

## Confirm GMIS Portal Access for those Already Listed as an Agency Contact OR Change User Role

*This is intended for: 1-2 Primary Users Brought Over in Data Migration*

Not sure which 1-2 Primary Users were brought over for your Agency? There is a Legacy GMIS Bulletin Board post will shared the details on the Primary User(s) by Agency.

Once you are logged into GMIS Portal, navigate to your *My Agency Profile*:

Department of Health

Home Browse Grants My Applications My Awards **My Agency Profile** Reports

Account Ohio QA Test 7 [Edit](#)

Agency Key 0506001 Agency Type County Agency Office Phone Number (234) 234-2345 ICQ Risk Level Low

**Agency Details** **Agency Contacts** Pending Agency Forms Files Agency Forms Invoices

Account Name Ohio QA Test 7 Agency Type County Agency

Employer Identification Number (EIN) DDD123456 Unique Entity ID (UEI) DDD123456789

Congressional District 12 ICQ Risk Level Low

Agency Fiscal Year End Date 08/31 Audit Cycle Annual

Cash/Accrual Cash

▼ Contact Information

Office Phone Number (234) 234-2345 Alternate Telephone Number

1. Select 'My Agency Profile' in the top banner.
2. Select 'Agency Contacts'

Account Brown County Health Department [Edit](#)

Agency Key 0081001 Agency Type County Agency Office Phone Number (716) 908-4378 ICQ Risk Level Medium

Agency Details **Agency Contacts** Pending Agency Forms Files Agency Forms Invoices

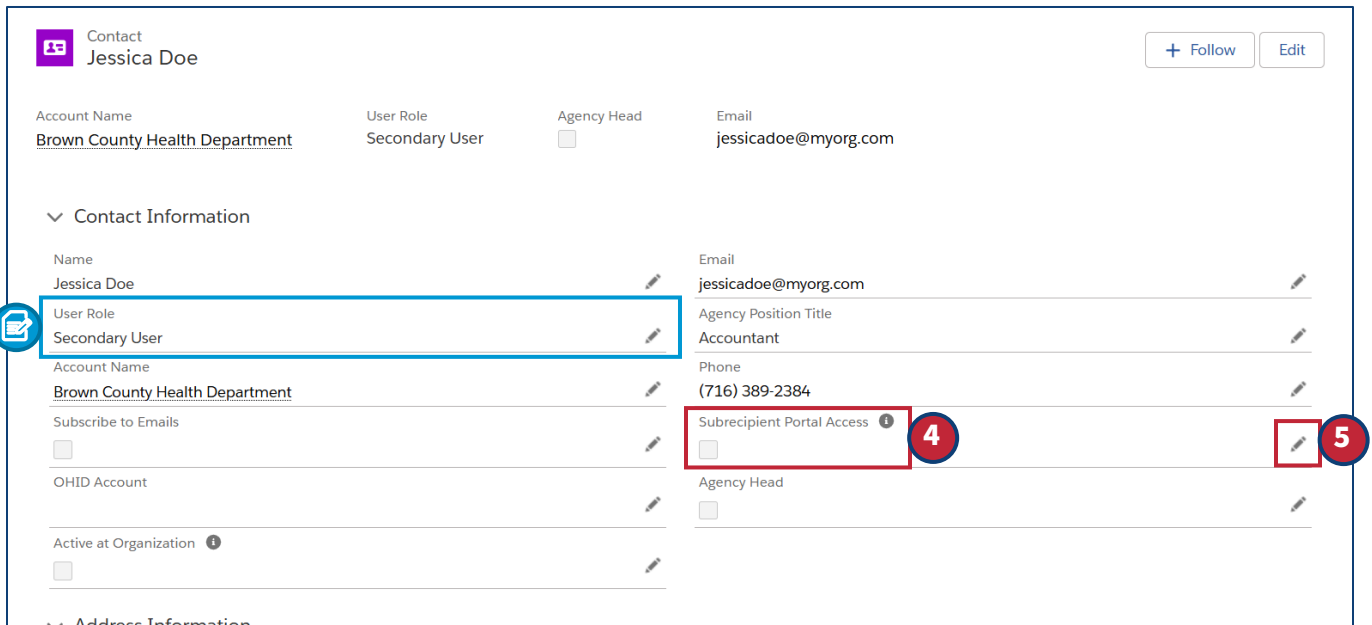
**Contacts (6)** [New](#)

Contact Name	User Role	Agency Head	Agency Position Title
Rita Brown	Secondary User	<input type="checkbox"/>	Fiscal Officer
<b>Jessica Doe</b>	Secondary User	<input type="checkbox"/>	Accountant
shakia test	Secondary User	<input type="checkbox"/>	Accountant
Primary User Training	Primary User	<input type="checkbox"/>	Chief Financial Officer
Seconday User Training	Secondary User	<input type="checkbox"/>	Bookkeeper
Krista Wasowski	Primary User	<input checked="" type="checkbox"/>	Health Commissioner

[View All](#)

3. Open the *Contact Name*.

## Confirm GMIS Portal Access for those Already Listed as an Agency Contact Or Change User Role (continued)



Contact  
Jessica Doe

+ Follow Edit

Account Name: Brown County Health Department User Role: Secondary User Agency Head: ☐ Email: jessicadoe@myorg.com

▼ Contact Information

Name: Jessica Doe Email: jessicadoe@myorg.com

User Role: Secondary User Agency Position Title: Accountant

Account Name: Brown County Health Department Phone: (716) 389-2384

Subscribe to Emails: ☐ Subrecipient Portal Access: ☐ 4 5

OHID Account: Agency Head: ☐

Active at Organization: ☐

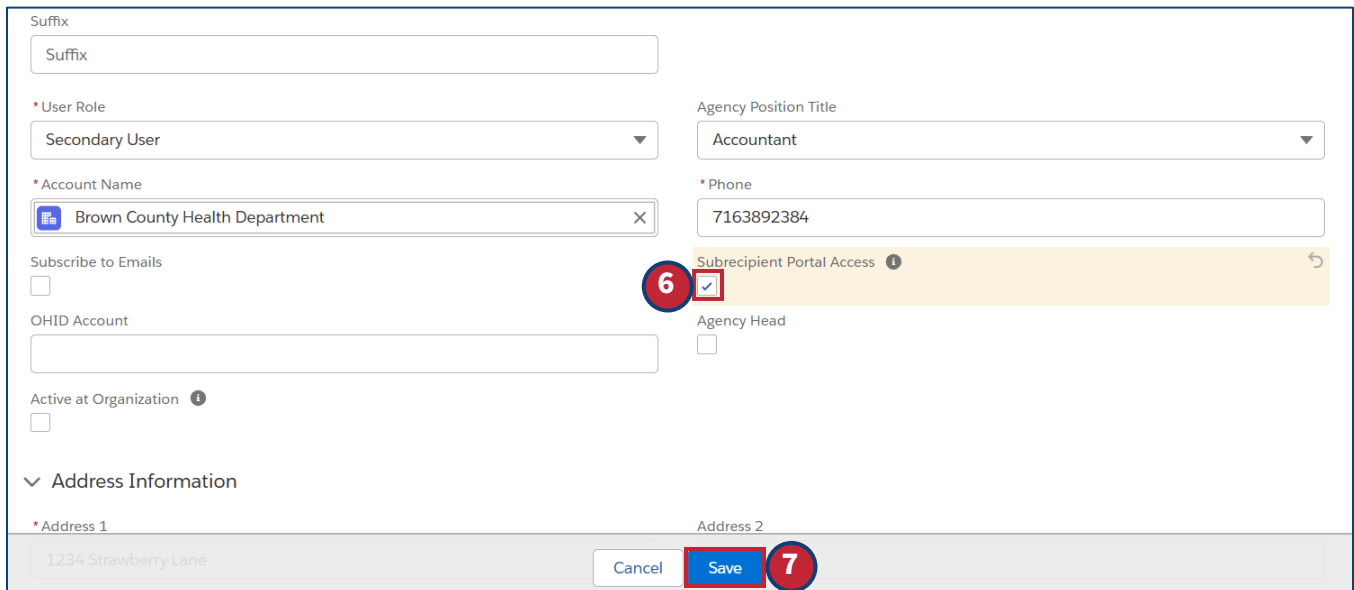
▼ Address Information

4. Confirm 'Subrecipient Portal Access' is checked.
5. If it is unchecked, and they need GMIS Portal access, select the *pencil*.



### Need to change a Contact to a Primary User or Secondary User?

Select the *pencil* next to 'User Role'! You can then edit a contact's role.



Suffix: Suffix

\* User Role: Secondary User Agency Position Title: Accountant

\* Account Name: Brown County Health Department \* Phone: 7163892384

Subscribe to Emails: ☐ Subrecipient Portal Access: ☒ 6

OHID Account: Agency Head: ☐

Active at Organization: ☐

▼ Address Information

\* Address 1: 1234 Strawberry Lane Address 2: Cancel Save 7

6. Check the box under 'Subrecipient Portal Access'
7. Select 'Save'.

The user will then be sent an email with instructions on how to log into the GMIS Portal. Repeat **steps 3-7** for each contact already listed.

This is the conclusion of this job aid.