



**Council on Licensure,
Enforcement & Regulation**

Promoting Regulatory Excellence

Bundle Administrator User Guide

What is a Bundle Administrator?

When a new membership is created, the email address of the individual used to submit the application becomes the Bundle Administrator.

Please contact Nicolle Harkness at nharkness@clearhq.org if you would like to change the Bundle Administrator for your membership, or with any membership related questions.

What can a Bundle Administrator do?

A Bundle Administrator can:

- **Add new users to the membership bundle.** We highly encourage you to take advantage of this feature as a way to maximize your membership.
- **Edit or Archive** (Delete) existing bundle members.
- **Register bundle members** for CLEAR Events and Webinars.
- **Pay invoices** for bundle members online.
- **Renew** an organization's membership online.

Instructions Below

Adding Users to a Membership Bundle

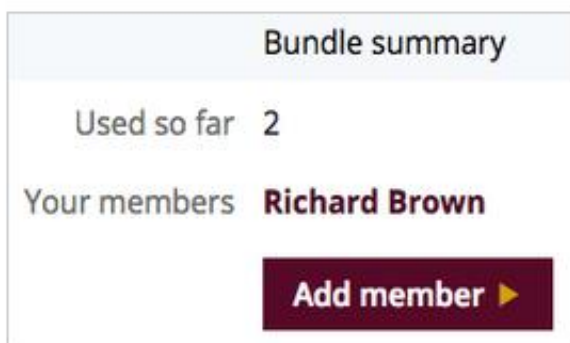
Adding board, council members and employees from your organization is the best way to ensure your membership with CLEAR is maximized, and that all individuals included in your membership are able to access resources only available to CLEAR members.

To add an individual to your membership bundle:

1. Sign into your CLEAR account and click on 'YOUR PROFILE' at the top of the screen.



2. Scroll down to your Bundle Summary.
3. Click the 'Add member' button.



4. Enter the new member information and click the 'Save' button.

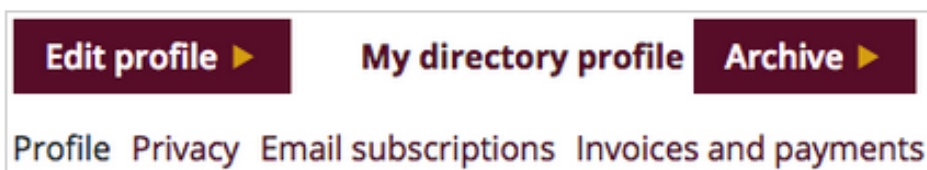
Important: An email address must be included with the new member's profile before member benefits can be accessed, including event discounts and member-only resources.

A confirmation email will be sent to the newly added member containing login credentials and instructions on accessing his or her member account.

Edit or Archive Bundle Member Profiles

To Edit a bundle member profile:

1. Sign into your CLEAR account and click on 'YOUR PROFILE' at the top of the screen.
2. Scroll down to your Bundle Summary and click on the name of the bundle member you wish to edit or update.
3. At the top of the bundle member's profile page, click the 'Edit' button.



4. Make the necessary edits to the member profile and click 'Save'.

Once individuals have been added to a membership bundle, members can make their own profile edits by signing into their accounts on the CLEAR website.

To Archive a bundle member profile:

1. Sign into your CLEAR account and click on 'YOUR PROFILE'.
2. Scroll down to your Bundle Summary and click on the name of the bundle member you wish to archive.
3. Click on the 'Archive' button to remove an individual from the membership bundle. **Please note:** All archived members will appear in the gray color under your Bundle Summary.

Registering Bundle Members for Events

Before you begin, please ensure the individual(s) you would like to register for an event have previously been added to your membership bundle. If an individual does not belong to a membership bundle, the member-only pricing will be unavailable for selection. To learn how to add individuals to your membership bundle, please see **Adding New Users to a Membership Bundle**.

1. Once logged into your CLEAR account, begin by selecting the desired program. A list of upcoming CLEAR Events can be found under the **Events** tab located in the ribbon at the top of your screen.
2. Click the 'Register' button and enter the e-mail address of the registrant. Click 'Next'. **Important:** Do not enter your email address if you are not the actual attendee of the event.

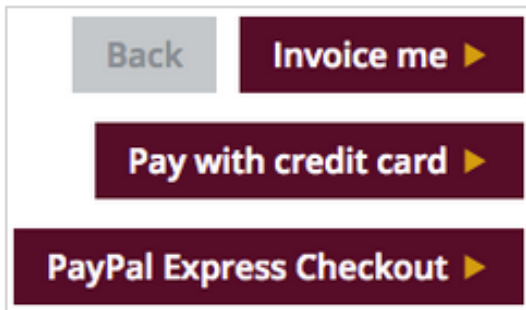
Enter registrant email

e-Mail *

Please ONLY enter the email address belonging to this contact and/or attendee.

3. Select the registration type and click 'Next'. If you are unable to select the member price, please check to make sure the individual being registered is listed under your membership bundle.
4. Review the registration to confirm all attendee information is correct. If the individual being registered is already listed under your membership bundle, the registration form will automatically populate.
5. Having reviewed the registration, you will be given the option to 'Add Guest' (attendee). This feature is simply an easy way to keep multiple attendees on one invoice, but is not a requirement.

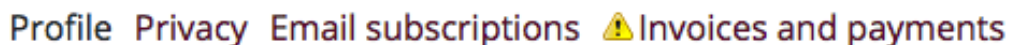
6. When the information is complete for all attendees, click 'Next'.
7. Select your payment method. You will be given the three payment options pictured below. If you choose the 'Invoice me' option, an invoice will be emailed to the individual completing the registration.



You can also access the invoice by visiting 'YOUR PROFILE' and clicking on the 'Payments and Invoices' tab.

Paying Invoices Online

1. Sign into your CLEAR account and click on 'YOUR PROFILE' at the top of the screen.
2. If you have any open invoices, you will see an alert icon next to the 'Invoices and payments' tab.

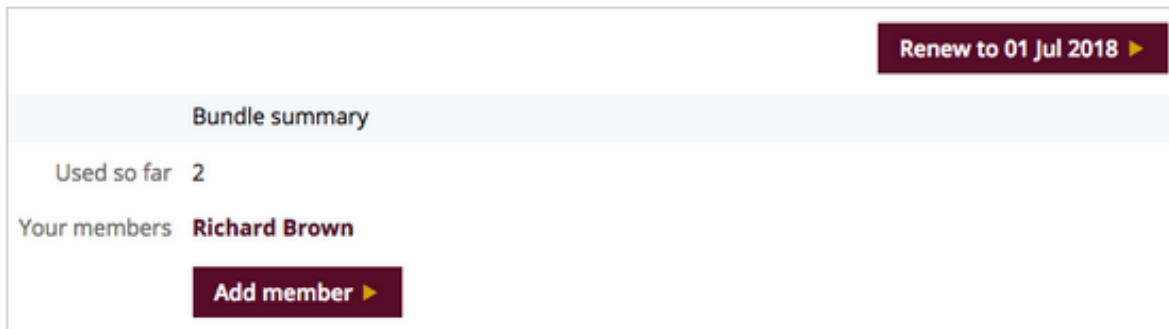
A screenshot of a navigation bar with four tabs: 'Profile', 'Privacy', 'Email subscriptions', and 'Invoices and payments'. The 'Invoices and payments' tab is highlighted in a darker color and includes a small yellow warning triangle icon to its left.

3. After clicking on the invoices tab, select the invoice(s) you wish to pay and select your payment option. If you prefer not to pay online, you may also mail a physical check or process an EFT payment.

This process can also be used to pay the invoice(s) for a bundle member. Simply click on the bundle member listed under your Bundle Summary and follow the steps listed above.

Online Membership Renewal

1. Sign into your CLEAR account and click on 'MY PROFILE' at the top of the screen.
2. To the right of your Bundle summary will be a button to renew your organization's membership for the following membership year. Click on the renew button to begin the renewal process. (Example pictured below.)



3. Next, you will be given the opportunity to review or edit your contact information. Complete any necessary changes and click the 'Update and next' button to continue to payment options and complete your membership renewal.

If you prefer not to pay online, you may also mail a physical check or process an EFT payment. If you choose this option, your renewal status will be changed to "Pending Renewal" until payment is processed.

Please contact **Nicolle Harkness** with any questions regarding your membership.