HOW-TO: COMPLETE THE ANNUAL UPDATE REQUEST

FOR: Applicants

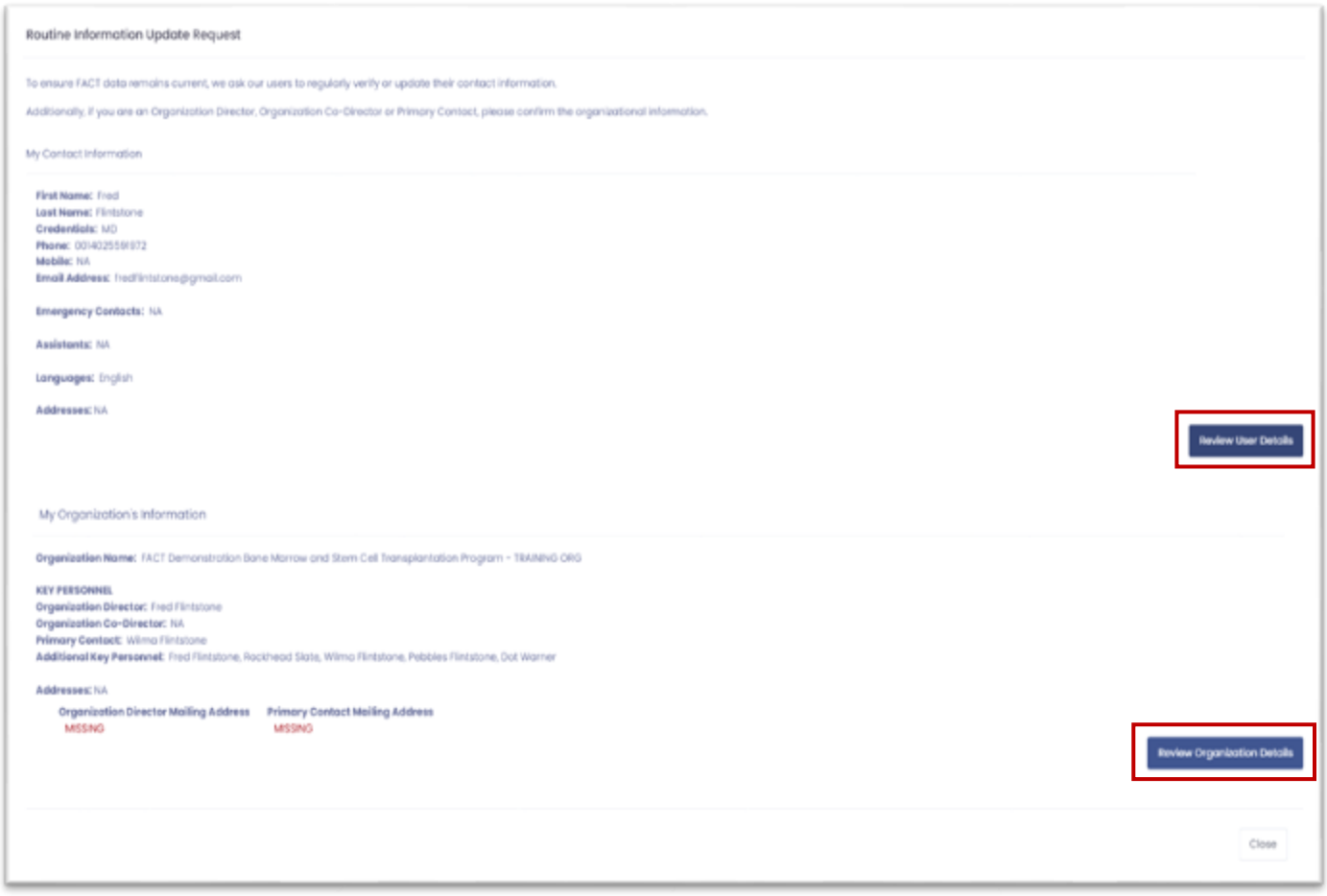
DESCRIPTION: Instruction for completing the annual update request within the FACT Accreditation Portal.

DEFINITIONS: Not Applicable

PREREQUISITES: Not Applicable

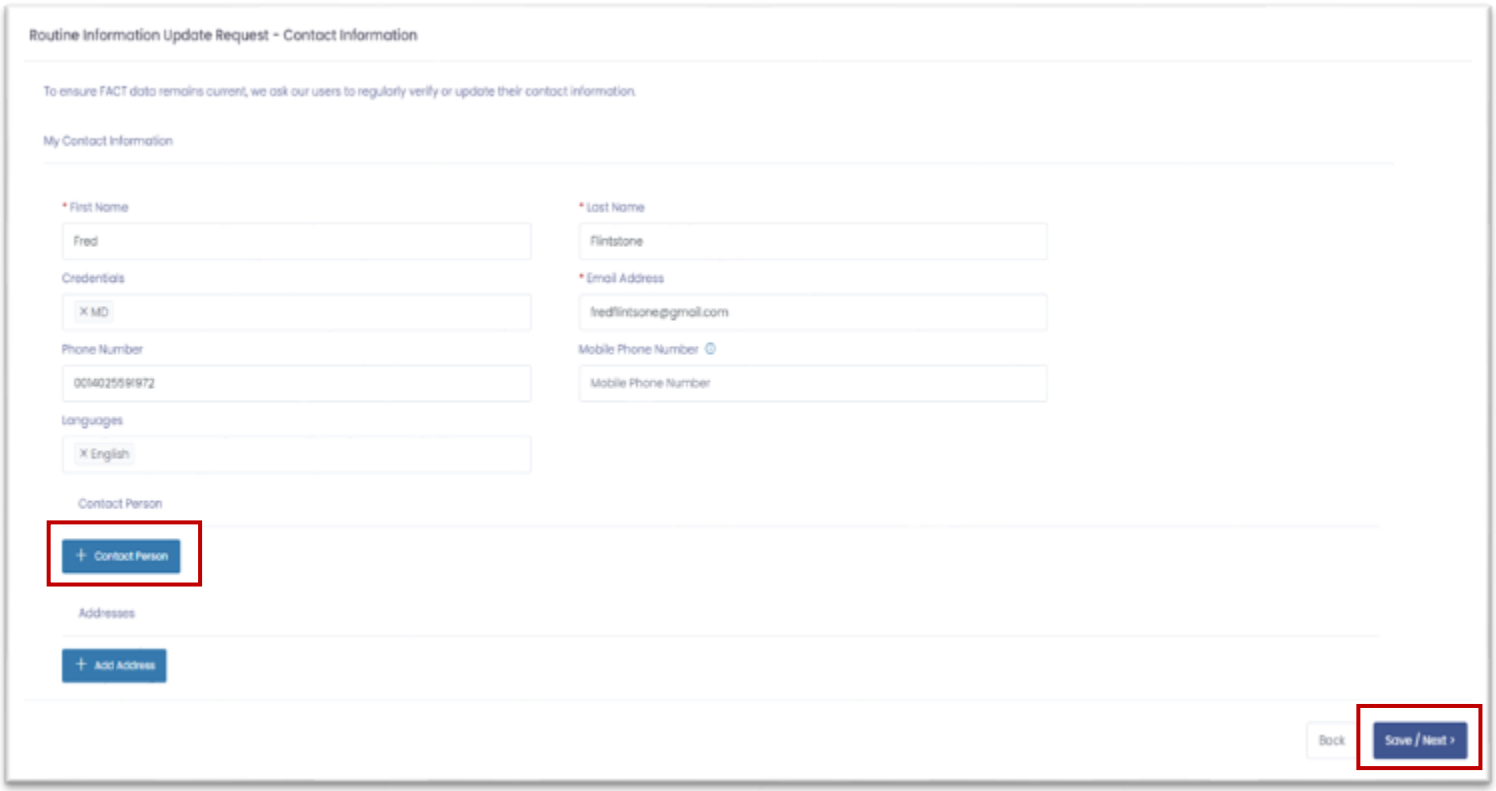
PROCESS:

1. Upon initial log in, the system displays the *Routine Information Update Request* screen.
2. This screen will continue to display at each log in until all required information has been completed and saved.



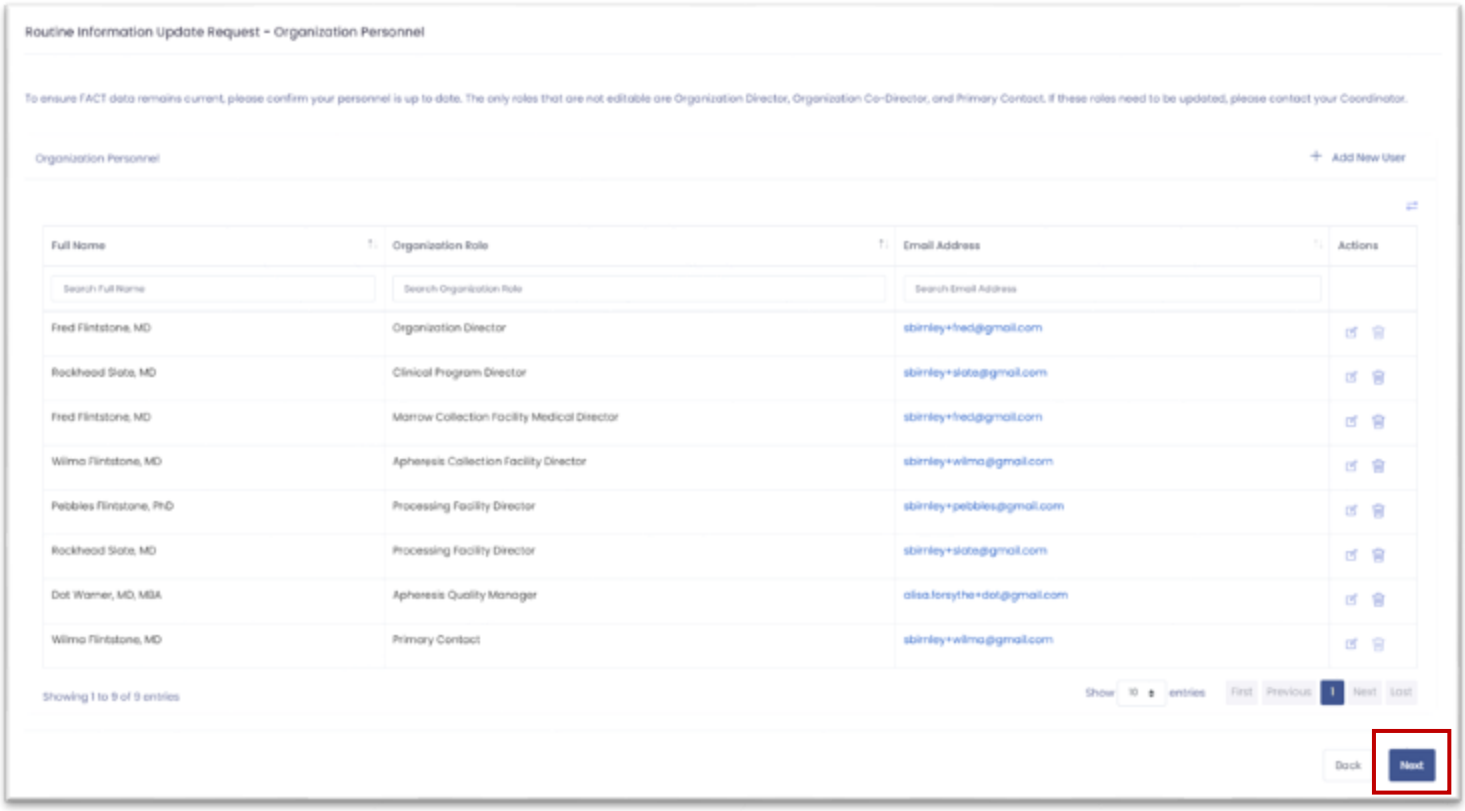
My Contact Information

3. Select *Review User Details* to review your information.
4. If you are an Inspector, the following fields are required:
    a. Mobile phone number
    b. Emergency Contact
    c. Mailing address(es)
5. Contact Person
    a. If an emergency contact is missing, 'Emergency Contact is Required' will display.
    b. Select the contact type (Emergency or Assistant) in the *Contact Type* dropdown field.
    c. Select the *X* button to delete a contact.
    d. Select *+ Contact Person* to add an additional contact.
    e. Complete all required information and select *Save*.
6. Based on the user's role, the following applies:
    a. For users who are not an Organization Director, Organization Co-Director, or Primary Contact, selecting *Save* returns the user to the initial screen.
    b. For users who are an Organization Director, Organization Co-Director, or Primary Contact, a *Save / Next* button will display. Selecting this will take the user to the organization section.

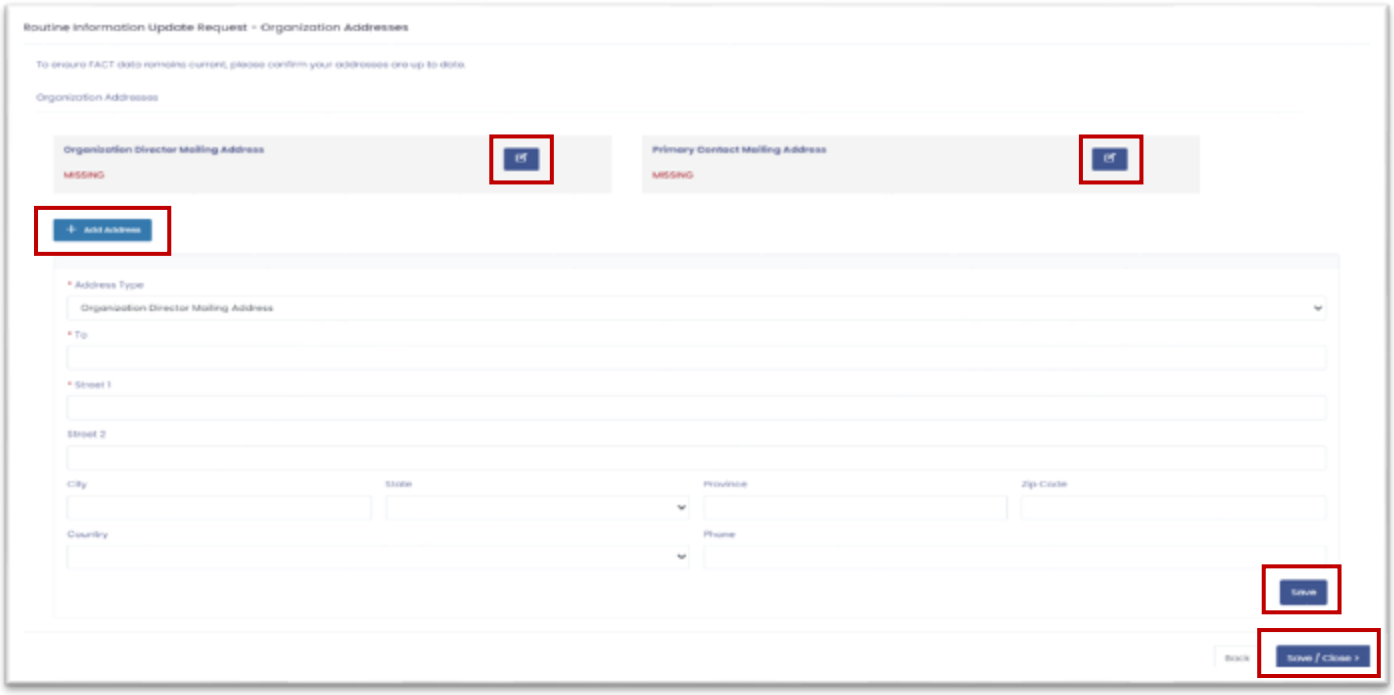
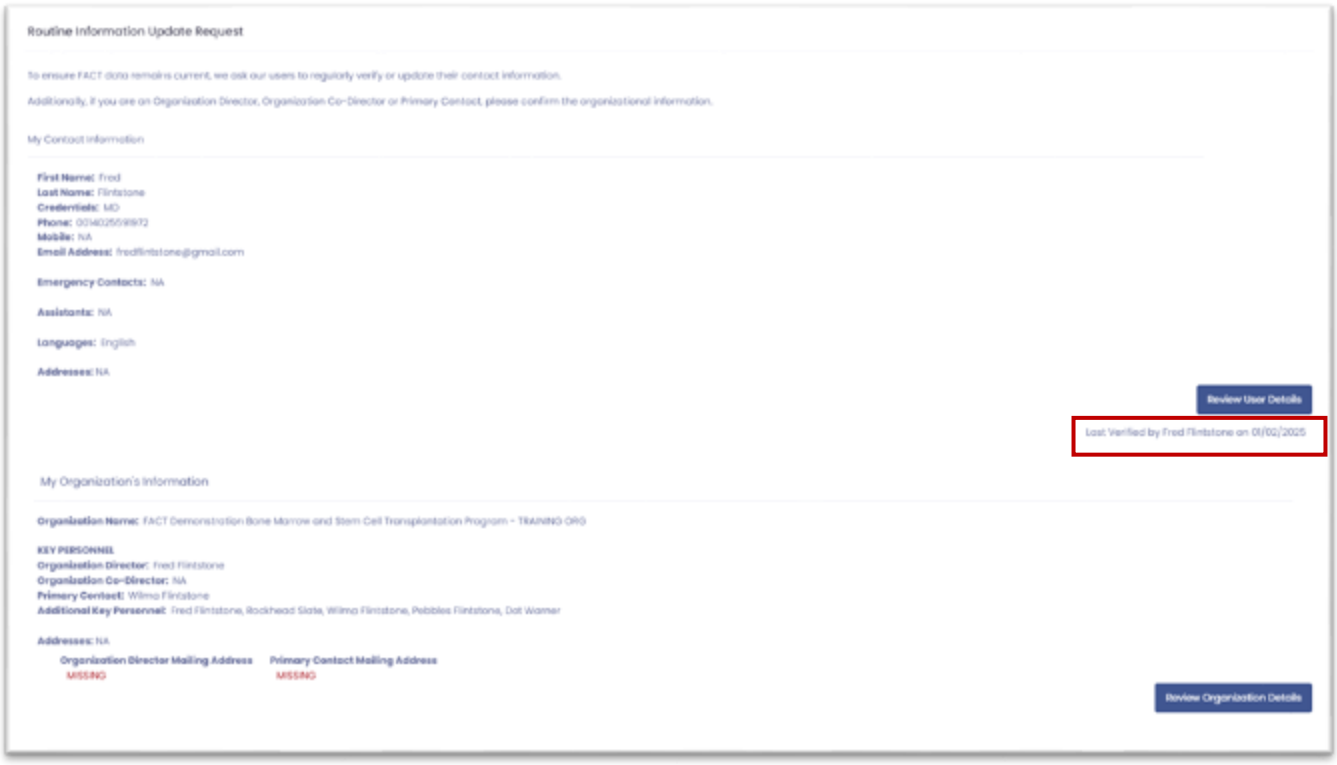


My Organization's Information

7. In the organization section, the Organization Director, Organization Co-Director or Primary Contact, will see their organization's information.
8. The Organization Director Mailing Address, Primary Contact Mailing Address, and Accreditation Certificate Mailing Address are required.
9. Select *Review Organization Details* to enter/review your information.
10. Personnel
    a. Refer to the How-To: Manage Users Within My Organization guide that provides detailed instructions on managing users within your organization.
    b. Select *Next* to move to the next section to review.



11. **Addresses**
    a. If any required address fields have not been completed, they will display as 'MISSING.'
    b. Select *+ Add Address* to add a new address.
    c. Select the *X* button to delete an address.
    d. Select *Save* to save the address changes.
    e. Select the edit button to edit an address.
    f. Select the *Save / Close* button once completed to return to the initial screen.



12. Upon completing the Contact Information and Organization Information sections, a verified timestamp will display.
13. Upon completing both sections, the *Routine Information Update Request* screen will not display until one year passes.