Job Aid- Grantee- How to Change Account Owners

Job Aid	How to Change Account Owners and/or Update Passwords
Grant Programs	All
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Revision Date	NA
Description	This job aid provides instructions on how to change Account Owners for your ZoomGrants Account.

Contents

I. Overview

In ZoomGrants each account has a singular *Account Owner* that is responsible for managing the grants contained within that account. The *Account Owner* can give access to specific grants on a project/grant by project/grant basis as a *Collaborator*; however, the *Collaborators* do not have the same access as the singular *Account Owner*.

There are several reasons why you might want to change the *Account Owner*:

- During initial setup the wrong person was made the Account Owner,
- Roles have changed within your Agency, and/or
- There has been staff turnover.

Note: The login credentials are associated with an individual's email address, and because of this, credentials cannot be passed from one individual to another when there are staff changes. Simply

assuming the Login Username and changing the Password will work in a pinch, but the notifications will still be linked to the *Account Owner*. Unless you have access to your predecessor's email account, then critical communications will be missed. Therefore, it is essential that the *Account Owner* information say current.

The steps for changing the login credentials – the email address and password that you use to log into your account – differ depending on:

- If you have the current Account Owner's credentials (see II below);
- If you don't have the current Account Owner's password, but have access to his/her email (see III below);
- If you don't have the current Account Owner's password and do not have access to his/her email (see IV below); and
- If you are trying to transfer the Account Owner to someone who already has a ZoomGrants account under his/her email address (see V below).

II. Have Access to ZoomGrants Account

Use these steps if you still have access to the account using the existing *Account Owner's* Information.
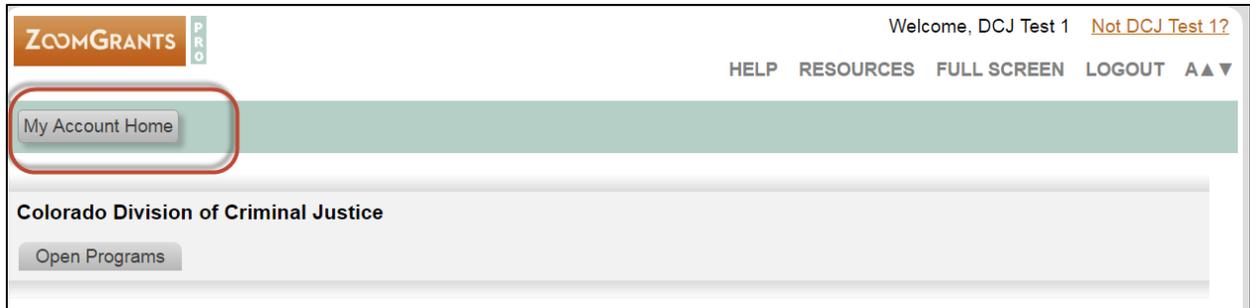
A. Log into ZoomGrants

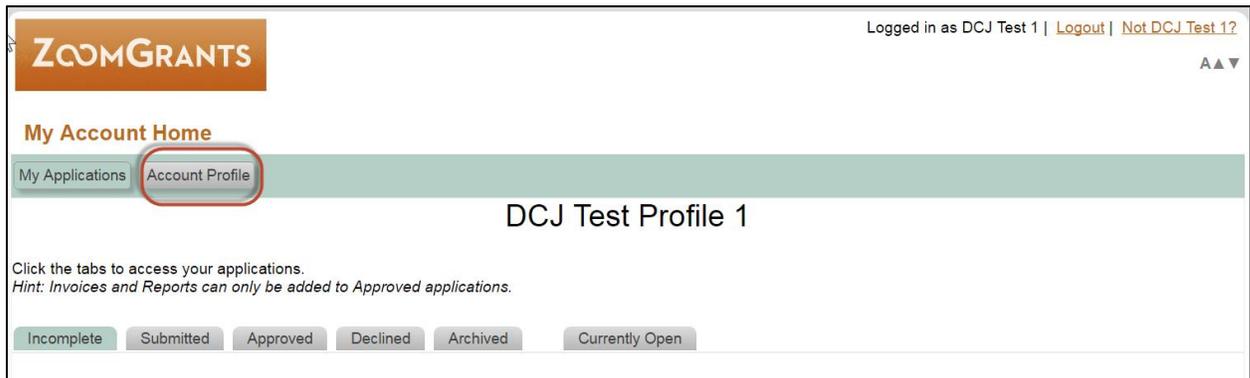*Account Owner* Login: https://zoomgrants.com/gprop.asp?donorid=2225

B. My Account Profile

Individual credentials for the user associated with the account.

1) Click on **My Account Home**

2) Click on the **Account Profile** button

3) Update the **My Account Profile** tab
   - Input the new *Account Owners* personal information.
   - If you have a change in Project Director you will need to complete a [Change in Project Officials (DCJ Form 4-B)](#) and upload the completed form on the *Documents* tab. Continue updating the *Account Owner* here, but a change form will be required to change the project official contact information on each respective grant.

4) Do NOT update **My Organization** tab without first speaking to your Grant Manager

5) Click on **Change UserID/Password**

6) Change the Email UserID (This changes the *Account Owner*):
   - Input a new email address in the **Email UserID** field, input the current password to confirm, then click the **Change UserID/Password** button.
   - Once you complete this task, you must logout and then log back in using the same credentials. If you do not, you will be able to see any of the records associated with this account.
   - NOTE: The email address cannot already be associated with a different ZoomGrants account. If the email address is already in use, see the instructions below to request that the account be transferred to another user.
   - NOTE: The email address should be associated with the individual listed in **My Account Profile. The email address is the UserID. If you change it, you will change your access to the account.**

III. No Longer Have Access to the ZoomGrants Account and DO Have Access to the Email Inbox

Click on the 'Forgot Password' link to request that a password reminder be sent to the email address associated with the account. (The message will come from Notices@ZoomGrants.com. If you don't receive it within a reasonable amount of time, you may want to check your spam or junk folder.) After you receive the reminder, follow the steps above to change the email address and/or password.

IV. No Longer Have Access to ZoomGrants Account and DO NOT Have Access to the Email Inbox

ZoomGrants can change the email address on the account for you and send a new password to the new user. This will effectively **transfer the account** to a new user. In order to do that, email ZoomGrants a request that verifies that the account should be transferred to a new person. That request must come from one of the following individuals:

- The original account owner
- The Executive Director of the organization
- A Program Admin with the funding organization

That request should include:

- The email address of the original user (the 'UserID').
- The new email address that should be tied to the account.
- An acknowledgment that the original email address should no longer be used to access the account and that the new email address should be the one that is used instead.

Please have the appropriate person (one of the individuals listed above) send the request via email to questions@zoomgrants.com. Once ZoomGrants receives the request, ZoomGrants will change the account over to the new email address, then send a new password via a password reminder sent the **new email address**. After logging in use the steps listed below to change the password as necessary (see VI below).

V. New Account Owner Already Has a ZoomGrants Account

ZoomGrants can verify that they have the correct account type then transfer the applications into that new person's account. In order to do that, ZoomGrants will need to receive an electronic request that verifies that the applications should be transferred to a new account. That request must come from one of the following persons:

- The original application owner
- The Executive Director of the organization
- A Program Adin with the funding organization

That request should include:

- The email address of the original user (the 'UserID').
- The new email address that should be tied to the account.
- An acknowledgment that the applications can be moved to the new person's account.

Please have the appropriate person (one of the individuals listed above) send that request via email to questions@ZoomGrants.com. Once ZoomGrants receive the request, ZoomGrants will move ALL
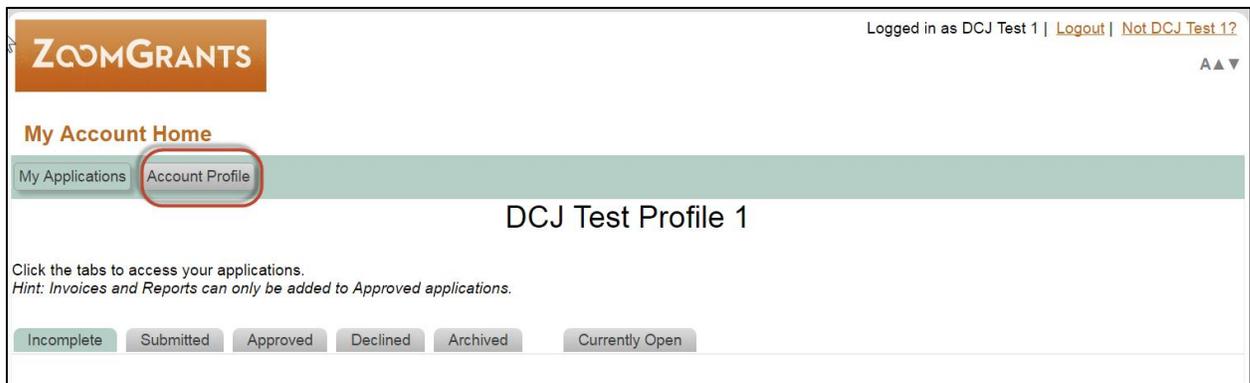
PROJECTS from the current account to the new account. The new *Account Owner* will own all the projects.
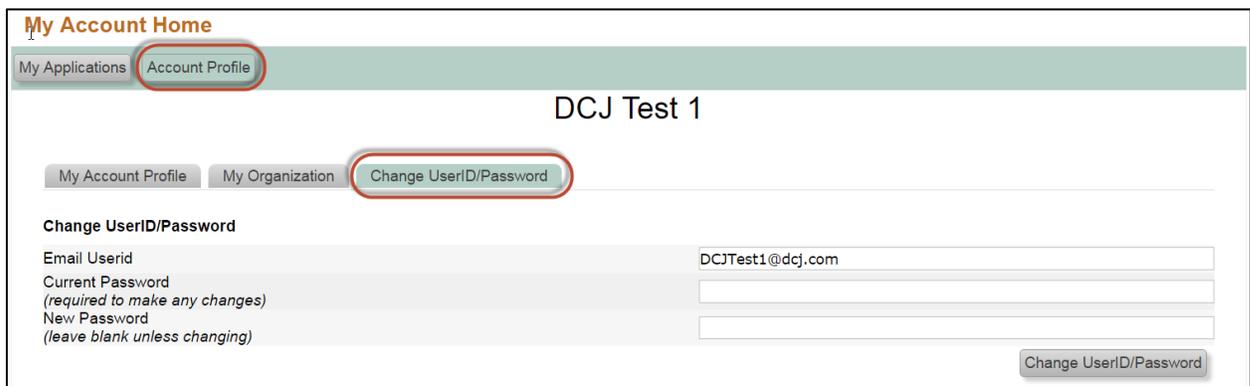
VI. Change your password

1) Click on **My Account Home**
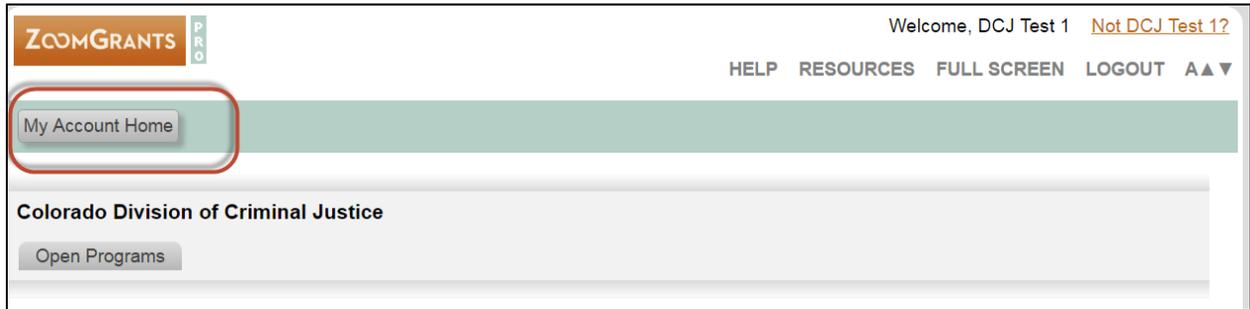
2) Click on the **Account Profile** button

3) Click on **Change UserID/Password**

- Enter the current password, then put in the new password that you'd like to use, and click the **Change UserID/Password** button to make the change.
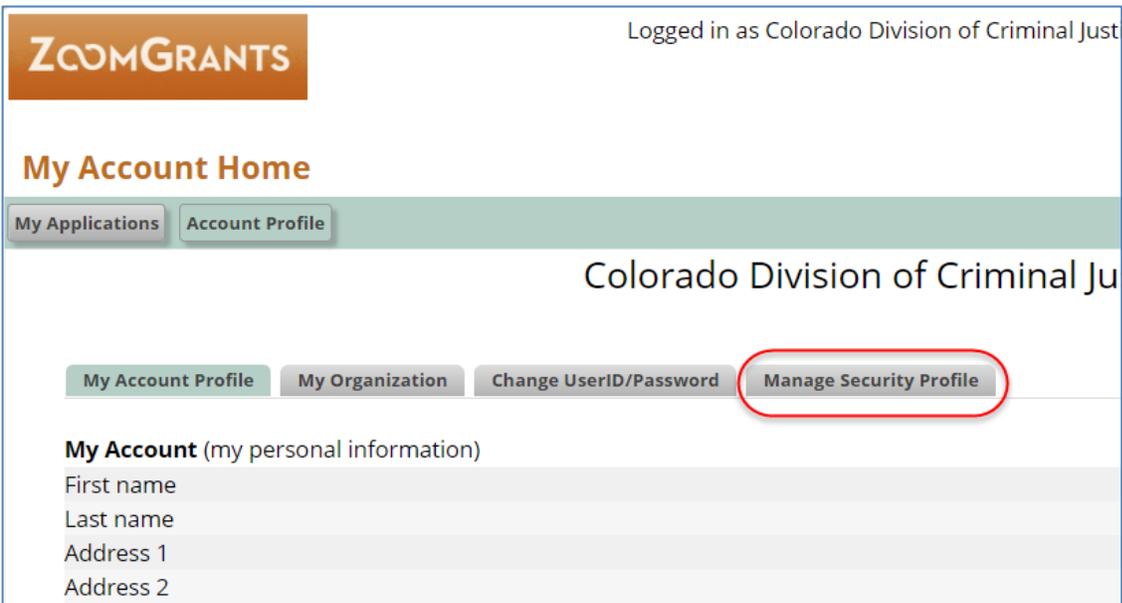
Log out of the account, then try logging in with the new credentials. Keep in mind that your browser may still remember the old email address or password, so you may need to type in the credentials manually and update the saved login information.

The security profile should be updated in the event that the new *Account Owner* needs to retrieve their password.

VII. Manage Security Profile

ZoomGrants requires all users to maintain a Security Profile to aid in the retrieval of passwords. This profile consists of three security question/answer pairs. If you forget your password, answering those three questions correctly will allow you to reset your password. When changing *Account Owners* it is important to update the **Security Profile**.

1. Click on **Manage Security Profile** tab

2. Review/Update **Manage Security Profile** as appropriate

Update your questions and answers, then click the Save button.