

Users Guide for Organization Accounts

This guide will walk you through setting up your organization account and will answer the following questions:

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What information do I have access to through my organization (org) account?

In your org account you will be able to access and manage the following organization information:

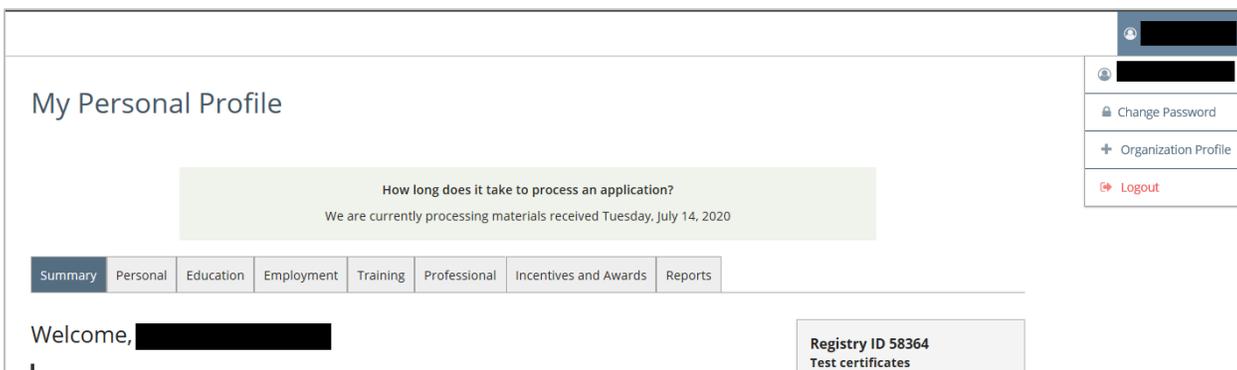
- **Status**-view and edit licensing and program information
- **Org details**-manage profile owner, user's access, and contact information
- **Settings**-view and edit Stripe Account, online registration, and payment settings
- **Program info**-view and edit benefits, business practices, curriculum, accreditation, and philosophy statement
- **Classrooms**-view and edit enrollment, classrooms, and STARS application type
- **STARS**-apply for STARS and view STARS status, checklist, and resources
- **Employees**-view employee status, update employment records, and invite staff to connect their employment to your organization.
- **Reports**- view Faculty Staff Lists and Professional Development Records of staff members

How do I create an organization account?

Log into your Registry account.

Click on the drop-down menu under your name in the top right corner.

Click **+Organization Profile**



Click **Create Profile**

Organization Profile Lookup

Please enter the organization ID to request access to the organization profile. This is not a license number.

Organization ID

Enter the Organization ID Number

Required

Find Profile

Need a New Organization Profile?

If you need to create a new organization profile, please click "Create Profile" to begin organization profile setup.

Create Profile

Provide the requested information for your organization, when finished, click **Submit**.

Communication Preferences

The Early Childhood Project sends periodic communications.

Unsubscribe

You will continue to receive emails regarding your account.

Subscribe

Submit

You have now successfully applied for your organization account. The system shows a confirmation that you successfully submitted your application for review.

✔ Your application has been submitted for review.

Thank You For Registering Your Organization!

You will be notified via email when you are approved. The approval process may take up to five business days. When you receive your approval email, you will be able to access your organization profile. If you are registering as a Training Sponsor, you will be able to apply for course approval and schedule events.

If you have any questions, or do not hear from us within five business days, please use the [Contact Us](#) form to request assistance.

Once your organization profile is verified by ECP staff, you will receive a confirmation email and the organization will appear in the drop-down menu in the top right corner of your Registry profile page.

The screenshot shows the 'My Personal Profile' page. At the top right, there is a user menu with a red box around the 'Organization Profile' option. Below the menu, there is a green box with the text: 'How long does it take to process an application? We are currently processing materials received Tuesday, July 14, 2020'. Below this, there is a navigation bar with tabs: Summary, Personal, Education, Employment, Training, Professional, Incentives and Awards, and Reports. At the bottom left, it says 'Welcome, [redacted]' and at the bottom right, it says 'Registry ID 58365'.

How do I connect to an existing organization account?

Note: This is for admin users only, not all employees as this will give users admin access to your organization account.

Log into your Registry account.

Click on the drop-down menu under your name in the top right corner.

Click **+Organization Profile**

This screenshot is similar to the previous one, but the 'Organization Profile' option in the user menu is highlighted with a red box. At the bottom right, it says 'Registry ID 58364' and 'Test certificates'.

Type in your organization ID.

click **Find Profile**

Organization Profile Lookup

Please enter the organization ID to request access to the organization profile. This is not a license number.

Organization ID

Find Profile

Need a New Organization Profile?

If you need to create a new organization profile, please click "Create Profile" to begin organization profile setup.

Create Profile

When your organization pops up, click **Send Request**.

Organization Lookup

We found the following organization:

#24284
[REDACTED]
[REDACTED]
Bozeman, MT 59718

Next Steps

If this is the correct organization, click **Send Request** to send an approval request to the owner of the organization profile.

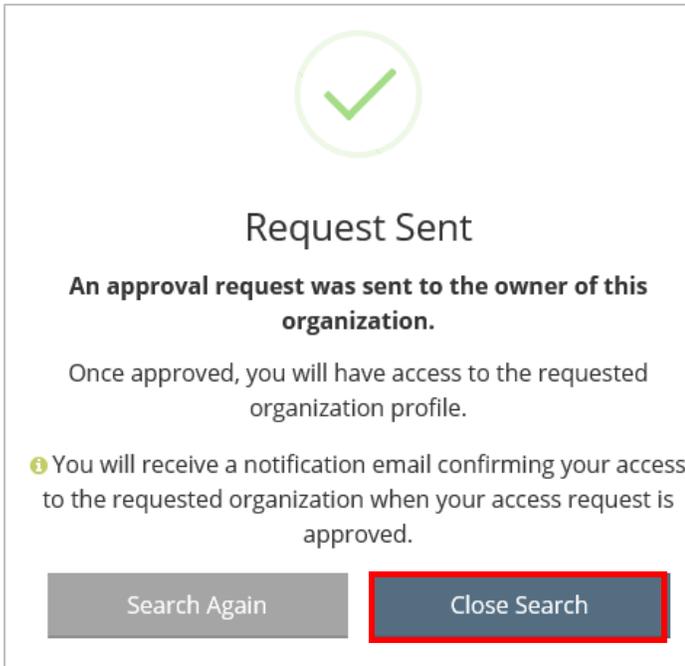
If this is not the correct organization, click **New Search** to re-type your organization ID or set up a new organization profile.

Send Request New Search

The system will confirm your approval request was sent to the owner of the organization.

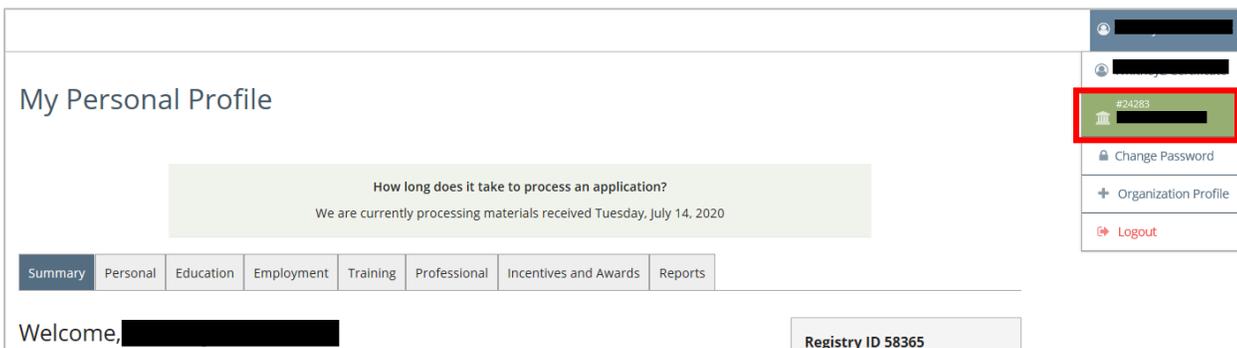
Once approved by the organization owner, you will receive an email confirming your access to the organization account.

Click **Close Search**



A notification box with a green checkmark icon at the top. The text reads: "Request Sent", "An approval request was sent to the owner of this organization.", "Once approved, you will have access to the requested organization profile.", and "You will receive a notification email confirming your access to the requested organization when your access request is approved." At the bottom, there are two buttons: "Search Again" and "Close Search", with the latter highlighted by a red border.

After approval, the organization will appear in the drop-down menu under your name in your Registry profile.



A screenshot of the "My Personal Profile" page. The page has a navigation bar with tabs: Summary, Personal, Education, Employment, Training, Professional, Incentives and Awards, and Reports. The "Summary" tab is selected. The main content area shows a message: "How long does it take to process an application? We are currently processing materials received Tuesday, July 14, 2020". On the right side, there is a user profile menu with options: "Change Password", "+ Organization Profile", and "Logout". The "Organization Profile" option is highlighted with a red box. At the bottom, there is a "Welcome, [redacted]" message and a "Registry ID 58365" box.

How do I invite staff to my organization account?

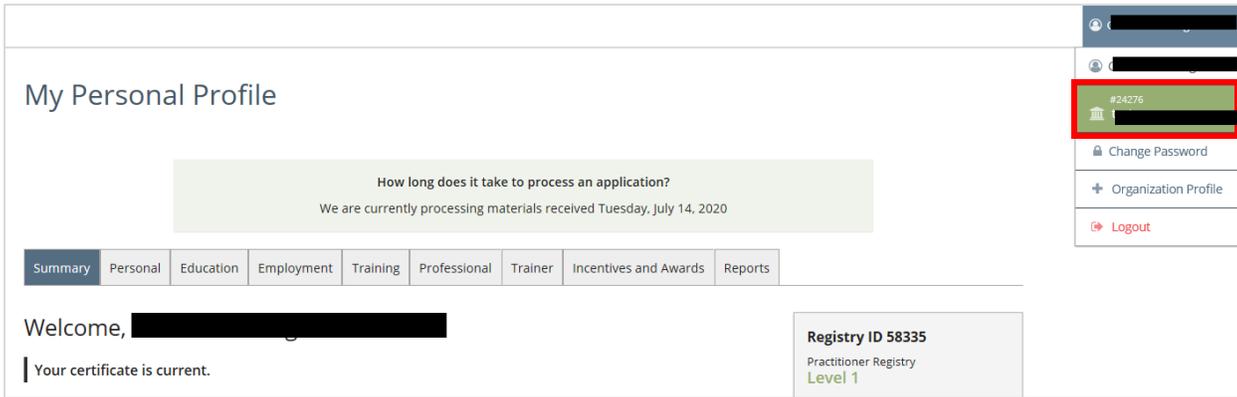
Note: This is for admin users only, not all employees as this will give users admin access to your organization account.

The purpose of this function is to invite staff to connect their employment to your organization account, **this does not give them access to the org account.**

Log into your Registry account.

Click on the drop-down menu under your name in the top right corner.

Click on your organization.



The screenshot shows the 'My Personal Profile' page. At the top right, a user profile dropdown menu is open, with the organization selection option highlighted in red. The main content area includes a notification about application processing, a navigation bar with tabs like 'Summary', 'Personal', 'Education', 'Employment', 'Training', 'Professional', 'Trainer', 'Incentives and Awards', and 'Reports', and a 'Welcome' message. A 'Registry ID 58335' badge is visible on the right.

Under the **Employees** tab, click **Manage Invites**.



The screenshot shows the 'Organization Profile' page. The 'Employees' tab is selected in the navigation bar. The 'Manage Invites' button is highlighted with a red box. The page title is 'Employees Practitioner Registry Status'.

Enter in the name and email address of the person you wish to invite.
Click **Send Invite**

Invite Staff

Invited staff must accept and confirm the invite before being added to the employee list for your organization.

First Name
Enter First Name Required

Last Name
Enter Last Name Required

Email Address
Enter Email Address Required

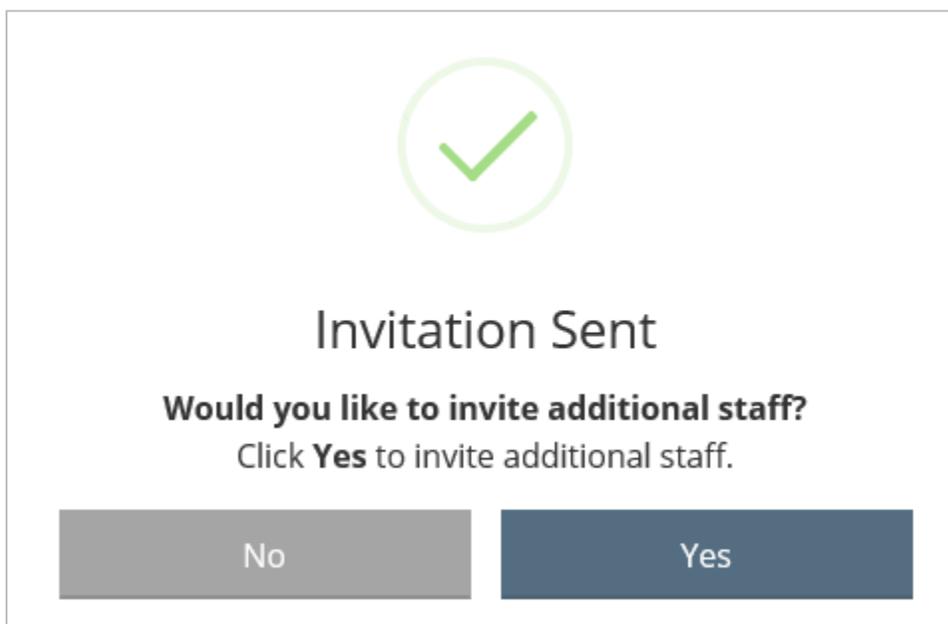
Optional Information

Position/Title
Select a Position/Title

Start Date
Enter Employment Start Date

Send Invite **Close**

The system will confirm the invitation was sent. If you would like to add another staff member, click **Yes**, if not, click **No**.



When you are finished inviting staff, click **Close** in the top right corner.



How do I manage my profile owner and users?

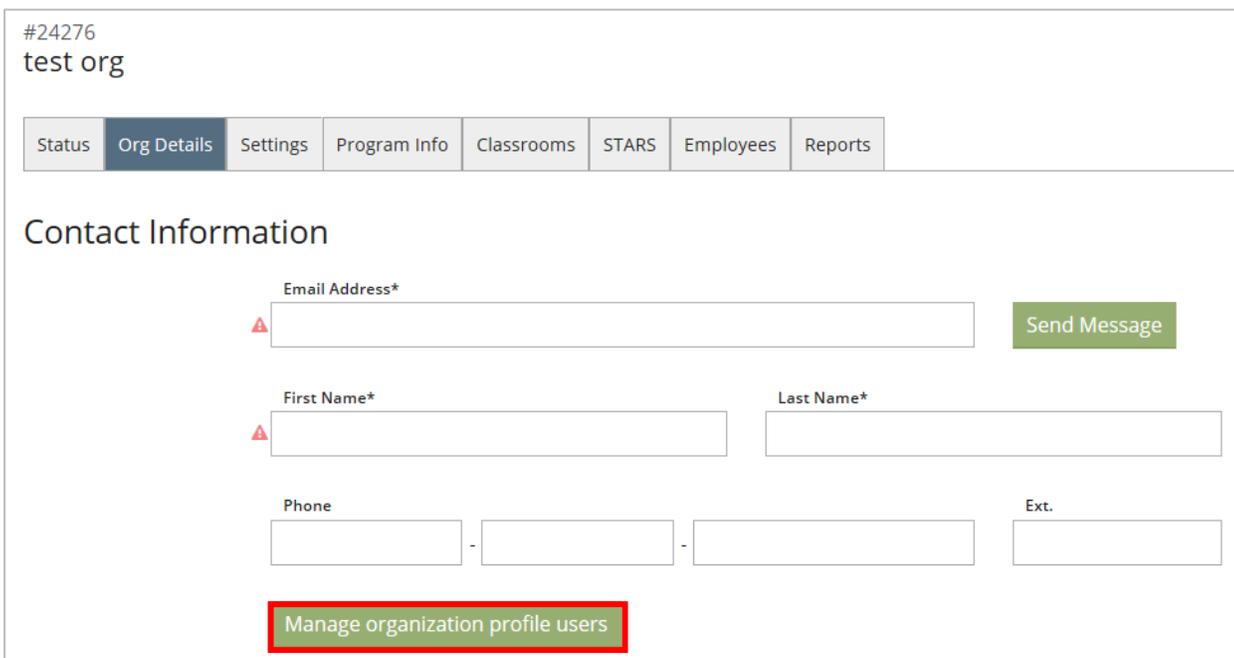
Log into your Registry account.

Click on the drop-down menu under your name in the top right corner.

Click on your organization.

Click on the **Org Details** tab.

click **Manage organization profile users**.



From here you can change ownership of the organization profile by clicking **Make Owner**. You can also add a user to give them access to this organization account when they sign in, by clicking the + button next to the employee's name. Only current employees are available to add.

#24276
test org

- Status
- Org Details
- Settings
- Program Info
- Classrooms
- STARS
- Employees
- Reports

Organization Profile Users

Return

The following users have access to this organization profile.



Individual - Testy Mc Testter (58334)

Make Owner

Individual - Conference Organizer (58335) - Profile Owner

Add User

Add a user to give them access to this organization profile when they sign in. Only current employees are available to add.



Whitney Newapptest

Program Administrator

For additional information regarding your organization account, please contact Montana's Early Childhood Project.