

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