Specify the profile approval method and
required fields for your group

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Available to group administrators only: Use the procedures below to choose and specify the profile approval method and required fields for your group.

Note: Institutions in your group must submit their profiles and you must provide a profile approval method if you want to let them refer questions within the group. For more information, see Let institutions in your group refer questions to other institutions in your group.

1. Review the available options

The following information describes the available options for profile approval method, activation e-mail address, and required fields.

<table>
<thead>
<tr>
<th>APPROVAL METHOD</th>
<th>HOW IT WORKS</th>
<th>ACTIVATION EMAIL ADDRESS</th>
<th>REQUIRED FIELDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic</td>
<td>The profile is automatically approved/activated when an institution clicks the Submit button regardless of the data provided.</td>
<td>You may specify no email address to receive no notice or one or more addresses to receive a notice when an institution submits a profile. (The default is no email address.)</td>
<td>You do not need to require any fields. Required fields are ignored for the Automatic approval method.</td>
</tr>
<tr>
<td>Semi-Automatic</td>
<td>If an institution adds some data in each required field, the profile is automatically approved/activated when the institution clicks the Submit button.</td>
<td>You may specify no email address to receive no notice or one or more addresses to receive a notice when an institution submits a profile.</td>
<td>You must require one or more fields for the Semi-Automatic approval method. Choose the fields for which your group has a particular need.</td>
</tr>
<tr>
<td>Manual</td>
<td>After an institution clicks the Submit button, the group administrator receives an e-mail notice to review the profile. The group administrator clicks the Activate button to approve/activate the profile.</td>
<td>You must specify one or more email addresses to receive a notice when an institution submits a profile so you know that you need to review and approve/activate the profile.</td>
<td>You must require one or more fields for the Manual approval method. Choose the fields for which your group has a particular need.</td>
</tr>
</tbody>
</table>
## 2. Choose your method

Use the table below to help you choose your group's profile approval method.

<table>
<thead>
<tr>
<th>IF</th>
<th>AND</th>
<th>THEN CHOOSE THE FOLLOWING</th>
</tr>
</thead>
</table>
| Your group has no particular need for the information in any parts or fields of the profile. | You want all institutions or no institutions in the group to be referral partners (institutions that receive referred questions from institutions in the group needing help with a question). | Approval method: Automatic.  
Email address: None.  
Required fields: None.  
Note: Because these are the default values, there is nothing for you to enter if this is your choice. |
| You want some, but not all, institutions in the group to be referral partners.          | You want some, but not all, institutions in the group to be referral partners. | Approval method: Automatic.  
Email address: Specify one or more addresses to receive a notice when an institution submits a profile as a reminder to consider adding the institution as a referral partner.  
Required fields: None. |
| Your group has a particular need for the information in some parts or fields of the profile. | You will rely on the institutions to enter the needed information correctly. | Approval method: Semi-automatic  
Email address: Specify one or more addresses to receive a notice when an institution submits a profile so you know when the needed information has been provided by an institution.  
Required fields: Select the parts and fields that you need. |
| You want to verify that the needed information has been provided by an institution.     | You want to verify that the needed information has been provided by an institution. | Approval method: Manual.                  |

Profile or contacts the institution if changes are needed.
**3. Enter your choices**

1. Log on to QuestionPoint using your group administrator authorization number.

2. Select Administration in the Select Service drop-down menu.

3. Click Subscription Group > Settings.

4. In the Approval Method for Group Profiles area, click the button for the approval method that you want to use for profiles in your group.
   
   **Note:** For help, see Choose your method.

5. If you clicked the button for the Manual approval method or you want to receive an e-mail notice whenever an institution submits a profile to your group, go to step 6. Otherwise, go to step 7.

6. In the Activation E-Mail Address box, type the email address or addresses that should receive a notice whenever an institution submits its profile to your group.
   
   **Note:** If you type two or more addresses, type ; (semicolon) after each address except the last one.

7. If you clicked the button for the Semi-Automatic or Manual approval method, go to step 8.
   
   If you clicked the button for the Automatic approval method, go to step 9.

8. In the Required Fields area, select the check box for each part/screen and field of the profile that you want each institution to complete.

9. Click Save. The system acknowledges your action. The choices that you saved are now in effect for profiles submitted to your group.