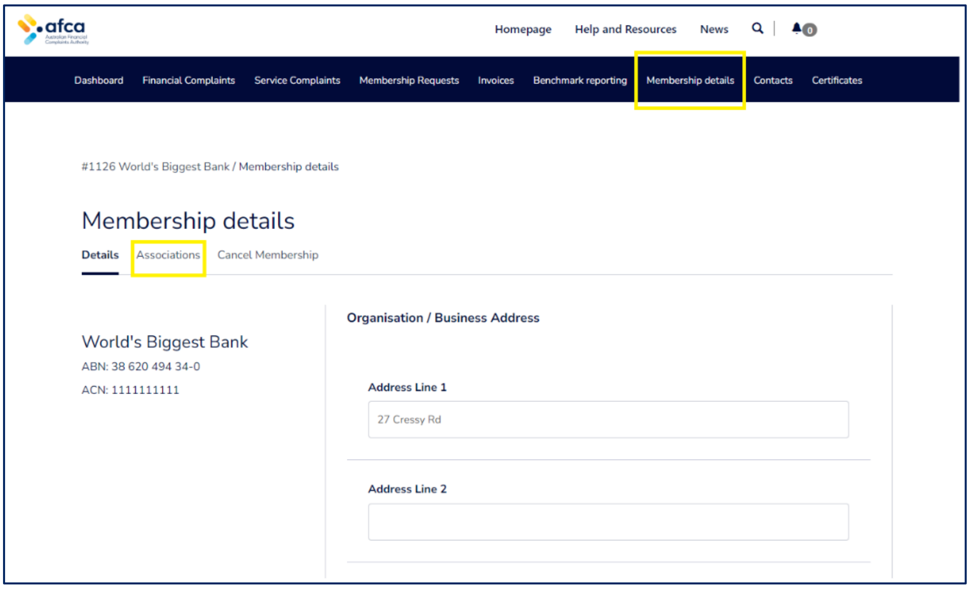
How to manage head member changes (ACR)

This is a guide for authorised credit representatives (ACR) to self-manage changes in the member portal. An administrator contact can make changes in the portal so that AFCA has up to date information about your organisation.

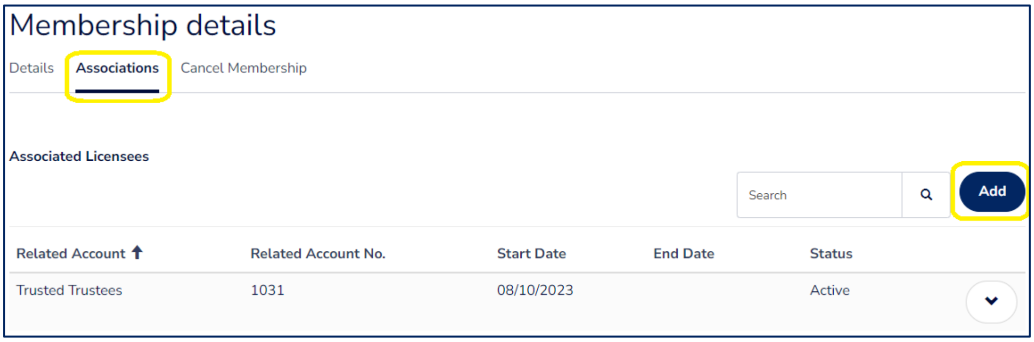
An ACR can update and manage the relationship relating to head member accounts. This means you will be able to add or create a new association or remove an existing association.

Adding or creating an association

1. Log in to the member portal.
2. Click on the **Membership details** tab.
3. Click **Associations**.



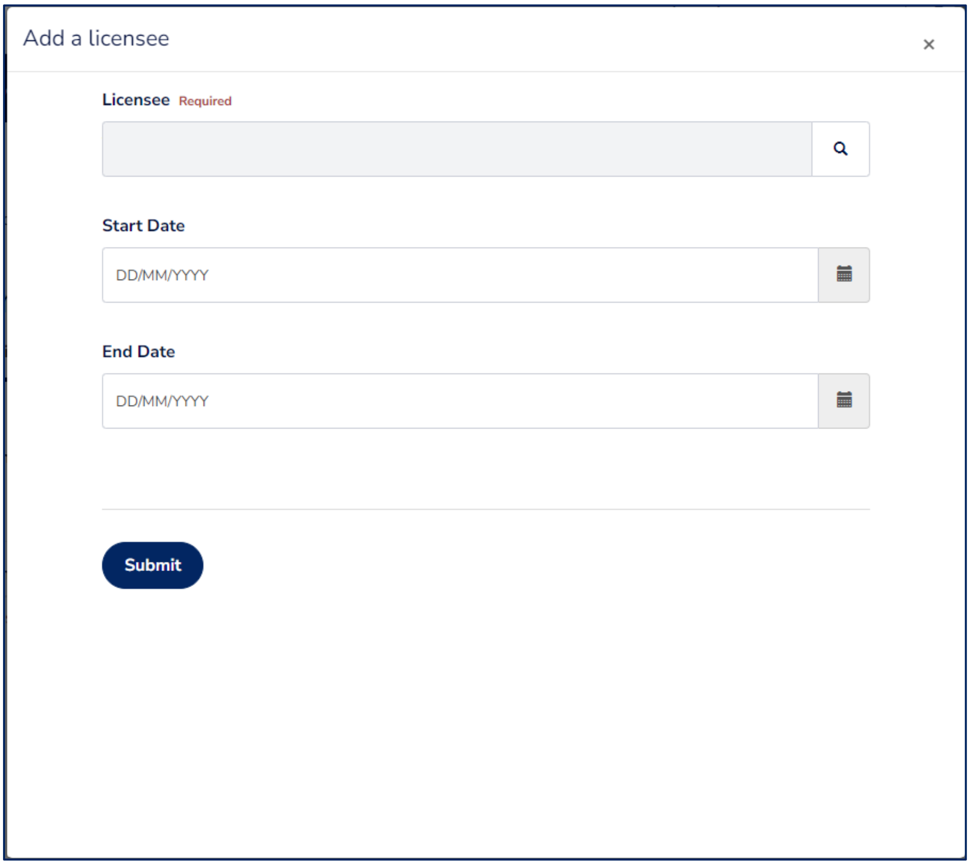
4. Click **Add.**



5. Add or create a new association by searching the ACR's member number.

6. Add the start date. This can be in the future. You are not required to fill in the end date.

7. Click **Submit.**



8. You and the head member will receive an email notifying you that an association has been created.

Updating ACR or Financial Firm member associations

ACR and FF members (depending on their contact role) can update their ACR, licensee association in the portal. You can add, amend (association end date only) and remove an association, which automatically updates this information in the Case Management System and notifies the other party.

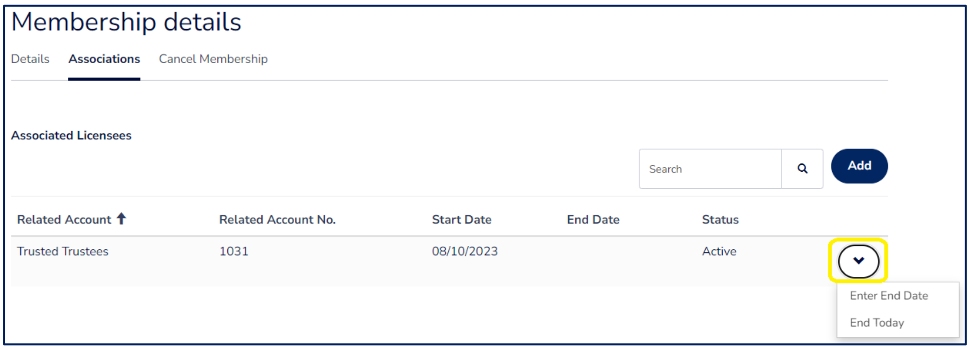
1. Log in to the member portal.

2. Click on the **Membership details** tab.

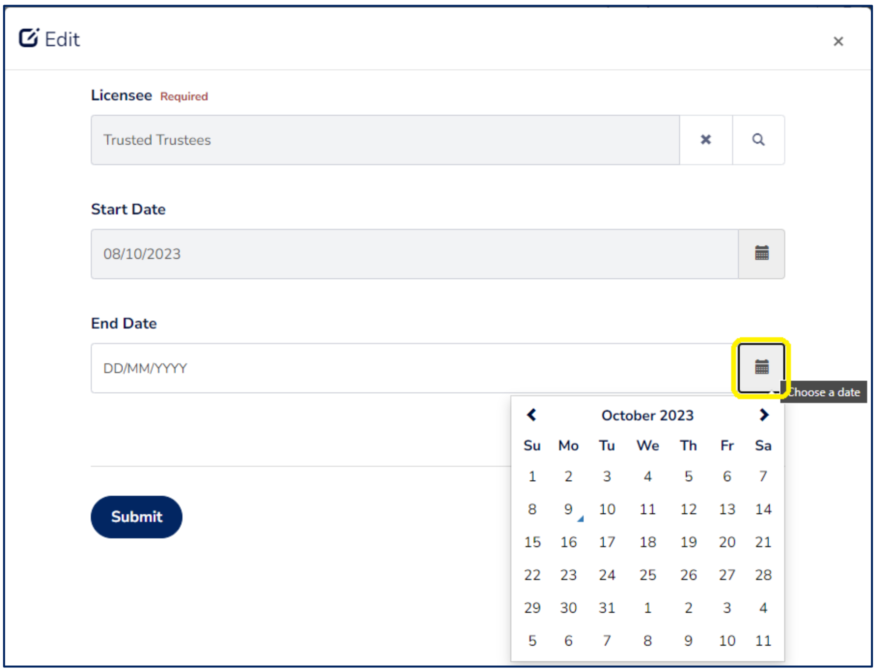
3. Click **Associations**.

4. Select the ACR you wish to amend.

5. Click the **down arrow** for the option to **Enter End Date** or **End Today**.



6. If you click **End Today**, **it** will automatically select today's date as the end date and end the association with the licensee. If you click **Enter End Date**, you can enter a specific end date in the past, present or future.



7. If you need to cancel your ACR membership, you need to submit a cancellation request in the **Member Requests** tab.