This document provides instructions on how to manage your contacts in the Equity Technical Assistance and Grant Management Portal, "<u>Equity Portal</u>". This includes adding contacts, changing your primary contact, and removing contacts from your organization.

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Equity Portal User Guide How to Manage Contacts

As a Contact Manager, Add a New Contact for your Organization

Only the "Primary Contact" will be able to manage contacts for the award. The original Primary Contact will have been established within the Equity Portal by an Office of Health Equity team member. However, you can change the Primary Contact for your Award after your initial login, by adding a new contact and then following the directions below to designate the new contact as the primary contact. If you need to manager your contacts, but don't see the "My Contacts" button below, reach out to your Award Manager.

- 1. Log in to the portal
- 2. Select the Award Management dropdown
- 3. Select My Contacts



4. Click Add Contact

Home > Award Management > My Contacts

My Contacts

			_	Add Co	ntact
Full Name 🕇	Email	Job Title	Portal Registration Status 🕈	Primary Contact	
Primary number2	primnnum2@email.com		Approved	Yes	~
test view	view@email.com	teter	Approved	No	*
Yiorg Primary	primarycontactsYir@email.com		Approved	Yes	~
YiorgOrg Test	yorg2@email.com	tester12/5	Approved	No	~

5. Fill out the new contact information to complete the form

Step	1 of 2	
Create a	a New Contact	
First	Name	
Last N	Name *	
Email	1*	
Job T	ïtle	
Prima No	ary Contact	

- a. If you would like this contact to be a Primary Contact, select "Yes" under Primary Contact. Please note that you can designate more than one Primary Contact. All Primary Contacts will have the same permissions to change contact information in relation to your Award.
- b. Select Next
- 6. If applicable, Add Award Access:
 - a. Select Add Award Access

2 of 2			
d Access			
ease note that adding this cor	ntact to an Award will give them access to edit/view all art	facts for the award.	ard Access
ward	Award Number	Primary Contact	
There are no records to display			
vious Finish			

b. Select the Award the Contact should have access to, then select **Add Award Access**

quit	v Te	chnical Assistance	Home	Start an Inquiry	Award	Management 🗸	Resources	Q	
nd	Add	Award Access for this Contact						×	
ird						Search		۹	I
nt	~	Awardee Name	Award Num	ber	Pr	imary Contact			I
	✓	Averi's Apple Orchard - Tribal CHR COVID19	1		Av	veri Apple			I
f SS et		CDPH - Health Ambassadors for People Experiencing Homelessness			A	ameda Test			wa
	Se	lected Awards:							
en	A	Averi's Apple Orchard - Tribal CHR COVID19						•	
					2	Add Award A	ccess Can	cel	

c. Select Finish

ard Access			
Please note that adding this contact to an Award w	ill give them access to edit/view all artif	acts for the award.	Add Award Access
Award	Award Number	Primary Contact	
Averi's Apple Orchard - Tribal CHR COVID19	1	Averi Apple	

- 7. Verify in the Contacts grid:
 - a. The newly created contact is now visible
 - b. You will now see that the Portal Registration Status=Approved

Home > Award Management > My Contacts

My Contacts

				Add Contact
Full Name 🕇	Email	Job Title	Portal Registration Status 🕇	Primary Contact
Primary number2	primnnum2@email.com		Approved	Yes
Santa Claus	santa@claus.com	Santa	Approved	No
test view	view@email.com	teter	Approved	No
Yiorg Primary	primarycontactsYir@email.com		Approved	Yes 💌
YiorgOrg Test	yorg2@email.com	tester12/5	Approved	No

As a Contact Manager, Revoke Access to Awards for Contacts in your Organization

- 1. Log in to the portal
- 2. Select the Award Management dropdown
 - a. Select My Contacts



- 3. Select the dropdown next to the contact you want to revoke access from
- 4. Select Update Contact

Home > Award Managemen	t > My Contacts				
My Contacts					
				Add C	ontact
Full Name 🕇	Email	Job Title	Portal Registration Status 🕇	Primary Contact	
Primary number2	primnnum2@email.com		Approved	Yes	~
Santa Claus	santa@claus.com	Santa	Approved	No	
test view	view@email.com	teter	Approved	No	Update Contac
Yiorg Primary	primarycontactsYir@email.cor	n	Approved	Yes	•
YiorgOrg Test	yorg2@email.com	tester12/5	Approved	No	~

5. Scroll down to the Award Access section and select the dropdown next to the Award you would like to revoke access from

vour ombil ufskodsta96126@g	mail.com	
your.email+Takedataoo150@g	man.com	
Job Title		
Future Web Developer		
Portal Registration Status		
Approved		~
Primary Contact ○ No		Add Award Access
		Primary Contact
Award	Award Number	rinnary contact

a. Select Remove Award Access

Award Access		
		Add Award Access
Award	Award Number	Primary Contact
Averi's Apple Orc CHR COVID19	:hard - Tribal 1	Averi Apple

b. Select Remove

🖸 Edit		×
	Email *	
2	Remove Award Access	
	Job Please note, removing this contact from an Award will no longer grant them access to view and edit all artifacts associated to the award.	
	Port: Cancel	
	Primary Contact	

6. Select **Update Contact** button