

California Arts Council

Organizational and Contact Change Requests



Please submit change requests in a timely manner prior to the grant application deadline. Grant deadlines will not be extended due to pending change requests. CAC staff assistance cannot be guaranteed the week of application due dates.

Please note that only the Primary Contact can edit a profile or submit change requests.

Instructions for change requests are included below. For a video tutorial of this process, please visit this link:

[Organization Certification, Contact and Address Changes Tutorial Video](#)

How to Update the Primary Contact	<p>To update an organization's Primary Contact, the person who will become the new Primary Contact must already be listed as an organizational contact in the grants management system.</p> <p>An organizational contact is a contact within the grants management system that can view almost all the content within the system but cannot recertify the organization or submit change requests. To register a new contact in the system:</p>
<p>Step 1.</p> <p>Registering the New Contact Within the Grants Management System</p>	<ol style="list-style-type: none">1. The <i>new Primary Contact</i> must add themselves as a contact through the Register Here button on the main login page.2. Search for the organization via the IRS Look Up Tool.3. Once the organization appears, the <i>new Primary Contact</i> will add themselves as a contact by following the onscreen options.<ol style="list-style-type: none">a. Please note: The <i>new Primary Contact</i> and the <i>current Primary Contact</i> cannot share the same email address. Email addresses must be unique in the system. The CAC does not delete old contacts for record purposes.4. The <i>new Primary Contact</i> will receive an email from the system with password instructions within 10 mins. The password email is time-sensitive. In the event the new password expires:<ol style="list-style-type: none">a. Go to the grants management system page, enter the email address associated with the new Primary Contact's account.b. Click Forgot Password.c. Check email for new password reset.

<p>Step 2:</p> <p>Primary Contact Listed in the Grants Management System Must Submit a Change Request</p>	<p>Once the <i>new Primary Contact</i> is registered in the grants management system as an organizational contact:</p> <ol style="list-style-type: none"> 1. The <i>former Primary Contact</i> must log into the grants management system. 2. Click on the Organizational Profile button in the top left corner of the screen. 3. Click on the Edit button in the top left corner of the screen. <ol style="list-style-type: none"> a. Do not click the “Submit a change request” button at the bottom of the page. 4. There will be a horizontal menu on the organizational profile. Scroll on the menu to the Change Request tab. 5. Click Change Request tab on the horizontal menu. <ol style="list-style-type: none"> a. Once in the Change Request tab, complete all the relevant information for the <i>previous</i> and <i>new Primary Contact</i>. b. Please note: CAC Staff cannot transfer the Primary Contact role or grants to a new Primary Contact until they are in the system as a registered contact. This step must be completed by the organization’s staff to avoid delays in processing. Review Step 1 for more details. 6. After entering all necessary information, click Submit Change Request. <p>Special circumstances:</p> <ol style="list-style-type: none"> 1. If the current Primary Contact’s login credentials and the Change Request tab feature are unavailable, register yourself as a contact per Step 1. Once registered, email program staff to request a Primary Contact change, specifying the lack of access to the <i>current Primary Contact’s</i> account. 2. IMPORTANT: This is a rare and special circumstance that takes longer to process given that the request is initiated outside the grants management system. CAC staff will respond to this special request with further instructions and questions.
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**How to Update an
Organizational Name
or Organizational Type**

1. The *Primary Contact* must log into the grants management system.
2. Click on the **Organizational Profile** button in the top left corner of the screen.
3. Click on the **Edit** button in the top left corner of the screen.
 - a. **IMPORTANT:** Do not click the “Submit a change request” button at the bottom of the page without completing the information on the **Change Request** tab.
4. There will be a horizontal menu on the organizational profile, scroll on the menu to the **Change Request** tab. Click on the **Change Request** tab on the horizontal menu. Once in the tab:
 - a. Complete the information for the name of the individual requesting the change.
5. Select the option for an Organization Profile Change.
 - a. Complete all required fields on the **Change Request** tab for the organization change you are requesting (name or type).
 - b. **Supporting documentation is critical.** Include any documentation from the IRS and California Secretary of State that demonstrates the change.
 - c. Ensure all your information is complete and be detailed in the open text fields. Missing information will cause delays.
6. After all necessary information is entered, click **Submit Change Request**.
7. CAC staff will contact the *Primary Contact* in the event further information is needed. Please note that changes in an organization's legal name or in the organization's type require additional staff review and assessment.