1. I need all of the information in the chart below completed and sent back to me.

LAST NAME	FIRST NAME	ORG EMAIL	OUTLOOK EMAIL	ACCESS LEVEL	PHONE	Address	Position Title

2. I need each person who will be trained to create a new email account using www.Outlook.com. I have included instructions for how to do this. It is free and takes about 5 minutes. This is NOT the Outlook application that they may use to receive their email. This is a website where they create a new email account.

The Outlook.com email and password will be used as their sign-in credentials for the Portal. It is **very important** that they remember their Outlook.com email address and password for training!

I need to know their Outlook.com email address, but please **do NOT** send me any passwords. The email address should end in @Outlook.com.

If the training is more than a week away, I need each person to s\login to their Outlook.com email at least weekly to keep it active until training. Very important or their account will suspend.

When each person creates their Outlook.com account, **please have each person use a cell phone number** where it asks for "Phone Number". This makes it much easier for them to reset their own password in case they forget it. It can be a work or personal cell phone as long as it is one they carry with them. Only they will be able to reset their password as no one else will know it, including me.

When each person creates their account, please insure they **use their name** in the email address so we know to whom each email belongs.
(Example: KayG@Outlook.com or Kay.Gollihugh@Outlook.com or KGoll@Outlook.com).

3. Access Level – Your Director will determine what access level each of your staff get. I need to know what Access level is choosen for each staff person.

There are 2 levels: **Collaborate** or **Read-Only**.

Collaborate allows access to the entire portal including the Collaborate tab where you can interact with the community.

Read-Only allows access to everything except the Collaborate tab.

Generally speaking, front line staff usually get Read-Only, and Directors, Managers, grant writers, Executives, etc. get Collaborate. However, it is up to each organization what level of access they give to each staff person. Access levels can be changed easily if you choose one, and then decide on another.

4. I have attached the Terms and Conditions of Use for the Portal. **Each staff person will need to sign the last page (the signature page), with their supervisor countersigning.**
If possible, please do this before the training, and bring the completed signature page with you to the training.

If you have any questions at all, please let me know. I am happy to assist any way I can. **My cell phone is: 817-528-0455**. You may call or text to it.

I look forward to meeting you at the training and getting you onto the Partner Portal! Thank you so much for your interest!..............Kay