



# Management of team roles

▶▶ Background information: A user with the role of employer account manager or provider account manager can manage roles within their team. This means they can assign the role(s) they possess (employer and/or provider) to a user who appears in the list of their team's employees.

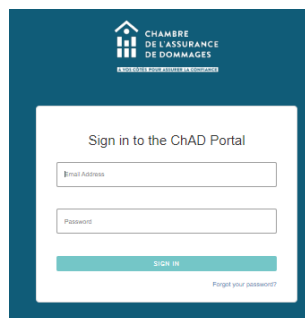
Here's how to do it:

## ▶▶ PROCESS



## INSTRUCTIONS

1. Log in to the ChAD Portal at [portail.chad.ca](http://portail.chad.ca). If need be, follow the [procedure for logging in](#).



The screenshot shows the login interface for the ChAD Portal. At the top, there is the ChAD logo and the text 'CHAMBRE DE L'ASSURANCE DE DOMMAGES'. Below this, the heading 'Sign in to the ChAD Portal' is centered. There are two input fields: 'Email Address' and 'Password'. Below the password field is a 'SIGN IN' button. At the bottom right, there is a link that says 'Forgot your password?'.



## Information Sheet Target group: Trainers



### 2. Click on “Managing business accounts.”

Welcome [redacted]

IMPORTANT: The current reference period (2022-2023) ends on March 31, 2024. There is no longer a grace period. Please go to chad.ca for further details.

<b>Profile</b> Confirm your personal information and give your employer consent to view your training file during the current period.	<b>ÉduChAD</b> View your training file, explore available training to improve your skills, and manage your professional development plan.	<b>Request for information</b>
<b>Trainer certification</b> Submit your application using our seamless procedure and become a ChAD recognized trainer.	<b>Managing business accounts</b> A one-stop shop for managing your needs: have training recognized, view your businesses, etc.	<b>Transactions</b> Make a payment, view and retrieve your invoices.
<b>Questionnaires</b>	<b>ChAD.ca</b>	<b>Confidentiality Policy</b>

### 3. Click on the company where the employee whose role you want to change is located.

A one-stop shop for managing your needs: view your businesses, manage employees, have training certified, etc.

## Your Corporate Services

**i** Information

Filter Search

Name	Training provider	Employer	Main address
CHAMBRE DE L'ASSURANCE DE DOMMAGES	✓	✓	999 BOUL. DE MAISONNEUVE O, SUITE 1200, MONTRÉAL, QUÉBEC, H3A 3L4, CANADA

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4. Click on the "Employee List" tab.

CHAMBRE DE L'ASSURANCE DE  
DOMMAGES

General Information Memberships **Employees List**

Members

[Redacted]
[Redacted]

5. Click on the name of the employee to whom you want to assign the role, then click on the blue pencil icon on the right.

CHAMBRE DE L'ASSURANCE DE  
DOMMAGES

General Information Memberships **Employees List**

Members

[Redacted]	Start Date : [Redacted]	End Date : --	
[Redacted]		Formateur	

6. Activate the button for the role you want to assign.

Add the start date.

Note: You can only assign a role that you possess.

For example, if you have the provider role but not the employer role, you will only be able to activate the "Provider Account Manager" button. Click "Save".



### Edit Employee

SAVE

[Redacted]

First Name\* [Redacted] Last Name\* [Redacted]

Start Date\* 2024-11-11 [Calendar icon] End Date [Calendar icon]

Responsible trainer account  Responsible employer account

SAVE

An uncertified employee does not appear in your list, and you want to assign them a role?

They may not yet have an account in the ChAD Portal or their association with your organization may not have been completed yet.

Contact us at [formation@chad.qc.ca](mailto:formation@chad.qc.ca) so we can resolve the situation.

### Who is the organization's training courses manager?

It is your responsibility to inform us if this person should be the contact to the organization's training courses recognized by the ChAD. To do this, contact us at [formation@chad.qc.ca](mailto:formation@chad.qc.ca) as soon as possible to let us know.

This change of contact, if applicable, is important and impacts your organization's operations. The provider account manager receives automatic messages regarding, among other things, the renewal of training recognized courses.