



Instructions to Update SACRAO Institutional and Individual Profiles

Below you will see instructions on how to make common changes on the institutional account. Each member can change/update their individual profile, but only the Primary Contact has access to make changes to the institutional profile. If the Primary Contact is asking someone else to update their institution's membership information or pay the membership fees, the Primary Contact would need to provide them with their ID and password, or to change that member to be the Primary Contact. There is very little sensitive information on the institutional profile page, so I am not too concerned with the sharing of passwords. Just remind them not to reassign the Primary Contact to another person. ☺

Login to the SACRAO website (www.SACRAO.org) with the ID (email address) and password of the individual profile (let me know if I need me to reset someone's password).

At the top right corner, click on the member's name to open a window and select the desired area, and note that after changes are made, you must scroll down and 'Save Changes':

- My Profile – to update that member's profile information. The Primary Contact can update all member's profiles.
- Notifications – to see announcement or individual communication to the member,
- Change Email – to, you guessed it, change their email which is also the account ID,
- Change Password – guess!
- **My Institution/Organization** – to view the institution/organization profile. The Primary Contact can also update the institution/organization profile.
- Logout – you are so perceptive!

These instructions will only work for the Primary Contact on the Institution/Organization profile:

- **Paying Membership Fees/Generate an Invoice:** At the top right, click on the Shopping Cart image 'Balance Due.' You can 'Pay Online via PayPal' on the right, with a PayPal account or a credit card (you don't have to have a PayPal account). Credit card payments are processed by a third-party vendor, so I am unable to assist with credit card payments. If you experience any problem with a visa card or P-Card, I can only recommend trying a different card. Worst case, under 'Transactions,' go to the last line with the most recent date and click 'Invoice' to view the current invoice that you can print to request a check to be mailed to the address noted (though I encourage making an electronic payment).
- **Reset Password:** If a member has forgotten their password, the Primary Contact can reset the password for other members.

- **Remove and Add Members:** Scroll down to see the Members, and on the right you can REMOVE a member, as well as ADD MEMBER. Always remove old members first, before you start adding members. You need at least an email address and name to add a member, and an email will automatically be sent to the new member with instructions to set up a password and update their individual profile page. You can click on the members name to view and update their profile yourself, or you can request that each member update their individual profile. Click on the Affiliation – college name to return to the Institutional Profile and the list of members.
- **Increasing and Decreasing Number of Members:** After you remove and add members, if you end up adding more members than you started with, the Primary Contact should automatically receive an invoice by email with the additional member fee. If you end up with less members than you started with, email me as I will need to reduce your total membership number at the beginning of the year.

Let me know if I can assist in any other way.

SACRAO Vice President for States/Regionals and Membership www.sacrao.org

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