



## **Managing your Organization Profile**

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This guide highlights best practices for Organizations from creating profiles to accessing staff learning records. To gain a better understanding of the benefits of creating an organization profile, please take a look at our [Organization Profile Overview video](#).

### **1. Create an Organization Profile**

1. Follow this [step-by-step guide](#) to create your organization profile.
2. To create multiple organization profiles, repeat the process outlined in the [guide](#). This should be completed for every organization profile created. Please note that a separate organization profile should be created for each license number.
3. If an organization profile has already been created and you need assistance in managing the profile, please contact us at 833-386-9238.
4. If an organization profile has already been created and you need access to the profile as an organizational profile user, please see step 4.

### **2. Employees- Give Learning Record Access to your Director**

1. Follow the [step-by-step guide](#) in granting your organization access to your learning record.
2. If you work at multiple sites, you can add employment for each site.

### **3. Verify your Staff's Employment**

1. To verify your staff's employment, follow this [guide](#).
2. To add a staff as an organizational profile user, a staff's employment must be verified first.

### **4. Administrative Staff- Request Organizational Profile Access**

1. If you do not want an administrative staff listed on the employees tab as an employee of a site, but need to give them administrative access as an organizational profile user, follow this [guide](#).

### **5. Manage Organizational Profile Users**

1. To grant access to an employee from your employees tab, follow the [step-by-step guide](#).

### **6. Access Staff Learning Records**

1. Once your staff has granted your organization access to their learning record, you can access their learning record from your organization 'Reports' tab. This [guide](#) will walk you through the steps.