



IHCA/INCAL

myIHCA **UPDATING ORGANIZATION's** **INFORMATION**

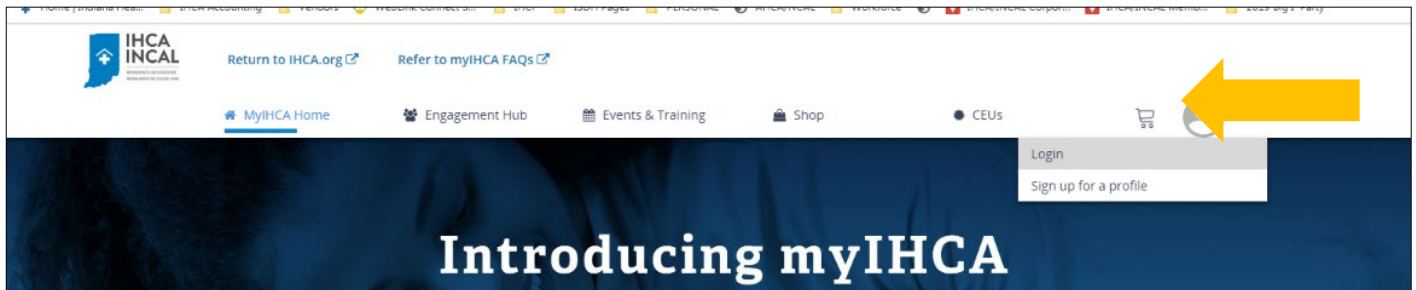
myIHCA TRAINING MODULE

HOW DO I UPDATE MY ORGANIZATION'S INFORMATION

This training identifies how to update your organization's/company's contact information: address, phone numbers, email addresses and staff contacts (employees of your company/organization).

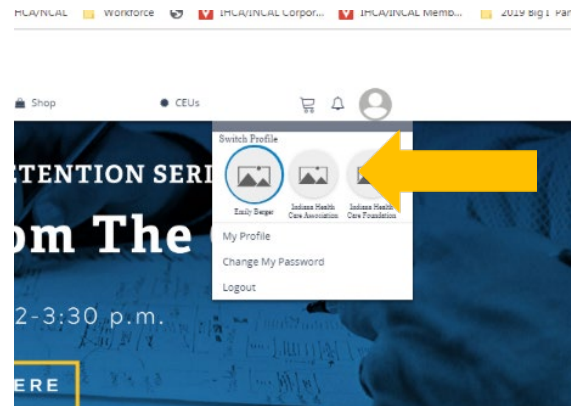
PLEASE NOTE: Only individuals designated to the role **Primary Contact (ADMIN)** may update contact information and staff listings for their organization. Contact IHCA/INCAL at 317-636-6406 for assistance with identifying and assigning your organization's Primary Executive Admin.

1. [Click here](#) to access the myIHCA portal.
2. Select the **Profile icon** (small gray circle with white head and shoulders) in the upper right of the window. You may already be logged in, but if you are not, click **"Login"** in the drop-down menu and enter your username and password.



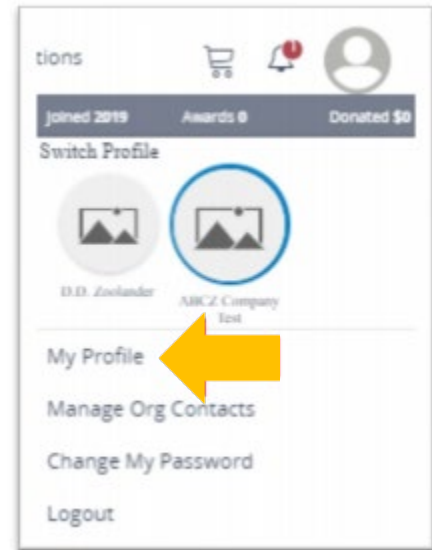
3. Once you are logged in, you will select your profile.

- If you are the Primary Admin for your organization, you will see two profiles: One with your Organization Name and another with your Own Name. **Select the one with your ORGANIZATION NAME.**
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.

- You can edit your Organization Name and Email by clicking in those fields.
- 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.
- If the bed count type listed for your organization is incorrect, contact IHCA/INCAL at 317-616-6406. Bed counts will only populate for facility member organizations.

 A screenshot of the 'My Info' tab in the user profile. The tab is highlighted with a blue underline and a yellow arrow. The page shows 'My Organization Information' with fields for 'Name' (ABCZ Company Test) and 'Email'. Below these are sections for 'Phone Numbers' and 'Addresses'. The 'Phone Numbers' section has a radio button for 'Organization' and a text field with '(515) 979-2201'. The 'Addresses' section has a radio button for 'Organization' and a text field with '123 Any Street, West Des Moines, IA 50266, United States'. At the bottom, there is a 'UNITS' section with a text field 'All Units' and two buttons: 'Cancel' and 'Update'.

How to Change Your Organization's Staff Contacts

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

The screenshot displays the IHCA INCAL website interface. At the top, there is a navigation bar with links for 'Return to IHCA.org' and 'Refer to myIHCA FAQs'. Below this is a search bar with the text 'Who are you looking for?' and a placeholder 'Name, Role, ID...'. To the right of the search bar is a user profile icon. A dropdown menu is open from this icon, showing options: 'Switch Profile', 'Emily Berger', 'Indiana Health Care Association', 'Indiana Health Care Foundation', 'My Profile', 'Manage Org Contacts' (highlighted with a red circle and a yellow arrow), and 'Logout'. Below the search bar, there is a section titled 'Current Contacts - 14'. On the left, there are filters for 'Role' and 'Current Contacts'. The main list shows five contacts: Deeksha Kapoor (Employee), Dennis Neary (Employee), Developer Test (Employee), Elizabeth Eichhorn (Employee), and Emily Berger (Primary Contact (ADMIN)).

2. At this time, If you need to ADD a new employee/contact to your organization, please email eberger@ihca.org or kniehoff@ihca.org with the individual's name, title and email address and we will affect this change for you.

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

- Click on the contact's name.
- Click the Pencil icon in the upper right, and update any of the fields listed.
- **PLEASE DO NOT USE THE RED TRASH CAN OPTION IN THE TOP RIGHT CORNER. If you need to remove this individual from your list of current employees, follow the steps below.**
 - Click on the "Role" drop down menu.
 - Select "Former Employee"
 - Enter an end date for their employment (a start data is not necessary).
 - You are not required to enter any notes in the field unless you'd like to provide clarifying information to IHCA/INCAL.
- Click "Update" to save your changes.

The screenshot displays the 'Org Contact Information' form for a contact named Deeksha Kapoor. The form includes fields for First Name, Last Name, Email, ID, and a Role dropdown menu. The Role dropdown is open, showing options: Employee, Former Employee (highlighted with a yellow arrow), and Primary Contact (ADMIN). Below the Role dropdown is a date field set to 12/18/2019, also highlighted with a yellow arrow. A red warning box on the right side of the form states: 'DO NOT USE THE TRASH CAN TO REMOVE AN EMPLOYEE FROM YOUR ORGANIZATION ROSTER!'. The form also has a Notes section and 'Cancel' and 'Update' buttons at the bottom.