IIA Group Admin Portal User Manual

GROUP MEMBERSHIP

This guide provides instructions for managing every element of group membership including

- How to manage your organization's account information
- How to add, edit and remove account administrators
- How to update the addresses associated with your account
- How to add or remove individuals from your roster (this is before membership can be assigned)
- How to assign, vacate and substitute membership slots.
- How to purchase and renew group membership
- How to purchase from the store and complete event registrations.

Contents

Updated 18 February 2022

Overview

This guide will explain how to successfully manage all aspects of IIA Audit Group Membership through the IIA Group Admin Portal.

Authorized User Permission

Only individuals with the Account Administrator role (also known as the Group Admin) for your organization's IIA account will have access to the IIA Admin Portal. If you are currently an account administrator, please refer to the Account Administrators for instructions on how to authorize others on your rosters as account administrators.

To inquire about establishing a new IIA group account, please complete the Group Services Inquiry Form.

If account administrators are no longer with your organization and you need to update who will be the main account administrator, please email CustomerRelations@theiia.org.

Technical Requirements

In order to have an optimal experience while using the Admin Portal, you will need to adhere to the following browser and operating system requirements.

Supported Browsers

Browser	Supported Versions
Google Chrome	76 or higher
Microsoft Edge	44 or higher

Supported Operating Systems

Operating System	Version
Microsoft Windows	7 or higher
Mac OS	X or higher

Please note that anti-virus software installed on computers may prevent list or template download.

Recommended Display (Screen)

You will need a display (screen) that has a minimum resolution width of 880 pixels. Please note that while it may be possible to still use the Admin Portal on a browser or operating system not listed above, many parts of the Admin Portal functionality you experience may be degraded and render the Admin Portal unusable. It is highly recommended to use the platforms listed above for optimal user experience.

Updated 18 February 2022

Key Terms

Key Terms		
	Term	**Definition**
	Account Roster	A list of individuals affiliated with your organization. The roster contains both IIA members and non-members who are affiliated with your organization linked by your organization's ID.
	Account Administrator	Also known as Group Administrator.
	GAN (Global Account Number)	Unique identifying number associated with an individual's account.
	Customer PO	Unique number assigned to your organization's approved Purchase Order, the official document issued by a buyer (Your Organization) committing to pay the seller (The IIA) for the sale of specific products or services to be delivered. The purchase order (PO) helps both the buyer and seller track delivery and payment.

IIA Admin Portal Dashboard - Overview

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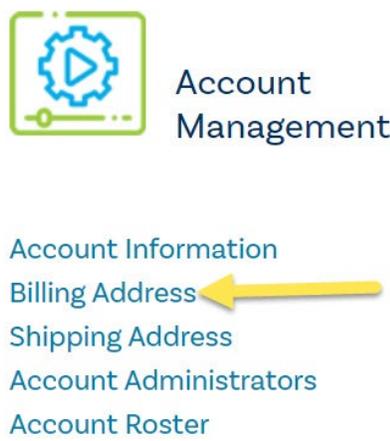
WELCOME, CRISTINA ALMEIDA - GAN

VIEW CART (2 ITEMS) 🛒 | CHANGE ACCOUNT 🔁 | SIGN OUT ▸

Account Management
Account Information
Billing Address
Shipping Address
Account Administrators
Account Roster

Group Membership
Manage Slots
Help

Store
Browse Products
View Course Catalog
View Quotes
View Orders

Account Management	Description
Account Roster	A list of individuals affiliated with your organization. The roster contains both IIA members and non-members who are affiliated with your organization linked by your organization's ID.
Billing Address	View and update organization's billing address.
Shipping Address	View and update organization's shipping address.
Account Administrators	Manage who has administrative authority over the group account.
Group Membership	**Description**
Manage Slots	Assign, Vacate, and Substitute individuals from Membership Slots.
Help	This option is currently disabled. For assistance, contact CustomerRelations@theiia.org.
Store	**Description**
Browse Products	Purchase Membership, Learning, Books, and Event Registrations.
View Course Catalog	View IIA's current Competency and Learning Course Catalog.
View Quotes	Review quotes generated by an account admin for potential purchases.
View Orders	View recent and pending orders. For purchases completed before 1/31/22, contact CustomerRelations@theiia.org for receipts.

Section One: Account Management

Manage Account Information

Procedure	Follow the steps below to manage account information.	
	Step	**Description**
	1. Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
	2. Access Account Information	Select "Account Information" under Account Management. Account Management Account Information Billing Address Shipping Address Account Administrators Account Roster
	3. View Account Information and Edit Business Phone	Here you can view your organization's Global Account Number, Account Name, Account Type, Industry and Industry Group. You can also view and update your Business Phone.
	4. Save Information	Do not forget to select the "Save" button on the bottom right hand corner. SAVE

Update Billing Address

Procedure	Follow the steps below to update billing address.

Step		Description
1.	Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
2.	Access Billing Address	Select where it says "Billing Address" under Account Management. Account Management Account Information Billing Address ← Shipping Address Account Administrators Account Roster
3.	Update Billing Address	Update your billing address and then select the green "Save" button on the bottom right hand side. SAVE

Update Shipping Address

Procedure	Follow the steps below to update shipping address.

| Step		Description
1.	Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
2.	Access Shipping Address	Select where it says "Shipping Address" under Account Management. Account Management Account Information Billing Address Shipping Address ← Account Administrators Account Roster
3.	Update Shipping Address	Update your shipping address and then select the green "Save" button on the bottom right hand side. SAVE

Account Administrators

	An account administrator is an individual who has permissions to access the IIA Admin Portal, manage the organization's account roster, complete purchases, and manage quotes & invoices. Account Administrator is also known as a Group Administrator.

Add an Account Administrator

| Procedure | Follow the steps below to add an account administrator. |

Step		Description
1.	Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
2.	Access Account Administrators	Under Account Management, select "Account Administrators." Account Management Account Information Billing Address Shipping Address Account Administrators Account Roster
3.	Select Add Administrator	Select the green "Add Administrator" button. ADD ADMINISTRATOR
4.	Fill Out Information	Fill out the information of the person you want to add. First Name (Given Name) * Email Address * Last Name (Family Name) * Job Title * When you are done, select the green "Submit" button below. SUBMIT
5.	Confirmation Email	The person you added as account administrator will receive an email that allows them to confirm their new role. Until they confirm, their status as a new administrator is pending. **Note:** If a person you add as an administrator is already listed as ACTIVE on your organization's roster, they will not receive an email. Once you submit the account administrator request, the person listed as ACTIVE should automatically show up as an account administrator.

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Remove an Account Administrator

	Procedure	Follow the steps below to remove an account administrator.

	Step	Description
1.	Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
2.	Access Account Administrators	Under Account Management, select "Account Administrators." Account Management Account Information Billing Address Shipping Address Account Administrators Account Roster
3.	Sort/Search Administrators	You will now see a list of current account administrators. You can sort them by name, job title, and email among other categories. LAST NAME ⬍ JOB TITLE ⬍ EMAIL Alternatively, you can search for a specific account administrator using the search function on the right side of the screen. Search:
4.	Delete Administrator	When you decide which administrator you want to delete, select the "Delete" button on the right hand side of their row under where it says "Actions." **Note:** You cannot delete yourself. If you need assistance switching the main account administrator, please contact CustomerRelations@theiia.org. ACTIONS Edit / Delete **(Continue to next page.)**

		5. Proceed With Deletion	Confirm that the administrator you are attempting to delete is the correct one and once you have confirmed, select the red "Proceed" button on the bottom right hand corner.
			You are about to delete the administrator for
			Gina Pettiti (Petitti080421@iiauat.org)
			Once deleted, this action cannot be undone.
			Are you sure you want to proceed?
			CANCEL **PROCEED**

Edit an Account Administrator

	Step	Description
Procedure		Follow the steps below to edit account administrator information.
	1. Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
	2. Access Account Administrators	Under Account Management, select "Account Administrators."
	3. Sort/Search Administrators	You will now see a list of current account administrators. You can sort them by name, job title, and email among other categories. Alternatively, you can search for a specific account administrator using the search function on the right side of the screen.
	4. Select "Edit"	When you decide which administrator you want to edit, select the "Edit" button on the right hand side of their row under where it says "Actions."
	5. Edit Information	Edit the account administrator's information. **Note:** You cannnot edit their GAN. Then, select the green "Submit" button below.
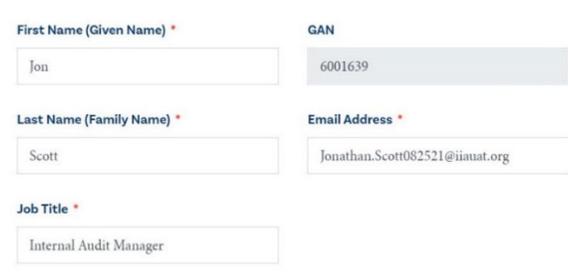
Account Roster

An account roster is where **members** and **non-members** associated with your organization can be managed. Once an individual is added to the roster, they will receive an email to confirm their association with your group. Due to privacy laws, the confirmation **MUST** be completed before membership can be assigned and/or completing a registration on their behalf.

Manage Account Roster

Procedure	Follow the steps below to manage the account roster.

Step	Description
1. Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
2. Access Account Roster	Select Account Roster under Account Management.
3. Sort / Search Account Roster	On the blue bar at the top of your account roster, you can sort by various categories such as "Member," "Status," and "Date Added" among others. Select a category to sort by. If you'd like the reverse order, hit the double arrows again. Alternatively, you can search for an individual on the roster using the search function on the right side of the screen.

Add To Roster – Individual

	Procedure	Follow the steps below to add one individual at a time to the account roster.

Step		Description
4.	Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
5.	Access Account Roster	Select Account Roster under Account Management. Account Management Account Information Billing Address Shipping Address Account Administrators Account Roster
6.	Add to Roster (Part One)	Select the green "Add to Roster" button. **Account Roster** ADD TO ROSTER UPLOAD ROSTER DOWNLOAD LIST
7.	Add to Roster (Part Two)	Fill out their information. **Important!** Before adding someone, please confirm with the individual whether or not they have an active MyIIA account. If they do, please confirm their primary email address associated with their IIA profile. This will ensure a duplicate profile is not created and their certifications and historical information are linked correctly. Add to Roster First Name (Given Name) * Email Address * Last Name (Family Name) * Job Title * CANCEL SUBMIT **Note:** Individuals added to the roster are **required** to confirm their association with your organization before a membership slot or account administrative rights can be assigned. Please read Confirm Account Association.
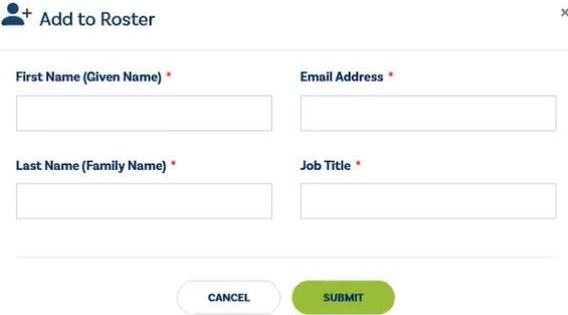
The Institute of
Internal Auditors

Add To Roster – Multiple Individuals

		Step	Description
Procedure		Follow the steps below to add multiple individuals at a time to the account roster.	
	8.	Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
	9.	Access Account Roster	Select Account Roster under Account Management. Account Management Account Information Billing Address Shipping Address Account Administrators Account Roster
	10.	Upload Roster (Part One)	Select the dark blue "Upload Roster" button. **Account Roster** ADD TO ROSTER UPLOAD ROSTER DOWNLOAD LIST
	11.	Upload Roster (Part Two)	You can download the template by selecting the blue button near the top left hand side of the page that reads "Download Template." **DOWNLOAD TEMPLATE** **Note:** All fields are **required** except the GAN field for upload. To upload, select to browse your files and upload your completed template roster. You can also drag and drop the file here. Drop files to attach, or browse. **Important!** Before adding someone, please confirm with the individual whether or not they have an active MyIIA account. If they do, please confirm their primary email address associated with their IIA profile. This will ensure a duplicate profile is not created and their certifications and historical information are linked correctly.
	12.	Upload Roster (Part Three)	Once you have uploaded the file correctly, the "Submit" button on the bottom right hand side will change colors from silver to green. When this happens, you will be able to submit your roster template. SUBMIT → SUBMIT
	13.	Upload Roster (Part Four)	The system will then allow you to preview your uploaded information in the Admin Portal. If everything is correct, select the "Submit" button again.

Note: Once you clicked Submit on the Preview Upload page, **do not** navigate away until all "Processing" status items have changed from "Pending" to one of the following:

Created status: The individual's profile has been created (or imported if previously held an account with email provided) and will reflect on the Account Roster.

Duplicate status: The individual is already listed on the roster. No further action needed.

Error status: The creation of this individual's account has not been completed. You will need to re-submit.

Note: Please read Confirm Account Association. Individuals added to the roster are required to confirm their association to your organization before a membership slot can be assigned.

Download Account Roster

Procedure	Follow the steps below to download your roster. You can do this anytime!

	Step	Description
1.	Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
2.	Access Account Roster	Select Account Roster under Account Management.
3.	Download Account Roster	To download a list of your current account roster in Excel format, select the light blue "Download List" button.

Edit the Account Information of Someone on Your Account Roster

Procedure	Follow the steps below to edit the information of someone on your account roster.	

Step		Description
1.	Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
2.	Access Account Roster	Select "Account Roster" under Account Management. **Account Management** Account Information Billing Address Shipping Address Account Administrators Account Roster
3.	Sort/Search Account Roster Member	You can sort the roster by name, job title, and email by selecting where it says "Name," "Job Title" and "Email." **NAME**　　**JOBTITLE**　　**EMAIL** Alternatively, you can search for a specific individual on the roster using the search function on the right side of the screen. Search:
4.	Select Account Roster Member	Once you have found whose profile you want to edit, select the blue "Edit" button towards the right hand side of the row. Edit / Delete
5.	Edit Account Information	Correct or update account information. **Note:** GAN cannot be changed. First Name (Given Name) *　　　　GAN John　　　　　　　　　　　　　　6001640 Last Name (Family Name) *　　　Email Address * Doe　　　　　　　　　　　　　JohnDoe1234@iiauat.org Job Title * Senior Audit Associate Then select the green "Submit" button below. SUBMIT

Confirm Account Association for Admin & Roster Additions

Procedure	Whether you've added an individual as an administrator or to the roster, each person will need to follow the steps below to confirm their account association. **Note:** This step is required before an administrator can gain access and before an individual can be assigned an available membership slot.

Step	Description
1. Confirm Email	Once you receive a confirmation email, select where it says "My IIA Portal". You will be redirected to your MyIIA account page. **Welcome** You have been invited to become an account administrator for West Account 5. Sign in to My IIA Portal with your IIA username and password. On the Account Associations page, click Confirm to change your Status from Pending to Active. As an active account administrator, you may sign in to the IIA Admin Portal with your IIA username and password. Once in the portal, click on Help to learn more about account administration.
2. Sign In	Once you have been redirected, sign in using your email address or GAN. Email or IIA Global Account Number Password Sign in Can't access your account? Click here. Don't have an IIA account? Sign up now.
3. Confirm Association	After you have reviewed that the information is correct, select where it says "Confirm" on the right. TERM BEGIN DATE STATUS ACTION Pending Confirm
4. Confirm That You Are Sure	Select to "Confirm" on the bottom right hand corner to indicate that you are sure. CONFIRM ACCOUNT ASSOCIATION × You are about to confirm Account Association Are you sure you want to proceed? CANCEL CONFIRM
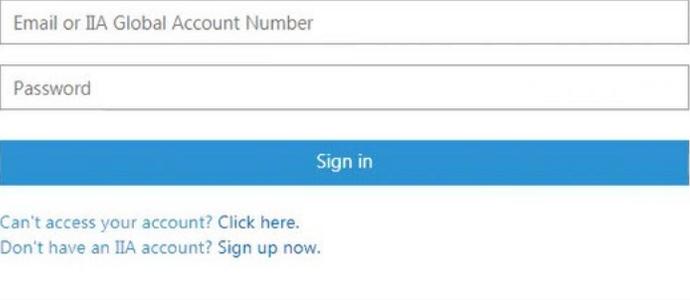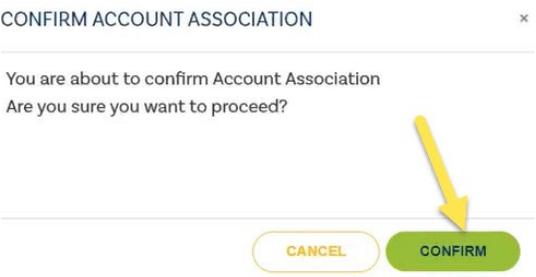
Section Two: Group Membership Management

Managing Slots - Overview

Assign Membership Slot: Once an individual has been uploaded to the account roster and confirmed their association to your organization, the administrator will be able to assign an available membership slot.

Vacate Membership Slot: Vacating a member from their membership slot terminates their access to member benefits immediately.

NEW! Substitute Membership Slot: To add enhanced value to group membership, organizations now receive a pre-set number of substitute slots determined based on the group size at the beginning of the membership term. A substitution slot will turn into an available slot after an active member is vacated from their membership slot. Once available substitutions reach zero, you will need to purchase prorated membership slots for new members.

Purchase Membership Slots – Outside of Renewal Period

Procedure	Follow the steps below to purchase prorated membership slots for new members through the group's current term.

Step	Description
1. Access the Admin Portal	Go to https://adminportal.theiia.org and log in using your IIA credentials.
2. Click "Manage Slots"	Click "Manage Slots" (towards the middle of the page.)
3. Click "Add Slots"	Click the "Add Slots" button. **Note:** This image indicates 68 slots were purchased and 50 remain available to be assigned to non-members on your roster. Eighteen slots have been assigned to individuals listed on the group roster.
4. Select Quantity of Slots	Type the quantity of membership slots you'd like to purchase once you click "Add Slots". Under "Quantity", type the amount of slots that you would like to purchase. Click Submit.
5. Review Shopping Cart Information	In your Shopping Cart, review and confirm your order. If necessary, you can alter your order by clicking "Update" or "Remove" on the right side of the screen. Update / Remove
6. Click Checkout Button	Once you confirmed the quantity, click the "Checkout" button on the bottom right hand side.
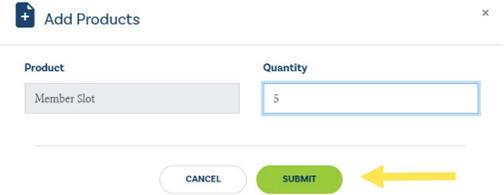
	7. Enter Customer PO (optional step)	If you have a Customer Purchase Order (PO), you can enter it where it says "CustomerPO" under the shopping cart. **CustomerPO** **Note**: This PO will appear on future invoices and receipts associated with this order.
	8. Apply Discount Code (optional step)	If you have a discount code, enter it in the "Discount Code" field. **Discount Code** Enter your discount code **APPLY DISCOUNT** Then select the green "Apply Discount" button once code is entered. **Discount Code** Enter your discount code **APPLY DISCOUNT** **Note:** You may only apply one discount code per order, and discounts may not be combined.
	9. Agree to Terms of Service	Check "The Terms of Service" box after reviewing the terms of service. Then select "Checkout." □ I agree with the terms of service and I adhere to them unconditionally **(read)** **Checkout**
	10. Select Billing Address	In the drop down, select from your previously used addresses or select "new" to type in a new billing address. Then click the green "Continue" button. **Continue** **Note:** If in the future, you need to update your billing address, please refer to Update Billing Address.
	11. Select Payment Method	Select your preferred payment method. Options include ACH; Check/Money Order; Pay on Account; Credit/Debit Card; and Wire Transfer. Then click the green "Continue" button below. **Continue** **Notes:** a. Orders with deferred payment methods (ACH, Checks and Wire Transfers) expire after 30 days. b. If payment has not been received within 30 days, your order will expire. c. Benefits and products will not be fulfilled until payment has been received and posted by the IIA.
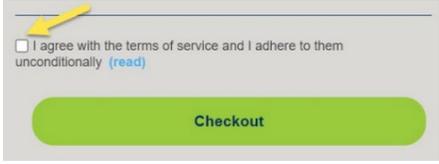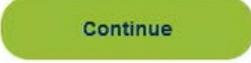
	12.	Fill Out Payment Information	Fill out your payment information that corresponds to the payment method you have selected. When you are finished, click the green "Continue" button.
			Note: Member slots will become available upon completion of payment. If paying by check / wire, receiving and processing payment can take up to two weeks from your organization's issue date.
	13.	Confirm Order	Review your order summary one last time and if everything is correct, click the green "Confirm" button at the bottom of the page.
	14.	Confirmation E-mail	You will now receive an e-mail confirming your order.

Managing Membership Slots

Assign Membership Slots to Individuals

Procedure	Follow the steps below to assign available membership slots. An individual must be Added to the Account Roster and Confirm Their Association before a membership slot can be assigned.

	Step	Description
1.	Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
2.	Click "Manage Slots"	Click "Manage Slots" (towards the middle of the page.)
3.	Available Slots	You will see the number of available slots on this screen.
4.	Sort/Search Roster (optional step)	Scroll down to the heading "Roster" which contains individuals not assigned a membership slot. You can sort your roster by any of the available fields. Alternatively, you can search for a specific roster member using the search function on the right side of the screen.

| | 5. Assign Slot | Under the "Roster" heading, check the box on the left of the name and GAN of the individual(s) you intend to assign a membership slot.

Note: You can select multiple boxes at once

Once you have selected who you want to assign slots to, scroll up and click the green "Assign Slot" button.

Note: Only individuals who have a status of "Active" can be assigned to a membership slot. An 'greyed out' check box indicates the individual needs to confirm their association to the roster through the confirmation email sent to them at the time of their addition to the roster. Once confirmation is accepted, their status will change from "Pending" to "Active and the check box will be active.

Please remind individuals in Pending status on your roster to click the email link and accept. |

Vacate Members from Membership Slots

Procedure	Follow the steps below to vacate membership slots. **Note:** As soon as an individual is vacated from their membership slot, they will lose access to membership. If there are Available Substitutions, when a Vacate occurs, substitutions will automatically decrease by 1 and turn into an Available Slot. More information on Substitutions are coming up next in this manual.

Step	Description
1. Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
2. Select "Manage Slots"	Select "Manage Slots" (towards the middle of the page.)
3. Sort/Search Roster (optional step)	You can sort your roster by name, job title, and email by clicking where it says "Name," "Job Title" and "Email." Alternatively, you can search for a specific roster member using the search function on the right side of the screen.
4. Vacate Slot	Choose which member you would like to remove from the list of assigned roster members and click the "Vacate" button (to the left of their information) to vacate their slot.

Substitute Membership Slots (Vacate Membership Required)

Procedure	Follow the steps below to substitute membership slots. If there are Substitution slots available, they will automatically turn into Available Slots when you vacate someone from an assigned membership slot. Please note that as soon as you vacate someone from a membership slot, the individual will no longer have membership access.

Step	Description
1. Access the Admin Portal	Go to https://adminportal.theiia.org/and log in using your IIA credentials.
2. Click "Manage Slots"	Click "Manage Slots" under "Group Membership" (towards the middle of the page.) **Group Membership** Manage Slots Help
3. Check Available Substitutions	Check where it says "Available Substitutions" and make sure you have at least one remaining. Available Slots: 51 Purchased Slots: 68 Available Substitutions: 2 **Note: Available Substitutions are tiered based on the group size. Substitutions are based on your membership slots at the completion of the renewal purchase. Purchasing additional slots during the term will not increase the number of substitution slots.**
4. Sort/Search Roster (optional step)	You can sort your roster by name, job title, and email by clicking where it says "Name," "Job Title" and "Email." NAME JOBTITLE EMAIL Alternatively, you can search for a specific roster member using the search function on the right side of the screen. Search:
5. Vacate Slot	On the list of assigned roster members (under where it says "Assign Slots"), choose which member you would like to remove and click the "Vacate" button, left of their information to vacate their slot. **Note:** When a membership slot is vacated, "Available Substitutions" will decrease by 1, and "Available Slots" increase by 1. VACATE ▲ GAN FIRST NAME Vacate 6001637 Adam
6. Assign New Slot	On the list of unassigned roster members (under where it says "Roster"), check the box next to the name of who you would like to assign a slot to and click the "Assign" button to give them membership. **ASSIGN SLOT**

Renew Group Membership

Procedure	Group memberships become eligible to renew 60 days before the end of the membership term. Follow the steps below to renew group memberships. **NEW!** Renew early without any additional prorated dues for new members!

Step	Description
1. Access the Admin Portal	Go to https://adminportal.theiia.org/ and log in using your IIA credentials.
2. Access Account Roster	Select "Account Roster" under "Account Management." **Account Management** Account Information Billing Address Shipping Address Account Administrators Account Roster
3. Download Account Roster	To download a list of your current account roster in Excel format select the light blue "Download List" button. **Account Roster** ADD TO ROSTER UPLOAD ROSTER DOWNLOAD LIST **Notes:** a. Downloading the current roster allows you take a "snapshot" of your group. You will see a Y or N under Member column, and if a Y is notated, that person has membership in your organization's group. b. This will be helpful when you reassign membership slots after completing the renewal payment.
4. Select Dashboard	Select the dashboard button at the top of the screen to return to the home page. **DASHBOARD**
5. Select Manage Slots	Select the "Manage Slots" function under "Group Membership." **Group Membership** Manage Slots Help

6.	Select Renew	Group memberships are eligible to renew their IIA membership as early as 60 days before the end of the membership term. The green "Renew Slots" button is only displayed on the screen during the renewal period. Select "Renew Slots" when ready to place your renewal order. Membership Term: **27/Oct/2021 - 12/Mar/2022** **RENEW SLOTS**
7.	Number of slots	Type the number of slots desired and click Submit. Add Products Product Quantity Member Slot Renewal 100 CANCEL SUBMIT
8.	Click Checkout	Click the "Checkout" button on the bottom right hand side. BACK TO STORE CHECKOUT
9.	Enter CustomerPO (optional step)	If you have a Customer Purchase Order (PO), you can enter it where it says "CustomerPO" under the shopping cart. **CustomerPO** **Note:** PO will appear in future invoices and receipts associated with this order.
10.	Apply Discount Code (optional step)	If you have a discount code, enter it in the "Discount Code" field. **Discount Code** Enter your discount code **APPLY DISCOUNT** Then select the green "Apply Discount" button once code is entered. **Discount Code** Enter your discount code **APPLY DISCOUNT** **Note:** You may only apply one discount code per order, and discounts may not be combined.
11.	Agree to Terms of Service	Check "The Terms of Service" box after reviewing the terms of service. Then select "Checkout." ☐ I agree with the terms of service and I adhere to them unconditionally (read) Checkout
12.	Select Billing Address	Select from your previously used addresses or type in a new address to be billed. Then click on the green "Continue" button.
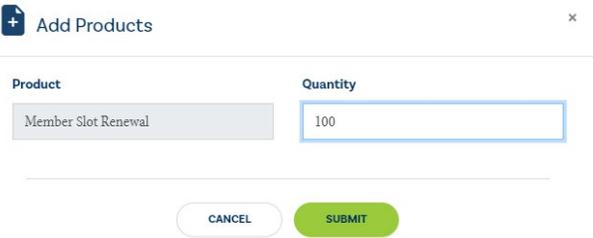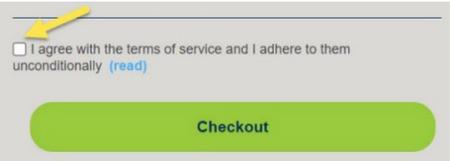
			Continue
13.	Select Payment Method	Select your preferred payment method. Options include ACH, Check/Money Order, Pay on Account, Credit/Debit Card, and Wire Transfer. Then, once again click the green "Continue" button below. Continue **Notes:**	
		a. Orders with deferred payment methods (ACH, Checks and Wire Transfers) expire after 30 days.	
		b. If payment has not been received within 30 days, your order will be cancelled.	
		c. Member slots will become available upon completion of payment. If paying by check / wire, receiving and processing payment can take up to two weeks from issue date.	
14.	Fill Out Payment Information	Fill out your payment information that corresponds to the payment method you have selected. When you are finished, click the green "Continue" button. Continue	
15.	Confirm Order	Review your order summary one last time and if everything is correct, click the green "Confirm" button at the bottom of the page. Confirm	
16.	Confirmation E-mail	You will now receive an e-mail confirming your order.	
17.	Return to IIA Admin Portal	**After payment is fully processed**, log into https://adminportal.theiia.org/.	
18.	Select Manage Slots	Select the "Manage Slots" function under "Group Membership." Group Membership Manage Slots Help	
19.	Assign Membership Slots	Under the "Roster heading" check the box on the left side of each individual you wish to assign a member slot. New members must be Added To The Account Roster and Confirm Their Association before a slot can be assigned to them.	
			ASSIGN ▲ GAN ⬍ FIRST NAME ⬍
			☐ 6001783 Marcus
		Note: Consider using the downloaded roster from Step 3 to verify which individuals to assign to membership slots.	
20.	Confirmation E-mail	When you have completed assigning membership slots, every individual assigned will receive an e-mail confirmation.	