Mandatory one-time Organization Setup Instructions

To submit a request, you must first complete the **MANDATORY one-time Organization** setup. This setup will link you, the Requestor, to your Organization's profile within the tool. Please follow the instructions below:

1. Select the *Organization Information* Tab
2. When you click on the *New* button you will be given 2 options.
   a. Search by Name
   b. Create New
3. **Always "Search by Name" first, to see if your Organization's name already exists in the tool.**
   a. Type the first few letters of your Organization's name (no acronyms) in the search field and then scroll down until you find it.
   b. Once you find your Organization's name, click the plus sign (+) to select it. The system converts the plus sign to a check mark (√) thus linking yourself to this organization.
4. If you cannot find your Organization, you will need to create it (no acronyms). Please go back and choose the – ***Create New*** option.
5. For both options:
   a. you will be prompted to **Agree** to the Compliance Statement.
   b. You will need to provide detailed information, such as address information, authorized signer, and payee information to finalize the Organization setup.

Note: The authorized signer and payee information must be inputted at this time, otherwise you will not be able to submit your request.