How to add, remove or amend a contact on a membership

This is a guide to adding, removing or amending a contact on your membership in the member portal.

Member administration contacts can add, remove or change contact roles for their membership

To set up a portal account, you can create a portal login on the AFCA website

Once you create a portal login, you can log in to the memeber portal and add, remove or change contacts based on their role type

Creating a profile as a new or existing member contact

Before applying for AFCA membership, you will need to create a member portal account from the AFCA website. This will collect your basic details including your name and contact details.

Then you will be able to apply for a new membership. This needs to be completed with the required organisational fields and contact roles. You can assign yourself to all roles or add additional contacts to specific roles. Those added to specific roles will be invited to create a login when the membership is formally approved.

If you are an existing member and do not have a contact profile, you will need an administrator to create one before you can manage complaints or other tasks.

How to create your profile:

1. Have your administrator contact add you and fill out your contact details and roles.

2. Once you have been added to the membership, you will receive an email asking you to set your password.

3. Once you set your password you will have access to any memberships your contact profile has been added to.

Member role types

When establishing a new membership, you will be required to provide key contacts as listed below. These contacts can be changed; however, you will not be able to remove the key contacts without replacing them.

This is a list of member role types:

a) Administrator Contact (key contact)
b) Billing Contact (key contact)
c) EDR Manager (key contact)
d) Systemic Issues and Reportable Matters (SARM) (key contact)
e) Code Compliance (key contact, if a Code subscriber)
f) Reporting Contact
g) Team Manager
h) Case Worker
i) CEO
j) Executive Assistant
k) Appointed External Administrator (external contact type)
l) Appointed Liquidator (external contact type)

Accessing member contacts

An administrator contact can add, remove or amend a contact role in your membership in the member portal.

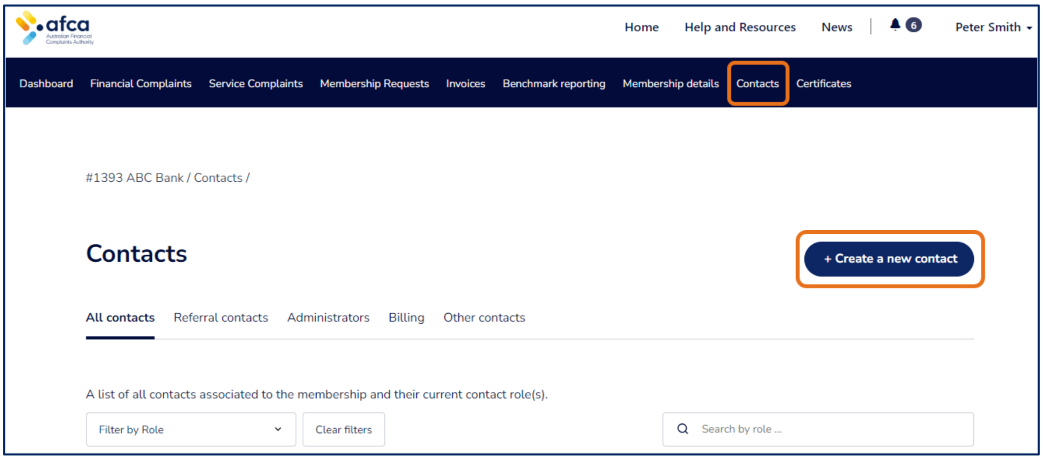
When they log into their portal account, they will arrive at the homepage.

Click on the **Contacts** tab to see a list of your users and roles.

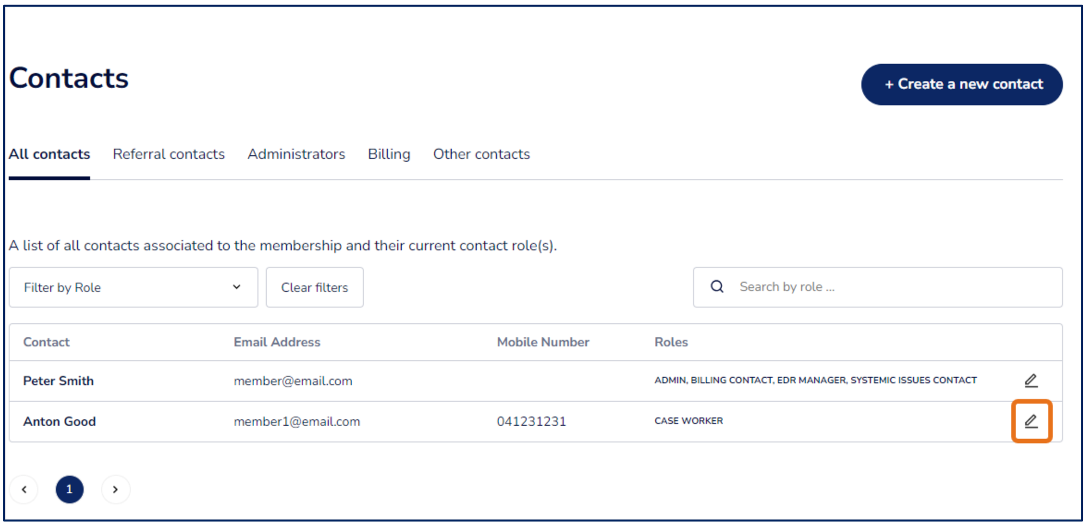
Adding, changing or removing a contact

Depending on your portal account access level, you can add, change or remove contacts in your membership.

1. To add a new contact, click **Create a new contact**, enter the new user's details and save. Once added, the new user will receive an invitation to join.

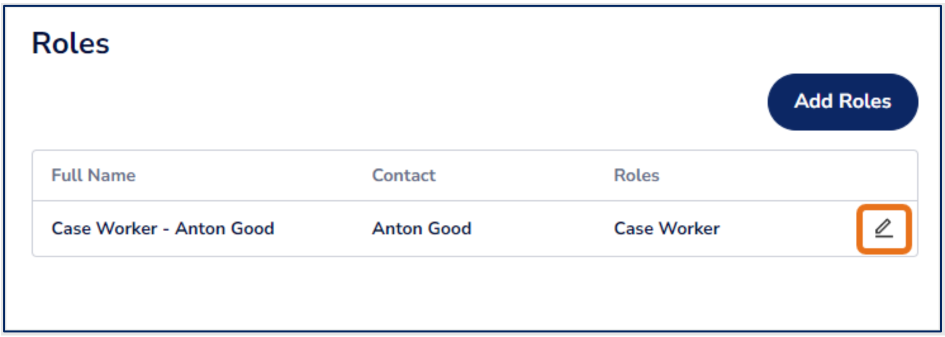


2. To amend or remove a contact, click **All contacts** list. Click the **edit icon** next to the contact's name to amend their details.



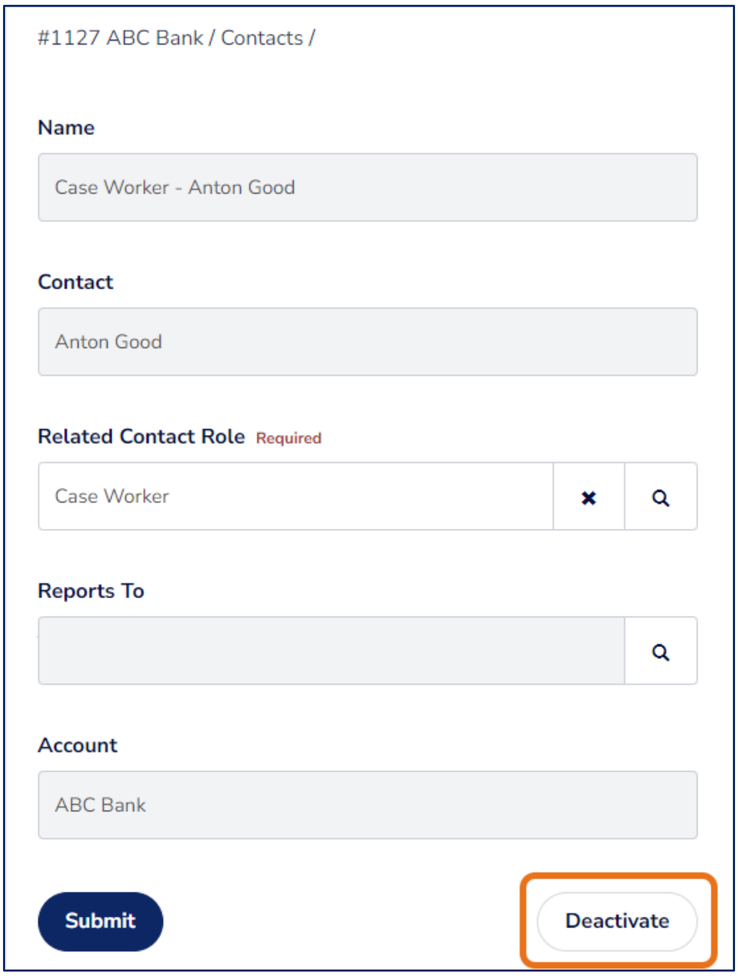
3. Edit the contact's details shown on the screen.

4. If you want to edit the contact's role, scroll down to **Roles** and click the **edit icon**.



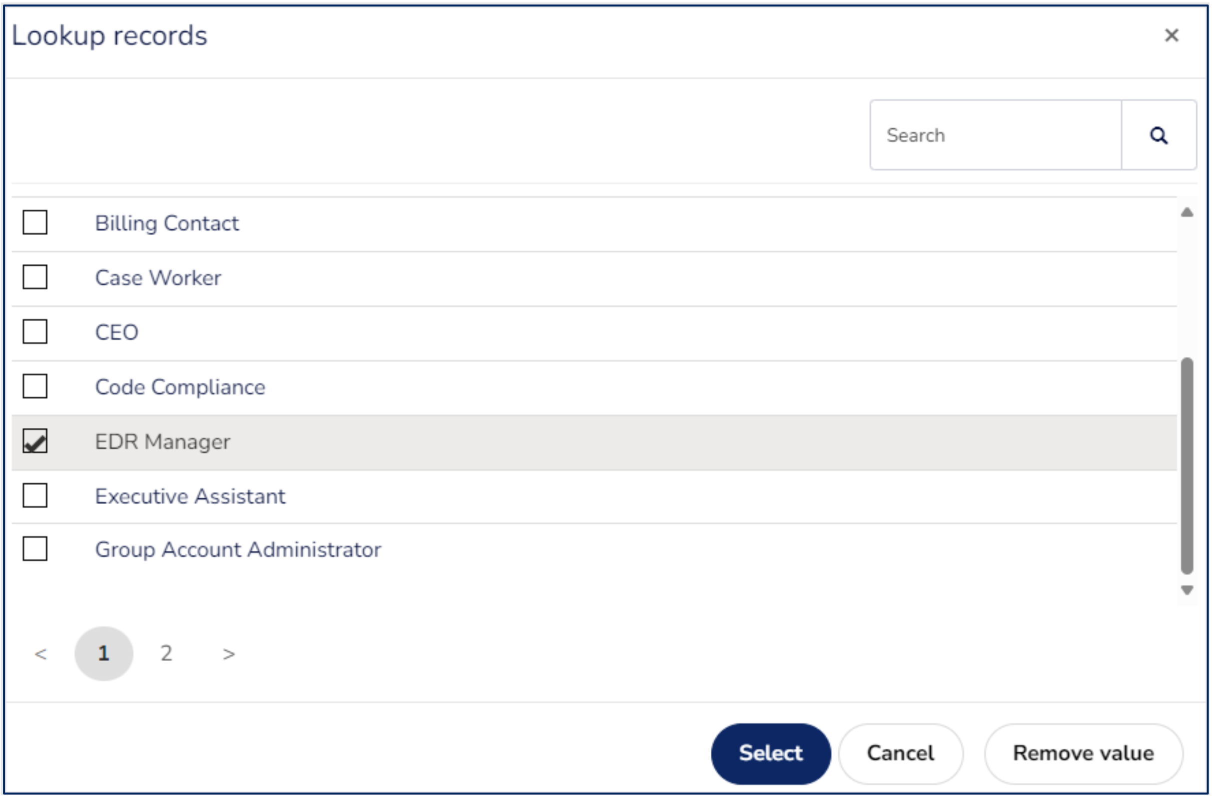
4. Change the contact's role in the **Related Contact Role** field by using the search function. Then click **Submit** to save changes.

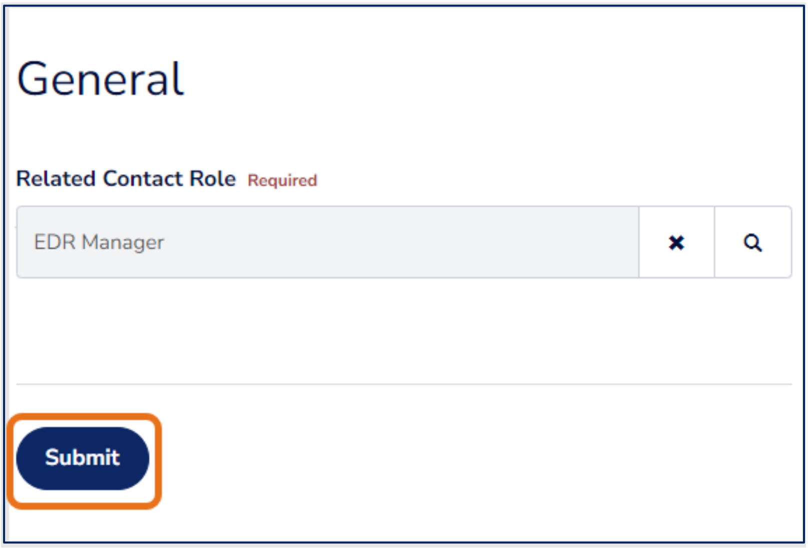
5. To remove the contact from your membership, click **Deactivate**.



6. To add another role to a contact, click **Add Roles**.

7. Select the roles you would like to add for that contact and click **Submit.**

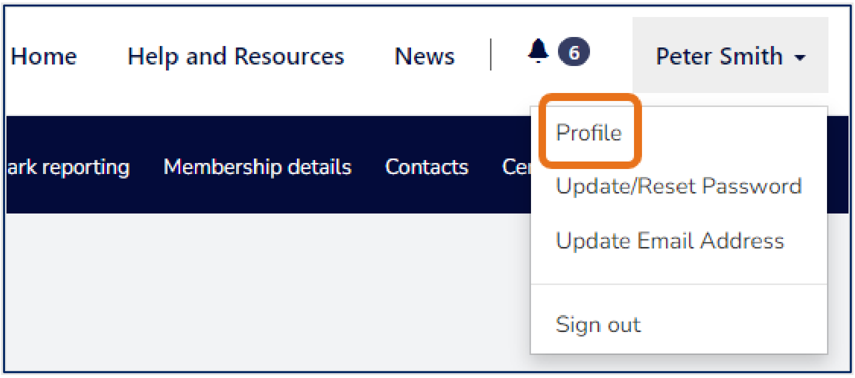




8. Once you return to the Contacts page, you will see that the contact's role has been updated.

Editing your own contact details

Select your name in the top right corner and click **Profile**.



You can edit your details in the profile screen.