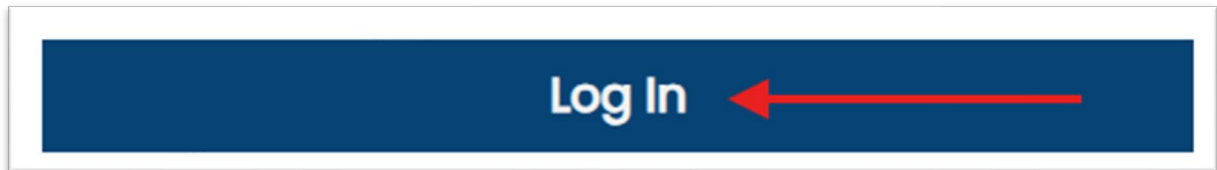


How to Add and Edit Roles on Existing User's Main Profile

Note: Roles assigned on the main user profile automatically carry over to all new applications. For example, assigning a user as a Project Director will designate that person as the Project Director for every new application, regardless of program (Highway Safety, SRO, Justice, etc.). **If the agency uses different Project Directors for different programs, assign the role within each specific application instead.** For instructions, see the guide titled **How to Add a New User or Edit Roles to an Existing Application.**

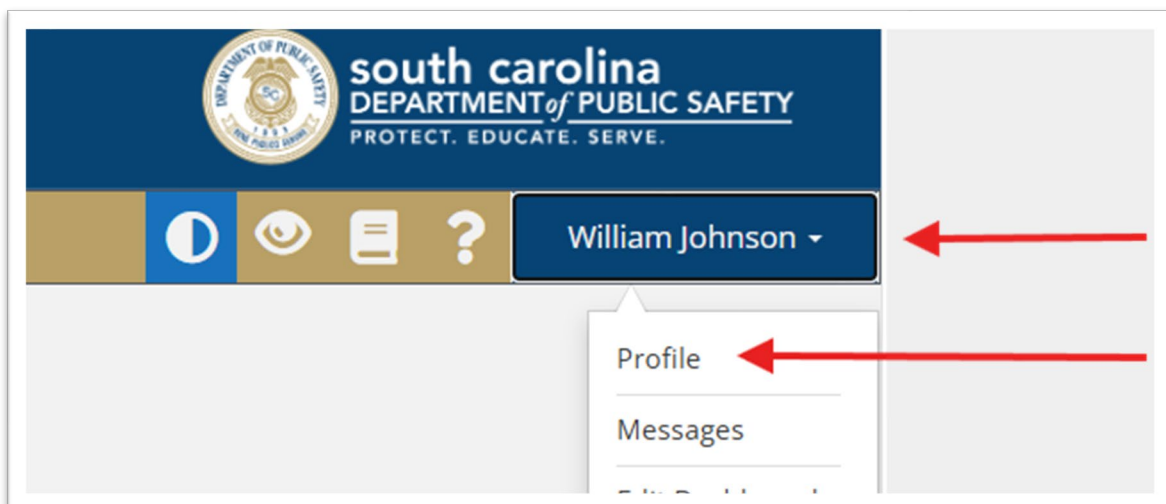
Step 1:

As the Agency Administrator, log into IntelliGrants at <https://scdps.intelligrants.com/>



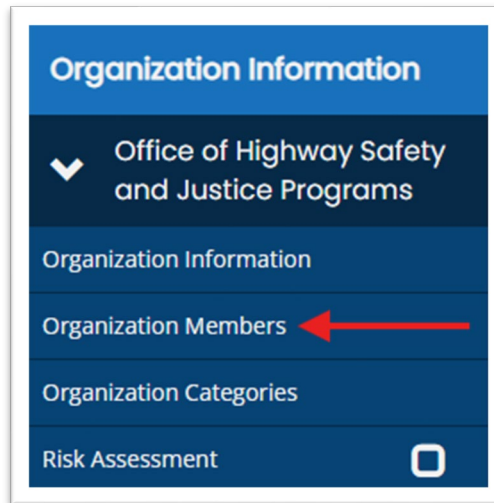
Step 2:

Click on the Username and then click on Profile.



Step 3:

Navigate to the Organization Information panel on the left-hand side. Click on Organization Members.



Step 4:

Under Members, find the user that you want to add or edit roles for. Click on the Pencil icon on the far right of the user's row.

▼ Members					
Person Name	Role Name	Active Date	Inactive Date	Last Modified By	Last Modified By Date
Adamson, Adam	Agency Project Director Agency Administrator	07/06/26 07/06/26		Tucker, Michael Test, AA	07/28/26 07/06/26
					

Step 5:

An Edit Person window will appear. To change a user's role, make the current role inactive by selecting an inactive date. Click the + button. Select the appropriate role for the new user in the dropdown menu (see chart provided on the last page for user role permissions). Do not select an inactive date for the new role. Click Save.

The screenshot shows the 'Edit Person' window for Adamson, Adam. The 'Role' dropdown is currently set to 'Agency Administrator'. Below it, a table shows the 'Active Date' and 'Inactive Date' for the current role. The 'Active Date' is 07/30/2026 and the 'Inactive Date' is 07/31/2026, both with a green checkmark. A red arrow points from the 'Inactive Date' field to a '+' button. Below the table, the 'Agency Project Director' role is selected in the dropdown, with a green checkmark next to it. The 'Active Date' is 07/31/2026 and the 'Inactive Date' is MM/DD/YYYY, both with a red X. A red arrow points from the '+' button to the 'Save' button, which is highlighted with a green box.

Role	Active Date	Inactive Date
Agency Administrator	07/30/2026	07/31/2026
Agency Project Director	07/31/2026	MM/DD/YYYY

Alternatively, to add another role to the existing user without ending the current role, do not select an inactive date. Click the + button. Select the appropriate role for the new user in the dropdown menu (see chart provided on the last page for user role permissions). Click Save.

The screenshot shows the 'Edit Person' window for Adamson, Adam. The 'Role' dropdown is currently set to 'Agency Administrator'. Below it, a table shows the 'Active Date' and 'Inactive Date' for the current role. The 'Active Date' is 07/31/2026 and the 'Inactive Date' is MM/DD/YYYY, both with a red X. A red arrow points from the 'Inactive Date' field to a '+' button. Below the table, the 'Agency Project Director' role is selected in the dropdown, with a green checkmark next to it. The 'Active Date' is 07/31/2026 and the 'Inactive Date' is MM/DD/YYYY, both with a red X. A red arrow points from the '+' button to the 'Save' button, which is highlighted with a green box.

Role	Active Date	Inactive Date
Agency Administrator	07/31/2026	MM/DD/YYYY
Agency Project Director	07/31/2026	MM/DD/YYYY

IntelliGrants Agency User Role Permissions				
Permission / Action	Agency View Only	Agency Contributor	Agency Certifying Official / Agency Administrator	Agency Project Director
View Agency Documents	✓	✓	✓	✓
Add to Document Before Submission		✓	✓	✓
Add / Edit User			✓	
Submit Application			✓	✓
Submit Revision Request			✓	✓
Submit Revision			✓	✓
Submit Extension Request			✓	✓
Submit Request to Purchase				✓
Submit Request for Payment				✓
Submit Training Request Form				✓
Update Personnel Assignment				✓

Note: The system assigns User Roles to applications upon their creation of the application based on roles assigned at the time in each User's Main Profile. If a New User is added to the Organization or an Existing User's Main Profile role(s) are changed after an application is created, the New User or Roles must be added to an existing application that needs them assigned. For instructions, see the guide titled [How to Add a New User or Edit Roles to an Existing Application](#).