Alberta.ca Account for Organizations Reference Guide



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Alberta.ca Account for Organizations Reference Guide

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Overview

Alberta's government is making changes to how organizations access our services through Alberta.ca Account for Organizations. This document outlines how to sign in with an existing account, create a new account, add a new organization, manage an account and manage an organization.

Signing in

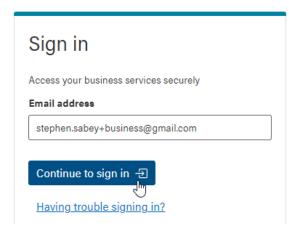
If you have an existing Alberta.ca Account for Organizations, previously called a MyAlberta Digital ID for Business (MADI-B) account, you will be able to sign in using your current credentials (i.e., your MADI-B credentials).

To sign in, go to: business.account.alberta.ca.

Signing in with the email associated with your MADI-B account

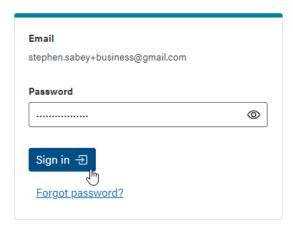
Enter the email address associated with your MADI-B account and click on 'Continue to sign in'.
 *If you do not know the email address associated with your MADI-B account, but do know your MADI-B username, please see 'Sign in with your MADI-B username' section.

Alberta.ca Account



2. Enter the password associated with your MADI-B account and click on 'Sign in'.

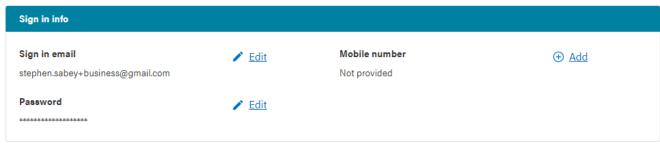
Enter password



3. You will be brought to the 'Manage your account' screen, where you will see your contact information.

Welcome, Bob McGyver

Manage your account, information and security to make Alberta.ca Account work better for you.

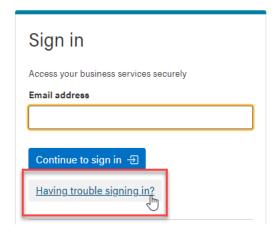




Signing in with your MADI-B username

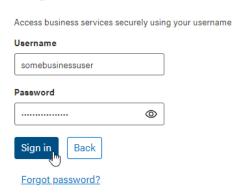
1. If you forgot the email address associated with your MADI-B account, you will be able to login using your MADI-B username and password. On the <u>Alberta.ca Account for Organizations</u> page, click on 'Having trouble signing in?'.

Alberta.ca Account



2. Enter the username and password associated with your MADI-B account and click on 'Sign in'.

Sign in



You will see the 'Use your email to sign in' screen reminding you of the email address associated with your MADI-B
account and advising that, going forward, you will be able to sign in with your email address instead of your username.
Click 'Continue'.

Use your email to sign in



4. You will be brought to the 'Manage your account' screen, where you will be able to see your contact information.

Welcome, Bob McGyver



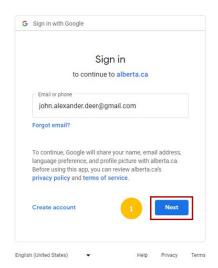


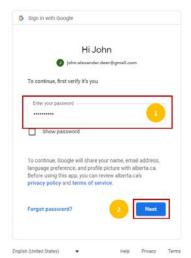
Signing in with different email accounts

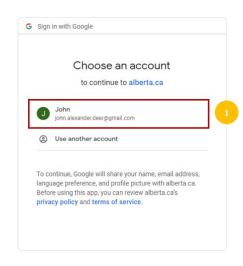
You can now sign in to <u>Alberta.ca Account for Organizations</u> with your everyday email address and password. When you enter your workplace email, you will be redirected to the appropriate sign in page without having to create a new account specific to our platform. The experience will be different depending on your email provider.

Google G-Suite Account

If you have a Google account, you will be prompted to sign in with your Google account. Below are some of the prompts you might see. Simply follow the prompts to sign in.

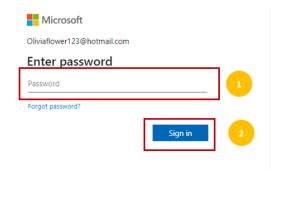


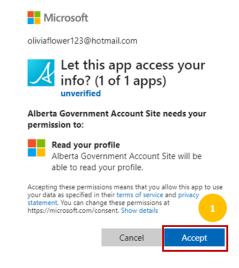




Microsoft M365 Account

If you have a Microsoft account, you will be prompted to sign in with your Microsoft account. Below are some of the prompts you might see. Simply follow the prompts to sign in.





Other Accounts

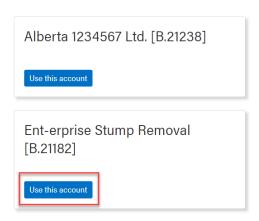
If you are signing in with an email account that does not prompt for automatic sign in, you may have to confirm you own that email address. You will receive an email notification with a link requesting that you confirm your account. You will need to click the link within 30 minutes, before the link expires. If the link expires, you will need to reinitiate the process.

Signing in when associated with multiple organizations

You can now represent multiple organizations from one Alberta.ca Account for Organizations.

1. When you have multiple staff accounts (multiple organizations), you will be prompted to select which organization you want to operate under in the current browsing session. After you have followed the sign in prompts, you will need to select an organization, click on 'Use this account.'

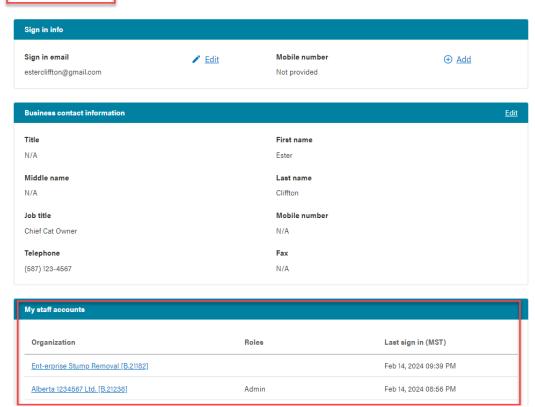
Choose staff account



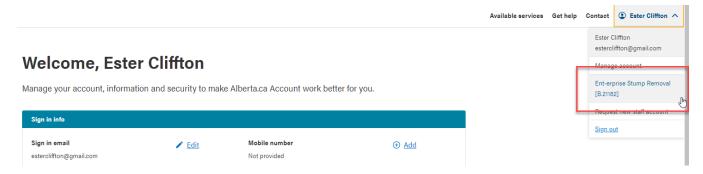
2. Once you select your organization, you will now be signed in under that specific organization and be redirected to the 'Manage your account' page, where you will be able to see all organizations associated with your account under 'My staff accounts.'

Welcome, Ester Cliffton

Manage your account, information and security to make Alberta.ca Account work better for you.



3. To confirm that you are operating under the correct organization, click on the arrow beside your name in the top-right corner and you will see the organization listed for the current session.



4. To operate on behalf of another organization, simply end the session by signing out. You will be prompted to select your organization again on sign in.

Creating a new account

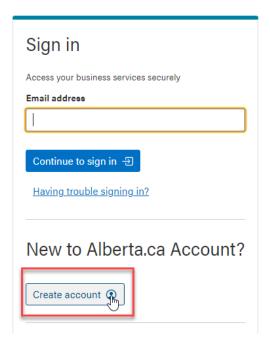
If you are new to Alberta.ca Account for Organizations, you can create a new account using your current workplace email address and password.

Creating a new account with your existing credentials

To create a new account, go to the Alberta.ca Account for Organizations page.

1. Click on 'Create account'.

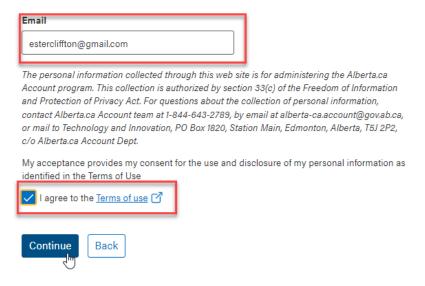
Alberta.ca Account



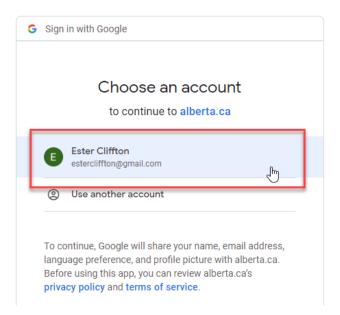
2. Enter your email address, then read and agree to the Terms of Use. Click 'Continue'.

Create account

Enter your email address



3. Follow prompts to sign. The below example shows a Google G-Suite Account. To see other domain examples, please refer to Signing in with different email accounts for more information.



4. You will now be prompted to add your organization. Begin by typing your organization name in the search field.

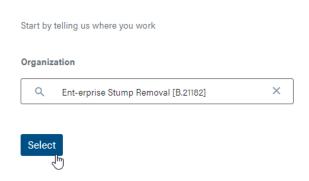
Choose your organization



5. Select your organization from the list and hit 'Select' to continue.

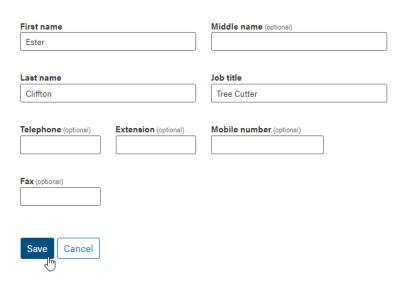
*If you do not see your organization in the list, or if you are looking to add your organization for the first time, please see the 'Adding a new organization' section.

Choose your organization



6. You will be prompted to enter your contact information. This should be the information you use to communicate on behalf of your organization. Click 'Save' to continue.

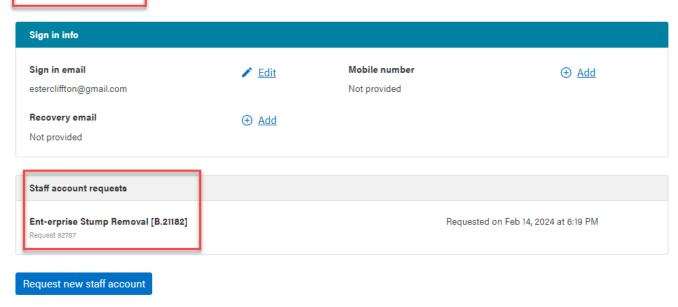
Business contact information



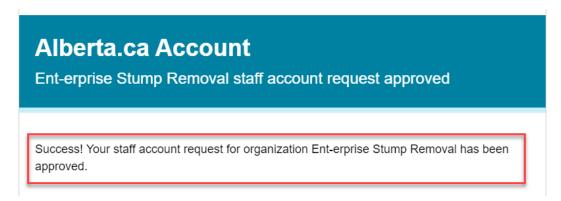
7. You will now be brought to the 'Manage your account' page, where you see your sign in information and your Staff account request.

Welcome, estercliffton

Manage your account, information and security to make Alberta.ca Account work better for you.



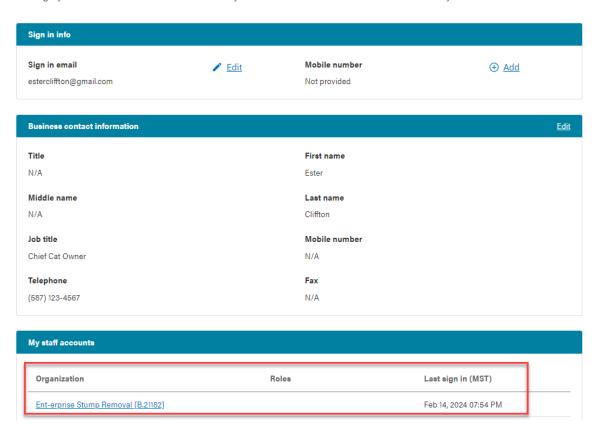
8. Once your organization's administrator approves your request, you will receive an email notification.



9. You will now see your organization listed under 'My staff account' from the 'Manage your account' page.

Welcome, Ester Cliffton

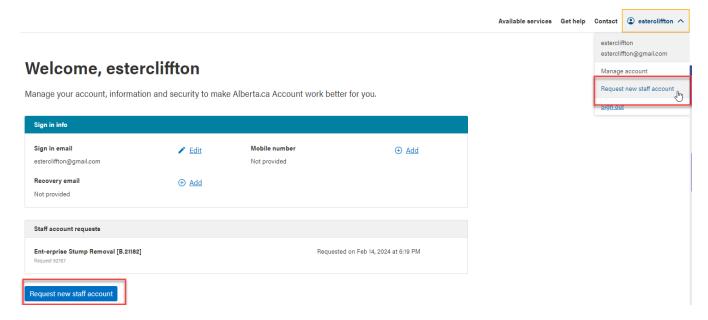
Manage your account, information and security to make Alberta.ca Account work better for you.



Adding a new organization

To add a new organization to Alberta.ca Account for Organizations, go to: business.account.alberta.ca.

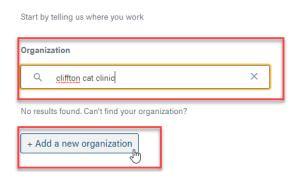
- Sign in to your Alberta.ca Account for Organizations.
- 2. Once signed in, you will need to navigate to the Organization Search page. To get here, click on 'Request new staff account' at the bottom of the page. Alternately, click on the arrow beside your name in the top-right corner and select 'Request new staff account.'



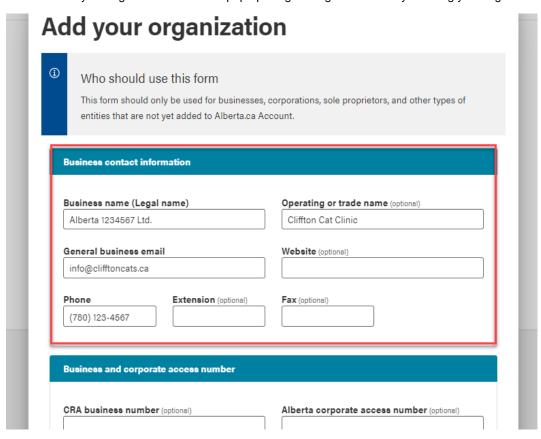
3. Verify that your organization is not already in the list by typing the name into the 'Organization' field. This is an important step because it reduces the number of duplicate entries in the list. Once confirmed, click on 'Add a new organization' to continue.

*If you discover that your organization is already listed, please join that organization. If you have lost access to this organization, please contact the Alberta.ca Contact Centre for assistance.

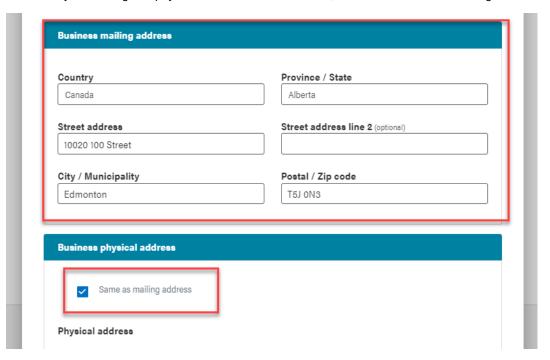
Choose your organization



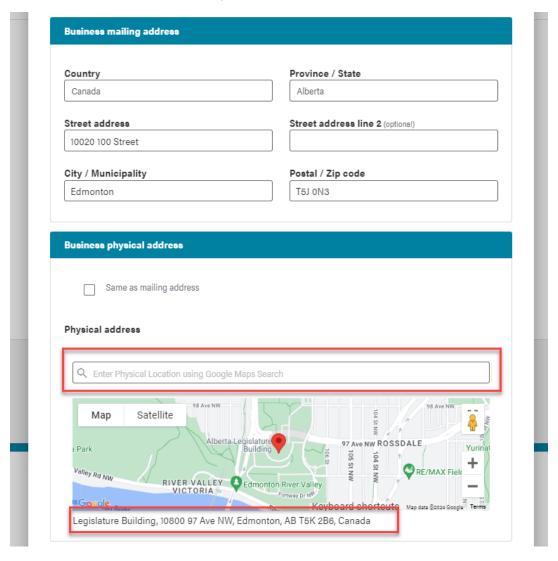
4. The 'Add your organization' form will pop up. Begin filling in the form by entering your organization's contact information.



- 5. Add your business mailing and physical addresses.
 - a. If your mailing and physical addresses are the same, click on the 'Same as mailing address.'



b) If your mailing and physical addresses are not the same, enter your physical address in the 'Physical address' search bar by typing your address. The location will appear in the drop-down menu. Select your physical address and you will see it listed below the Google map.

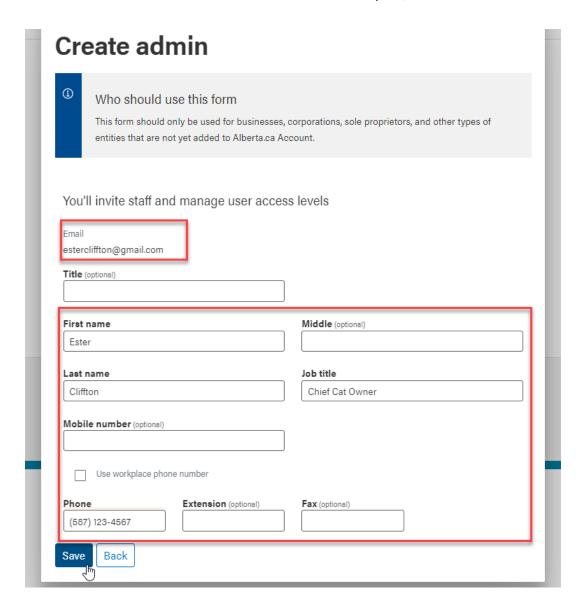


- 6. Click 'Continue' once complete.
- 7. You will now be prompted to add yourself as the first administrator for this organization, which is explained in the next section. This is a default feature so that an organization is created with at least one administrator. It is recommended that an organization have at least two administrators. More information can be found in 'Managing you organization.'

Setting up the administrator

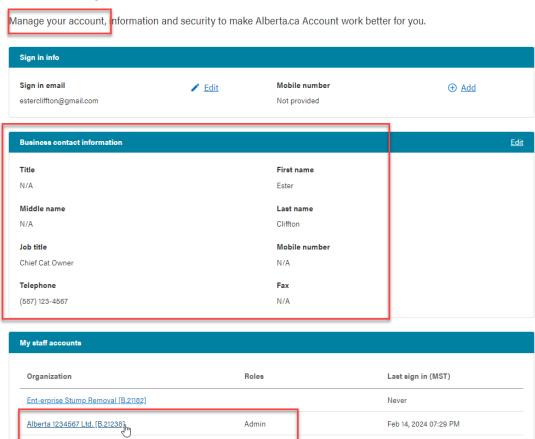
Once the organization is added, you will see the prompt to 'Create admin.' You will notice that your email address is already populated.

1. Begin by filling out the contact information form. This should be the contact information you use to interact on behalf of your organization. The mandatory 'Phone number' field is the shared line for your organization, whereas the optional 'Mobile number' is for a direct line to the individual. Once complete, click on 'Save'.



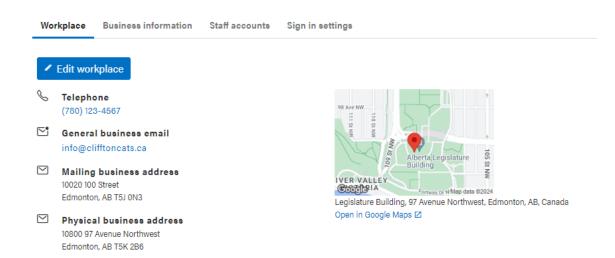
2. You will now be brought back to the 'Manage your account' screen, where you will see your organization's information and your newly created administrator account (i.e., your business account).

Welcome, Ester Cliffton

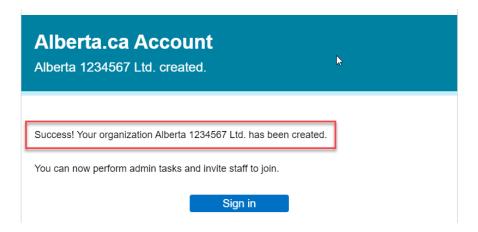


3. If you click on the name of your business, you will be able to see your organization's details.

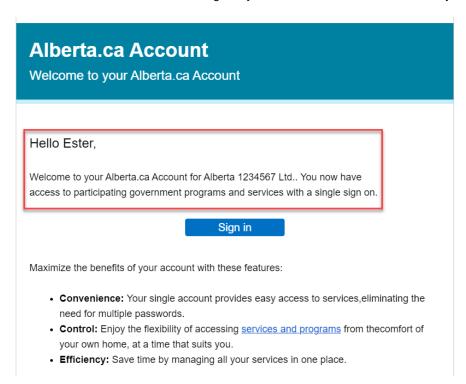
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4. You will receive an email confirming that the organization was created successfully.



5. You will also receive an email confirming that your account was created successfully.



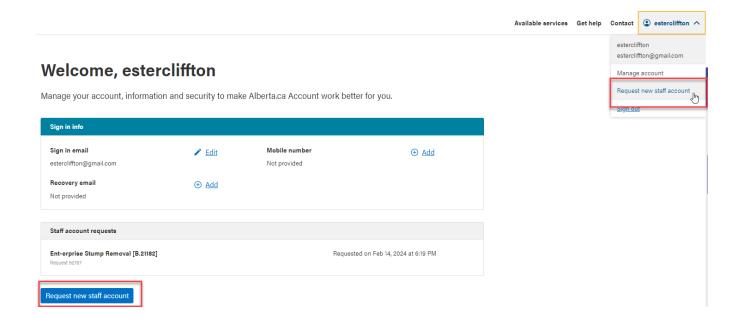
Managing your account

Now that you can sign in to Alberta.ca Account for Organizations, you are ready to manage your account and explore new features such as submitting a staff account request.

Submitting a staff account request

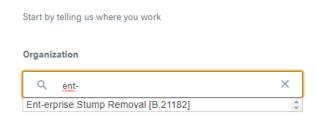
To send a request for a staff account to your organization, go to the Alberta.ca Account for Organizations page.

- 1. Sign in to your Alberta.ca Account for Organizations.
- 2. From the 'Manage your account' page, click on 'Request new staff account' at the bottom of the page. Alternately, click on the arrow beside your name in the top-right corner and select 'Request new staff account.'



3. You will now be prompted to add your organization. Begin by typing your organization name in the search field.

Choose your organization



4. Select your organization from the list and hit 'Select' to continue.

*If you discover a list of duplicate organizations and are unable to determine which is the appropriate organization to join, please contact the <u>Alberta.ca Contact Centre</u> for assistance.

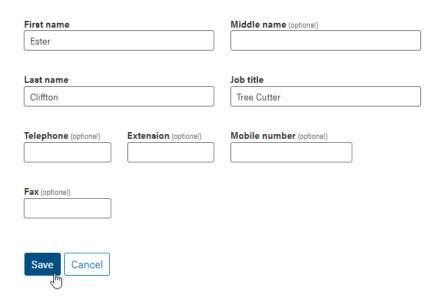
*If you do not see your organization in the list, or if you are looking to add your organization for the first time, please see the 'Adding a new organization' section.

Choose your organization



5. You will be prompted to enter your contact information. This should be the information you use to communicate on behalf of your organization. Click 'Save' to continue.

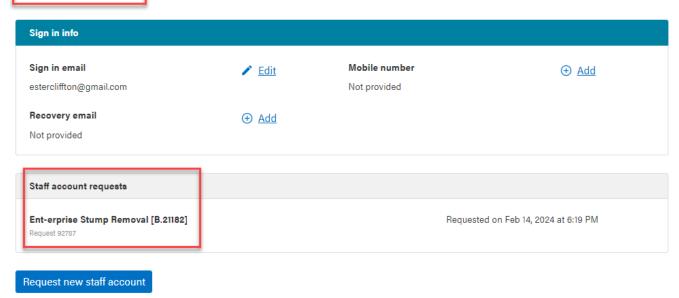
Business contact information



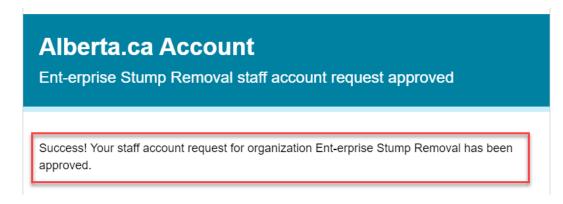
6. You will now be brought to the 'Manage your account' page where you see your sign in information and your Staff account request.

Welcome, estercliffton

Manage your account, information and security to make Alberta.ca Account work better for you.



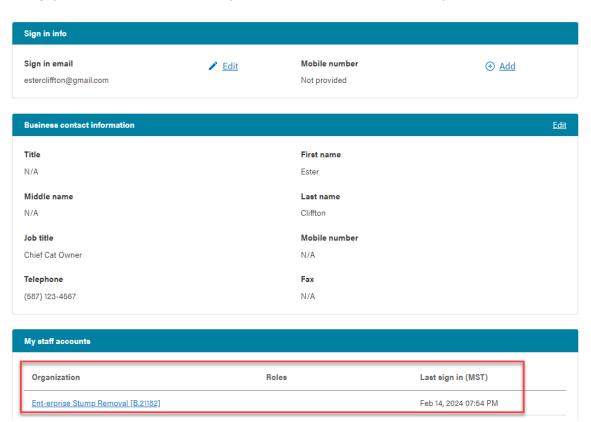
7. Once your organization's administrator approves your request, you will receive an email notification.



8. You will now see you your organization listed under 'My staff account' from the 'Manage your account' page.

Welcome, Ester Cliffton

Manage your account, information and security to make Alberta.ca Account work better for you.



Managing your organization

Now that you can sign in to Alberta.ca Account for Organizations, you are ready to manage your organization and explore new features such as accepting a staff request.

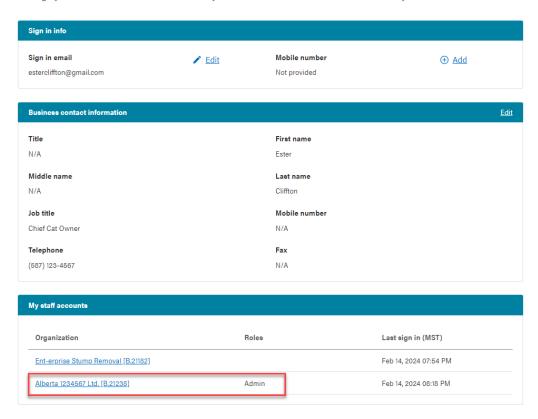
Adding staff to your organization

To add additional personnel to your organization, go to the Alberta.ca Account for Organizations page.

1. Sign in to your Alberta.ca Account for Organizations. Scroll down to 'My staff accounts.' Select the organization that you would like to add staff to by clicking on the organization name.

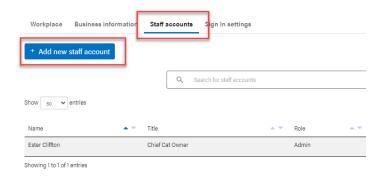
Welcome, Ester Cliffton

Manage your account, information and security to make Alberta.ca Account work better for you.

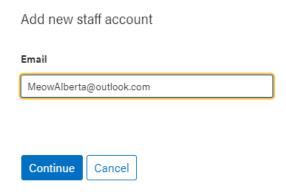


2. From the 'Organization directory' page, click on the 'Staff accounts' tab and click on 'Add new staff account.' This will redirect you to a new screen where you will be able to add new staff.

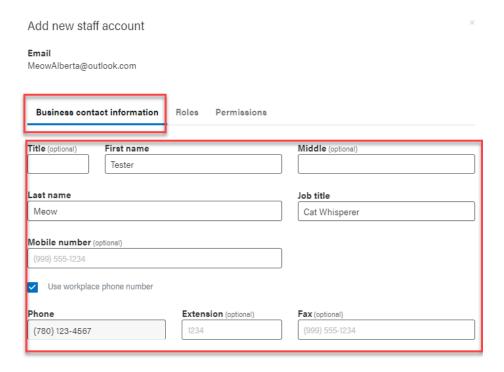
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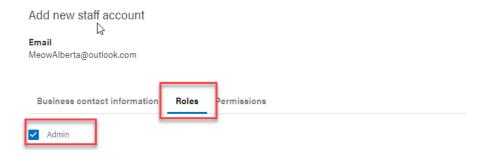
3. Enter the staff member's email address and click 'Continue'.



4. Enter the staff member's business contact information. If the staff member already has an existing Alberta.ca Account for Organizations, their business contact information will be pre-populated.



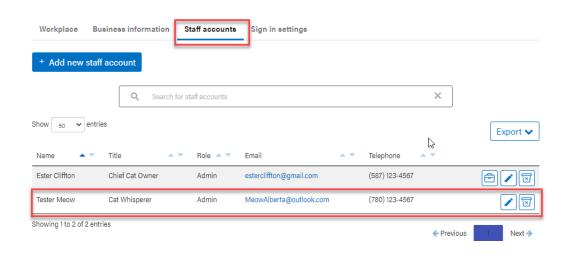
5. Under the 'Roles' tab, you will have an option to make this staff member an 'Admin.' Click the 'Admin' box to grant this individual administrator privileges to your organization.



- 6. The 'Permissions' tab is for future functionality. Currently, there are no separate permissions that you can apply.
- 7. Once you confirm the account details are correct, click on 'Save.'
- 8. You will see your new staff member in your list of 'Staff accounts.'

*If this individual already has an Alberta.ca Account for Organizations, then they will receive an email notification that they have been successfully added to your organization. If this individual did not already have an Alberta.ca Account for Organizations, they will receive an account creation notice in their email. They will have 30 days to complete their account set up.

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Approving a staff account request

If you are an administrator of an organization, you will receive an email notification when a staff account request is created. The administrator(s) will have 30 days to review the request before it expires. At that point, a new request would need to be submitted.

- To review a staff account request, click on the 'Review' button to start the process directly from your inbox. Alternately, sign in to your account by going to the <u>Alberta.ca Account for Organizations</u> page, click on your organization name under 'My staff account' and navigate to the 'Staff accounts tab.'
- 2. You will see the request waiting and pending review under. Click on 'View request.'

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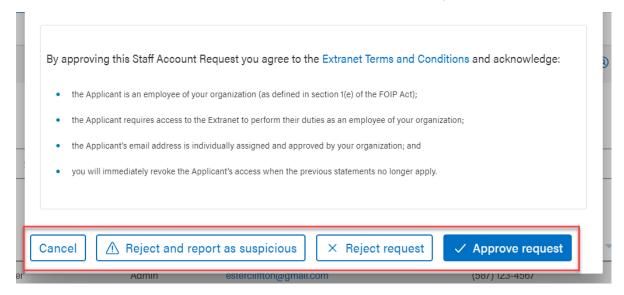
3. On the next screen you will be able to review the applicant's information.



4. You will have an option to make this staff member an 'Admin.' Click the 'Admin' box to grant this individual administrator privileges to your organization in Alberta.ca Account for Organizations.



5. At the bottom of the form, you will see options available to approve or reject the request. You can also reject a request and report it as suspicious if you have concerns about its origins. If you're not ready to make a decision, you can 'Cancel' to exit the screen. Be sure to read the Terms and Conditions prior to approving a request.

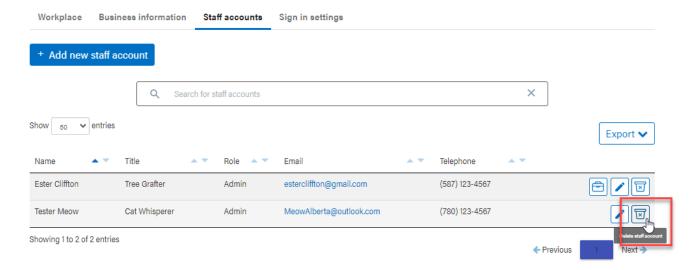


- 6. Once you approve the request, you will receive a confirmation message. You will be able to see the new staff member under your organization's 'Staff accounts' tab.
- 7. The individual will receive an email notifying them that their request has been approved.

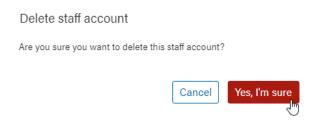
Removing a staff account

If you are an administrator of an organization, you are responsible for maintaining staff accounts. This includes revoking access to individuals who have departed your organization or no longer require access.

- 1. Sign in to your <u>Alberta.ca Account for Organizations</u>. Scroll down to 'My staff accounts.' Select the organization that you would like to remove staff from by clicking on the organization name.
- 2. From the 'Organization directory' page, click on the 'Staff accounts' tab and you will a list of your current staff accounts.
- 3. Identify the staff account that is no longer required and click on the 'Delete staff account' icon.



A pop up box will appear to confirm that you would like to delete this staff account from your organization. Click 'Yes, I'm sure.'



5. You will then get a pop up confirmation that the account has been removed.

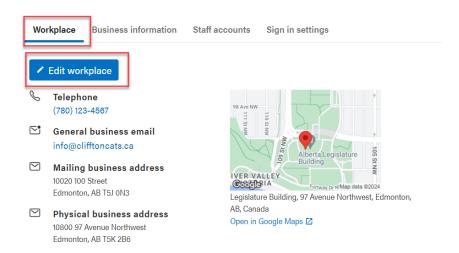


Updating and adding organization information

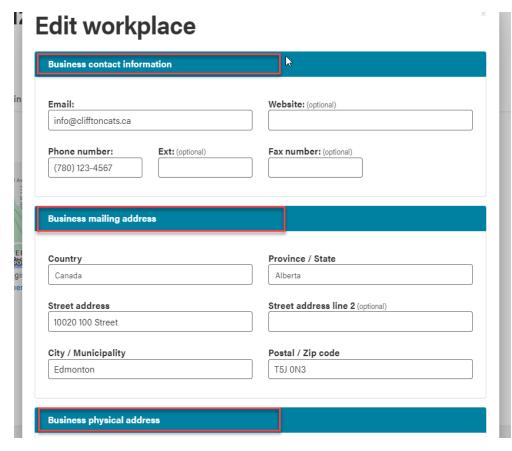
If you are an administrator of an organization, you are able to update and add additional information for that organization.

- 1. Sign in to your account by going to the Alberta.ca Account for Organizations page.
- 2. Click on your organization name under 'My staff account.' The 'Workplace' tab displays your business contact information. Click on 'Edit workplace' to edit.

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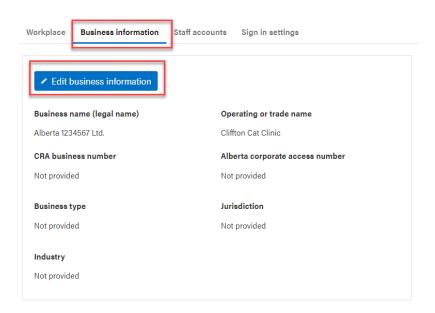


3. A new screen will pop up where you will be able to edit your business contact information, including the mailing and physical addresses. Click 'Save' once complete.

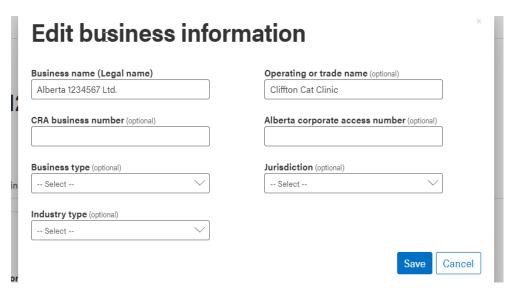


4. Under the 'Business information' tab, click on 'Edit business information' to update the information.

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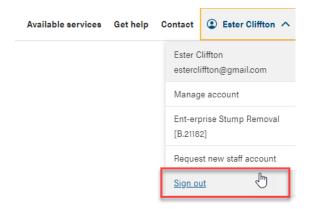
5. A new screen will pop up where you will be able to your business name, operating name, and business numbers. You can also add additional information such as business type, jurisdiction, or industry type. Click 'Save' once complete.



Further Assistance

Signing out

To sign out, click on your name in the top-right corner and select 'Sign out'.



Deactivating your account

You deactivate your Alberta.ca Account for Organizations by calling the contact centre at 1-844-643-2789. You will need to provide the email address for your account. Once your account is deactivated, you will no longer be able to sign in and access online services.

Reporting a compromised account

If you think your account has been compromised, sign in and change your password immediately. Call the contact centre at 1-844-643-2789.

Contact us for assistance

To receive technical assistance or ask questions about your Alberta.ca Account for Organizations, you can reach us by:

Contact Centre Phone at: 1-844-643-2789

Contact Centre Email at: alberta-ca.account@gov.ab.ca

Website at: https://account.alberta.ca/ui/account/help