

User Guide

Manage My Account



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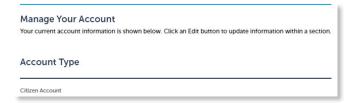
Manage My Account

The **My Account** link allows the account holder to update account information, edit and add contacts, associate Licensed Professionals, and add delegates. To access **My Account**, log in to the portal and select **My Account** from the upper right-hand menu.



Account Type

The **Account Type** displays the type of account associated to the login. The account type cannot be changed.



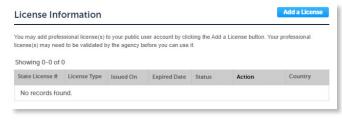
Login Information

The **Login Information**' section details the user's login information. Select the **Edit** link to make edits to the information and select **Save**, if applicable.

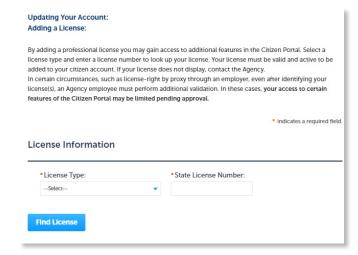


License Information

The **License Information** section will list all Licensed Professionals associated to the user's account. Adding an associated Licensed Professional allows the applicant to quickly and easily select and associate the Licensed Professional to any given application.



 Select Add a License, to add a Licensed Professional to the section. 2) Select **License Type** from the drop-down, enter a valid state license number, and select **Find License**



Please note: The Licensed Professional's **State License Number** is required to perform this step.

3) Select **Add License to Account** and select **OK** to confirm.



Contact Information

The **Contact Information** section lists all contacts associated to the user's account.



View Contact

- Select View from the Action drop-down to view information for the listed contacts.
- 2) Update information, if applicable, and select **Save**.

Set Contact as Account Owner

Select **Select as Account Owner** from the **Action** drop-down to set the contact as the account owner.

Delegates

Add a Delegate

Account holders can appoint delegates to submit applications, create records, and perform transactions on their behalf.

1) Select the **Add a Delegate** link.



- 2) Enter the name and email of the person to delegate access to.
- 3) Enable the checkbox next to each permission that the delegated user will have access to.
- 4) Complete the reCaptcha requirements and select **Invite a Delegate**. The invited delegate will receive an email to accept the invitation.

Please note: Delegates must have an account utilizing the same email address added in step 2

Edit Delegate User Access

- 1) Select the **Actions** drop-down in the **Delegates** section and select the appropriate option.
 - a. **Edit Permissions** select this option to edit the delegate's rights in specific categories.
 - b. **View Permissions** select this option to view the delegate's permissions.
 - c. **Remove** select this option to remove the delegate from the account.



Update the settings, if applicable, and select Save Changes.

Accept the Delegate User Invitation

Prior to performing functions on the account holder's behalf, the delegate must first accept the invitation.

- 1) Click Account Management link.
- 2) Select the **Accept** link in the Delegates section.

