CAHF SmartSimple GMS for Applicants

Chapter 5: Managing Your Contact Profile
Password Reset

- “Change Password” button on Home Portal - fast
- “Forgot password” link on login page - fast
- Email the SysAdmin team – as fast as we can
Updating Profile Information

• “My Profile” button on User home portal
• “Organization Profile” button on User home portal
Connecting an Existing Organization to Your Profile

• Start at “Register New” button
  – Avoid duplication – search the name bar carefully
• Use the “binox” (binoculars) search button to open a list plus search field
• Complete your role
• Click “submit”
Connecting a New Organization to Your Profile

- Start at the “Register New Organization button on User home portal
- 501(c)(3) vs Organization with Fiscal Sponsor
- Avoid duplicates!
  - Name search field first
  - Name search IRS database with “click here” link
- Use “click here” link to register new organization manually
Registering a New Organization Manually

• Enter the information requested
• Mandatory fields are marked with a red “*”
• Click “Submit”
Connecting to an Added Organization

• Logout/login required
• “Change Organization” menu bar button
• Verify the change and update your role if needed
Getting Help

• Your System Administration Team:
  – Cecile LaBore, CAHF Information Manager
  – Nelsy Dominguez, CAHF Program Director
  – Dennis McCutcheon, CAHF Communications & Outreach Coordinator

• Reach us at: sysadmin@conalma.org