Managing Organization Contact and Address Information

In this document, you will find information or step-by-step directions on the following topics:

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Update Medical Director

**Important:** Review the drop down menu labeled I'm making purchases for to ensure you are making the purchase on behalf of the correct organization or party.

Update person details (Email, Phone)

1. Click **Update** next to the current medical director.

2. Use the radio button to **Update person details (Email, Phone).**

3. Edit **Email** (required) and/or **Phone**.

4. Click **Save and Submit**.

**TIP:** The phone’s country code will default based on the physical address of the organization.

**TIP:** Click **Cancel** at any time and changes will not be saved.
Once you **Save and Submit**, a confirmation message will be displayed.

5. Click **Continue**.

**Select/add a person for this role**

1. Click **Update** next to the current medical director.
2. Verify the radio button is selected to **Select/add a person for this role.**

3. **Select** the radio button for the new medical director.

   **TIP:** All people who currently have a relationship with the organization will be listed.

   **Important:** The selected medical director’s current contact details are displayed and can be edited.

4. Enter required fields and any additional contact information.

5. **Click** **Save and Submit.**

   **TIP:** See Update contact details for additional information.

   **TIP:** **Click** **Cancel** at any time and changes will not be saved.
Once you Save and Submit, a confirmation message will be displayed.

6. Click Continue.

Add person

1. Click Update next to the current medical director.
2. Verify the radio button is selected to **Select/add a person for this role.**

3. Click the link to **Add Person.**
4. Enter required fields and any additional contact information.

5. Click **Save and Submit**.

Once you **Save and Submit**, a confirmation message will be displayed.

6. Click **Continue**.
Update Ordering Contact

Important: Review the drop down menu labeled I’m making purchases for to ensure you are making the purchase on behalf of the correct organization or party.

Update person details (Email, Phone)

1. Click Update next to the current ordering contact.

2. Use the radio button to Update person details (Email, Phone).

3. Edit email (required) and/or phone.

4. Click Save and Submit.

TIP: The phone’s country code will default based on the physical address of the organization.

TIP: Click Cancel at any time and changes will not be saved.
Once you **Save and Submit**, a confirmation message will be displayed.

5. Click **Continue**.

**Select/add a person for this role**

1. Click **Update** next to the current ordering contact.
2. Verify the radio button is selected to **Select/add a person for this role**.

3. **Select** the radio button for the new ordering contact.

4. **Enter** required fields and any additional contact information.

5. **Click** **Save and Submit**.

**Important**: The selected ordering contact’s current contact details are displayed and can be edited.

**TIP**: All people who currently have a relationship with the organization will be listed.

**TIP**: See Update contact details for additional information.

**TIP**: Click **Cancel** at any time and changes will not be saved.
Once you Save and Submit, a confirmation message will be displayed.

6. Click Continue.

Select a Generic Contact
A generic contact is used when you want the attention to be directed to a department or role rather than a specific contact name.

1. Click Update next to the current ordering contact.
2. Verify the radio button is selected to **Select/add a person for this role**.

3. Use the radio button to **Select** a generic contact (existing or new).

**TIP:** The Generic Contacts section is listed under the organization contacts.
4. Enter required fields and any additional contact information.

5. Click **Save and Submit**.

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**Important**: If your organization has an existing generic contact and you choose an existing generic contact, the existing contact details are displayed and cannot be edited.

Once you **Save and Submit**, a confirmation message will be displayed.

6. Click **Continue**.
Add person

1. Click Update next to the current ordering contact.

2. Verify the radio button is selected to Select/add a person for this role.

3. Click the link to Add Person.
4. Enter required fields and any additional contact information.

5. Click **Save and Submit**.

Once you **Save and Submit**, a confirmation message will be displayed.

6. Click **Continue**.
No Ordering Contact

1. Click **Update** next to the current ordering contact.

2. Select the radio button **No Ordering Contact**.

3. Click **Save and Submit**.

   TIP: Click **Cancel** at any time and changes will not be saved.

Once you **Save and Submit**, a confirmation message will be displayed.

4. Click **Continue**.
Update Proctor Contacts

**Important:** Review the drop down menu labeled *I'm making purchases for* to ensure you are making the purchase on behalf of the correct organization or party.

**Select/add a person for this role**

1. Navigate to the *Shipping* page of the checkout process.

2. Click *Update/Add* next to the proctor contact(s).

**TIP:** See the Ordering help document for how to checkout.

**TIP:** The proctor contacts will only be visible when there is a PAP PT program in the shopping cart.
3. **Select** the radio button for the new proctor contact.

**TIP:** All people who currently have a relationship with the organization will be listed.
**Important:** The selected proctor contact’s current contact details are displayed and can be edited.

4. Enter required fields and any additional contact information.

5. **Check the Box** to agree to the CAP Proficiency Testing Proctor terms.

6. Click **Save and Submit**.

**Add person**

1. Navigate to the Shipping page of the checkout process.

2. Click **Update/Add** next to the proctor contacts.

**TIP:** See the Ordering help document for how to checkout.

**TIP:** The proctor contacts will only be visible when there is a PAP PT program in the shopping cart.
3. Click the link to **Add Person**.
4. Enter required fields and any additional contact information.

5. **Check the Box** to agree to the CAP Proficiency Testing Proctor terms.

6. Click **Save and Submit**.

**TIP:** Click **Back** to access the previous page.

**TIP:** If you know the CAP Personal ID for the new proctor contact, enter it in the **CAP Personal ID#** box and click **Find**. The new contact’s detail information is displayed. Click **Reset** to remove CAP Personal ID#.

**TIP:** Click **Cancel** at any time and changes will not be saved.
Remove Existing Proctor

1. Navigate to the Shipping page of the checkout process.

2. Click Remove next to the proctor contacts.

3. Select the contact(s) you want to remove.

4. Click Remove.

**TIP:** See the Ordering help document for how to checkout.

**TIP:** The proctor contacts will only be visible when there is a PAP PT program in the shopping cart.

**TIP:** If the laboratory is an active PAP PT customer, at least 1 proctor is required.

**TIP:** Click Cancel at any time and changes will not be saved.
Update Ship to Contact

**Important:** Review the drop down menu labeled *I’m making purchases for* to ensure you are making the purchase on behalf of the correct organization or party.

Update person details (Email, Phone)

1. Navigate to the Shipping page of the checkout process.

2. Click **Update** next to the current Ship to Contact.

**TIP:** See the Ordering help document for how to checkout.
3. Use the radio button to select **Update person details (Email, Phone)**.

4. Edit **email** (required) and/or **phone**.

5. Click **Save and Submit**.

6. **TIP**:
   - The phone’s country code will default based on the physical address of the organization.
   - **TIP**: Click **Cancel** at any time and changes will not be saved.

Once you **Save and Submit**, a confirmation message will be displayed confirming the change for future shipments.

6. Click **Continue**.

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*Warning*

Your ship to contact will be updated. All future shipments for this account will be addressed to this contact except for those programs and services that are scheduled to ship within 30 days of the change.

Click **Continue** if you wish to proceed, or **Cancel** to abort.
Select/add a person for this role
1. Navigate to the Shipping page of the checkout process.
2. Click Update next to the current Ship to Contact.
3. Verify the radio button is selected to Select/add a person for this role.
4. Select the radio button for the new Ship to Contact.

TIP: See the Ordering help document for how to checkout.

TIP: All people who currently have a relationship with the organization will be listed.
5. Enter required fields and any additional contact information.

6. Click Save and Submit.

Once you Save and Submit, a confirmation message will be displayed noting it will be changed for all future shipments.

7. Click Continue.
Select a Generic Contact
A generic contact is used when you want the attention to be directed to a department or role rather than a specific contact name.

1. Navigate to the Shipping page of the checkout process.

2. Click Update next to the current Ship To contact.

TIP: See the Ordering help document for how to checkout.
3. Verify the radio button is selected to **Select/add a person for this role.**

4. Use the radio button to **Select** a generic contact (existing or new).

5. Enter required fields and any additional contact information.

6. Click **Save and Submit**.

**TIP:** The Generic Contacts section is listed under the organization contacts.

**TIP:** See Update contact details for additional information.
**Important:** If your organization has an existing generic contact and you choose an existing generic contact, the existing contact details are displayed and cannot be edited.

Once you **Save and Submit**, a confirmation message will be displayed noting it will be changed for all future shipments.

7. Click **Continue**.

**Add person**

1. Navigate to the Shipping page of the checkout process.

2. Click **Update** next to the current Ship to Contact.

**TIP:** See the Ordering help document for how to checkout.
3. Verify the radio button is selected to **Select/add a person for this role**.

4. Click the link to **Add Person**.
5. Enter required fields and any additional contact information.

6. Click **Save and Submit**.

   Once you **Save and Submit**, a confirmation message will be displayed noting it will be changed for all future shipments.

7. Click **Continue**.
Update Ship to Address

**Important:** Review the drop down menu labeled *I'm making purchases for* to ensure you are making the purchase on behalf of the correct organization or party.

**Select another address in my organization**

1. Navigate to the Shipping page of the checkout process.

2. Click **Update** next to the current Ship to Address.

**TIP:** See the Ordering help document for how to checkout.
3. Select the radio button for the new Ship to Address.

4. Click Save and Submit.

Once you Save and Submit, a confirmation message will be displayed noting it will be changed for all future shipments.

5. Click Continue.
Add address

1. Navigate to the Shipping page of the checkout process.

2. Click **Update** next to the current Ship to Address.

3. Click the link to **Add Address**.
4. Enter required fields and any additional address information.

5. Click **Save and Submit**.

Once you **Save and Submit**, a confirmation message will be displayed noting it will be changed for all future shipments.

6. Click **Continue**.
Update Bill To Customer

Important: Review the drop down menu labeled I'm making purchases for to ensure you are making the purchase on behalf of the correct organization or party.

Select another billing account

1. Navigate to the Billing page of the checkout process.

2. Use the dropdown list to select the new Bill To Customer.

TIP: You can only update the Bill To Customer to another billing account with an existing relationship to the organization.
Update Bill To Contact

Important: Review the drop down menu labeled I'm making purchases for to ensure you are making the purchase on behalf of the correct organization or party.

Update person details (Phone, Email)

1. Navigate to the Billing page of the checkout process.

2. Click Update next to the current Bill To Contact.

TIP: See the Ordering help document for how to checkout.
3. Use the radio button to select Update person details (Email, Phone).

4. Edit email (required) and phone.

5. Click Save and Submit.

Once you Save and Submit, a confirmation message will be displayed confirming the change is pending CAP’s review.

6. Click Continue.
7. The Billing page will display the current Bill To Contact and the Bill To Contact change pending CAP’s review.
Select/add a person for this role

1. Navigate to the Billing page of the checkout process.

2. Click **Update** next to the current Bill To Contact.

**TIP:** See the Ordering help document for how to checkout.
3. Verify the radio button is selected to **Select/add a person for this role**.

4. **Select** the radio button for the new Bill to Contact.

**TIP**: All people who currently have a relationship with the organization will be listed.
5. Enter required fields and any additional contact information.

6. Click **Save and Submit**.

Once you **Save and Submit**, a confirmation message will be displayed confirming the change is pending CAP’s review.

7. Click **Continue**.
8. The Billing page will display the current Bill To Contact and the Bill To Contact change pending CAP’s review.
Select a Generic Contact
A generic contact is used when you want the attention to be directed to a department or role rather than a specific contact name.

1. Navigate to the Billing page of the checkout process.

2. Click **Update** next to the current Bill To Contact.
3. Verify the radio button is selected to **Select/add a person for thus role**.

4. Use the radio button to **Select** a Generic Contact (existing or new).

5. Enter required fields and any additional contact information.

6. Click **Save and Submit**.

**TIP:** See Update contact details for additional information.
Once you Save and Submit, a confirmation message will be displayed confirming the change is pending CAP’s review.

7. Click Continue.

8. The Billing page will display the current Bill To Contact and the Bill To Contact change pending CAP’s review.
Add person

1. Navigate to the Billing page of the checkout process.

2. Click **Update** next to the current Bill To Contact.
3. Verify the radio button is selected to Select / add a person for this role.

4. Click the link to Add Person.
5. Enter required fields and any additional contact information.

6. Click **Save and Submit**.

Once you **Save and Submit**, a confirmation message will be displayed confirming the change is pending CAP’s review.

7. Click **Continue**.

TIP: If you know the CAP Personal ID for the new bill to contact, enter it in the CAP Personal ID# box and click **Find**. The new contact’s detail information is displayed. Click **Reset** to remove CAP Personal ID#.

TIP: Click **Back** to access the previous page.

TIP: Click **Cancel** at any time and changes will not be saved.
8. The Billing page will display the current Bill To Contact and Bill To Contact change pending CAP’s review.
Update Bill To Address

**Important:** Review the drop down menu labeled *I’m making purchases for* to ensure you are making the purchase on behalf of the correct organization or party.

**Select another address in my organization**

1. Navigate to the Billing page of the checkout process.

2. Click **Update** next to the current Bill To Address.
3. Select the radio button for the new Bill To Address.

4. Click Save and Submit.

Once you Save and Submit, a confirmation message will be displayed confirming the change is pending CAP’s review.

5. Click Continue.
6. The Billing page will display the current Bill To Address and Bill To Address change pending CAP's review.
Add address

1. Navigate to the Billing page of the checkout process.

2. Click Update next to the current Bill To Address.
3. Click the link to **Add Address**.
4. Enter required fields and any additional address information.

5. Click **Save and Submit**.

Once you **Save and Submit**, a confirmation message will be displayed confirming the change is pending CAP’s review.

6. Click **Continue**.
7. The Billing page will display the current Bill To Address and Bill To Address change pending CAP’s review.