The Aaron Copland Fund for Music

Organization Profile Management

Organization profiles contain an organization's basic information, applications, and financial information. Each organization is limited to one profile, but each profile may have any number of member accounts contribute to its management. Conversely, a single user account can be a member of multiple organization profiles (ex. a freelance grant writer who works for multiple organizations).

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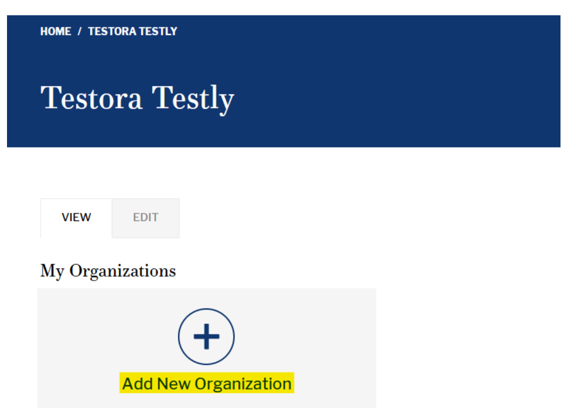
Creating an Organization Profile

Please note: Organization profiles are limited to one per organization. If you are unsure if your organization already has a profile, please contact our Grants Team.

1. When logged in, go to "My Account" in the upper right corner to access your account dashboard.
2. On your account dashboard, click "Add New Organization"



3. Complete the required fields for your organization profile. Required fields are marked with a red asterisk.

4. When you have completed filling out the profile, click "Create Organization and Become a Member" at the bottom of the form.

CREATE ORGANIZATION AND BECOME A MEMBER

Note: Payment Preference and Bank Information are not required for initial organization profile set-up.

Member Roles & Permissions

There are three types of member roles with different permission levels:

- **Member:** Can view applications, create new applications, and edit applications they have created.
- **App Manager:** Same as Member, but can also edit any application, regardless of who created it.
- **Admin:** Same as App Manager, but can also edit the organization profile and manage members and roles.

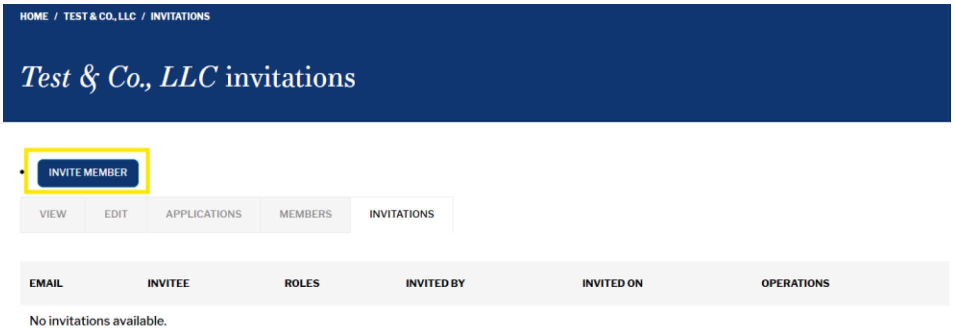
Role	**View Applications**	**Create Applications**	**Edit Own Applications**	**Edit All Applications**	**Edit Org Profile**	**Manage Members**
Member	✓	✓	✓	X	X	X
App Manager	✓	✓	✓	✓	X	X
Admin	✓	✓	✓	✓	✓	✓

The account used to create an organization profile will automatically be set as an **Admin**. If you had an account on our website from April 2025 or earlier, your account has been set as the Admin for your organization's profile.

Inviting New Members

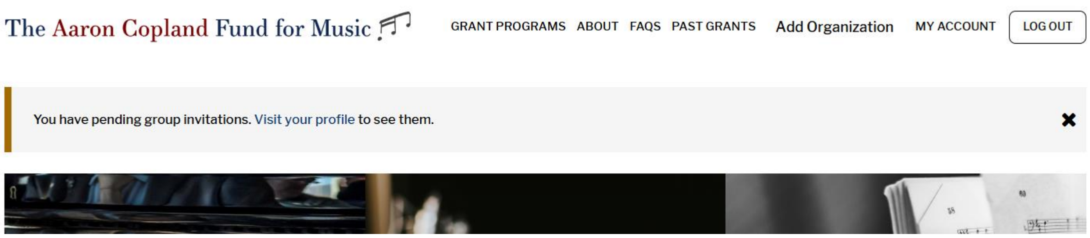
Admins can invite new members by email address to help manage their organization profile and/or applications. Invitations expire after 30 days.

1. When logged in, go to "My Account" in the upper right corner to access your account dashboard.
2. From your account dashboard, select the organization you wish to invite a new member to.
3. On your organization profile, click the "Invitations" tab.
4. Click the "Invite Member" button.



5. Enter the email address for the person you wish to invite and select a role for their account, if needed. If no role is selected, they will automatically be set with the Member role.
6. Click the "Save" button.

If the person you are inviting already has an account, a notification banner will appear at the top of the page the next time they log in with a link to view pending invitations.



If the person you are inviting does not already have an account, an invitation email will automatically be sent to the address provided, prompting them to create a new account. Once their account is set up and they are logged in, a notification banner will appear at the top of the page the next time they log in with a link to view pending invitations.

Changing Member Roles

Admins can change member roles for members of their organization profile at any time.

1. When logged in, go to "My Account" in the upper right corner to access your account dashboard.
2. From your account dashboard, select the organization for which you would like to manage the members.
3. On your organization profile, click the "Members" tab.
4. Find the member you want to edit, click the drop-down arrow in the right-most "Operations" column, and click "Edit Member."
5. On the next page, select or deselect the role you want to assign to the member. If no role is selected, the member will be assigned the basic Member role.

6. Click the “Save” button.

Removing Members

Admins can remove members from their organization profile at any time.

1. When logged in, go to “My Account” in the upper right corner to access your account dashboard.
2. From your account dashboard, select the organization for which you would like to manage the members.
3. On your organization profile, click the “Members” tab.
4. Find the member you want to remove, click the drop-down arrow in the right-most “Operations” column, and click “Remove Member.”
5. On the next page, click “Delete” to proceed with removing the member, or “Cancel” to return to the previous page.