This document provides instructions on how to manage your contacts in the Equity Technical Assistance and Grant Management Portal, "[Equity Portal](#)". This includes adding contacts, changing your primary contact, and removing contacts from your organization.

California Department of Public Health

Office of Health Equity

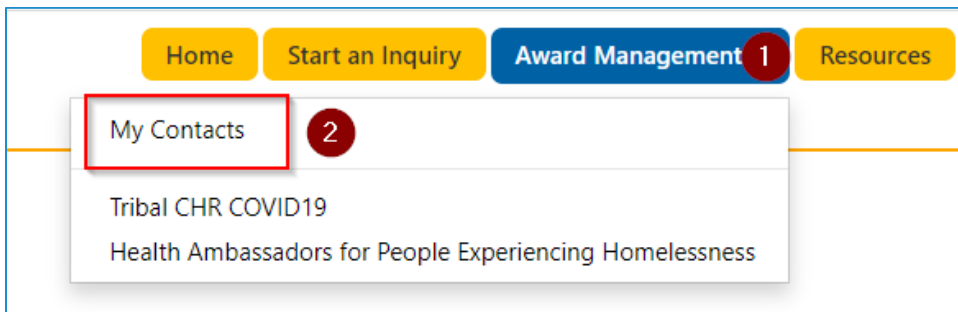Last Updated: April 5, 2023

Prepared By: Crowe LLC

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**

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

Home > Award Management > My Contacts > **Add Contact**

Add Contact

Step 1 **of** 2

1 Create a New Contact

First Name

Last Name *

Email *

Job Title

Primary Contact
◉ No ○ Yes

2 [Next]

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**

Step 2 **of** 2

Award Access

Please note that adding this contact to an Award will give them access to edit/view all artifacts for the award.

[Add Award Access]

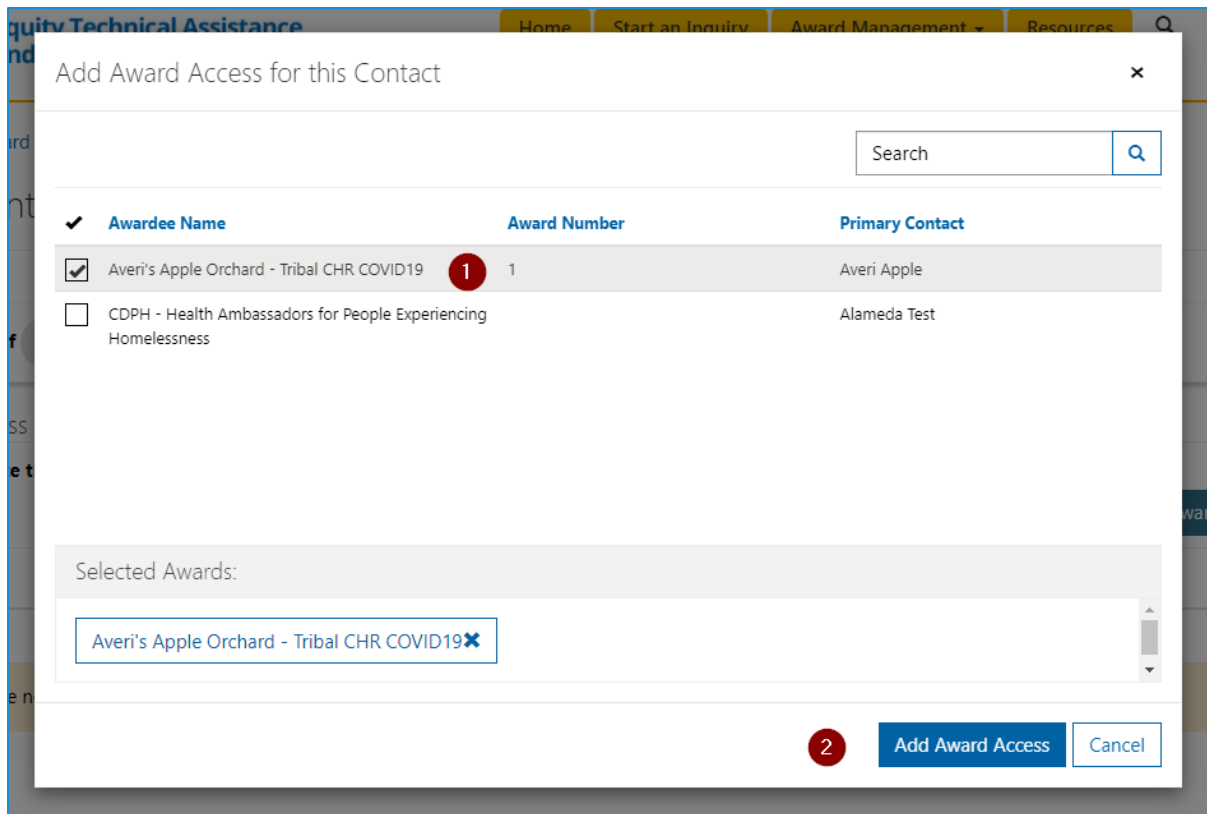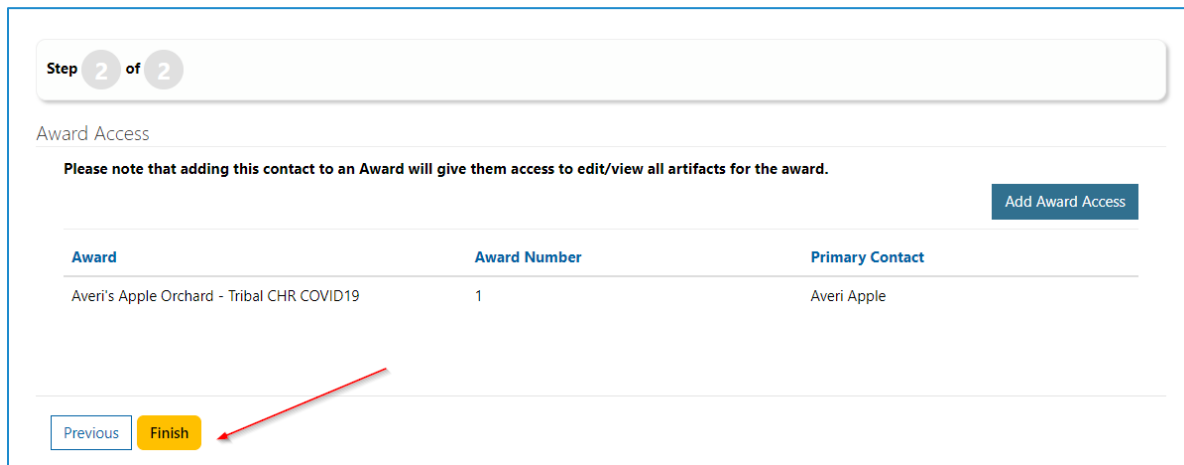| **Award**	**Award Number**	**Primary Contact**

There are no records to display.

[Previous] [Finish]

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

c. Select **Finish**

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**
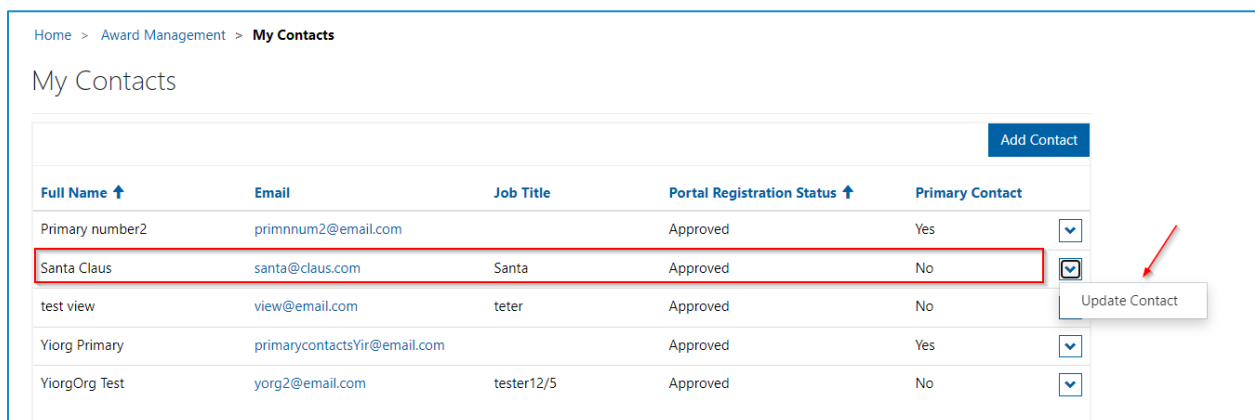
My Contacts

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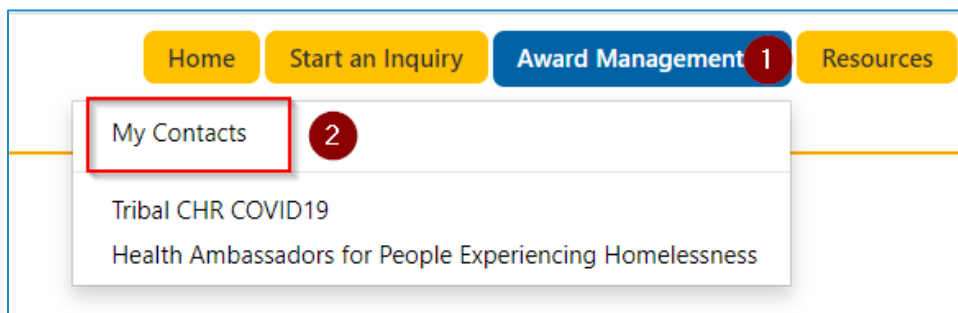
3. Select the dropdown next to the contact you want to revoke access from
4. Select **Update Contact**

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

a. Select **Remove Award Access**

b. Select **Remove**

6. Select **Update Contact** button