
HOW-TO: MANAGE USERS WITHIN MY ORGANIZATION

FOR: Applicant

DESCRIPTION: The process for creating a new user, editing an existing user, or removing a user from your organization.

DEFINITIONS:

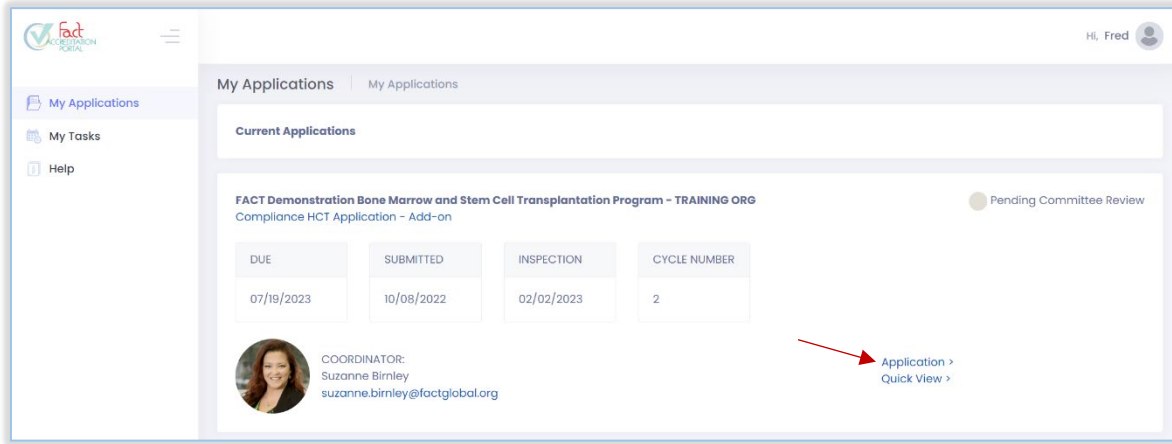
- **Organization Director:** The individual responsible for the administrative; operational functions and compliance with Standards, Applicable Law, and the Quality Management Plan; and serves as the point of contact with FACT. The Organization Director is listed on the accreditation certificate and FACT's list of Accredited Organizations on the website. For Clinical Programs, this is the Clinical Program Director; for independent collection and/or processing facilities, this is the Collection or Processing Facility Director (as designated by the facility); and for Cord Blood Banks, this is the Cord Blood Bank Director. Only one individual may be designated as the Organization Director in the Accreditation Portal for FACT purposes.
- **Organization Co-Director:** If an organization has Co-Directors, this individual is responsible for the administrative and operational functions and compliance with Standards, Applicable Law, and the Quality Management Plan. The Organization Co-Director is listed second on the accreditation certificate and second on FACT's list of Accredited Organizations on the website.

PREREQUISITES:

- To manage personnel, you must be the Organization Director, the Primary Contact, or an alternate contact within your organization.
 - Alternate contacts are included on all organizational email notifications and can manage personnel.
- Your organization must have at least one active application (Eligibility, Compliance, Annual Report, or Renewal Report).

PROCESS:

1. From the *My Applications* homepage, select the **Application** link to access any application related to the organization where personnel will be added or edited.

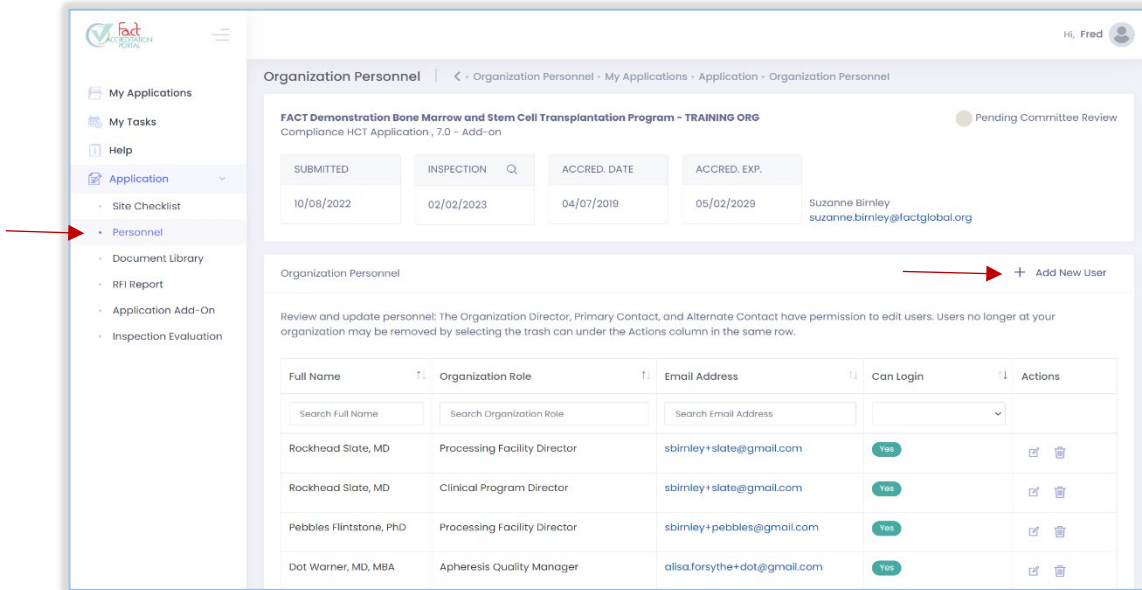


Compliance Application Tile

2. In the left navigation pane, select **Personnel**.

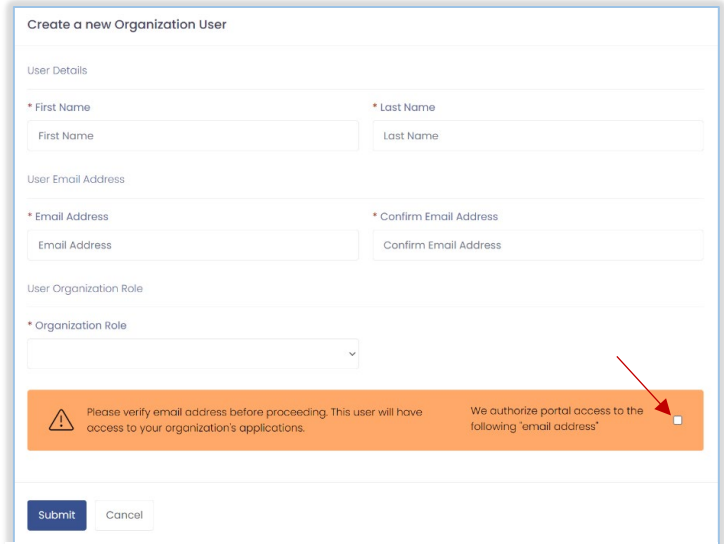
Adding New Staff

- a. At the top of the *Organization Personnel* section, select **Add New User**.



Personnel List

- b. Complete the form.
All fields are required.
- c. Select the checkbox to authorize the user access to the portal.
- d. Select **Submit** to create the user.
Once submitted, the user will receive an email notification that an account has been created.



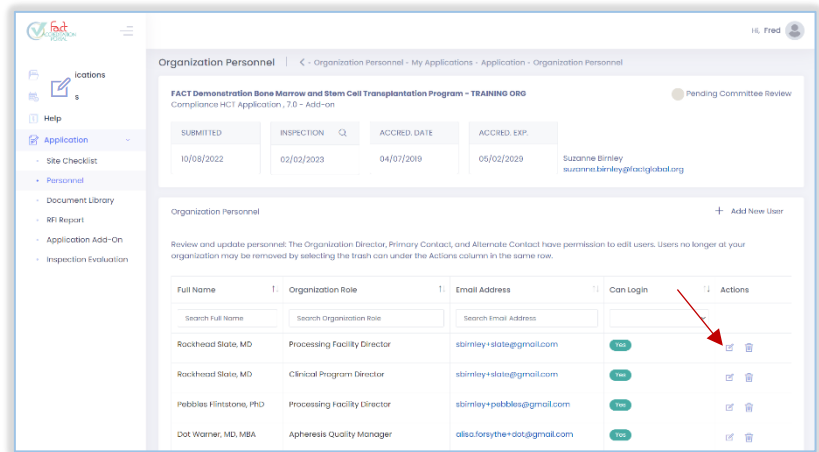
New User Form

Edit Existing Staff

- e. In the personnel list, locate the user to be modified.
- f. In the **Actions** column, select the Edit icon.

Note: Your Organization's Director and Primary Contact can only be updated by a FACT Staff member. Please contact your FACT Accreditation Coordinator for assistance.

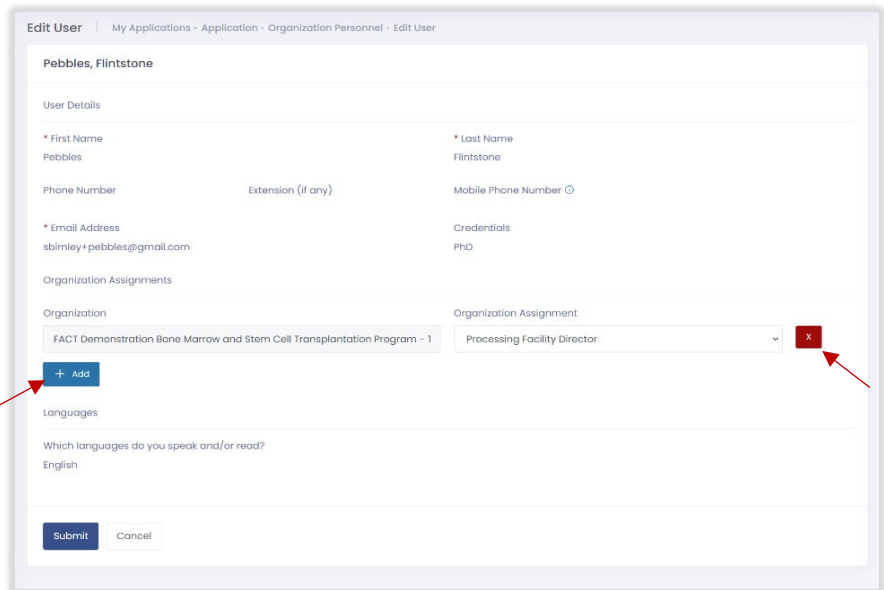
- g. On the **Edit User** form, select + **Add** to assign the user to an additional role(s) within your organization.



SUBMITTED	INSPECTION	ACCREDITED DATE	ACCREDITED EXP.	Actions
10/08/2022	02/02/2023	04/07/2019	05/02/2029	Suzanne Birnley suzanne.birnley@factglobal.org

Full Name	Organization Role	Email Address	Can Login	Actions
Rockhead State, MD	Processing Facility Director	sbirnley+state@gmail.com	Yes	[Edit] [Trash]
Rockhead State, MD	Clinical Program Director	sbirnley+state@gmail.com	Yes	[Edit] [Trash]
Pebbles Flintstone, PhD	Processing Facility Director	sbirnley+pebbles@gmail.com	Yes	[Edit] [Trash]
Dot Warner, MD, MBA	Apheresis Quality Manager	dot.warner@dot@gmail.com	Yes	[Edit] [Trash]


Personnel List – Actions Column

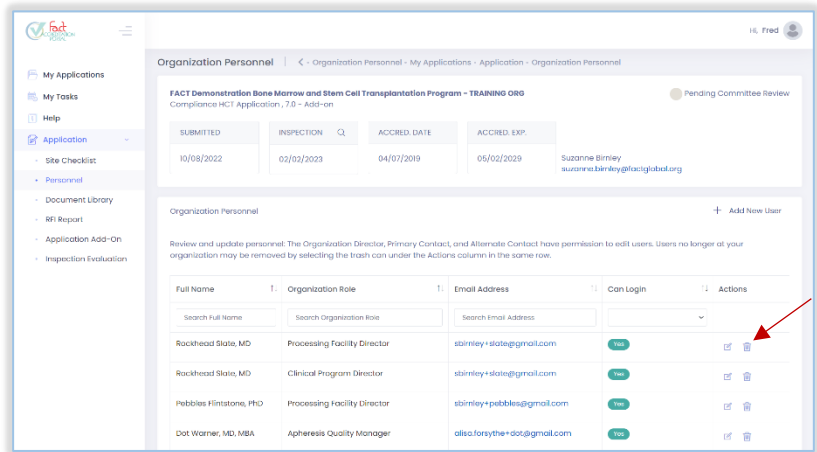


Edit User Form

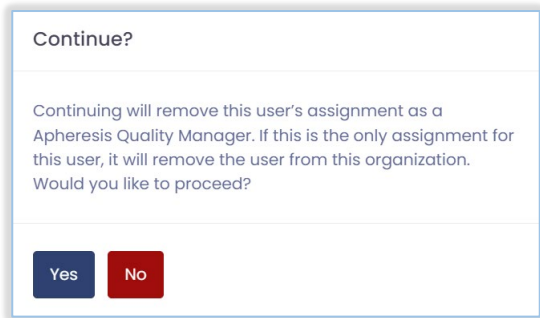
- h. Select the red **X** to remove a user's assignment within your organization.

Remove a Staff Member from an Organization

- i. In the personnel list, locate the user to be removed from the organization. In the **Actions** column, select the  **Delete** icon. A confirmation prompt will display.



Personnel List – Actions Column



- j. Select **Yes**.

Note: Deleting a user from an organization does NOT remove the user's account within the portal. It will remove the user's link to this organization and remove all access to the organization's applications. You may safely remove someone from your organization without impacting any other organizational connections the user may have.