



About the New Member Experience-Member FAQs

1. Why is PPAI introducing a new Member Portal?

PPAI launched a new Member Portal to give members easier access to the tools, information, and resources they need most. The new experience is designed to simplify common tasks while providing greater visibility into your membership benefits, company information, education, and event participation.

2. What's changing for me?

The biggest change is the introduction of a new self-service Member Portal where you can manage many of your interactions with PPAI more efficiently.

Depending on your role and permissions, you'll be able to:

- View your membership status and benefits
 - Update your personal profile and contact information
 - Manage your company information and roster (for authorized users)
 - Register for Expo and other PPAI events
 - View purchases, invoices, and payment history
 - Access groups, resources, and member services
-

3. What are the benefits of the new portal?

The new Member Portal is designed to make managing your PPAI membership easier and more convenient by providing:

- A single destination for membership and account management
- Greater visibility into your membership status, benefits, certifications, and purchases
- Easier profile, company, and roster management
- A more streamlined event and Expo registration experience
- Faster access to resources and member information
- More self-service options for everyday account updates
- Improved accuracy and consistency across PPAI services

Our goal is to give members more control over their information while making interactions with PPAI simpler, faster, and more connected.



Getting Started

1. Do I need to take any action before the portal launches?

No action is required at this time.

Before the new Member Portal launches, PPAI will provide everything you need to get started, including:

- Instructions for accessing the new portal
- Guidance for verifying and updating your account information
- Expo registration information, if applicable
- Quick start guides and training resources
- Information on where to get help if you need assistance

We recommend watching for email updates from PPAI as launch approaches.

2. How do I log in for the first time?

You can access the Member Portal at members.ppai.org/login.

When the portal launches, you'll receive instructions on how to access your account.

If PPAI already has a member record for you:

- Select **Sign In** and use the email address associated with your membership. In most cases, this will be your work email address.
- If this is your first time accessing the portal, select **Forgot Password** to create a password before signing in.
- Some members may receive an email invitation to join their organization within the portal. If so, the invitation will include a temporary password for your initial login.

If you're new to PPAI:

- Select **Sign Up** to create a new account.



- Once your account is created, you'll set your password and can begin using the Member Portal.
-

3. How do I reset my account password?

If you've forgotten your password, select **Forgot Password** on the login page and follow the prompts. You'll receive an email with instructions to create a new password.

If you don't receive the email or continue experiencing issues:

1. Contact your company's designated membership administrator and ask them to resend your organization invitation, which will include your temporary password.
 2. If you're still unable to access your account, chat with our PPAI Support team via AskPPAI chat for immediate assistance.
-

4. Do activation links expire? If so, how do I get a new one?

Yes. Activation links may expire after a period of time.

If your activation link has expired or is no longer working:

1. Go to the Member Portal login page.
2. Select **Forgot Password**.
3. Follow the instructions to create a new password and access your account.
3. If you're still unable to log in, chat with our PPAI Support team via AskPPAI chat for immediate assistance.

Tip: Using the Forgot Password option is typically the fastest way to regain access to your account.

5. What browser should I use for the best experience?

The Member Portal is designed to work with current versions of the most commonly used web browsers, including:

- Google Chrome
- Microsoft Edge



- Mozilla Firefox
- Safari

For the best experience, we recommend using the latest version of your preferred browser.

6. Where can I find a basic overview or tour of the dashboard?

PPAI will provide quick-start guides, short training videos, and other helpful resources to help you become familiar with the new Member Portal.

These resources will be available before launch and will remain accessible afterward, so you can refer back to them whenever needed.

7. What are the core features I should set up on day one?

After logging in for the first time, we recommend taking a few minutes to:

- Complete or review your personal contact information
- Confirm your company affiliation
- Review your membership information and benefits
- Update your password, if prompted
- Explore your dashboard and available member resources

If you're a company administrator, we also recommend:

- Reviewing your company information for accuracy
- Confirming key contacts and roster information
- Verifying that users have the appropriate roles and permissions
- Reviewing membership details and available benefits

Taking a few minutes to review your information early will help ensure you have access to the services, resources, and benefits available to you and your organization.



8. I wasn't automatically connected to my company in the Member Portal. What should I do?

If your account isn't already connected to your company, you can request access directly through the Member Portal.

Simply:

1. Search for your company.
2. Submit a request to join the organization.
3. Wait for your company's designated administrator to review and approve the request.

Once approved, you'll be connected to your organization and have access to the appropriate membership information and resources based on your role.

9. What should I do if my request to join a company is pending, denied, or connected to the wrong organization?

If your request is still pending, please allow time for your company's administrator to review it.

If your request is denied, if you've been connected to the wrong company, or if you've identified a duplicate organization, chat with our PPAI Support team via AskPPAI chat for immediate assistance.

Our team will review your request, verify your information, and help ensure you're connected to the correct organization with the appropriate access, permissions, and membership benefits.

Membership & Account History

1. Where can I view my active member benefits, eligibility, or member pricing?

Your Member Portal dashboard will provide a personalized view of your membership status, benefits, and available member pricing.

Depending on your membership type, you'll also be able to view products, events, programs, and services available to you as a PPAI member.



2. Will all of my education credits be transferred to the new system?

PPAI plans to carry forward your education history into the new Member Portal.

As part of the transition, education records are being migrated and reviewed to help ensure completed education credits remain available after launch.

If you believe any information is missing after the transition, PPAI Member Support will be available to assist.

3. Will my PPAI ID (PIN), membership history, certifications, and training records carry over?

Yes. Your existing PPAI ID and PIN, membership history, certifications, and completed training records are expected to transfer to the new Member Portal.

These records are an important part of your membership journey and are being preserved as part of the transition, allowing you to continue accessing your history and achievements in one place.

Good news: Existing membership records, certifications, training history, and your PPAI ID are all expected to move with you to the new portal.

4. Will my PPAI ID (PIN) change?

No. Existing members will keep their current PPAI ID and PIN.

A new PPAI ID and/or PIN will only be created for individuals who do not already have a PPAI membership record.

5. Will I lose my event participation history?

No. PPAI intends to preserve your historical event participation as part of the transition to the new Member Portal.

This means you'll continue to be able to view and reference your past event participation after launch.



6. Will changes to our roster automatically update training and event eligibility?

In most cases, yes.

Your company affiliation, membership status, and assigned permissions help determine your access to training programs, events, member pricing, and other benefits. When roster updates are made, those changes are generally reflected throughout the Member Portal.

In some situations, updates may take a short time to process or require review by PPAI staff before they are applied.

7. Will anything change about my membership benefits or renewal process?

Your membership benefits will remain largely the same. The biggest change is how you access and manage your membership through the new Member Portal.

The new portal makes it easier to:

- View your membership status and benefits
- Renew your membership
- Access member pricing
- Update your account information
- Review purchase and transaction history

Our goal is to make managing your membership simpler while continuing to provide the benefits and services you rely on from PPAI.

8. Can I renew my membership through the Member Portal?

Yes. You can renew your membership directly through the Member Portal.

Your membership status and renewal information will be displayed on your dashboard, making it easy to see when your membership is due for renewal and complete the process online.



9. Why do some memberships renew through SAGE and others through PPAI?

Some memberships renew through Sage because they are part of a Canadian distributor program governed by existing contractual agreements. Those memberships will continue to be managed and renewed through Sage.

Other memberships are renewed directly through PPAI and can be managed within the Member Portal.

Members with Sage-based memberships may still purchase eligible PPAI add-on benefits. However, these purchases do not change the underlying Sage membership tier or provide additional Sage licenses.

10. What happens if my membership is expired, lapsed, or in a grace period?

The Member Portal will help guide you through your available renewal options based on your membership status.

If your membership expires, you may have a grace period during which you can renew while continuing to receive certain member benefits. Grace period eligibility and available benefits may vary based on your membership type.

If your membership has fully lapsed, the portal will provide information about the appropriate renewal or reinstatement process.

If you're unsure of your membership status or need assistance, log in to the Member Portal or chat with our PPAI Support team via AskPPAI chat for immediate assistance.

Profile & Account Management

1. How do I update my contact or personal information?

You can update much of your personal information directly through the Member Portal, including your:

- Name
- Email address



- Phone number
- Mailing address
- Social media links (if applicable)

Simply sign in to the Member Portal, navigate to your profile, make your updates, and save your changes.

Some information may require review or verification before updates are finalized.

2. What should I do if I notice missing or incorrect information after launch?

If you notice information that is missing or incorrect after logging in to the Member Portal, first check whether you can update it yourself through your profile.

If the information cannot be edited or still appears incorrect after you've made updates:

1. Contact your company's designated administrator to confirm the information on file.
2. If you still need assistance, chat with our PPAI Support team via AskPPAI chat for immediate assistance.

Our team will review the information and help make any necessary corrections.

Tip: We recommend reviewing your profile information shortly after your first login to help ensure your contact details, company affiliation, and membership information are accurate.

3. How do I upload or change my profile picture?

After signing in to the Member Portal, navigate to your profile and select the option to upload or update your profile photo.

Once your changes are saved, your updated photo will appear on your member profile.

4. Can I customize my notification preferences? If so, how?

Yes. Depending on the type of communication, you may be able to manage certain notification preferences through your member profile.



Some notifications, such as password resets, purchase confirmations, and other account-related messages, are transactional communications that cannot be turned off because they are necessary to manage your account.

Marketing and promotional communications will continue to be managed through PPAI's communication preference settings.

5. Can I save my credit card information through the Member Portal?

Depending on your membership type and payment options, you may have the ability to securely save a payment method for future purchases or membership renewals.

If this feature is available for your account, you'll be given the option to save your payment information during checkout.

6. Are my payment details secure in the Member Portal?

Yes. Payment information is processed using secure, industry-standard payment technology.

PPAI does not store complete payment card information directly within the Member Portal. If you choose to save a payment method, your payment information is stored securely through PPAI's authorized payment processing providers.

Protecting member information is a priority, and payment transactions are handled using established security practices designed to safeguard your data.

Company Roster Management

1. What website do I use to update my information and/or my company roster?

You'll use the **PPAI Member Portal** to manage your personal information and, if you have the appropriate permissions, your company's profile and roster.

The Member Portal provides a central location for maintaining company information, managing roster changes, and accessing membership-related services.



2. Can I add or update people on my company roster myself?

Yes. If you've been assigned the appropriate administrator role or permissions, you can add, remove, and update individuals on your company's roster directly through the Member Portal.

Your level of access depends on the permissions assigned to you by your organization or PPAI.

3. Can anyone add themselves to my company's roster without permission?

No.

Individuals may request to join a company through the Member Portal, but those requests must be reviewed and approved before they are added to the company roster.

Depending on how your organization is configured, requests may be reviewed by your designated company administrator, PPAI staff, or both.

This approval process helps ensure roster information remains accurate and secure.

4. How many administrators or primary contacts can we have on our account for roster change approvals?

Your organization can assign 1 Primary Contact and up to 2 Organization Administrators.

Administrators and Primary Contacts help manage your company information, review roster requests, and support membership-related activities on behalf of your organization.

Not sure who currently has administrator access, or need help assigning permissions? Check out the Admin training materials on the [PPAI Portal Resource Center](#).



5. What is the difference between roles and permissions?

Roles and permissions determine what users can view and do within the Member Portal.

- **Roles** are assigned to individuals based on their responsibilities within a company or organization.
- **Permissions** define the specific actions a user can take within the portal, such as updating company information, managing roster requests, or viewing invoices.

Your access to certain features depends on the role assigned to you.

If you're unsure what access you should have, contact your company administrator or PPAI Member Support for assistance.

Good to know: Not all users will see the same options within the Member Portal. Available features and access levels are based on assigned roles and permissions.

6. How do I change user permissions for my team?

If you have administrator access, you can update user roles and permissions directly within your company's profile in the Member Portal.

This allows you to assign, update, or remove responsibilities as your team's needs change.

If you're unable to make a change or need additional assistance, reference the Admin training material located on [The PPAI Portal Resource](#) center.

Under settings you can also view and update information on everything from your company contacts to your purchases, group and upcoming event information as well as invoices.

7. Is there a minimum amount of roster additions or changes we can make to our company?



No. You can make roster updates whenever they are needed. There is no minimum number of changes required before updating your roster.

8.Can I import data or contacts from a spreadsheet, if there are a lot of changes that I need?

No, unfortunately there is no bulk roster management feature at this time.

9.Can I invite team members to join my company roster?

Yes. If you have the appropriate permissions, you can invite team members to join your company through the Member Portal. Invited users will receive instructions to activate their account or complete their account setup before joining your organization.

10. When adding a new team member to my roster, do I need to complete all of their information?

Not necessarily.

In many cases, you can add a new team member using the basic information needed to create their account. Once invited, they will receive instructions to activate their account and complete or update the rest of their profile information themselves.

Depending on your organization's setup, certain required information may need to be provided before an invitation can be sent.

11. How do I remove someone from my roster?

To remove an individual from your roster, simply add an affiliation end date to their contact record.

Not sure how or where to find that information, or need additional help? Check out the Admin training materials on the [PPAI Portal Resource Center](#).



Events & Conference Registration

1. Do I register for the 2027 Expo through the Member Portal?

Yes. Registration for the 2027 Expo will be completed through the Member Portal.

When registration opens, you'll be able to access and complete the Expo registration form directly within the portal.

2. If I add someone to my company roster, are they automatically registered for Expo or other conferences?

No.

Adding someone to your company roster does not automatically register them for Expo or any other PPAI event.

Being part of your company roster helps establish their company affiliation and may affect their eligibility for member pricing, event registration, and other benefits. However, each attendee must still complete the event registration process.

3. Can I register someone for Expo or a conference if they are not on our company roster?

No, attendees must be listed on your company roster.

For many member benefits and member pricing opportunities, individuals must first be associated with the appropriate company roster before registering. In some cases, non-members or other eligible attendees may be able to register without being part of your company roster.

4. How quickly will my records be updated after I register for or attend an event?

Event registrations will generally appear in your Member Portal shortly after registration has been completed and processed.

Attendance history, education credits, and other event-related records may take additional time to update after an event concludes while participation records are finalized.



Learning & Certifications

1. What website do I use to access my online training?

You'll continue to access PPAI's online training through the **PPAI Learning Management System (LMS), Blackboard**.

The Member Portal will make it easier to find and access your available training and learning resources. PPAI will provide updated links and instructions before launch.

2. Can I access online training courses through the Member Portal?

Yes.

Once you're signed in to the Member Portal, you'll be able to access available online training and learning resources through the LMS based on your membership status, company affiliation, and applicable benefits.

3. How quickly will my records and credits update when I complete online training?

In most cases, training completions and education credits will update automatically shortly after you've successfully completed an online course.

4. How quickly will my records and credits update when I complete training at an in-person event?

Education credits earned through in-person events are typically processed after attendance has been verified and event records have been finalized.

Processing times may vary by event. Once processing is complete, your credits and training history will appear in your member record.

5. Will I be able to view my education credits, certifications, and training history?



Yes.

The Member Portal will provide visibility into your education history, certifications, completed training records, and earned credits, making it easier to track your professional development and monitor progress toward maintaining or earning credentials.

This information will be available in one place, helping you stay informed about your learning achievements and certification status.

Good to know: Your education history, certifications, and completed training records are being carried forward as part of the transition to the new Member Portal.

Training & Resources

1. Where can I access training videos, user guides, and other help resources?

PPAI will provide a variety of self-service resources to help you get started with the new Member Portal, including:

- Quick-start guides
- User guides and documentation
- Frequently Asked Questions (FAQs)
- Short training videos

These materials, along with links to additional resources, will be available under the **Resources** section of the Member Portal.

Whether you're logging in for the first time or looking for help with a specific feature, you'll be able to find the information you need in one convenient location.

2. Will Office Hours be recorded if I can't attend live?

Yes. Whenever possible, Office Hours sessions will be recorded and made available for on-demand viewing.

If you're unable to attend a live session, you'll be able to access the recording at a time that's convenient for you.

PPAI will share details about where to find recordings, training materials, and additional support resources as they become available.



Good to know: Training resources, FAQs, and recorded sessions are designed to help you get the most out of the Member Portal and continue learning at your own pace.

Billing & Payments

1. Where can I view my invoices, orders, payment status, or account credits?

You can access your purchase history, invoices, payment status, and available account credits through the **PPAI Member Portal**.

Within your account, you can view:

- Current and past invoices
- Payment history
- Order history
- Available account credits (if applicable)

The Member Portal provides a convenient, centralized location to manage and track all your transactions and account activity with PPAI.

2. Will I be charged automatically for my membership?

AutoPay is available through the PPAI Member Portal. If you choose to enroll in AutoPay, or if it is required for your membership type, your membership renewal will be processed automatically using your saved payment method.

If you are not enrolled in AutoPay, you will receive a renewal reminder and can renew your membership manually through the Member Portal before your renewal date.

You can manage your payment preferences and renewal settings within the Member Portal.

Help & Feedback

1. How do I contact support if I get stuck on a step?



If you're unable to complete a task or have questions about using the Member Portal, we recommend starting with the available FAQs, Help Center articles, training videos, and other self-service resources.

2. What if I don't see my question here?

This FAQ is designed to answer the most common questions about the Member Portal, but it may not cover every situation.

If you can't find the information you're looking for, chat with our PPAI Support team via AskPPAI chat for immediate assistance. We're happy to help.

3. Where can I submit feedback about my onboarding experience?

We welcome your feedback.

If you have suggestions about the Member Portal, onboarding experience, training resources, or other aspects of your member experience, we'd love to hear from you.

You can share feedback with PPAI Member Support at portalhelp@ppai.org or through any feedback opportunities offered during the rollout.

Your feedback helps us continue improving the experience for members across our community.

Thank you for your feedback. Member input plays an important role in helping us make the Member Portal and overall member experience better for everyone.