

## Edit Name or Email Address

**When to use:** When you receive a request from a user to edit personal information.

### Log into MAX

- 1) Navigate to <https://www.tracommax.com/>
- 2) Enter your username and password (both are case sensitive)
- 3) Click "**LOGIN**"

### Find Individual

- 1) Under the **INDIVIDUALS** tab, click "**Search Individual**"
- 2) Enter the individual's information in the boxes labeled "**Email Address,**" "**First Name,**" "**Last Name**" or any combination of the three
- 3) Select an Individual Type if known; otherwise keep all options checked
- 4) Click "**SEARCH**"

### To Edit Learner/Rater Information in the Individual Record:

- 1) Choose which name needs to be updated in the search results.
- 2) Click on the individual's first name
- 3) Click "**EDIT**" under **Individual Detail**
- 4) Make the needed changes in the **Individual Detail** section
- 5) Click "**SAVE**"

**\*\*NOTE: If the Learner has an incorrect email address in a current session. Remove the Learner from the session and add the Learner once more with the correct email address.**

### To Edit Rater Name for a Specific Session:

- 1) Choose which name needs to be updated in the search results
- 2) Click on the individual's first name
- 3) Click on the Session Name where the edit needs to be made under **Rater Activities**
- 4) Make the needed changes in the **Rater For** section
- 5) Click "**SAVE RATER DETAILS**"

**\*\*NOTE: If the Rater was invited with an incorrect email address, advise the Learner to re-invite the rater with the correct email address**

**\*\* NOTE: If the Session Status is **Closed** or **Completed** you will not be able to make updates at the Session level.**