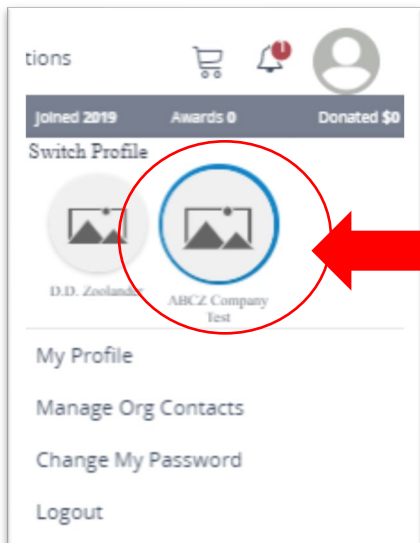


## How to Update Your Organization's Information

This training identifies how to manage your organization's contact information (address, phone, email) and staff contacts.

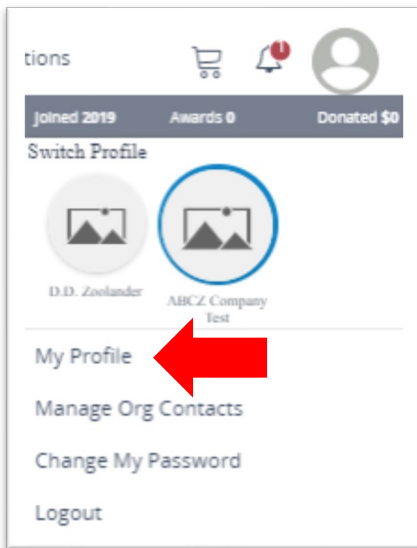
*Only individuals designated to the role Primary Executive Admin may update contact information and staff listings for their organization. Contact IHCA at 800-422-3106 for assistance with identifying and assigning your organization's Primary Executive Admin.*

1. Access the Member Portal link from the IHCA website.
  - Select the **Member Portal logo** at the bottom left of the home page.
  - Select the **Access IHCA Member Portal** button.
2. Select the **Profile (person) icon** in the upper right of the window, and login to the portal. Then click on your **organization's profile icon**. This will provide you with options for:
  - My Profile – Change your organization's phone number, address or email, check your organization's membership status and view/pay invoices.
  - Manage Org Contacts – Update staff contact lists.
  - Change My Password – Change the password to the portal for the organization.
  - Logout

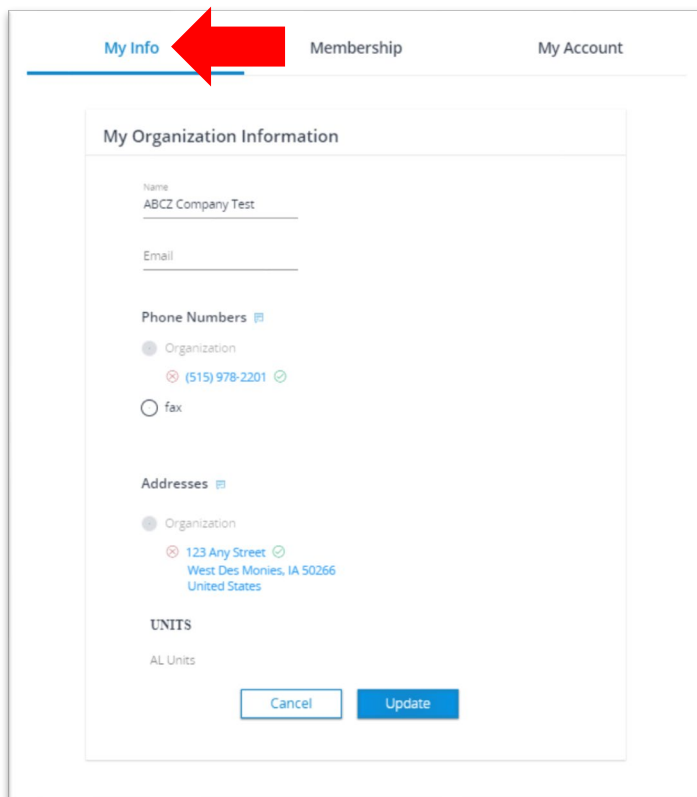


## How to Update Your Organization's Contact Information (Address, Phone, Email)

1. Under the Profile icon, select **My Profile** from the drop-down menu.

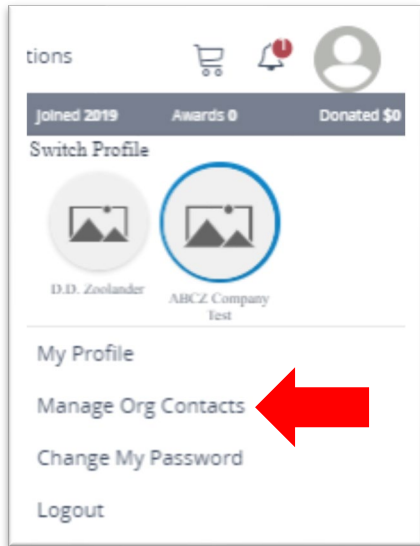


2. Make sure you are on the My Info tab.
  - a. You can edit your Organization Name and Email by clicking in those fields.
  - b. To edit phone numbers and addresses, click on the red X to remove an existing phone number or address, and then select the circle next to the phone or address field to enter a new phone number or address.
  - c. If the Units type listed for your organization is incorrect, contact IHCA at 800-422-3106.



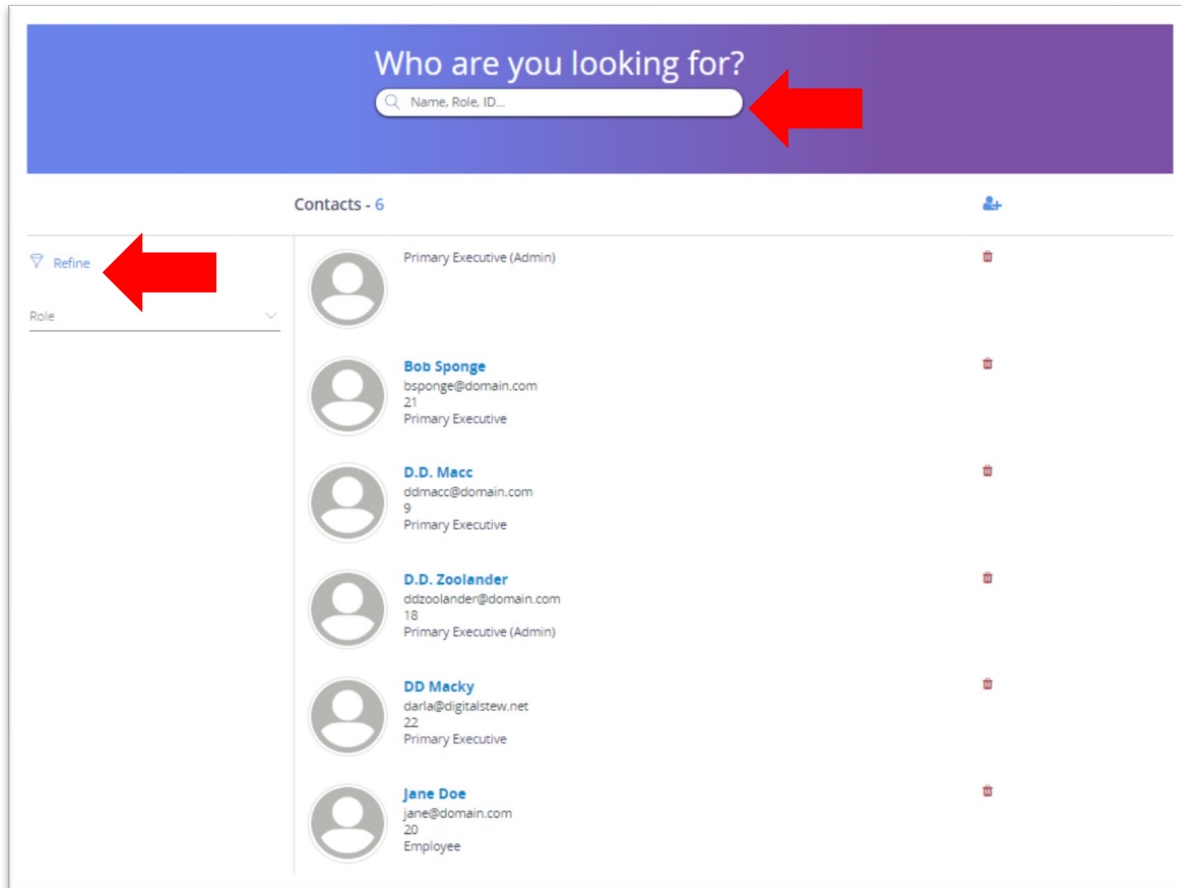
## How to Change Your Organization's Staff Contacts

1. Under the Profile icon, select **Manage Org Contacts** from the drop-down menu.



To Search for an Individual, there are two options:

- Use the “Who are you looking for?” search bar at the top to search by name or role.
- Use the Refine filter to the left to filter the list by role.

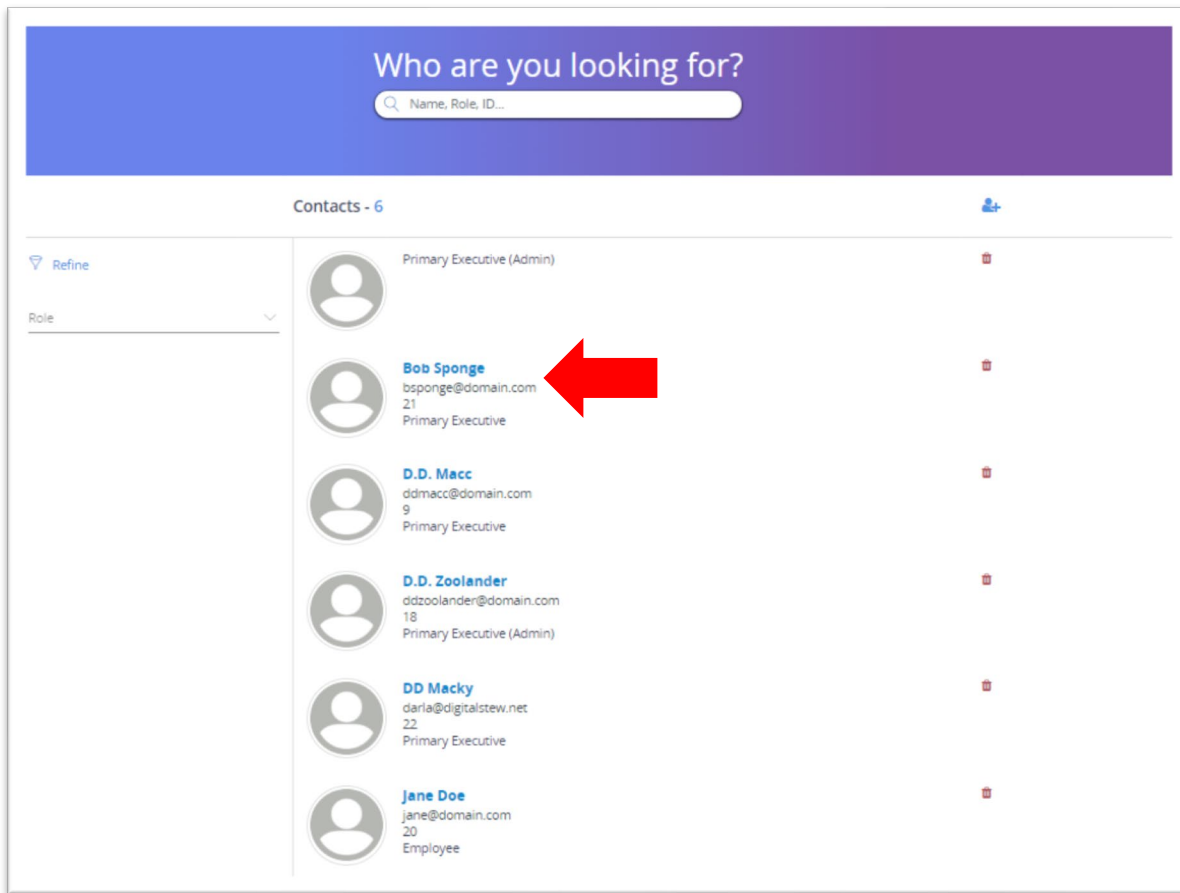


## To Add a New Contact

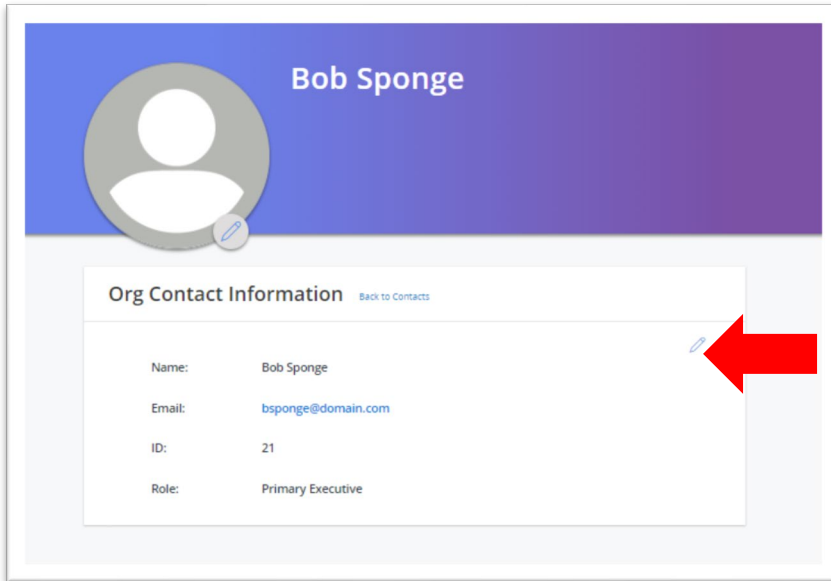
1. **Before adding a new contact, contact IHCA at 800-422-3106 to confirm the individual record doesn't already exist under another organization.** If they do not, select the People Plus icon in the upper right. Complete the fields in the drop-down box that appears (First Name, Last Name, Email and Role) and select the Update button.

## To Edit an Existing Contact (Change email information, etc.)

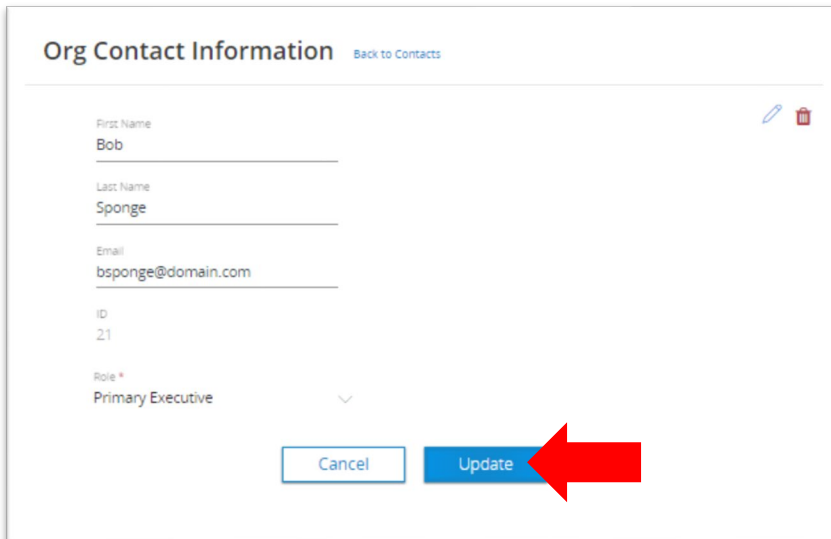
1. Click on the contact's name.



2. Click the Pencil icon in the upper right, and update any of the fields listed.
  - *Organizational Role options include:*
    - Employee = Any staff member other than an administrator
    - Home Office = Any home (corporate) office staff member
    - Primary Executive = The administrator of the organization
    - Primary Executive (Admin) = The person designated to have access to view and update organizational information in the IHCA Member Portal. *Must be approved by IHCA before access is granted to organizational information.*
  - To add or update an employee photo, click on the Pencil Icon next to the person icon.



3. Select the Update button to save changes.



## To Remove an Existing Contact

1. To remove a contact, click on the Red Trash icon next to the individual's listing.

