

# Update Organization Contact Information

## Introduction

Agencies, corporations, and municipalities<sup>1</sup> can become accredited under the *Safety Codes Act* (Act) in the building, electrical, fire, gas, and plumbing technical disciplines. Once an organization is accredited, they will submit applications, compliance documentation, and other requests through **Council Connect**. This procedure walks through the steps that must be followed to update an accredited organization's contact information that has been populated within Council Connect.

## Key Considerations

Only authorized representatives of an accredited organization should request changes to the organization's contacts. Council staff will create and maintain the relationships between the accredited organization and their authorized individuals.

An organization's authorized representatives must be employees of the organization. These individuals will be designated by the organization to act as a Quality Management Plan (QMP) Manager, a Secondary QMP Contact, a QMP Administrator, a discipline specific QMP Manager, or have responsibility for the management and administration of the organization's accreditation. Most importantly, an authorized representative **cannot** be an employee of an accredited agency contracted to deliver safety codes services on behalf of the organization.

Within Council Connect, authorized representatives are identified as either a QMP Manager, or an Account Administrator. Employees of the organization that will be given the role of Account Administrator are discipline specific QMP Manager; secondary QMP contacts; QMP administrators; and other roles with responsibility for the management of the organization's accreditation.

In addition, the corporate contact information will be the location of the Senior Corporate Executive Officer, or Senior Administrative Officer that signed the organization's QMP.

If an organization wishes to allow related individuals to bill the organization for purchases made in Council Connect, those individuals also need to have a relationship established with the organization. QMP Manager, Account Administrators, Safety Codes Officers and Permit Issuers who hold an active DOP with the organization will have the ability to do this. Other employees however will need to have the appropriate relationship set up by the Council. The procedure noted below can be used for this purpose.

There is no fee charged to request changes to an organization's contacts.



**Tip:** *Please be aware that the organization's authorized representative must also have an individual account established in Council Connect. An individual account can be set up directly through the main Council Connect web portal.*

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## Notes:

1. Regional Service Commissions and Métis Settlements are included within the term "municipalities."

## Overview of Steps

An organization's authorized representative:

1. Sends an email to the Accreditation Department **or**
2. Logs into Council Connect and completes a customer request form.
3. Provides the updated contact information.
4. Receives confirmation of the submitted email or customer request.
5. Responds to any questions or requests for additional information as required.
6. Receives confirmation that the organization's contact information has been updated.

## Steps to Request a Change to an Organization's Contacts

The individual submitting the request must be the organization's QMP Manager or other representative that is a representative authorized to act on behalf of the organization. If submitting the request via the online request form, the individual must have appropriate permissions to access the organization's dashboard in Council Connect.

### Via Email

An authorized representative sends an email from the organization to [Accreditation@safetycodes.ab.ca](mailto:Accreditation@safetycodes.ab.ca) that contains:

1. A signature block that clearly identifies that the person sending the email is employed by the organization.
2. The name, title, phone, email of the individual that they want associated with the organization
3. The role that individual plays in the administration of their accreditation (this might be clarified through a reply to the original email)
  - a. QMP Manager – person responsible for administering the accreditation
    - i. **Note:** The organization's QMP will need to be updated by way of an online application whenever a QMP Manager is changed. Refer to the **Update Accreditation Application** tutorial in the Help section of Council Connect for more information.
  - b. Secondary QMP Contact – individuals involved in the day-to-day administration of the accreditation or a key contact within the organization
  - c. QMP Manager – Discipline Specific (i.e. building, or electrical, or fire, or gas, or plumbing). Most prevalent in the fire discipline.
  - d. Senior Administrative Officer or Official – President & CEO, Vice-President, Chief Administrative Officer, Chief Elected Official, Owner, Executive Director, Director & etc. Any individual that could potentially be responsible for signing a QMP on behalf of an organization
    - i. **NOTE:** The Account Admin role is not set up or managed by the accreditation department. This role or relationship type is set up and managed by the training department for training related purposes. Contact the Council's training department at [training@safetycodes.ab.ca](mailto:training@safetycodes.ab.ca) to request contacts be assigned this role in Council

Connect.

- ii. **NOTE 2:** Setting up a designation of powers (DOP) role or relationship is subject to a fee and is done through an application process. Refer to the Apply for SCO Designation of Powers tutorial located under the Help menu in Council Connect for detailed instructions to complete applications of this nature.

## Via an Online Customer Request Form

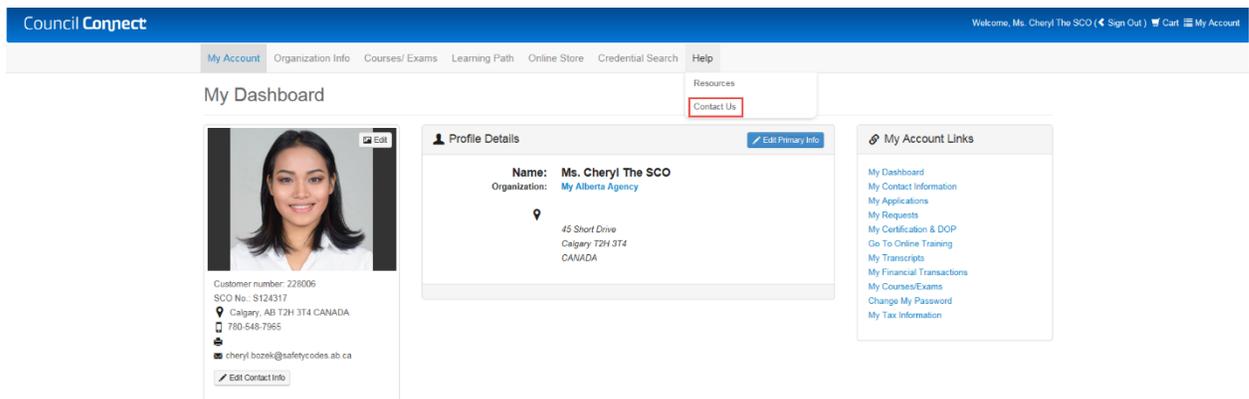
The individual submitting the request must be the organization’s QMP Manager or other representative that has the appropriate permissions (authorized representative) to view the organization’s dashboard in Council Connect. Refer to the SOP called **Sign In, Sign Out, and Change Password** document for more information on logging into Council Connect.

### Create an Online Request

You must be logged on to contact the Council via the online request form. Refer to the [Create a New Account tutorial](#) under the [Help menu](#) for more information.

### Contact Us When Logged In

When you are logged in to Council Connect, you will see the **My Dashboard** page. Follow the instructions below to contact the Council through the online request form.



7. From the **My Dashboard** page:
  - a. Hover over **Help**
  - b. Select **Contact Us**

## Individual Information Request | [Your Information](#)

Name: Ms. Cheryl The SCO

Customer Number: 228006

On Behalf of  
Organization:

My Alberta Agency



Select the related  
organization

### Explain Your Request

Activity:

Accreditation Enquiries



Required: Please choose an area of interest that best describes your inquiry.

Reason:

Update Contact Information



Then choose the type of information you are requesting.

Summary:

Required: Include brief summary of request

8. From the **Individual Information Request** form:
  - a. Select the organization the request is being made on behalf of in the **On Behalf of Organization** field (note: this list only populates if the appropriate relationship and permissions to the organization's record has been set up)
  - b. Click the **arrow** beside **Activity** and select **Accreditation Enquiries**
  - c. Click the **arrow** beside **Reason** and select **Update Contact Information**
  - d. Enter a summary regarding your request in the **Summary** section (maximum 50 characters)

Detail:

Feel free to add more specific details in the "Comments" area.

Upload File: Please don't use special character '&amp;' in the file name

 Browse...

Only if required (Accepted formats PDF,DOCX,DOC,XSL,XSLX,PNG)

Email confirmation?

Cancel

Submit

2. From the **Individual Information Request** form:
  - a. Enter the details regarding your request in the **Detail** section
    - iii. The name, title, phone, email of the individual that they want associated with the organization
    - iv. The role that individual plays in the administration of their accreditation (this might be clarified through a reply to the original email)
      - ❖ QMP Manager – person responsible for administering the accreditation
      - ❖ Secondary QMP Contact – individuals involved in the day-to-day administration of the accreditation or a key contact within the organization
      - ❖ Senior Administrative Officer or Official – President & CEO, Vice-President, Chief Administrative Officer, Chief Elected Official, Owner, Executive Director, Director & etc. Any individual that could potentially be responsible for signing a QMP on behalf of an organization
      - ❖ QMP Manager – Discipline Specific (i.e. building, or electrical, or fire, or gas, or plumbing). Most prevalent in the fire discipline.
      - ❖ **NOTE:** The Account Admin role is not set up or managed by the accreditation department. This role or relationship type is set up and managed by the training department for training related purposes. Contact the Council's training department at
  - b. Click on the **Browse** button to upload any files if required  
**Note:** Refer to the **Upload a Document** tutorial in HELP for detailed instructions on how to [upload a document](#).
  - c. Uncheck the **Email Confirmation** box if you do not wish to receive an email confirmation
  - d. Click **Submit** to send the request

## 2. Request for Further Information

- a. As the Council reviews and processes the application additional information, and/or documentation may be requested.
- b. The Council will send an email notification to the organization’s representative detailing the additional action required in order to continue processing the request.
- c. Instructions to respond will be included in the Council’s email.

## 3. Notification of Completion

- a. Once the Council’s update of the information in Council Connect has been completed, the organization will be notified by email.

## 4. View Updated List of Organization’s Contacts in Council Connect

- a. To view the updated list of the organization’s contacts, click **My Organization Contacts** in the **My Account Links** menu on the **Organization Dashboard**.

Organization Dashboard ◀ Go Back

Customer Number: 228028  
Accreditation Number: M000000  
780-413-0099

Details Your role: QMP Manager

**Name:** Town of Oceanville  
**Type:** Municipality

500 Oceanville Road  
Oceanville, AB T5J 3N4

My Account Links

- My Organization Dashboard
- My Organization Information
- My Applications
- My Accreditation Status
- My DOP List
- My QMP
- My Organization Contacts
- My Financial Transactions
- Mv Requests

Click Here

- b. If not already expanded, click the V icon next to the **My Contacts** title to display a list of the organization’s contacts, and their accreditation role under the Title column.

My Organization Contacts (Town of Oceanville) Back to My Organization Dashboard My Account Menu ▾

▼ My Contacts

Click Here to Expand

Name	Title	Email	Phone Number	Start Date	End Date
Janet Smith	QMP Manager	janetsmith@oceanville.com	780-413-0099	10/17/2018	
Henry Tudor	Account Admin	hanktudor@oceanville.com	780-413-0099	10/18/2018	
William Windsor	Account Admin	willwindsor@oceanville.com	780-413-0099	10/18/2018	