



Managing Users in Utah Grants

Key Point of Contact

Each organization assigns a single Key Point of Contact (POC). The Key POC:

- Is assigned the Approver role and functionality
- Is copied on organization-level communications, award letters, etc.
- Manages the organization's profile and users (user access administrator)
- Is the default internal approver on submissions to USBE (this task can be reassigned by the Creator to another individual with the role of Approver, if appropriate).

Where to Locate User Information

From the Utah Grants Home screen, select *Manage Organization Profile* (left pane). Users appear in the *Overview* subtab in the *Contacts* section.

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Adding New Users

The Key POC adds new users by clicking on the New button in the Contacts section of the Organization Profile.

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Utah gov		Full Name	Role	Email	Business Phone	Status	Is User	Is Key POC / Default Internal Approve	r A	ctions
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		Gary Thomas	Creator	gary thomas@ccsdut.org	(435) 792-7637	Active	~		-	1 👁
		Joel Alfred	Creator	joel allred@ccsdut org	(435) 792-7631	Active	~			1 👁

The Key POC enters the information for the user. Selects the appropriate Role (See *User Roles* below), selects USBE as the *Sponsoring Agency* and clicks Save. Click the *Back* button to return to the *Organization Overview*.

Create Contact		
Additional User Contact		Fields marked as * are required
Salutation (1)	*Role Creator	*Sponsoring Agency USBE
*First Name (1)	"Last Name (I)	Phone (1)
*Email 🚯		

New users will now appear in *Contacts* with a *Status* of New.

Click the purple paper airplane icon to send the user an invitation to register.

▲ Contacts ①							
Quick Search		Q					
Full Name	Role	Email	Business Phone	Status	Is User	Is Key POC / Default Internal Approver	Actions
Dale Hansen	Approver	utahapplicant@reisyst	(435) 792-7603	Active	~	×	A 👁
Gary Thomas	Creator	gary.thomas@ccsdut.org	(435) 792-7637	Active	~		A 👁
Joel Allred	Creator	joel.allred@ccsdut.org	(435) 792-7631	Active	~		A 👁
Michael Liechty	Approver	mike liechty@ccsdut.org	(435) 752-3925	Active	~		A 👁
Paula Hull	Creator	utahapplicant@reisyst	(435) 792-7617	Active	~		A 👁
Clement Robin	Creator	robin.clement@ccsdut	(435) 792-7615	Active	~		A 👁
Robyn Hedgecock	Creator	robyn.hedgecock@ccs	(435) 752-3925	Active	~		11 👁
Steven Norton	Approver	steve nortan@ccsdut.org	(435) 752-3925	Active	~		41 👁
Tim Smith	Creator	tim.smith@ccsdut.org	(435) 792-7627	Active	~		41 👁
Roger singhal	Creator	psinghal0@gmail.com	(508) 542-0611	New			40
John Test	Creator	rebecca nielsen@scho	(801) 538-7666	New			40

A Send Invitation form will open. Edit the email invitation (if necessary) and click Send. The new user will then receive an email with a link to complete their registration.

The user activation process is summarized below:



Utah Grants Username

The invitation email to Utah Grants will provide a prompt to access Utah Grants and establish a password. The username is included in the email message. Please note that the username may not be the same as the user's email address.



Removing or Changing User Access

To remove a user's access or to change a user's role, the Key POC should email the change request to UtahGrants@schools.utah.gov. Please include your organization's name, the user's name, and a description of the change request.

User Roles

Role	Utah Grants Activities	Typical Title
Creator	Read, create, and update: applications, payment requests,	Business Manager
	budget revisions and progress reports.	Management Company
		Program Manager
		Management Company/Consultant
Approver*	Same as Creator plus approve & submit grant	Vice President, CEO, CFO
	applications, payment requests, budget revisions and	Business Administrator
	progress reports.	Superintendent
		Director of Finance

*An Approver can create or initiate a task, but cannot approve their own task. A different user with an Approver role must approve the transactions. See *Subrecipient User Roles* for more information.

New User Access to Applications

When an application announcement is published in Utah Grants, a task is sent to each **active** user in the organization. New **users activated after an announcement is published will not have access to that task**. If it is necessary for the new user to own the task of completing the application, please email utahgrants@schools.utah.gov with the organization's name, user's name, and the name of the application to be assigned.

Need Help?

Contact the Utah Grants team

Email: UtahGrants@schools.utah.gov Phone 801-538-7604