



Empowering CGAs to Keep Member Information Current, Accurate, and Secure

Our secure, intuitive tool gives Carrier Group Administrators control over their carrier contact information. With Member Connect, easily view and update contacts anytime, helping ensure communications from PCRB and DCRB reach the right people at the right time.



1 Access

Log into the Application Manager. Select **Member Connect** from the toolbar.

Upon entering the application, select the **Contacts** link from the toolbar to view and edit carrier contact information.

Tip for CGAs



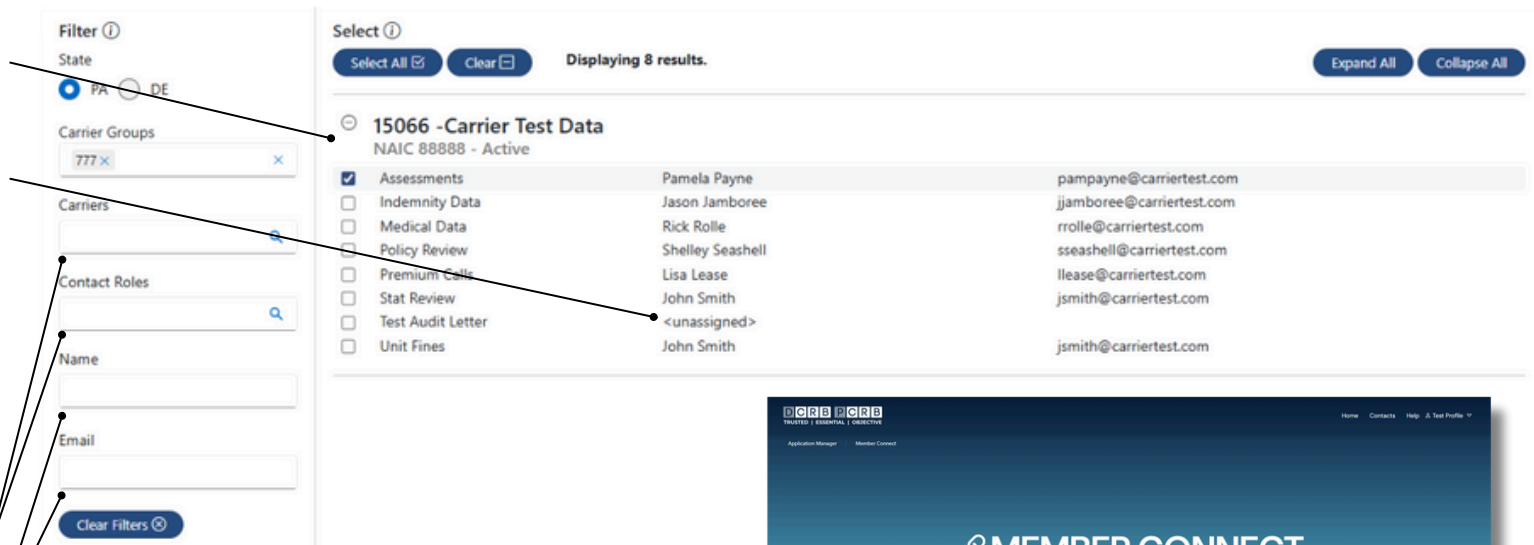
Before making updates, check the **built-in role descriptions** to by clicking **Help** to ensure each contact is assigned correctly.



2 Display

The screen will display all carriers in the carrier group and their respective contacts.

Contact information is **required** for each of the contact roles listed. Contacts are labeled as **<unassigned>** when there is a missing contact entry. These entries must be completed.

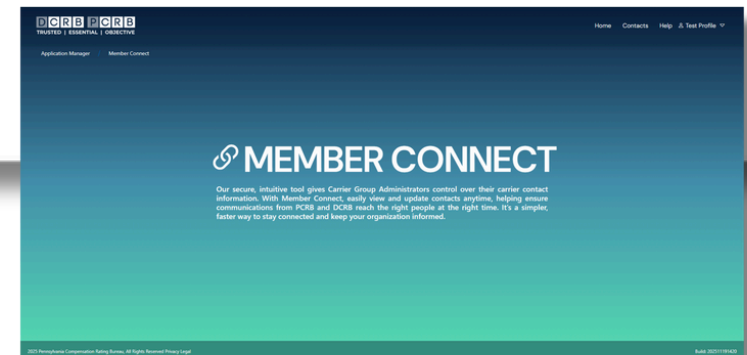


3 Filters

To filter carriers and contacts, use the fields to the left in the **Filter** section.

Users can filter information by carrier or contact role.

Users may also search within their data by entering all or a portion of a contact name and/or email address.





Editing and Updating Contacts

1 Select

Once the data has been filtered, use the **checkboxes to the left** of each contact row to select a contact role to edit.

Select ⓘ

Select All ⓘ Clear ⓘ Displaying 8 results. Expand All Collapse All

15066 -Carrier Test Data
NAIC 88888 - Active

<input checked="" type="checkbox"/>	Assessments	Pamela Payne	pampayne@carrier-test.com
<input type="checkbox"/>	Indemnity Data	Jason Jamboree	jamboree@carrier-test.com
<input type="checkbox"/>	Medical Data	Rick Rolle	rrolle@carrier-test.com
<input type="checkbox"/>	Policy Review	Shelley Seashell	sseashell@carrier-test.com
<input type="checkbox"/>	Premium Calls	Lisa Lease	lease@carrier-test.com
<input type="checkbox"/>	Stat Review	John Smith	jsmith@carrier-test.com
<input type="checkbox"/>	Test Audit Letter	<unassigned>	
<input type="checkbox"/>	Unit Fines	John Smith	jsmith@carrier-test.com

2 Edit

After selecting the contact(s) to change, the **editable fields** will display on the right side of the screen in the Edit section.

All fields with a red asterisk ***** are **required**. If you have questions while editing contacts, open the **Help** section for role definitions and FAQs, or email **membership@pcrb.com** for assistance.

Edit ⓘ

Contact Name * Job Title or Department

Pamela Payne

Email Address * Phone * Ext

pampayne@carrier-test.com 215-111-1111

Address (Line 1) Address (Line 2)

City State ZIP Code

Total 1 contact(s) will be modified with the above information.

- Pamela Payne - pampayne@carrier-test.com (1 rows selected)

Save ⓘ

Users may select multiple rows (contacts) to edit several contact roles at once.

If a user selects multiple contact roles for editing, the **changes will be applied to all selected contacts**. Review the summary below the Edit section which will display all of the contact roles that will be modified upon saving.

Note: When selecting multiple roles to edit at once, remember that **your changes will apply to every selected role**. Review the summary carefully to make sure bulk updates are accurate, especially for carrier groups with many contacts.

Filter ⓘ

State PA DE

Carrier Groups 777 ⓘ

Carriers

Contact Roles

Name

Email

Clear Filters ⓘ

Select ⓘ

Select All ⓘ Clear ⓘ Displaying 8 results. Expand All Collapse All

15066 -Carrier Test Data
NAIC 88888 - Active

<input checked="" type="checkbox"/>	Assessments	Pamela Payne	pampayne@carrier-test.com
<input type="checkbox"/>	Indemnity Data	Jason Jamboree	jamboree@carrier-test.com
<input type="checkbox"/>	Medical Data	Rick Rolle	rrolle@carrier-test.com
<input type="checkbox"/>	Policy Review	Shelley Seashell	sseashell@carrier-test.com
<input checked="" type="checkbox"/>	Premium Calls	Lisa Lease	lease@carrier-test.com
<input type="checkbox"/>	Stat Review	John Smith	jsmith@carrier-test.com
<input type="checkbox"/>	Test Audit Letter	<unassigned>	
<input type="checkbox"/>	Unit Fines	John Smith	jsmith@carrier-test.com

Clear Filters ⓘ

Edit ⓘ

Contact Name * Job Title or Department

Pamela Payne

Email Address * Phone * Ext

pampayne@carrier-test.com 215-111-1111

Address (Line 1) Address (Line 2)

City State ZIP Code

Total 2 contact(s) will be modified with the above information.

- Pamela Payne - pampayne@carrier-test.com (1 rows selected)
- Lisa Lease - lease@carrier-test.com (1 rows selected)

Save ⓘ

3 Review & Save

A confirmation window will pop up to verify that these changes will be saved. **Click Yes** to proceed with the change.

Filter ⓘ

State PA DE

Carrier Groups 777 ⓘ

Carriers

Contact Roles

Name

Email

Clear Filters ⓘ

Select ⓘ

Select All ⓘ Clear ⓘ Displaying 8 results. Expand All Collapse All

15066 -Carrier Test Data
NAIC 88888 - Active

<input checked="" type="checkbox"/>	Assessments	Pamela Payne	pampayne@carrier-test.com
<input type="checkbox"/>	Indemnity Data	Jason Jamboree	jamboree@carrier-test.com
<input type="checkbox"/>	Medical Data	Rick Rolle	rrolle@carrier-test.com
<input type="checkbox"/>	Policy Review	Shelley Seashell	sseashell@carrier-test.com
<input checked="" type="checkbox"/>	Premium Calls	Lisa Lease	lease@carrier-test.com
<input type="checkbox"/>	Stat Review	John Smith	jsmith@carrier-test.com
<input type="checkbox"/>	Test Audit Letter	<unassigned>	
<input type="checkbox"/>	Unit Fines	John Smith	jsmith@carrier-test.com

Clear Filters ⓘ

Edit ⓘ

Contact Name * Job Title or Department

Pamela Payne

Email Address * Phone * Ext

pampayne@carrier-test.com 215-111-1111

Address (Line 1) Address (Line 2)

City State ZIP Code

Total 2 contact(s) will be modified with the above information.

- Pamela Payne - pampayne@carrier-test.com (1 rows selected)
- Lisa Lease - lease@carrier-test.com (1 rows selected)

Save ⓘ

Confirm

Are you **sure** you want to save?

Yes No