

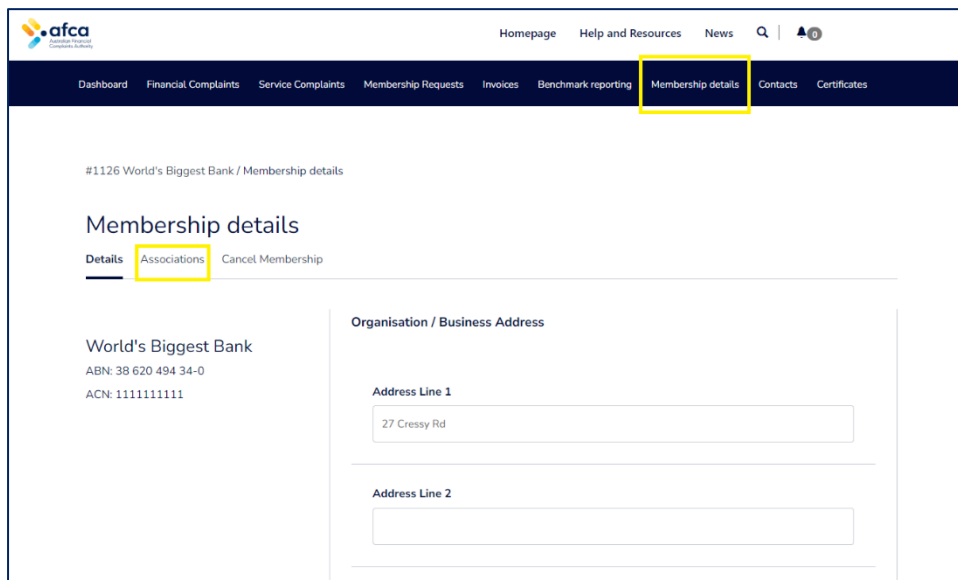
How to manage head member changes (ACR)

This is a guide for authorised credit representatives (ACR) to self-manage changes in the member portal. An administrator contact can make changes in the portal so that AFCA has up to date information about your organisation.

An ACR can update and manage the relationship relating to head member accounts. This means you will be able to add or create a new association or remove an existing association.

Adding or creating an association

1. Log in to the member portal.
2. Click on the **Membership details** tab.
3. Click **Associations**.



The screenshot shows the AFCA member portal interface. At the top, there is a navigation bar with links for 'Homepage', 'Help and Resources', and 'News'. Below this is a dark blue menu bar with various options: 'Dashboard', 'Financial Complaints', 'Service Complaints', 'Membership Requests', 'Invoices', 'Benchmark reporting', 'Membership details' (highlighted with a yellow box), 'Contacts', and 'Certificates'. The main content area is titled '#1126 World's Biggest Bank / Membership details'. Underneath, there are three tabs: 'Details', 'Associations' (highlighted with a yellow box), and 'Cancel Membership'. The 'Associations' tab is active, showing the 'World's Biggest Bank' information (ABN: 38 620 494 34-0, ACN: 1111111111) and a form for 'Organisation / Business Address'. The form has two input fields: 'Address Line 1' with the value '27 Cressy Rd' and 'Address Line 2' which is currently empty.

4. Click **Add**.

Membership details

Details **Associations** Cancel Membership

Associated Licensees

Search

Related Account ↑	Related Account No.	Start Date	End Date	Status
Trusted Trustees	1031	08/10/2023		Active

- Add or create a new association by searching the ACR's member number.
- Add the start date. This can be in the future. You are not required to fill in the end date.
- Click **Submit**.

Add a licensee ×

Licensee Required

Start Date

DD/MM/YYYY

End Date

DD/MM/YYYY

- You and the head member will receive an email notifying you that an association has been created.

Updating ACR or Financial Firm member associations

ACR and FF members (depending on their contact role) can update their ACR, licensee association in the portal. You can add, amend (association end date only)

and remove an association, which automatically updates this information in the Case Management System and notifies the other party.

1. Log in to the member portal.
2. Click on the **Membership details** tab.
3. Click **Associations**.
4. Select the ACR you wish to amend.
5. Click the **down arrow** for the option to **Enter End Date** or **End Today**.

Membership details

Details **Associations** Cancel Membership

Associated Licensees

Search [] [] Add

Related Account ↑	Related Account No.	Start Date	End Date	Status
Trusted Trustees	1031	08/10/2023		Active

Enter End Date
End Today

6. If you click **End Today**, it will automatically select today's date as the end date and end the association with the licensee. If you click **Enter End Date**, you can enter a specific end date in the past, present or future.

Edit

Licensee **Required**

Trusted Trustees [] []

Start Date

08/10/2023 []

End Date

DD/MM/YYYY [] []

Submit

October 2023

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

Choose a date

7. If you need to cancel your ACR membership, you need to submit a cancellation request in the **Member Requests** tab.