

How To Add Individuals To The Account Roster: Bulk Upload

This quick guide will help you add multiple individuals to your organization's account roster in one submittal.

1. Log into The IIA [Admin Portal](#).
2. On the dashboard, click on **Account Roster**.
3. Download the template.

- Click on **Upload Roster**.
- Click **Download Template**.

All fields are **required** except for GAN.

4. Submit roster for upload.

- Once the list is ready, click **Upload Roster**.
- Drag and drop the excel file and click **Submit**.

The Submit button will change from silver to green once the file has been uploaded.

- The system will allow you to preview the uploaded information. Please review for accuracy and then click the **Submit** button again.
- 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 prior account exists 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 resubmit.

Once the upload is complete, group administrators can complete purchases on the individuals' behalf. For those staff who should have IIA membership, you will need to have a membership slot assigned to them under Manage Slots.

Important Note: Please verify if the individual has held a previous membership; and if yes, confirm the existing primary email on their account. If they are registered with a different email, the system will create a new profile and will **NOT** link their certifications and membership history.

If a team-member reports having two profiles, direct them to email CustomerRelations@theiia.org for an account merge request.

