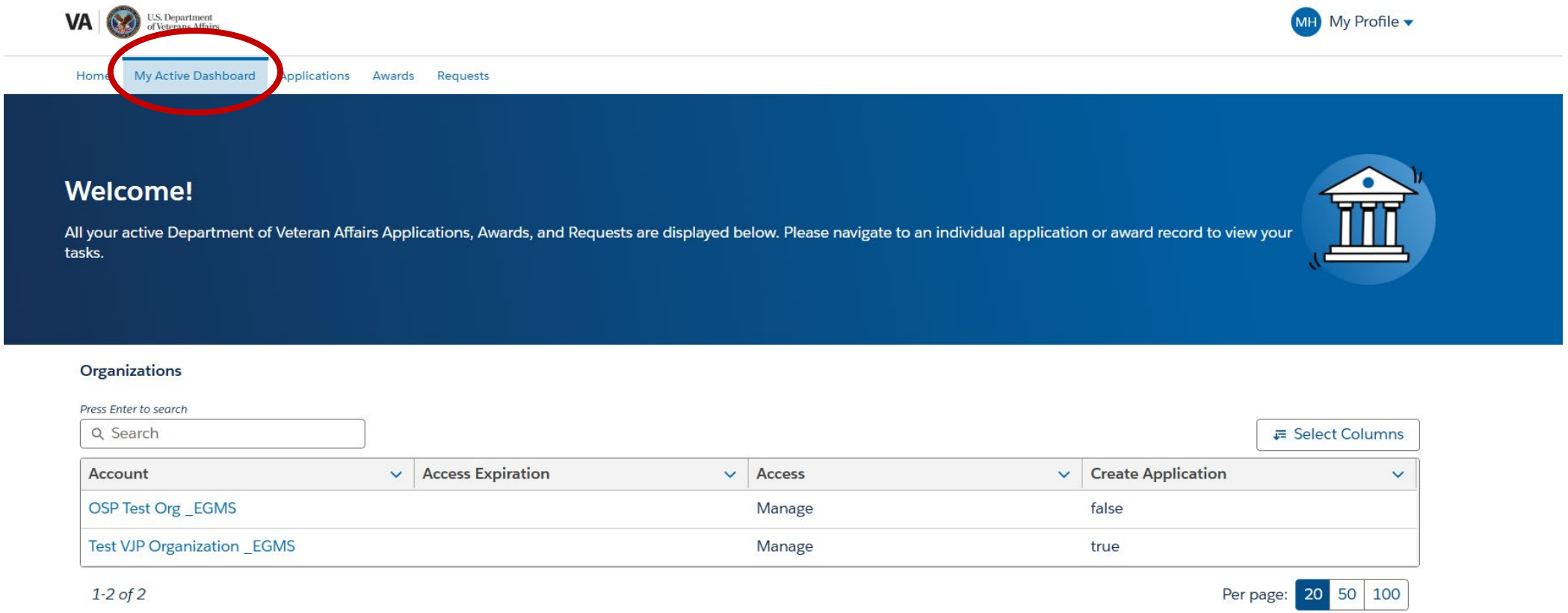
- Link to Salesforce: https://www.my.vaemcc.va.gov/eGMSPortalPublic/
- Grantees can manage the grant contacts associated with their organizational account and individual grant records.
- A Grant Contact must have “Manage” Participant Management permissions to change permissions for current contacts and/or invite other contacts.
- An individual must first be invited to the organizational account before the individual can be added to a grant record.
- The contact permissions includes the following: Account Manager (Sign, edit & submit); Account Editor (Edit & submit) and Account Viewer (View only). Only one permission can be selected per individual.
- Enter a role category for each contact. This will be a required field.
- Participants can be active, inactive, or deactivated and will appear on the corresponding tab. A participant will be on the **"active" tab** if they have access to the record and they are considered active in the system (they have logged in within the past 45 days). A participant will be on the "**inactive" tab** if their access has been intentionally removed from the record. A participant will be on the "**deactivated" tab** if the individual is an active participant on the record but has not logged into the system > 45 days; Once the deactivated individual logs into the system they will again appear on the "active" tab; no action is needed other than the user logging in.

Inviting Contacts to the Organization Account

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Access the Organizational Account

Click on the “My Active Dashboard” tab from the home page and select the organization.



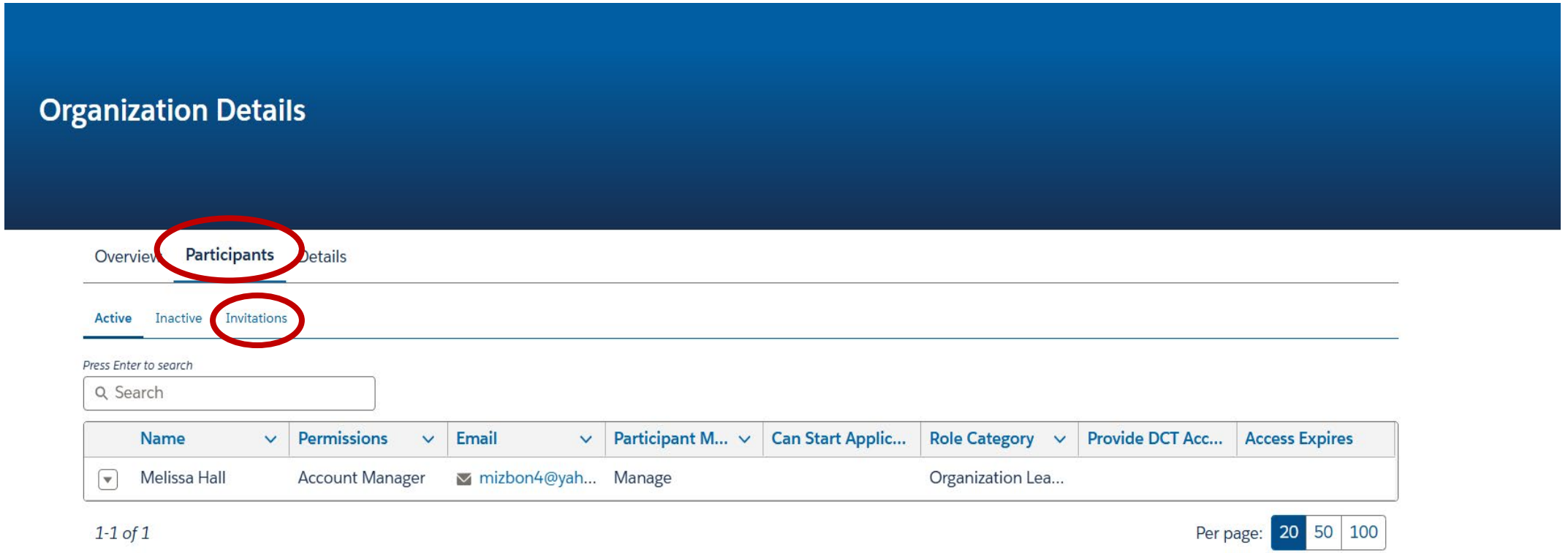
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Access the Participants Tab

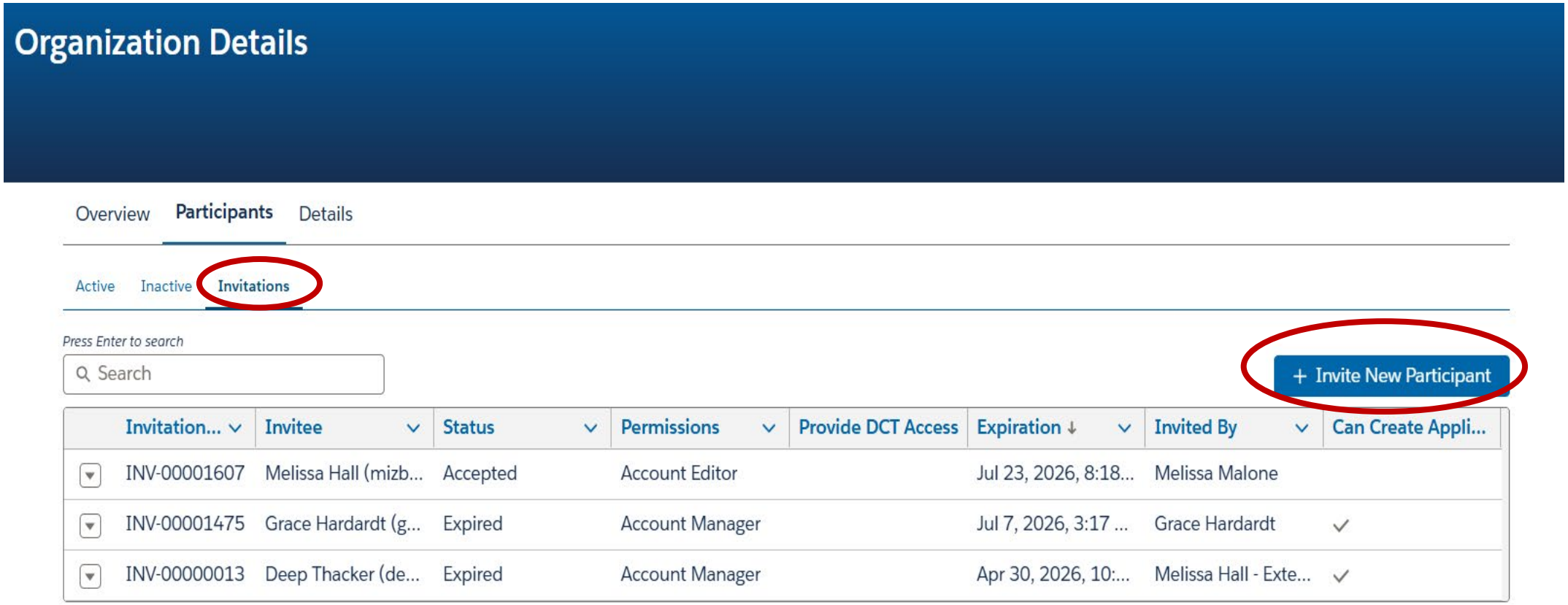
Click on the Participants tab

Contacts identified with your organization that are identified as active and inactive will be listed in the respective tabs. (Deactivated will be visible in an upcoming production release.)

Click on the invitations tab to invite a new contact.

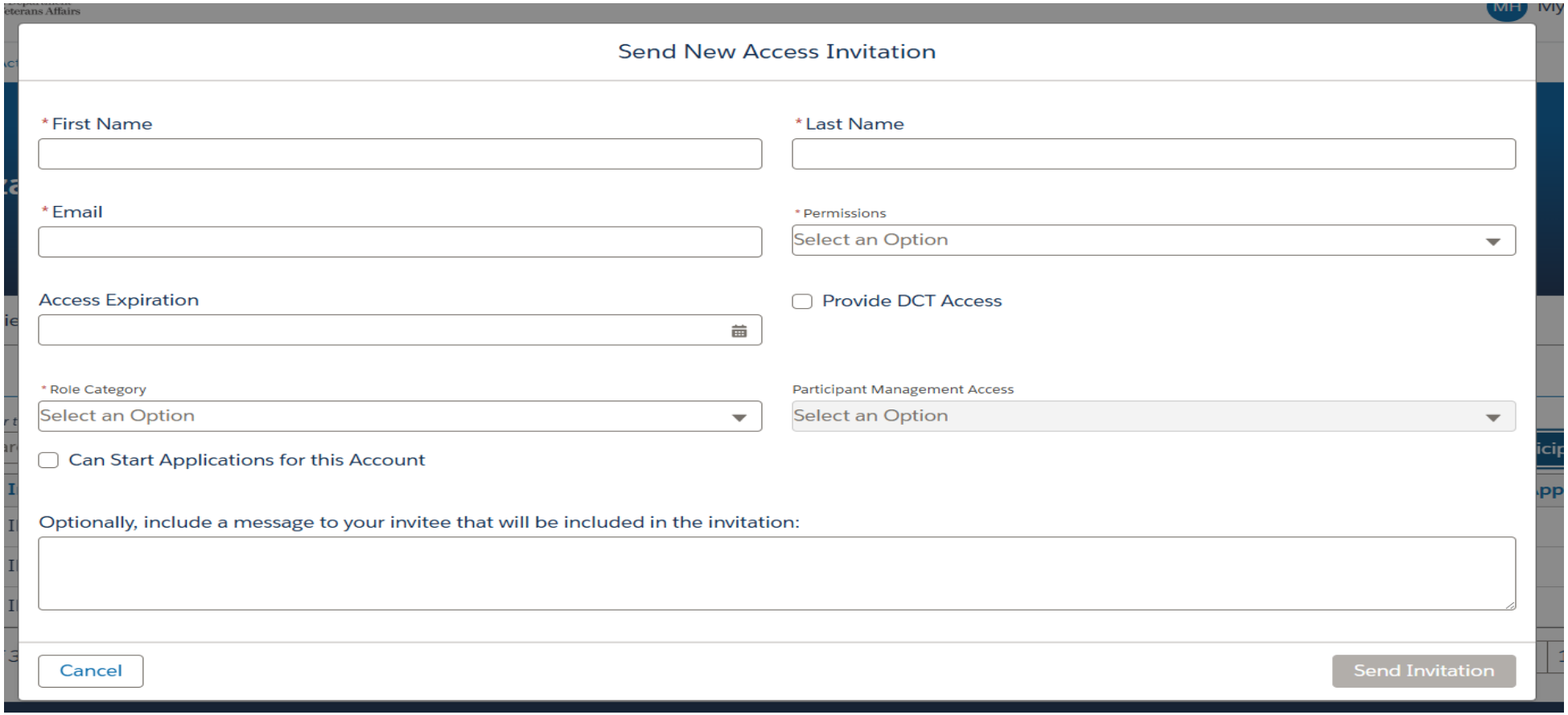


Click on the Invite New Participant Button



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Complete the Invitation Pop Up Fields

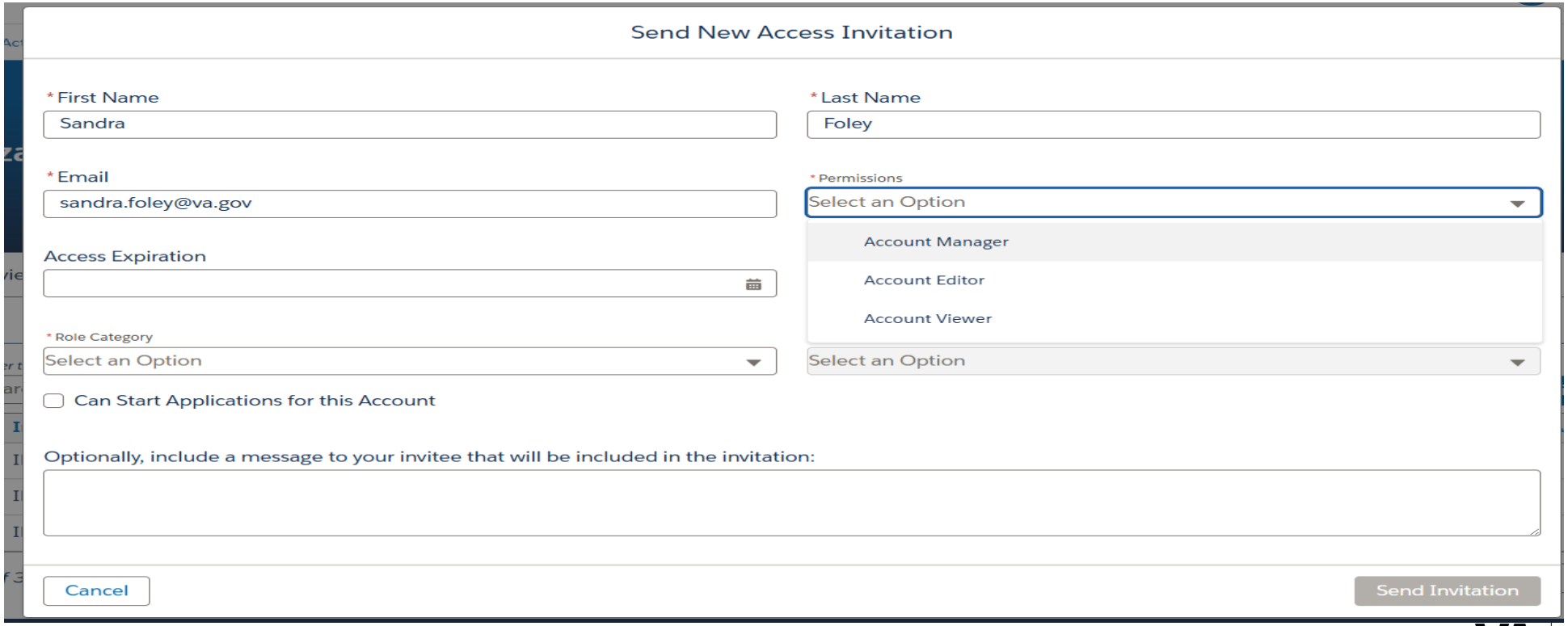


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Select the Correct Contact Permissions:

Account Manager (Sign, edit & submit); Account Editor (Edit & submit) and Account Viewer (View only)

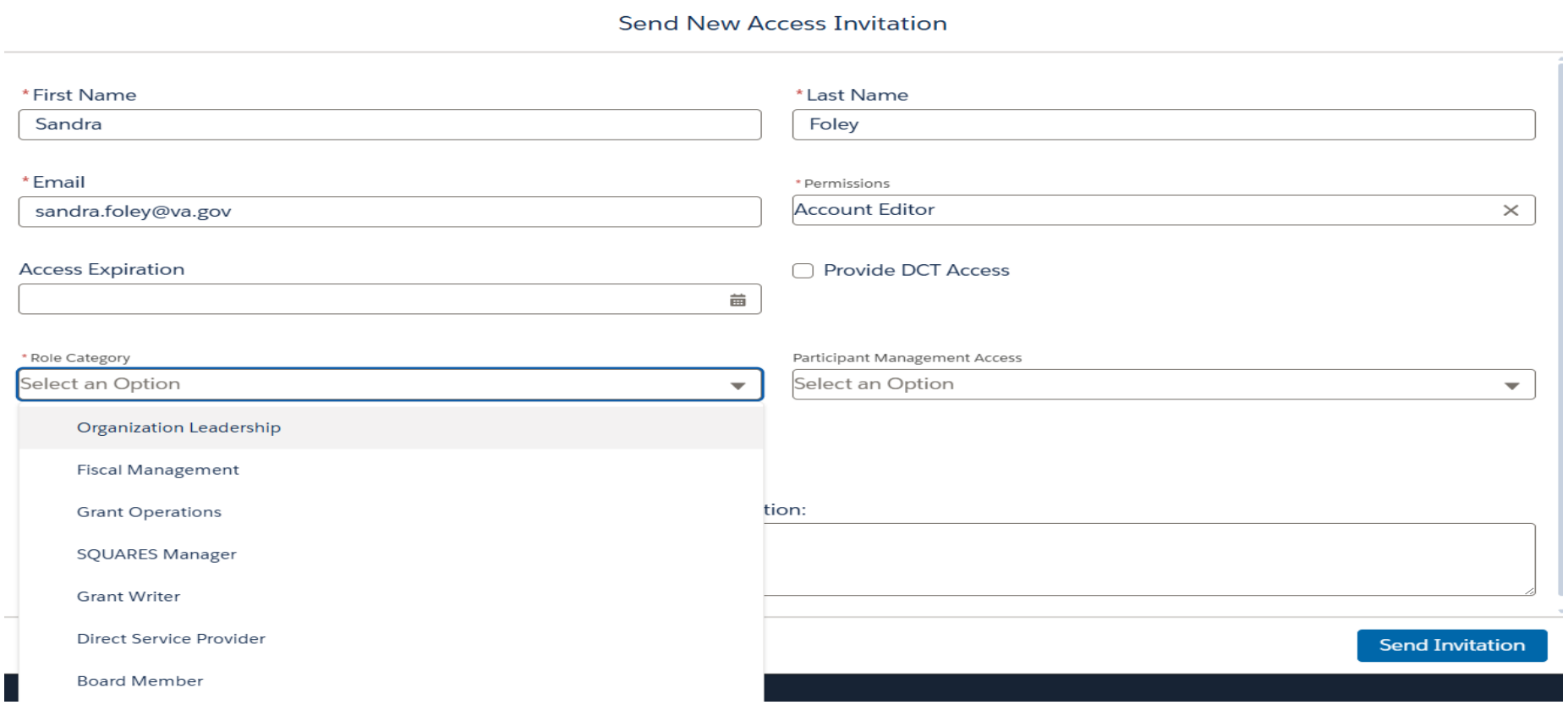
Account Manager will automatically default to the check box “Can start applications for this account” selected. If an Account Editor needs to have the ability to start applications for the future the check box can also be selected.



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Select a Role Category

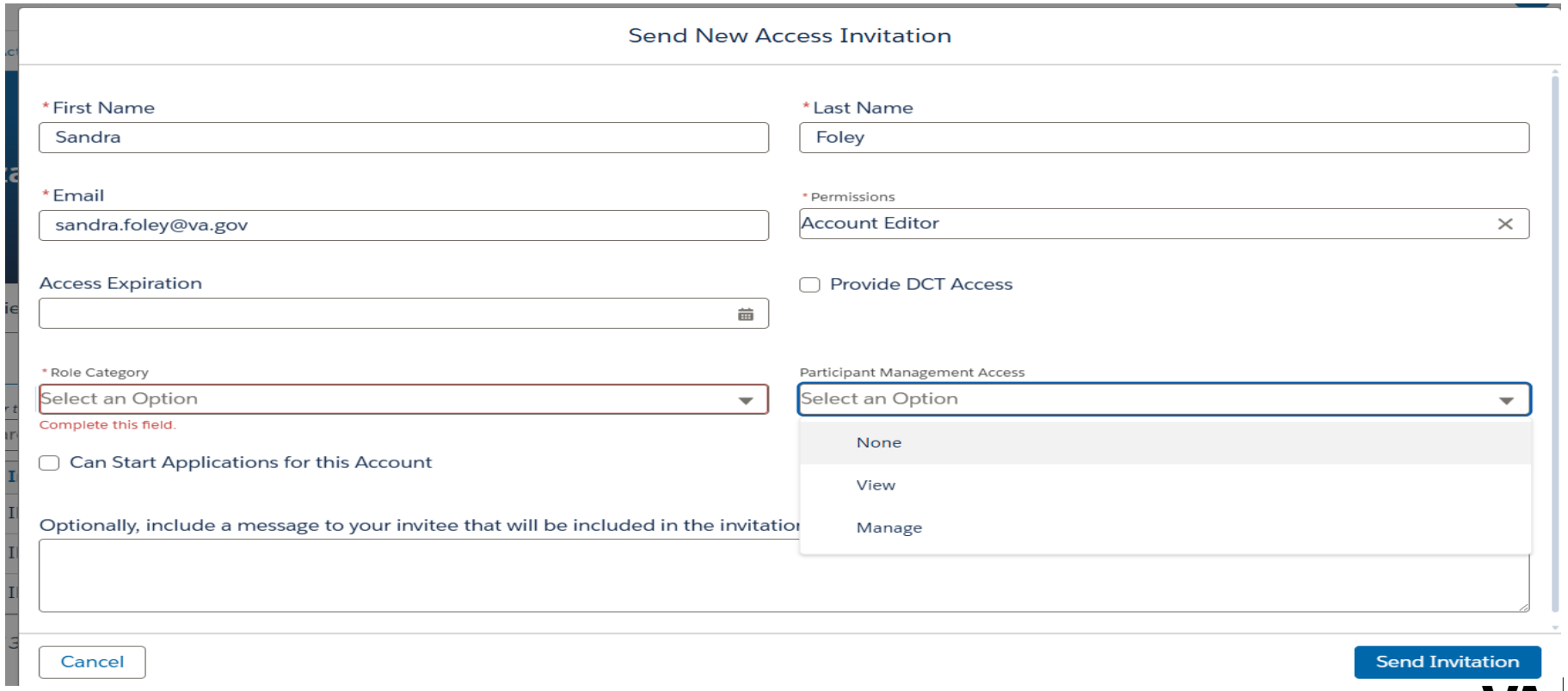
Always select a role category for the individual. This is a required field.



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Reminder:

Participant Management Access must be “Manage” to edit contact permissions or invite other contacts. Choose this ONLY if the individual should have this specific permission. This should be a careful consideration within your organization as only select contacts should have this permission.

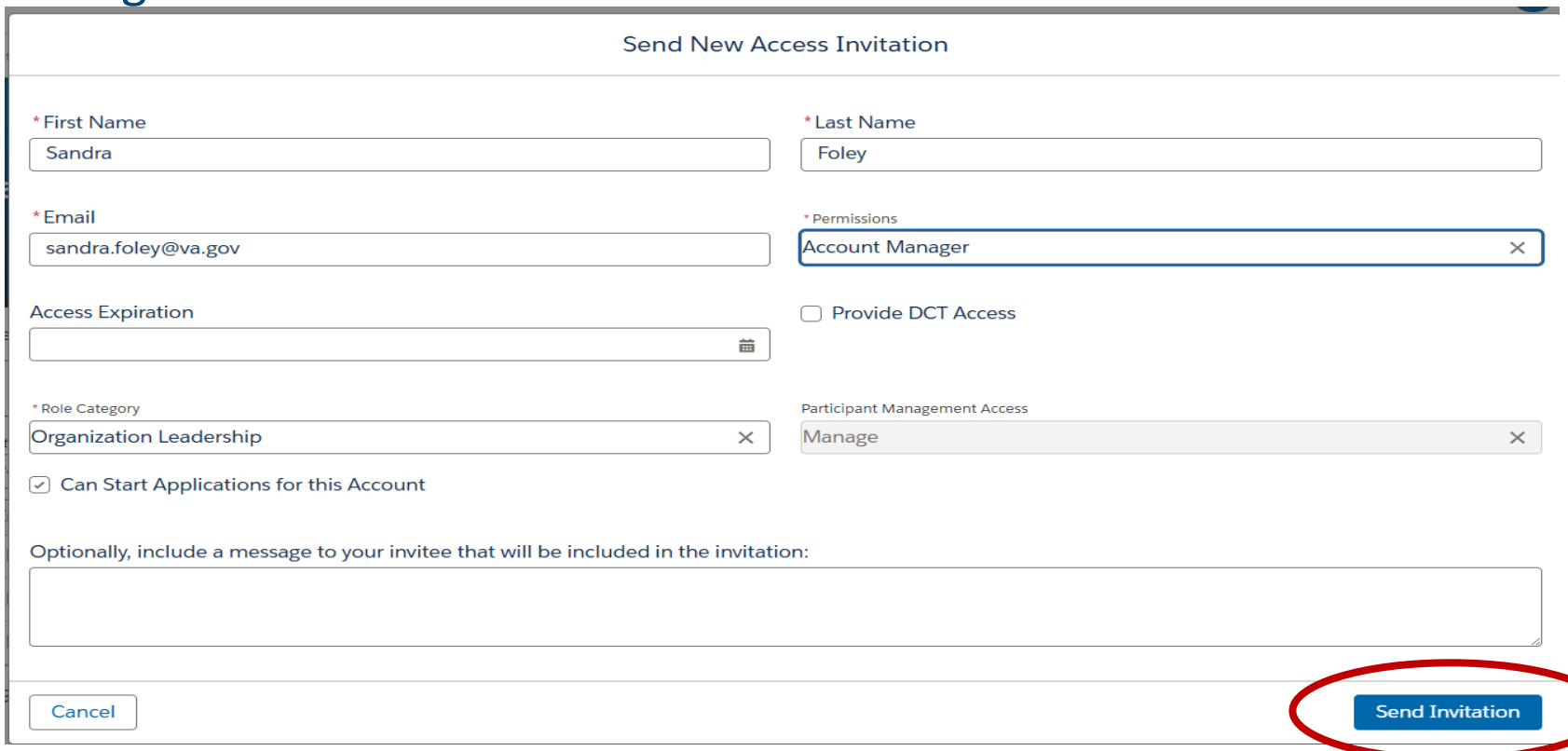


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Click “Send Invitation”

Once all the information is entered, click “send invitation.” Information is not required to be entered for access expiration and the optional message fields.

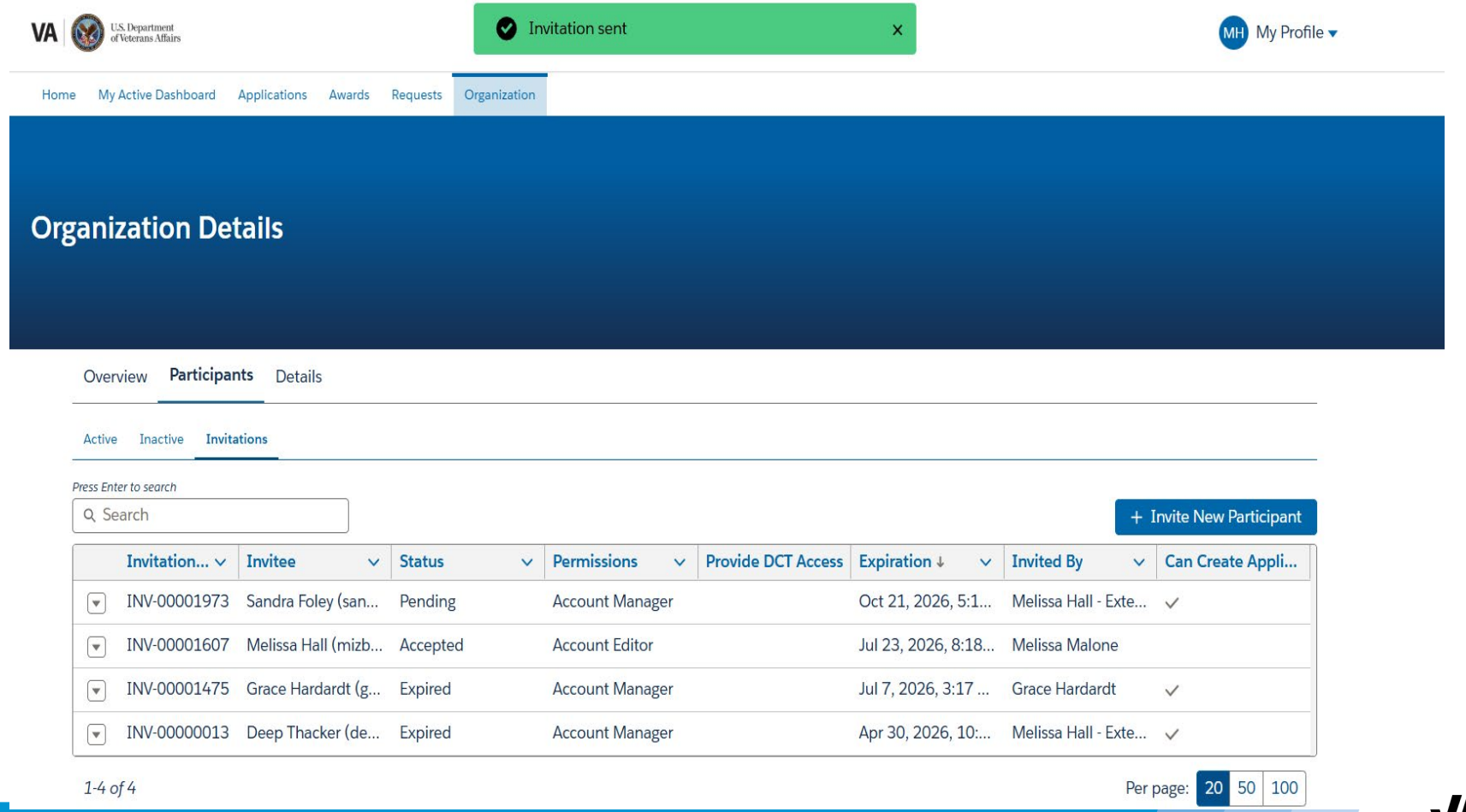
NOTE: “Provide DCT Access” is specifically for management of contacts access to the SSG Fox SPGP Data Collection Tool (DCT). Please do not select this if it does not apply to the contact you are adding.



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Confirmation Invitation Sent

The below pop up will appear when the invitation is successfully sent to the individual



Adding Organizational Contacts to Grant Records

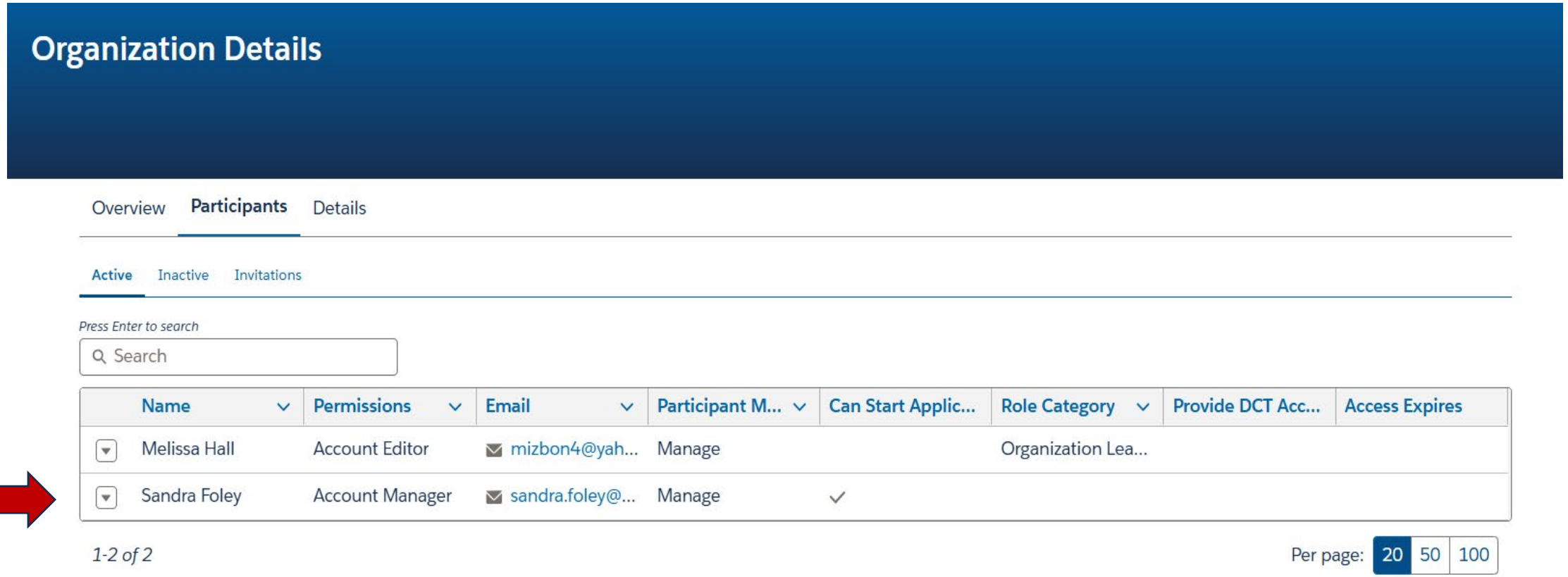
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General Information

Once the individual has accepted the invitation to the organization account, they will be visible on the Organizational Participants tab.

Once the individual is listed on the Organization's participants tab, the individual can then be added to the applicable application and/or award records.

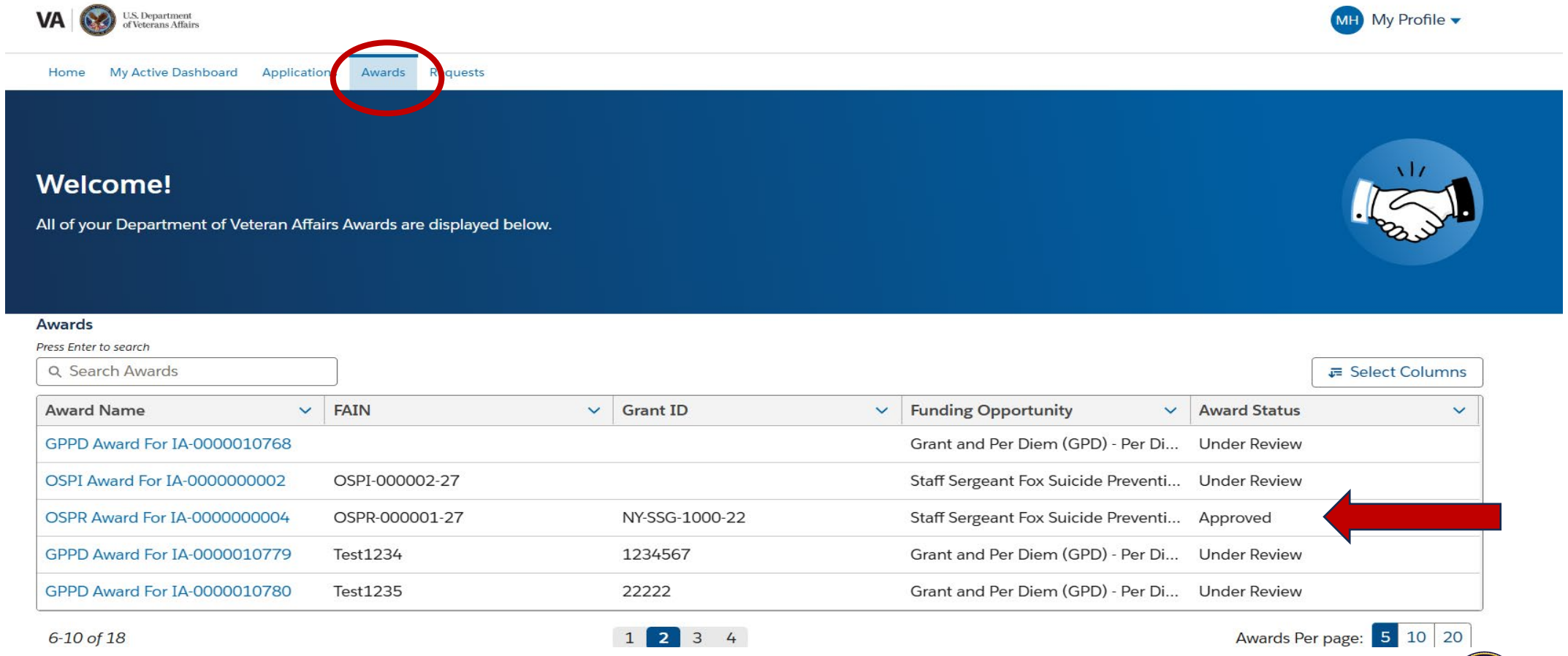
Invited Grant Contact Added to the Organizational Account



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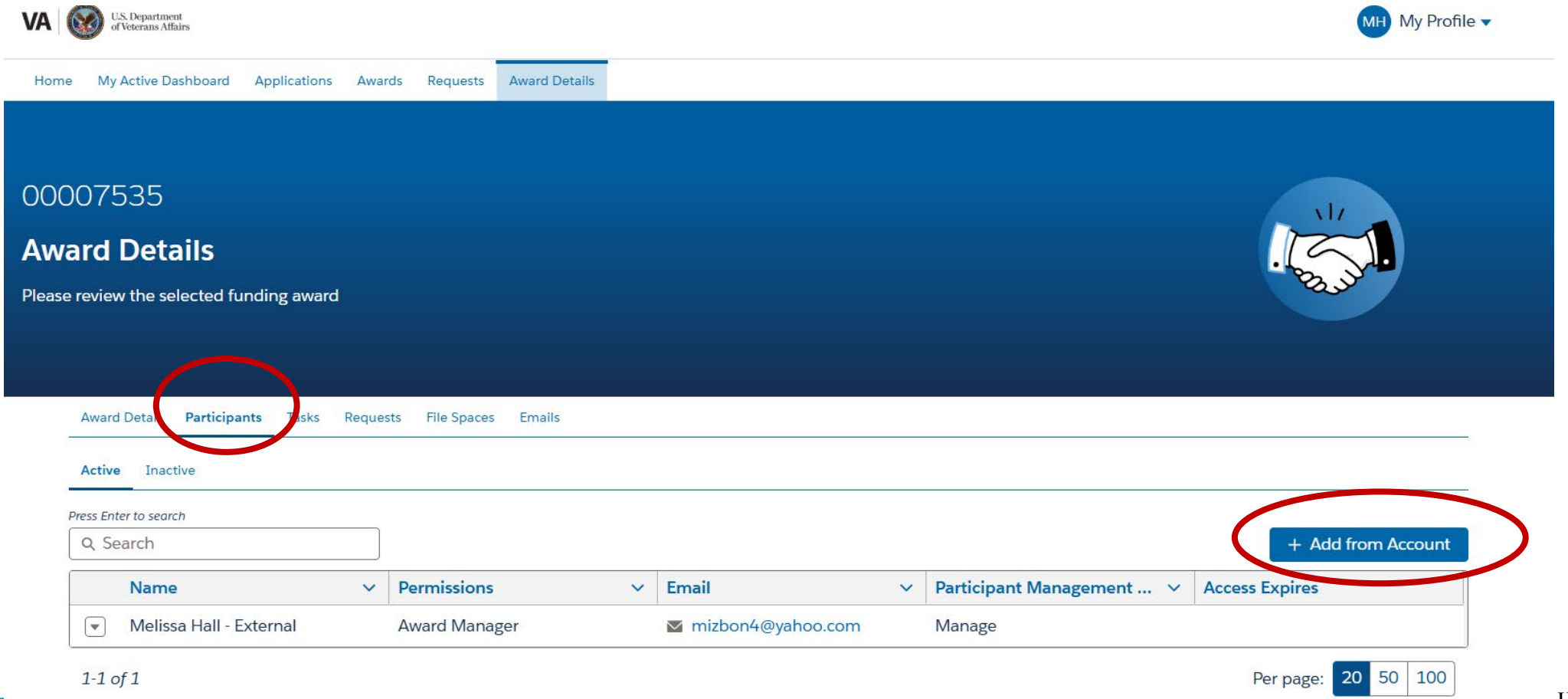
Select the Funding Award From the Awards Tab:

The Funding Award is accessed within the Awards tab from the Home page.



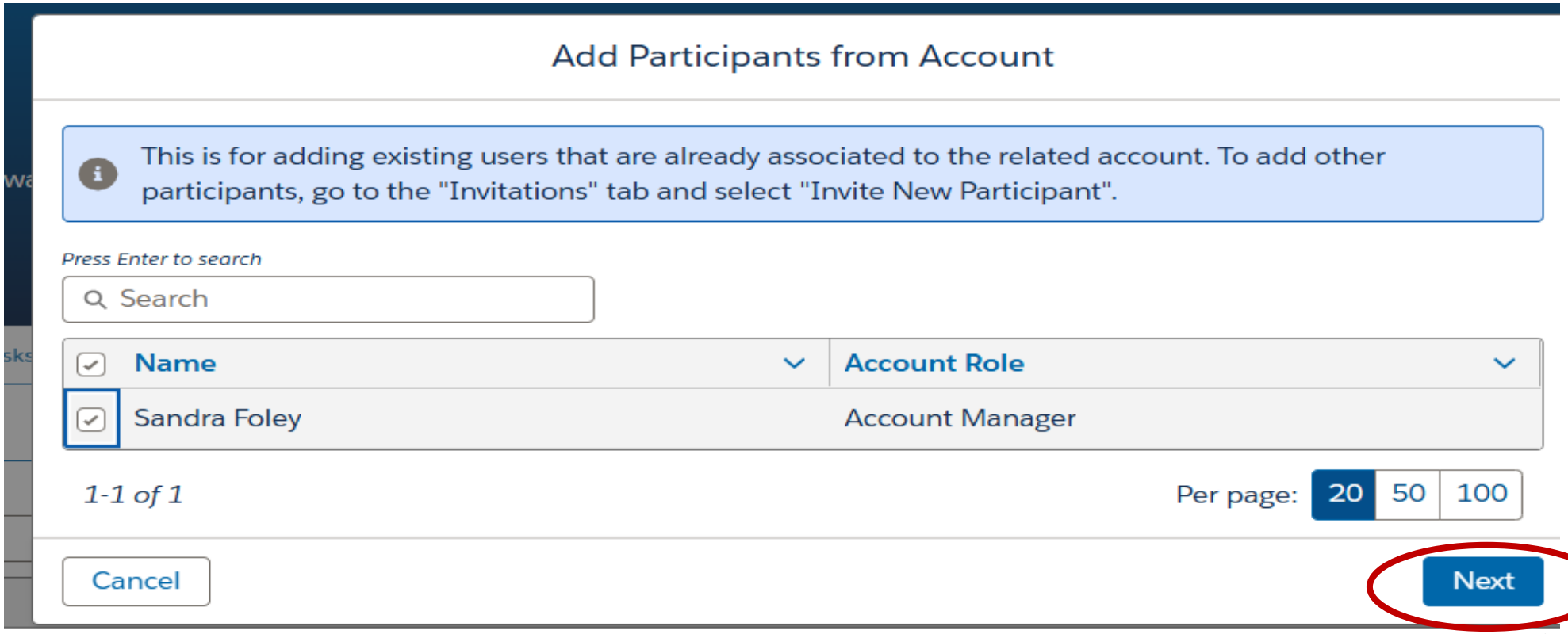
Select the Participants Tab Once the Funding Award is Opened

Click on the “Add from Account” button



Select the Contact That Needs to Be Added to the Grant Record

The contact will appear as soon as you click on the “Add from Account” button. Once the person is selected, click “Next.”

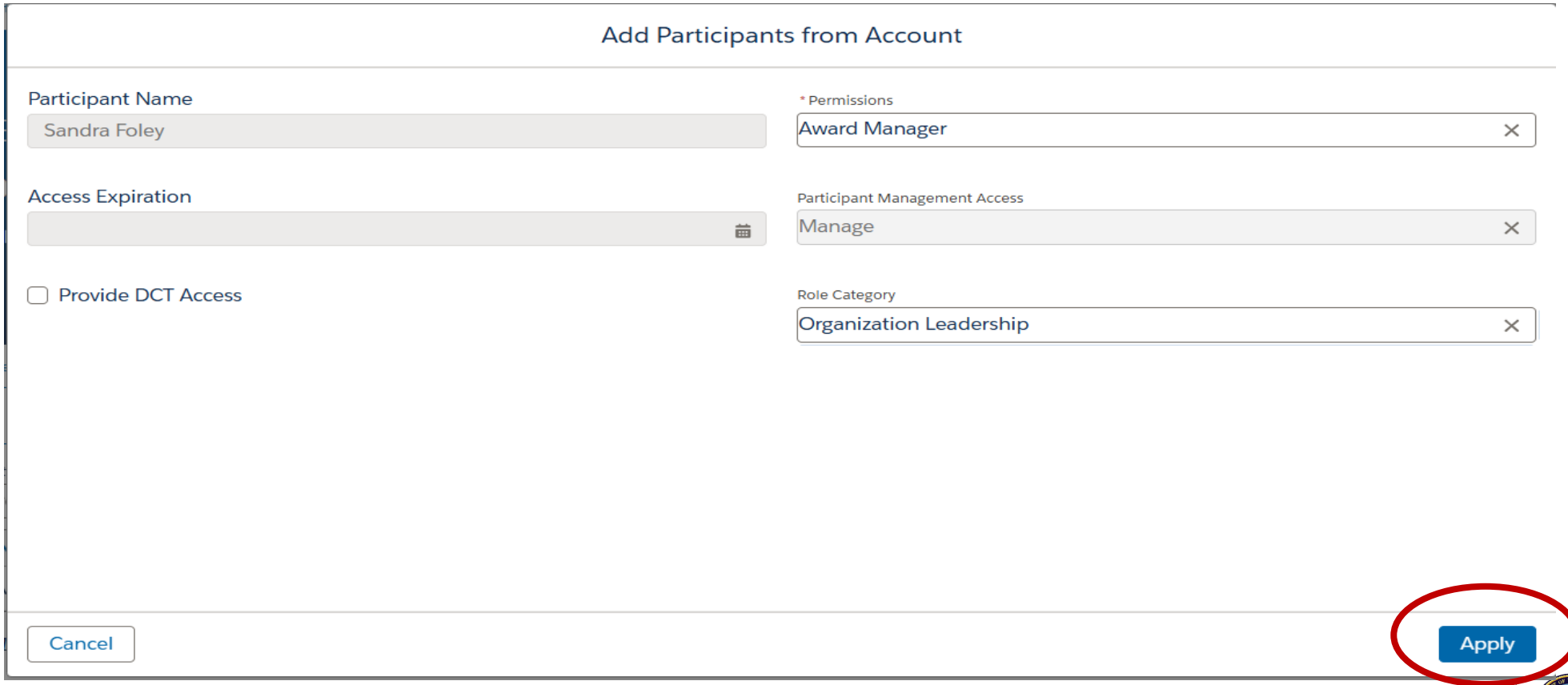


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Complete the Information in the Pop-Up Box.

The same information and permissions needs to be entered here that were previously entered in the Invitation for the Organizational account.

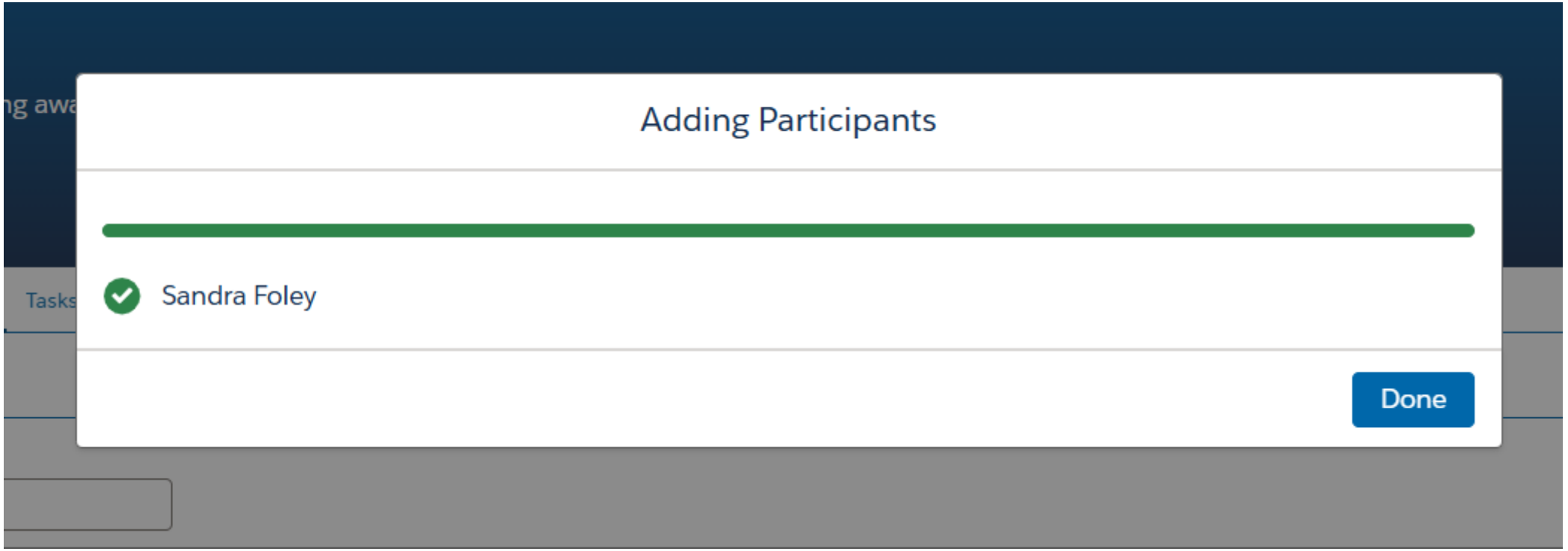
Once the information is entered, click “apply.”



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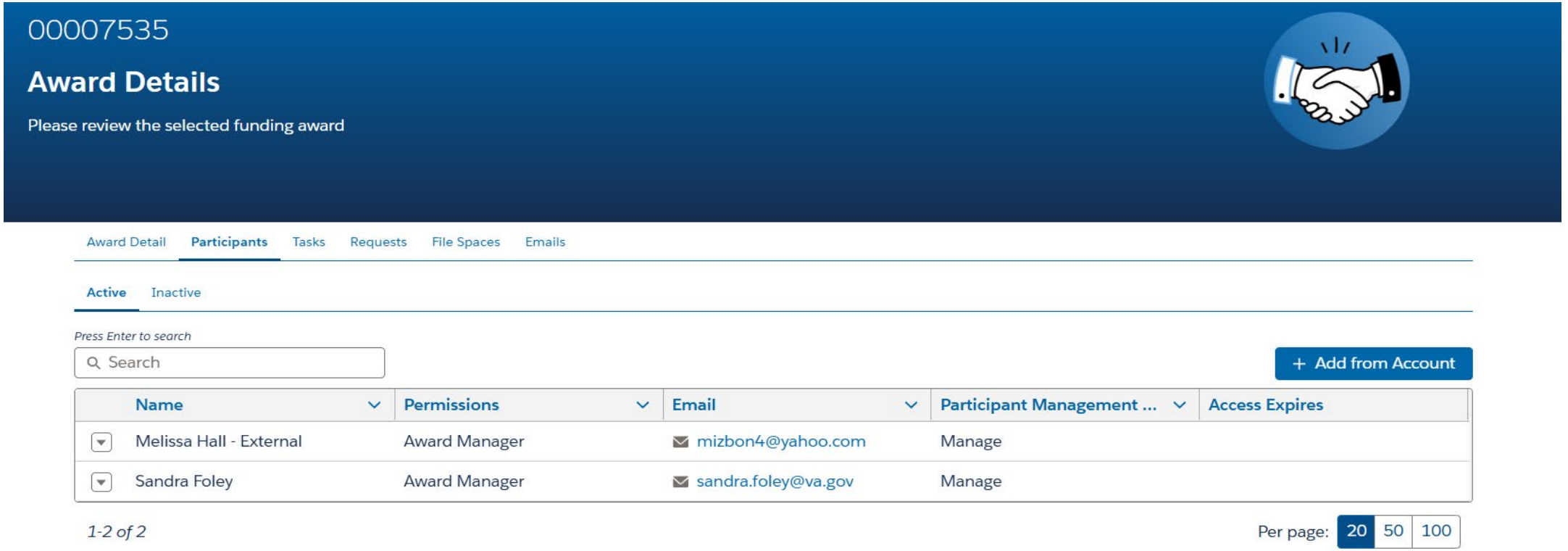
Successful Confirmation

Once the action is successfully processed, the below pop up will appear.



The Contact Will Now Be Visible in the Participants Tab.

Once “Done” is clicked from the previous screen, the contact will be visible on the Funding Award within the Participants tab. The individual will have access to the grant record.



Note: If the contact does not appear after you have added them from the account, this means that their user is deactivated (they have not logged in 45+ days), and they will not appear as a participant until they log into the eGMS portal.

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Changing and Removing Grant Contact Permissions and Access

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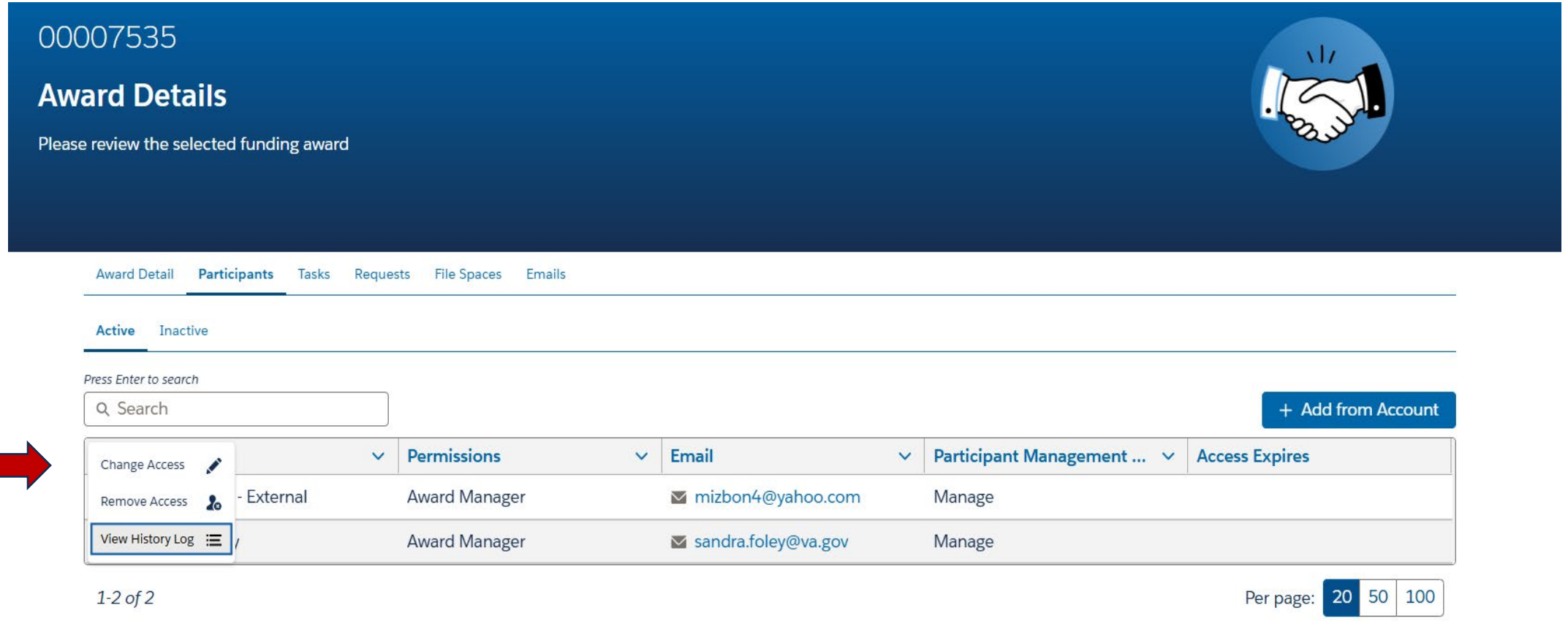
Adjusting Permissions for Contacts- General Information

- Grantees can make changes to other grant contacts permissions and restore access if the contact has “Manage” permissions for Participant Management. Only those with Manage permissions can make these changes.
- Permissions can be changed as needed to provide the ability for others who need to edit, submit and sign forms. Please think through this carefully when adjusting permissions to ensure you are providing the correct permission for the role of the individual within your organization.
- Grantees also can remove access for contacts if an individual leaves the agency and should no longer have access. After access is removed, the individual will show on the “Inactive” tab. Please ensure to keep this updated accurately.
- Permissions and overall access should be updated on both the organizational account and the grant records.
- If no one from your organization has manage permissions for participant management, you will need assistance from VA to adjust this permission.

Access the Participants Tab

Click the drop-down carrot next to the name of the person's permissions that need to be changed.

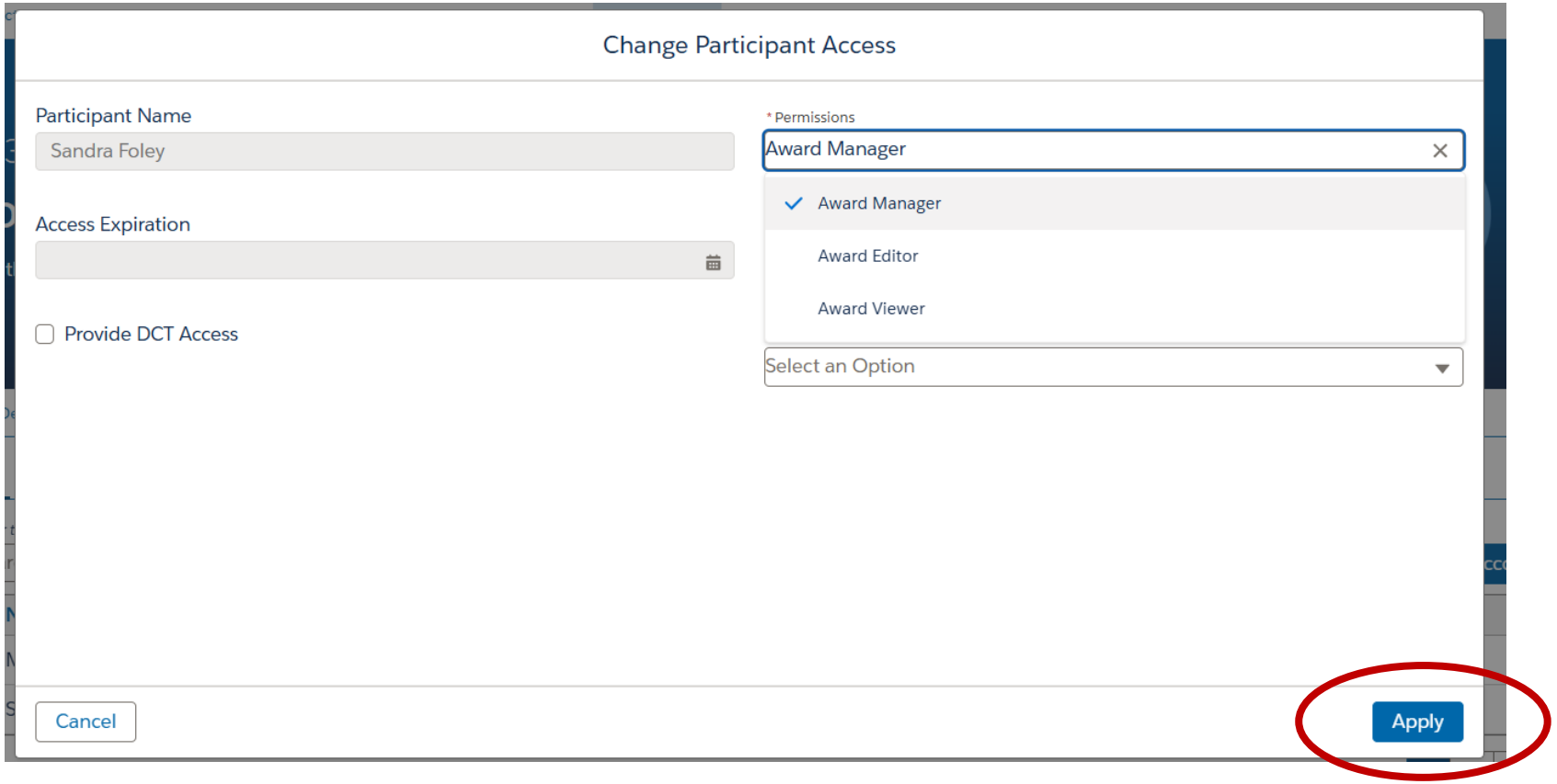
Select "Change Access."



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Change Participant Access Box Will Appear

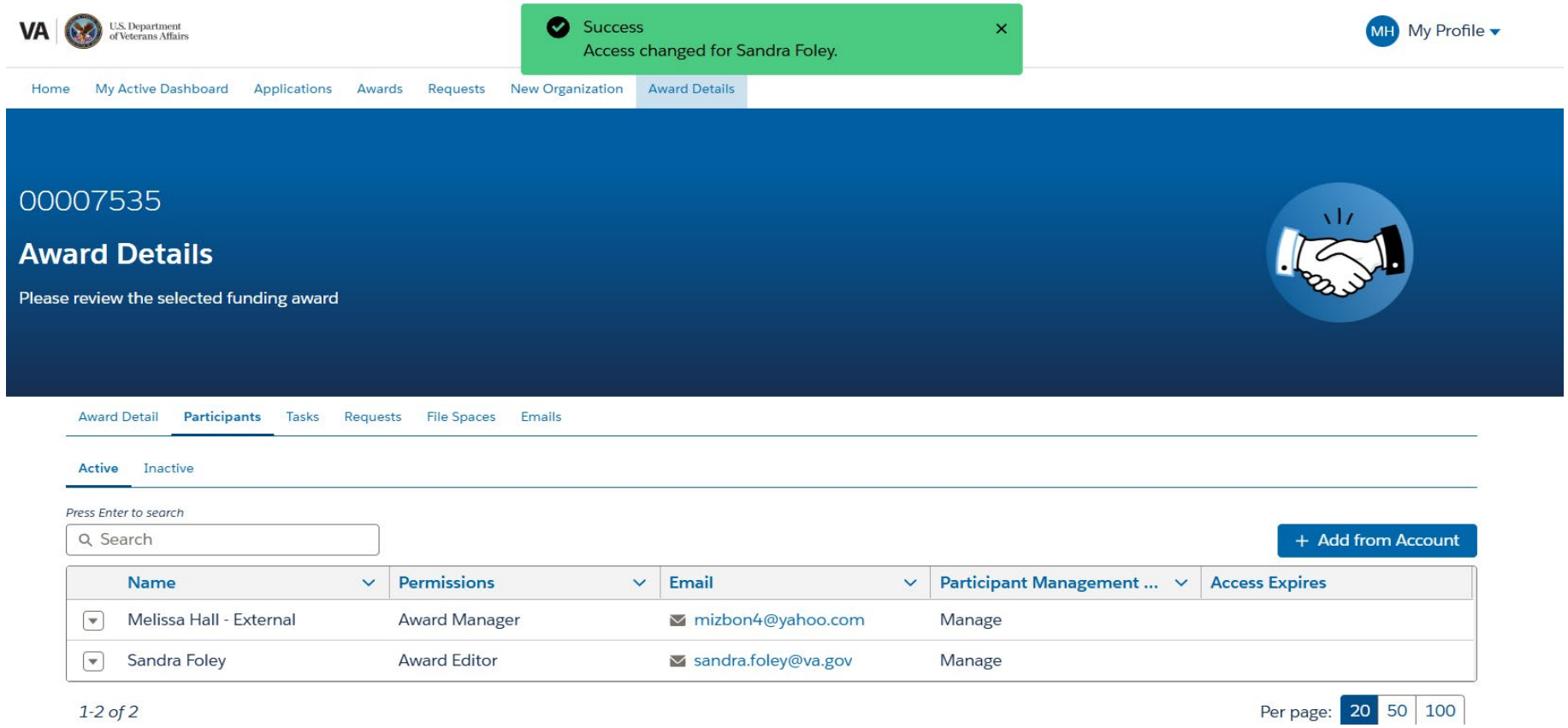
Click on the permissions field and adjust to the correct permission.
Click the Apply button.



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Success Message

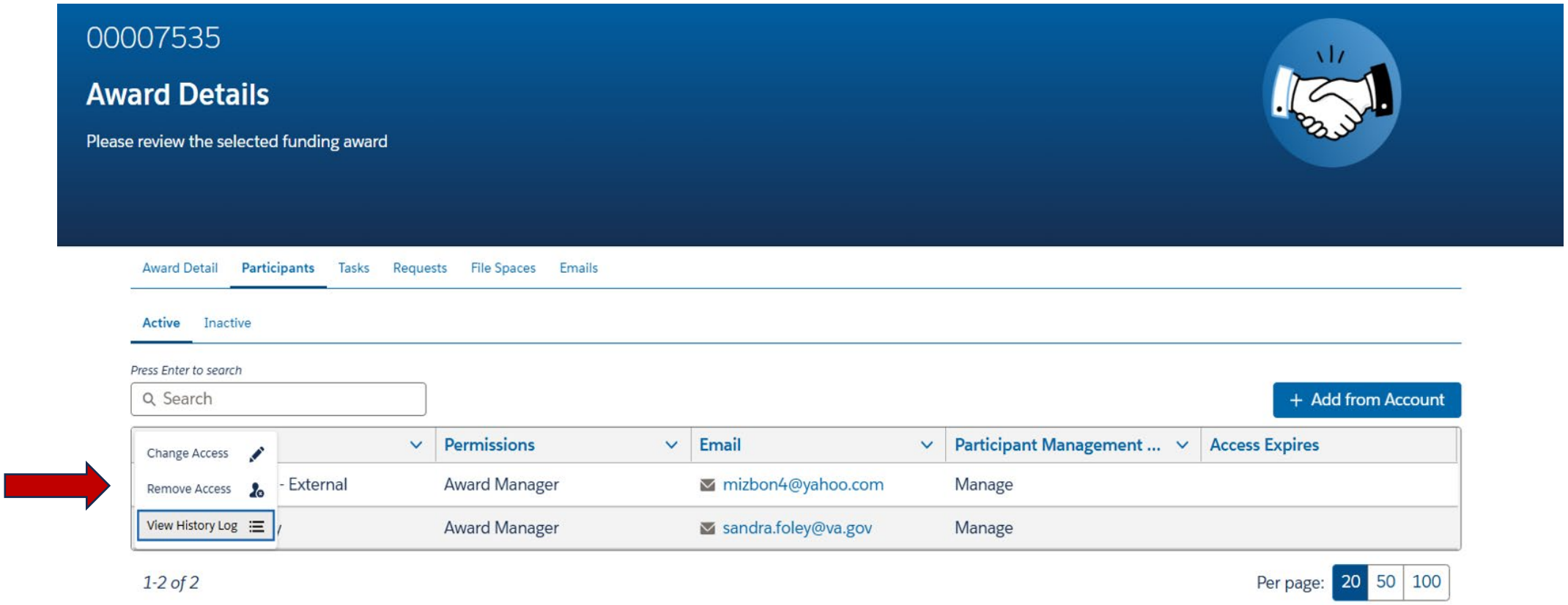
A message pops up indicating the change was successful.



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Remove Access

Remove access by selecting remove access

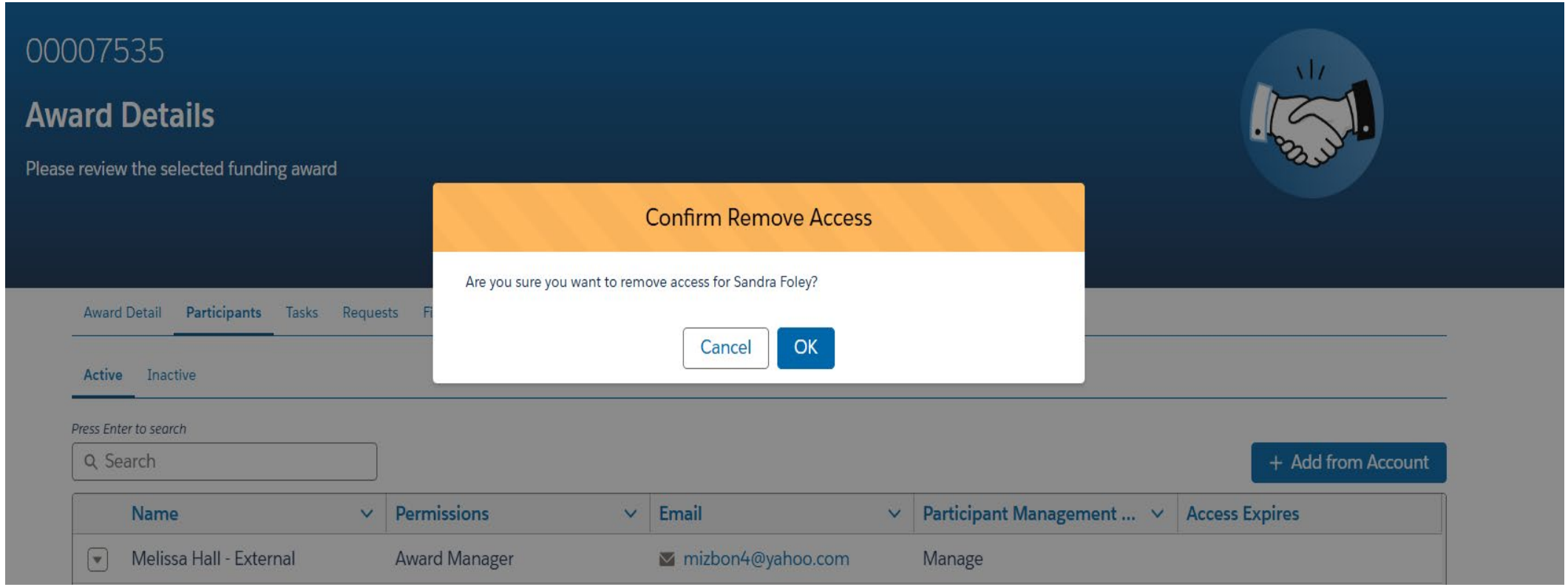


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Confirmation Pop Up

A confirmation pop up appears to confirm the intent to remove access for the individual.

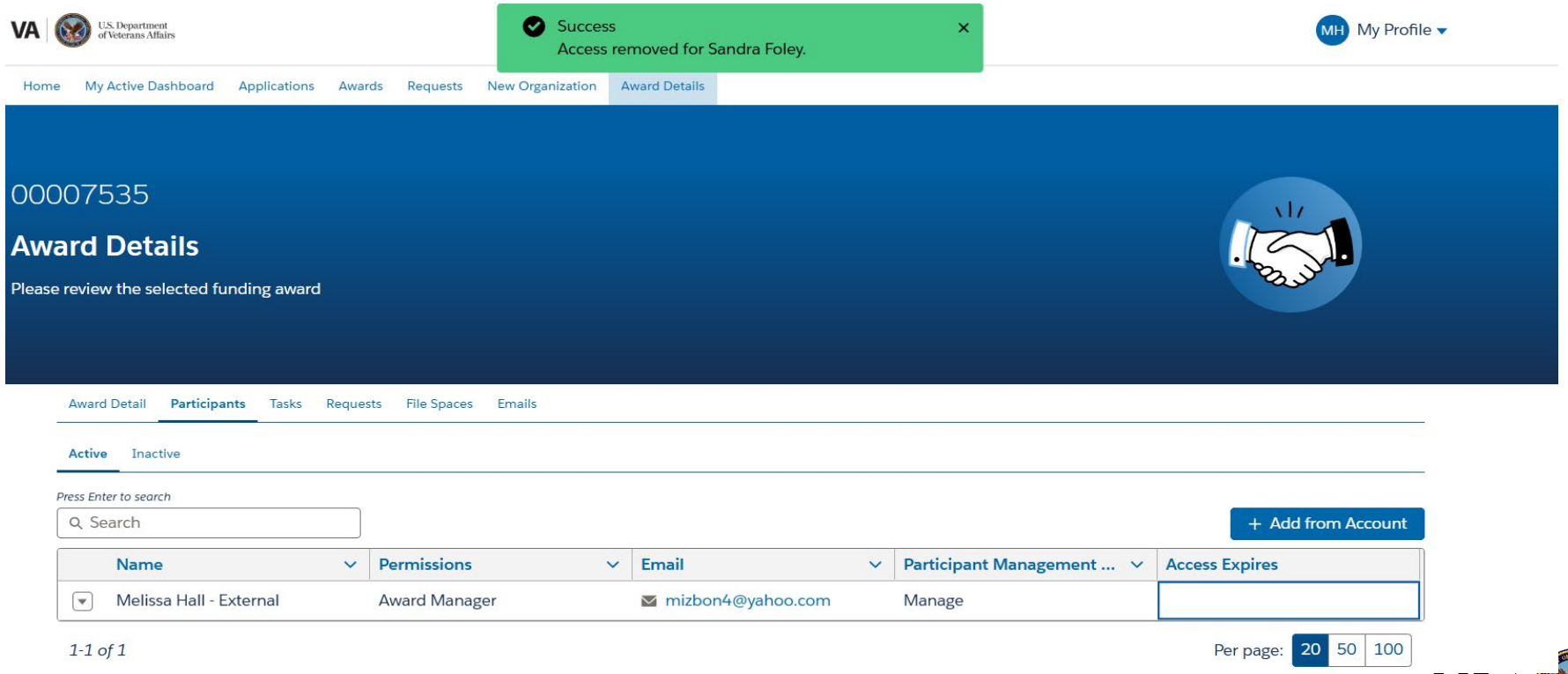
Click “OK.”



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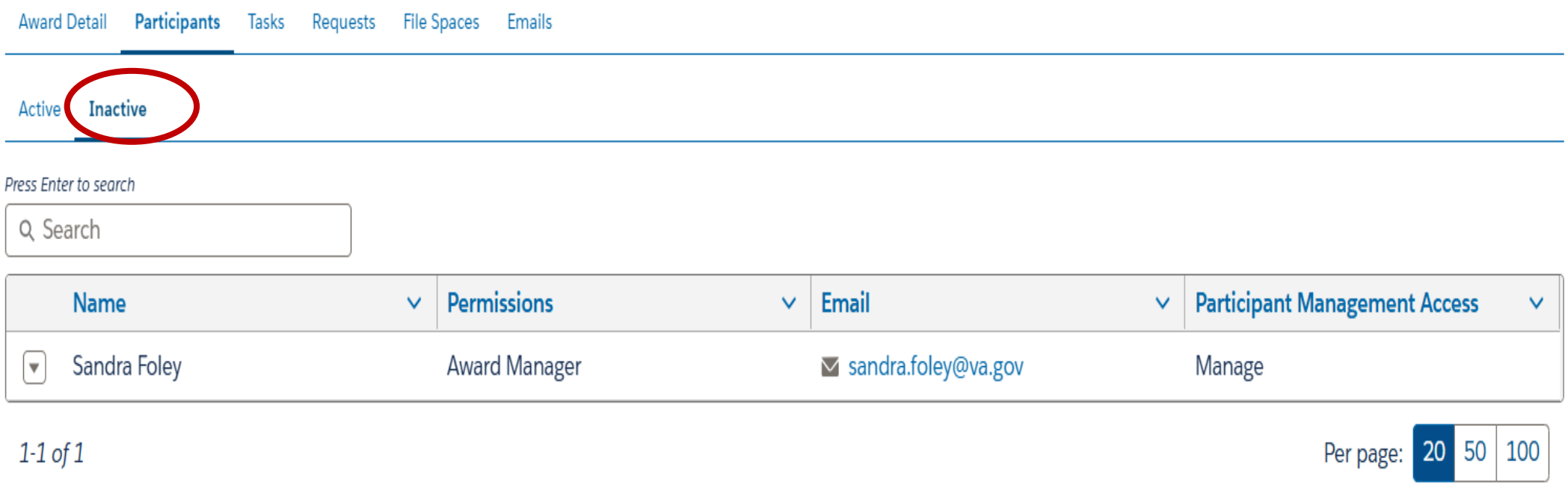
Success Message

A successful pop-up message appears confirming the action. The individual will no longer be visible on the record and will now appear on the Inactive tab.



Remove Access – Inactive Tab

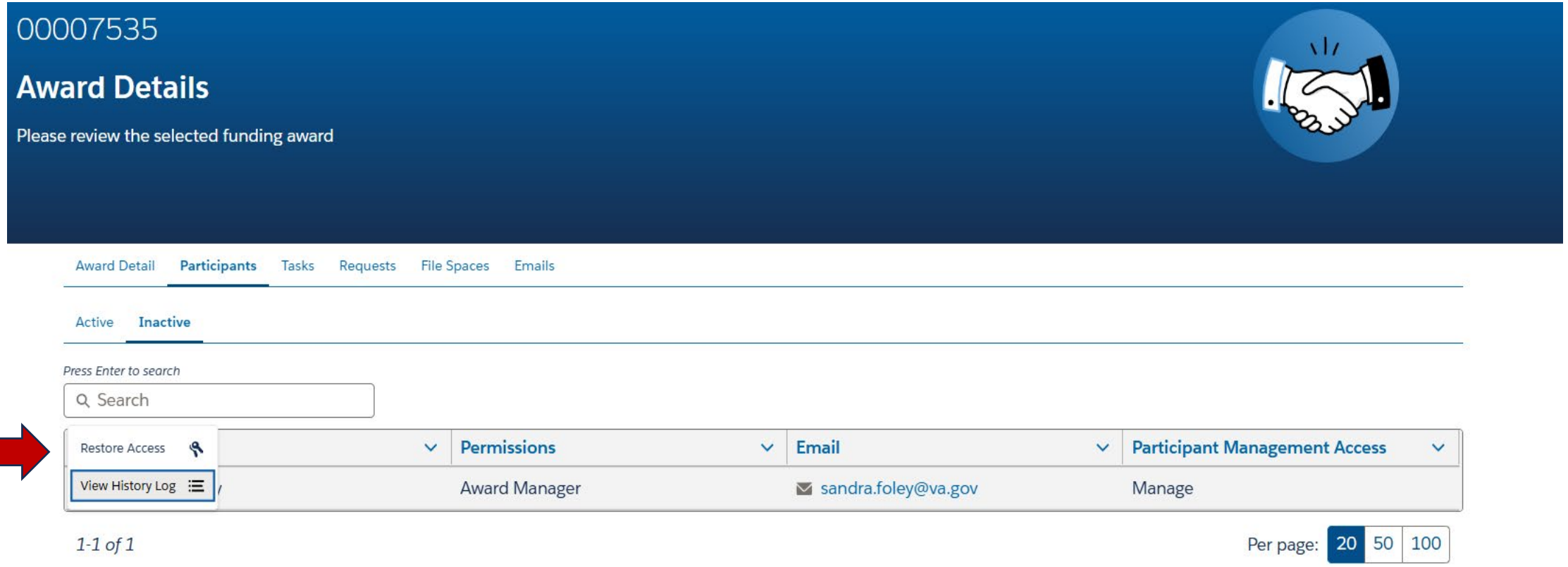
Once an individual's access is removed, the contact will show on the Inactive tab within Participants.



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Restore Access

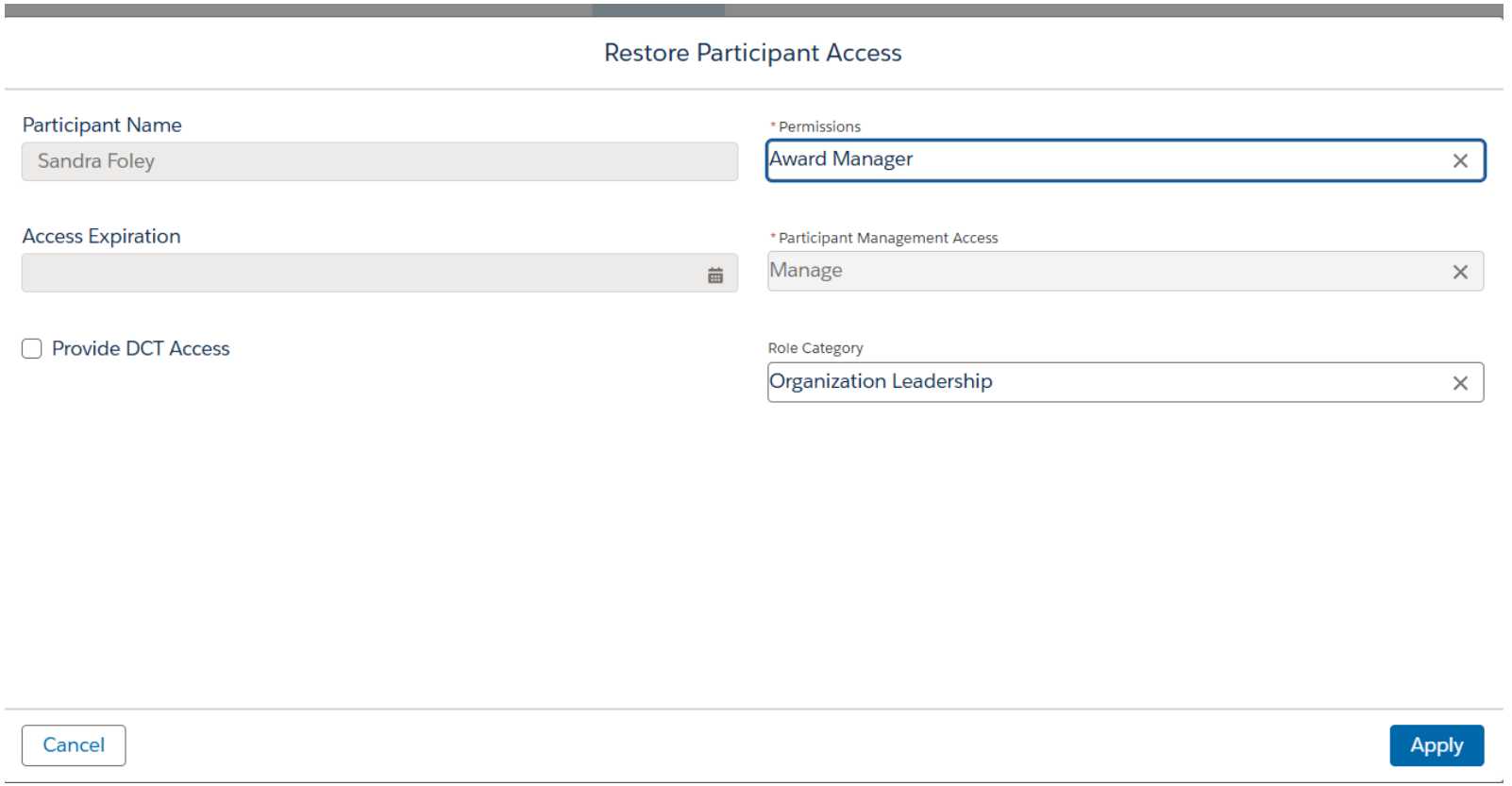
Click on the carrot next to the Individual and select “Restore Access.”



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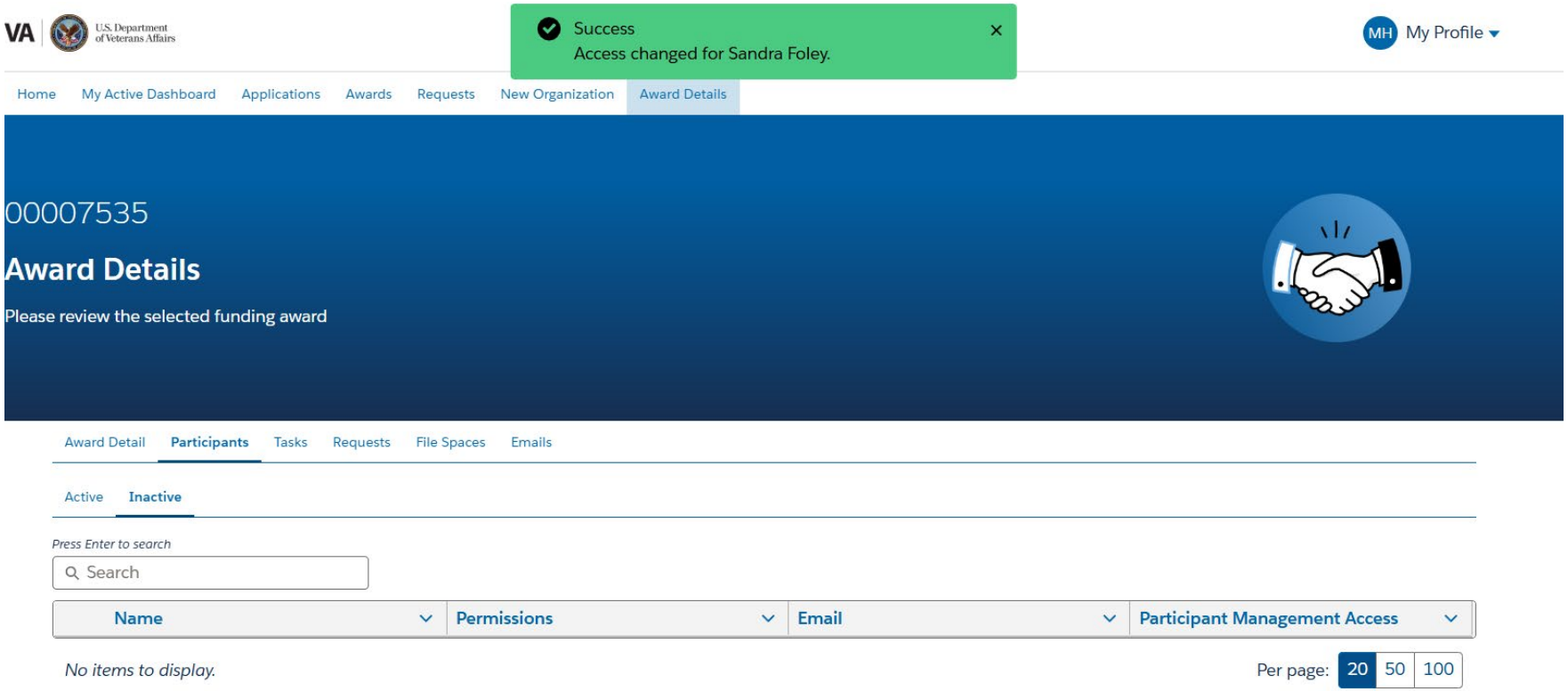
Enter the Pop-Up Information

Ensure to select a role category and click “apply.”
The permissions automatically default to what was previously listed for the contact.
The permissions can be adjusted if needed.



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Success Pop Up Appears For Confirmation



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The Contact is Now Visible Again in the Active Tab.

