Users Guide for Organization Accounts

This guide will walk you through setting up your organization account and will answer the following questions:

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What information do I have access to through my organization (org) account?

In your org account you will be able to access and manage the following organization information:

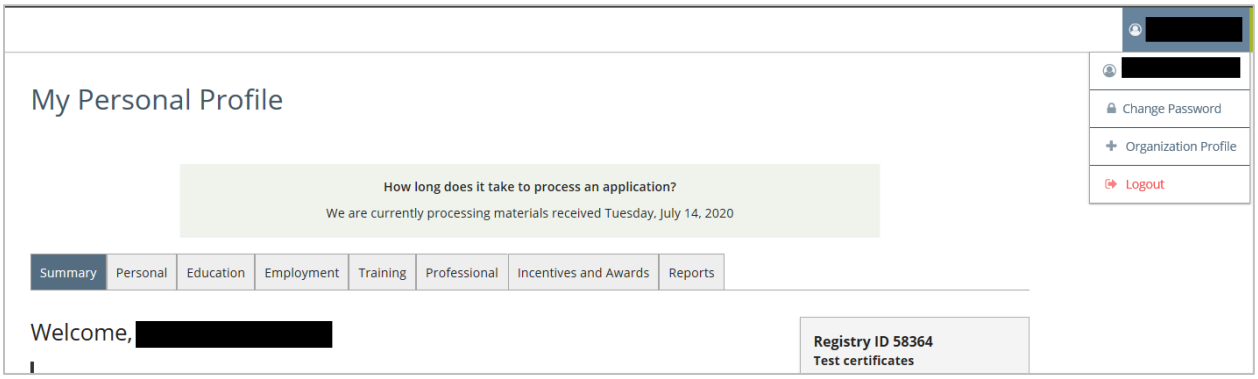
- **Status**-view and edit licensing and program information
- **Org details**-manage profile owner, user's access, and contact information
- **Settings**-view and edit Stripe Account, online registration, and payment settings
- **Program info**-view and edit benefits, business practices, curriculum, accreditation, and philosophy statement
- **Classrooms**-view and edit enrollment, classrooms, and STARS application type
- **STARS**-apply for STARS and view STARS status, checklist, and resources
- **Employees**-view employee status, update employment records, and invite staff to connect their employment to your organization.
- **Reports**- view Faculty Staff Lists and Professional Development Records of staff members

How do I create an organization account?

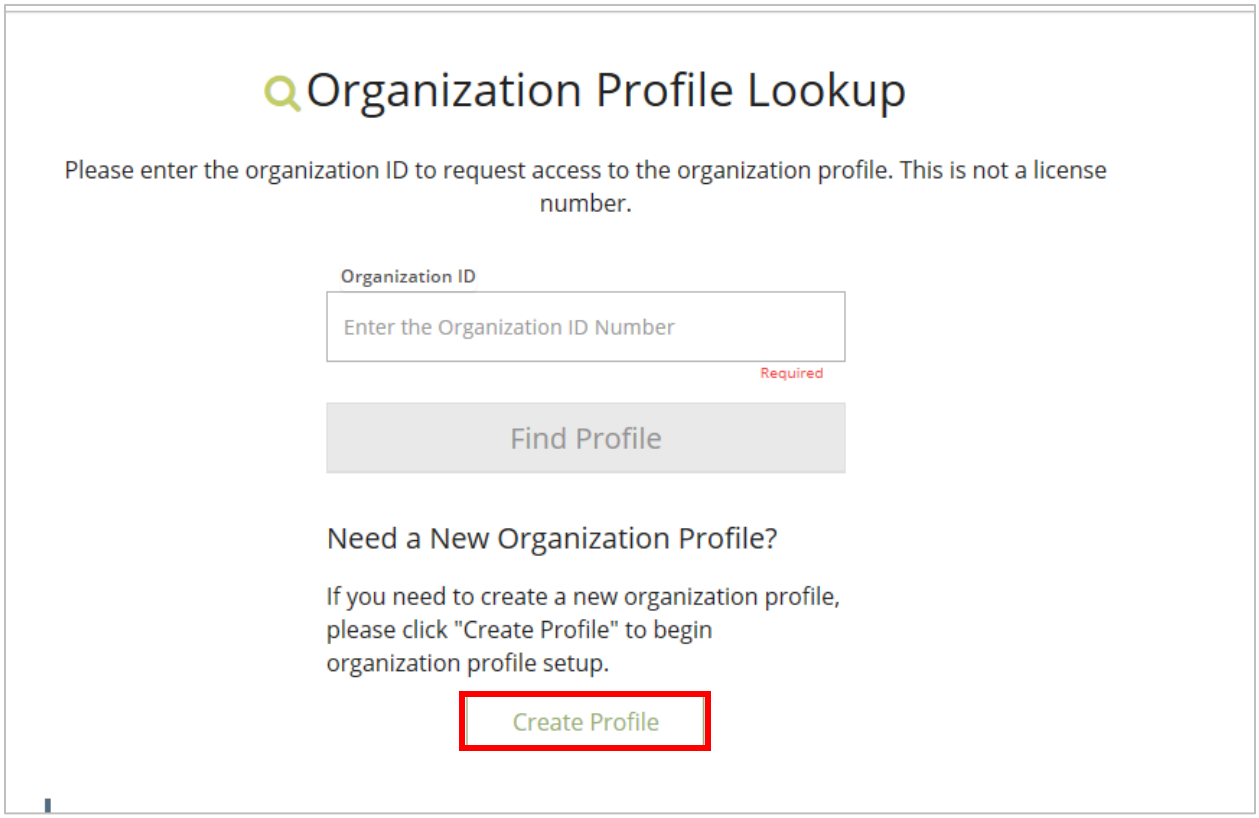
Log into your Registry account.

Click on the drop-down menu under your name in the top right corner.

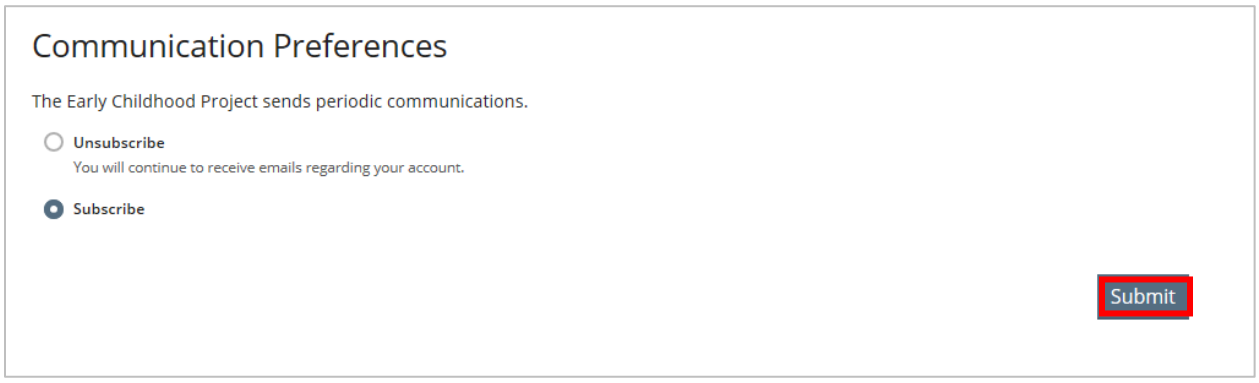
Click **+Organization Profile**



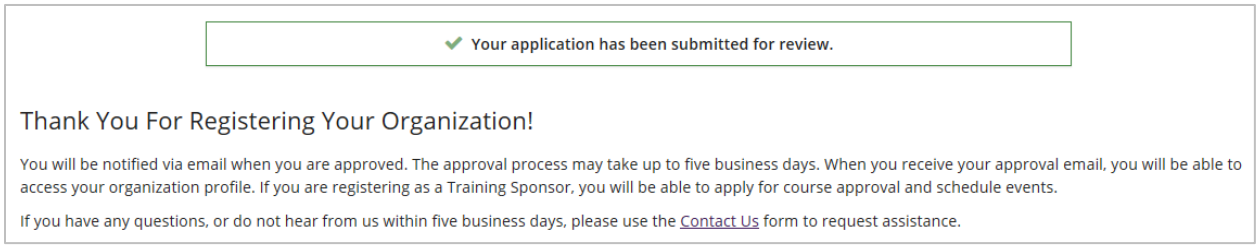
Click **Create Profile**



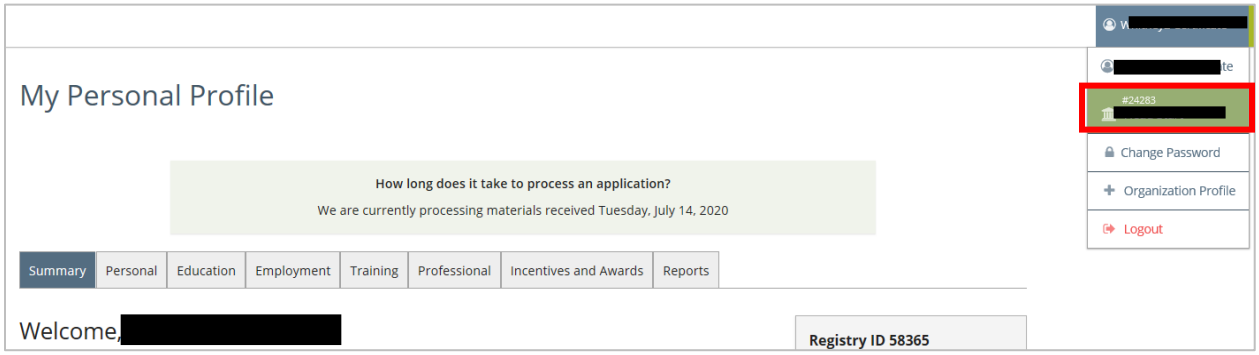
Provide the requested information for your organization, when finished, click **Submit**.



You have now successfully applied for your organization account. The system shows a confirmation that you successfully submitted your application for review.



Once your organization profile is verified by ECP staff, you will receive a confirmation email and the organization will appear in the drop-down menu in the top right corner of your Registry profile page.



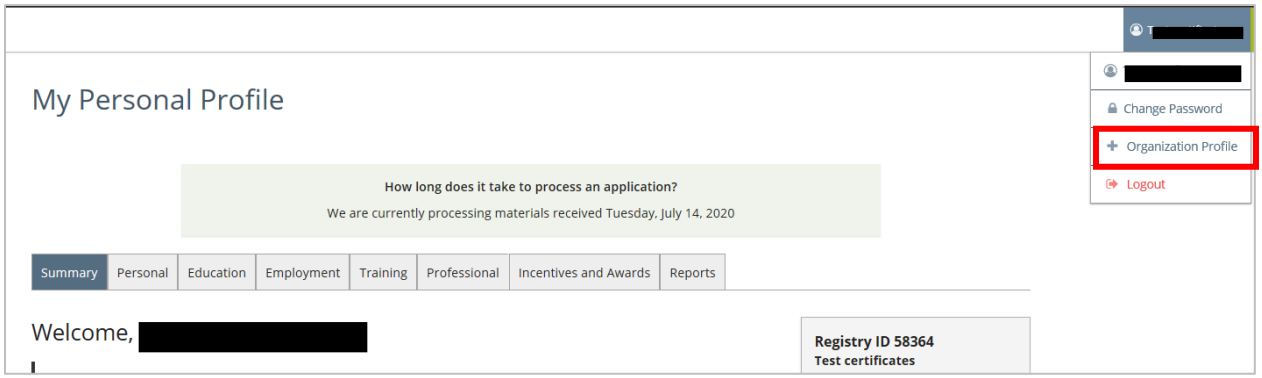
How do I connect to an existing organization account?

Note: This is for admin users only, not all employees as this will give users admin access to your organization account.

Log into your Registry account.

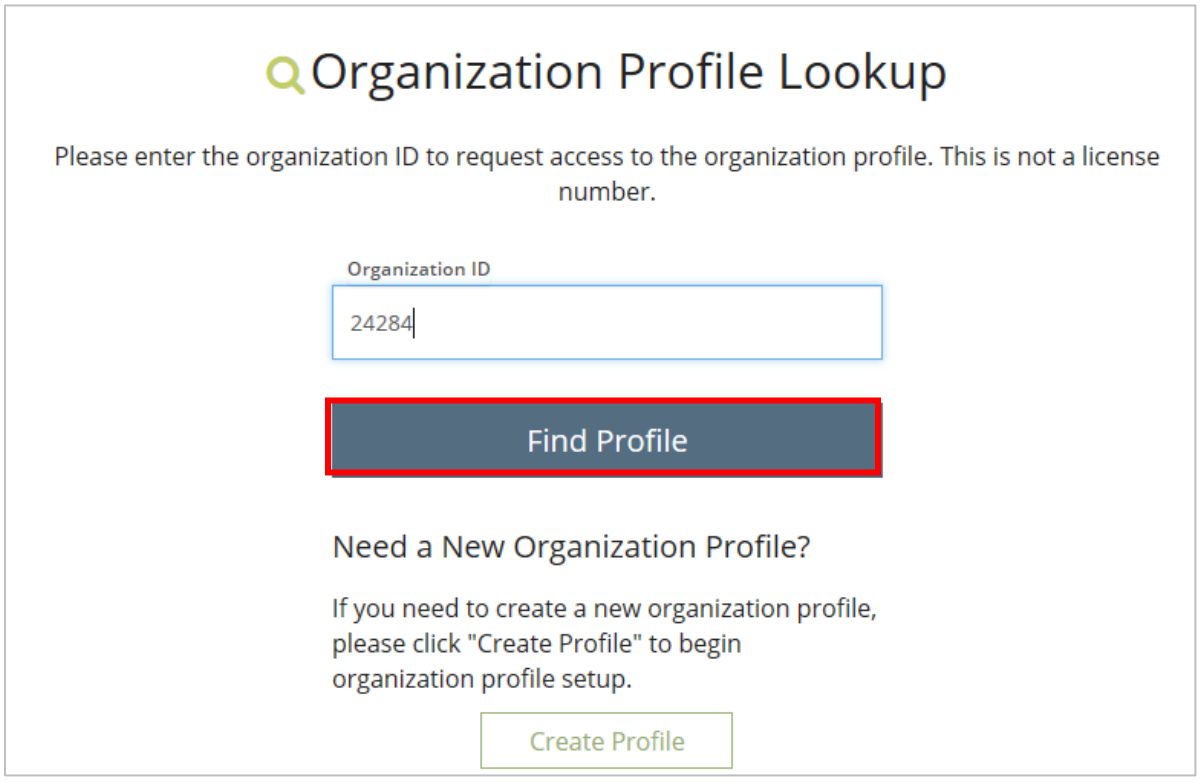
Click on the drop-down menu under your name in the top right corner.

Click **+Organization Profile**

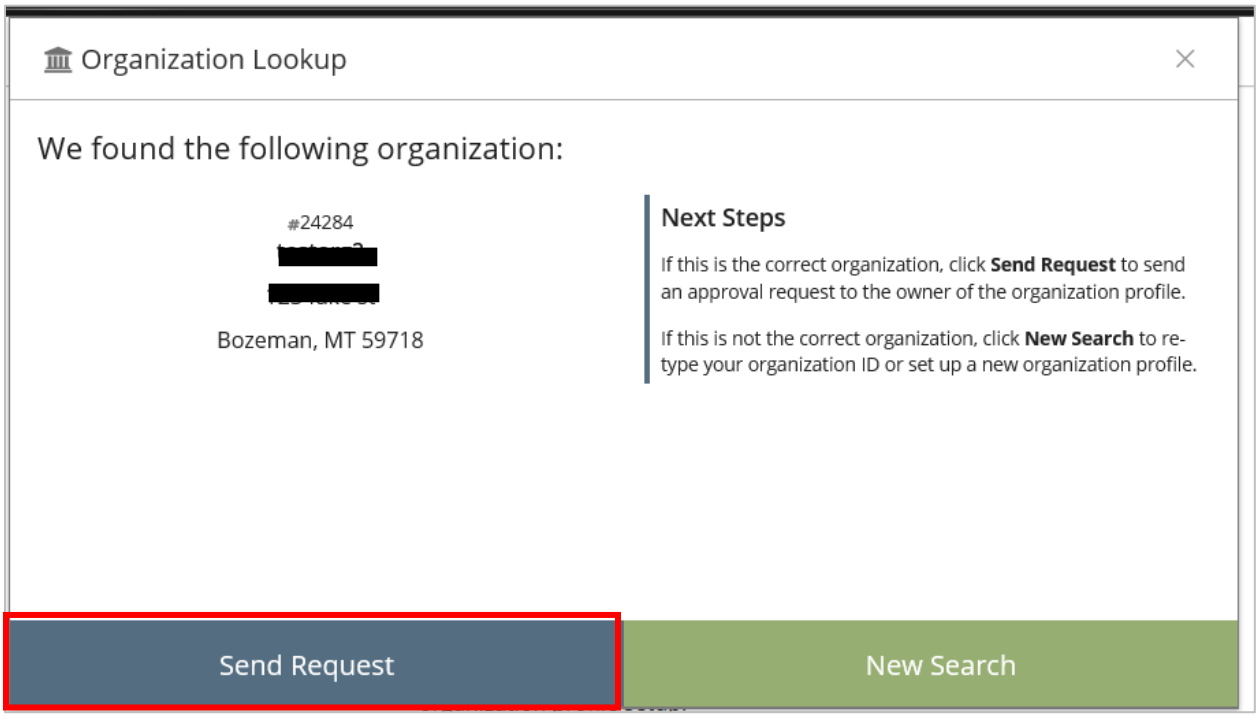


Type in your organization ID.

click **Find Profile**



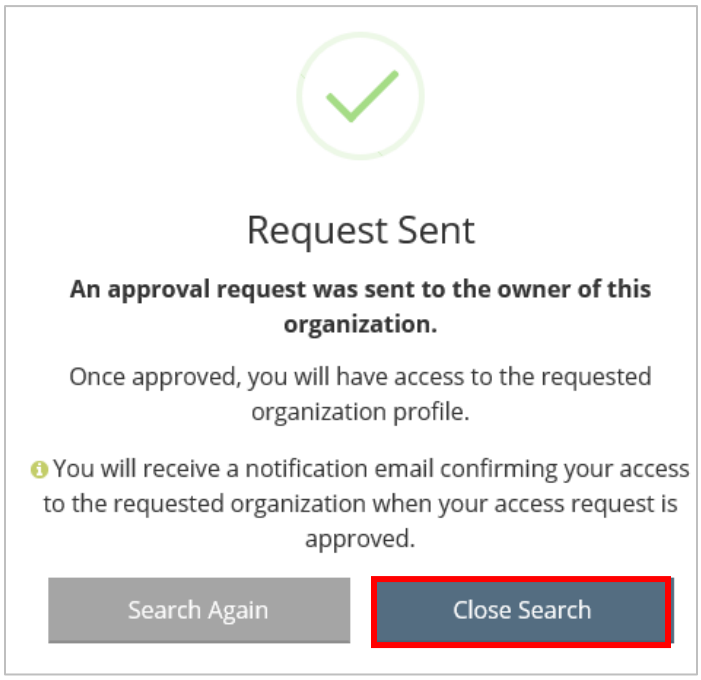
When your organization pops up, click **Send Request**.



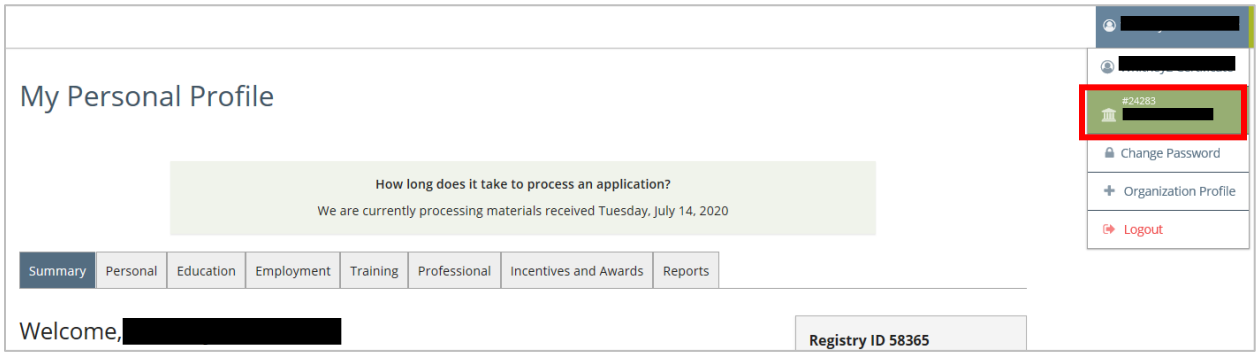
The system will confirm your approval request was sent to the owner of the organization.

Once approved by the organization owner, you will receive an email confirming your access to the organization account.

Click **Close Search**



After approval, the organization will appear in the drop-down menu under your name in your Registry profile.



How do I invite staff to my organization account?

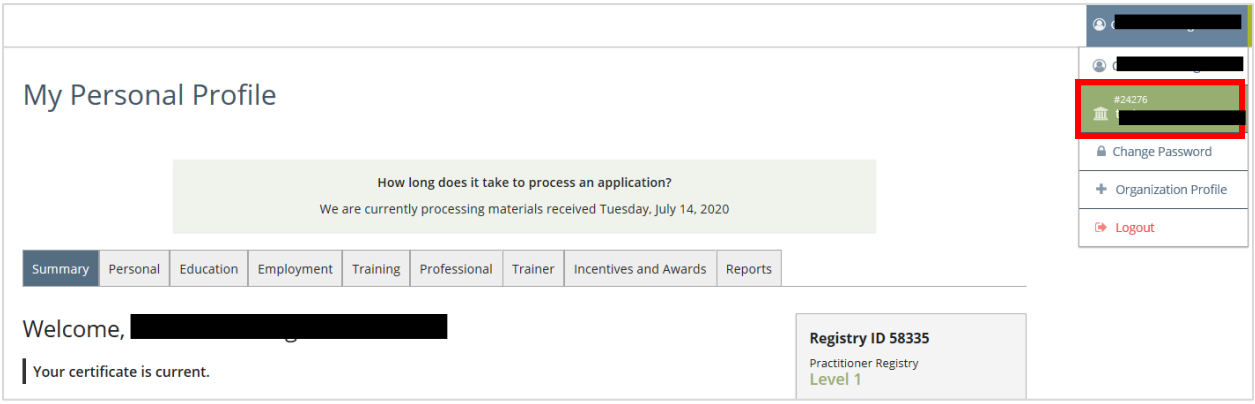
Note: This is for admin users only, not all employees as this will give users admin access to your organization account.

The purpose of this function is to invite staff to connect their employment to your organization account, **this does not give them access to the org account.**

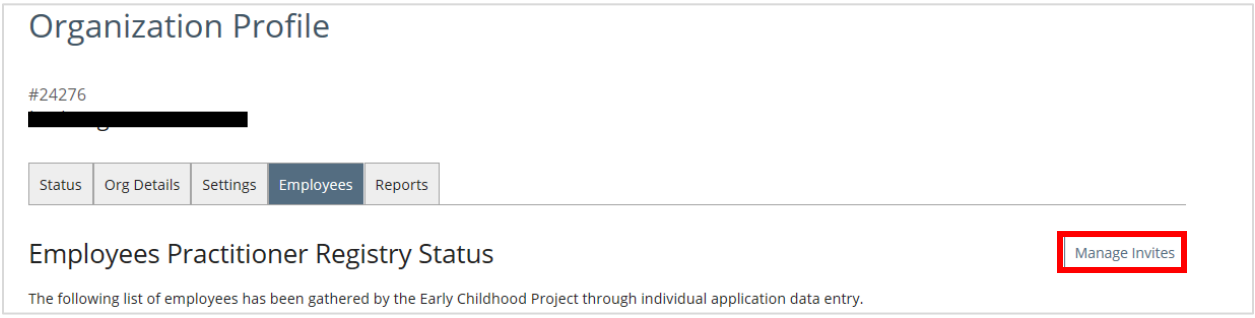
Log into your Registry account.

Click on the drop-down menu under your name in the top right corner.

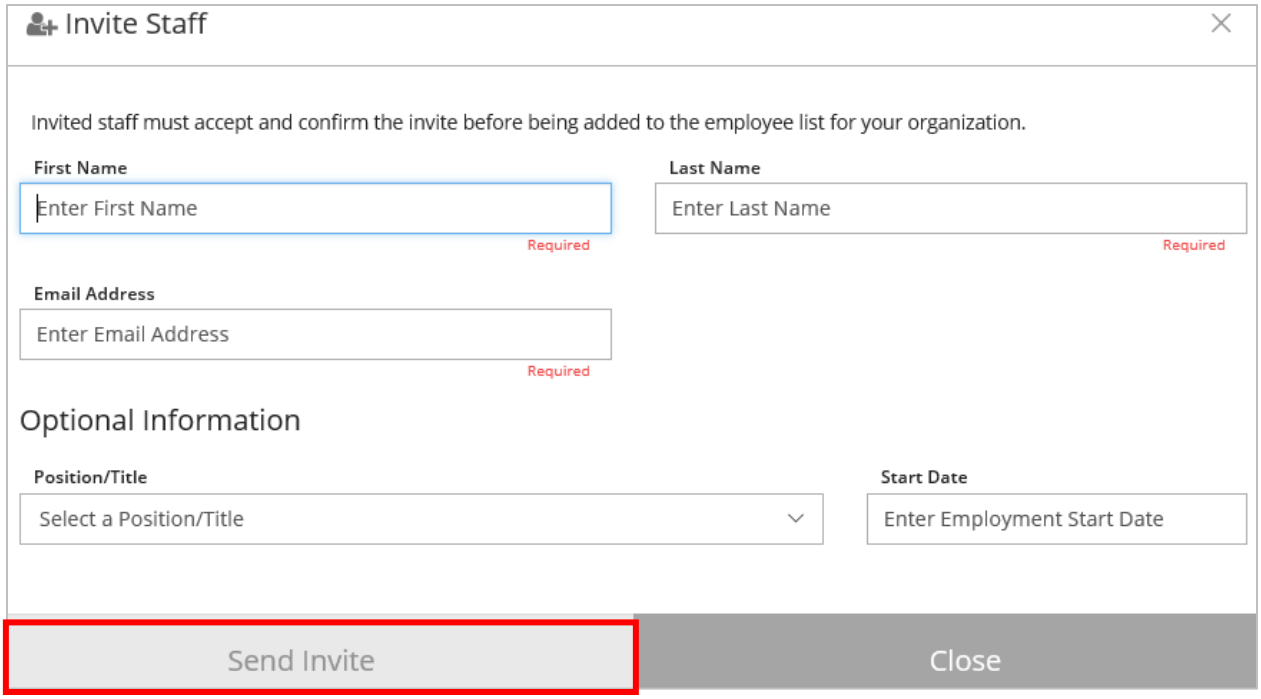
Click on your organization.



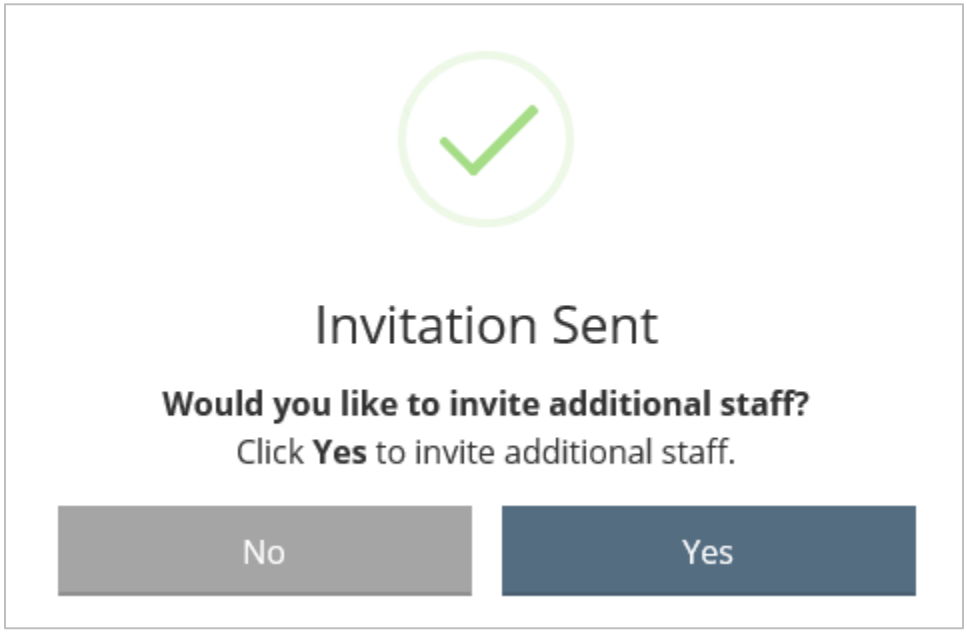
Under the **Employees** tab, click **Manage Invites**.



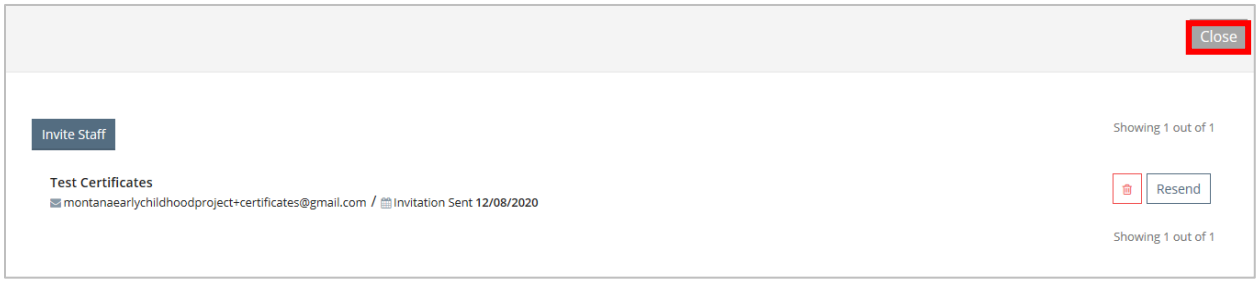
Enter in the name and email address of the person you wish to invite.
Click **Send Invite**



The system will confirm the invitation was sent. If you would like to add another staff member, click **Yes**, if not, click **No**.



When you are finished inviting staff, click **Close** in the top right corner.



How do I manage my profile owner and users?

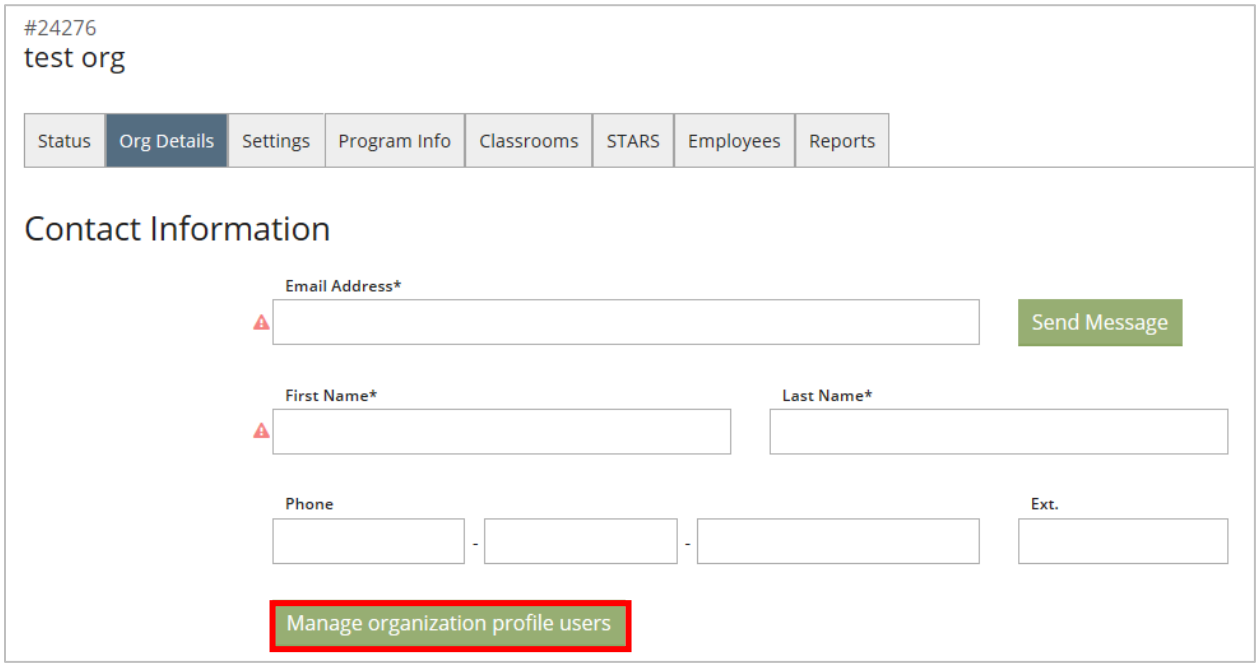
Log into your Registry account.

Click on the drop-down menu under your name in the top right corner.

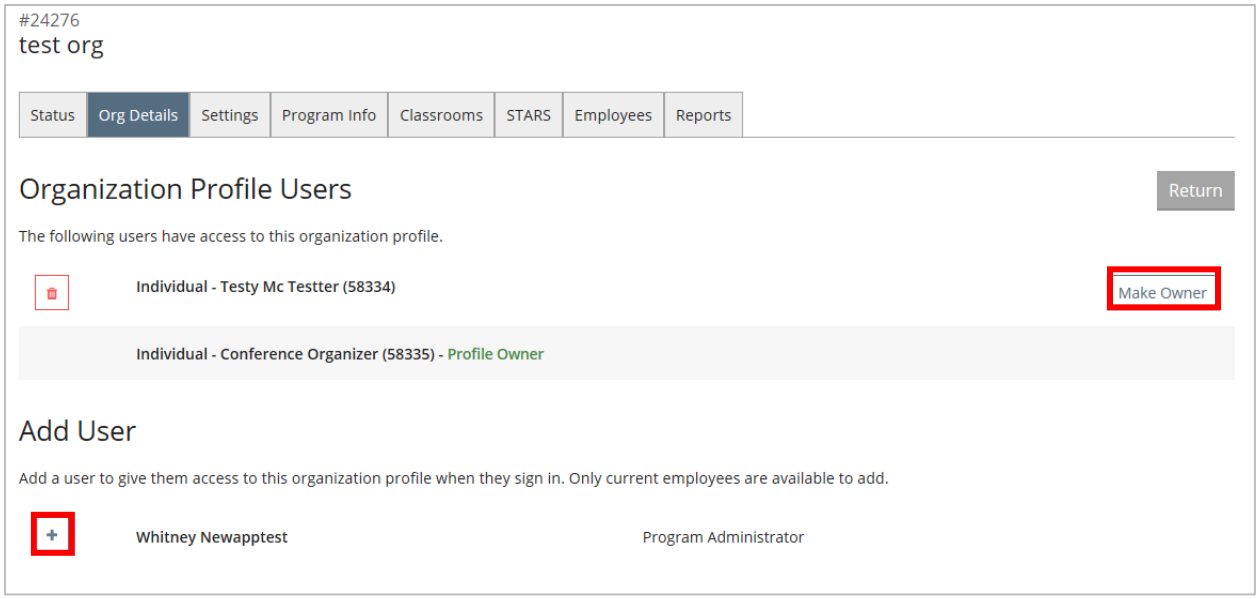
Click on your organization.

Click on the **Org Details** tab.

click **Manage organization profile users**.



From here you can change ownership of the organization profile by clicking **Make Owner**. You can also add a user to give them access to this organization account when they sign in, by clicking the **+** button next to the employee's name. Only current employees are available to add.



For additional information regarding your organization account, please contact Montana's Early Childhood Project.