

All organizations using the Community Investment Portal must designate at least one Access Manager. The Access Manager is responsible for managing their organizational contacts and activating access on the Portal.

### **Access Managers**

To designate one or more Access Managers, a [Community Investment Portal Access Authorization Form](#) must be completed and signed by an authorized representative and emailed to [wishportal@fhlbsf.com](mailto:wishportal@fhlbsf.com).

Community Investment staff will designate the requested individual(s) as an Access Manager. Once informed that your Access Manager profile is active, set your password by completing the following steps:

1. Navigate to the [Community Investment Portal log-in page](#).
2. Enter your email address where prompted.
3. Select "Forgot Password?"
4. You will then receive email instructions for setting your password.

Upon logging in, to provide access to other organizational contacts, Access Managers should complete the following steps:

1. Navigate to your profile icon in the top right corner of the screen (your initial inside a circle).
2. Select "My Organization" from the drop down menu.
3. Select "Contacts" from the lefthand navigation menu.
4. Search for and click on the relevant user record (see below for creating a new user record).
5. Within that user's profile page, update any missing or required information.
6. At the bottom of the page, click "Update Profile."
7. Click "Activate Profile."
8. Inform the contact that their profile is now active, so that they can follow the steps below.

If a contact does not appear on the list of organizational contacts, a new contact record must be created. Access Managers should complete the following steps:

1. Select "My Organization" from the drop down menu.
2. At the bottom of the page, go to create a contact and click on "Enter Contact Details".
3. Complete and submit the required Contact Information fields.
4. Follow steps outlined above to provide access.

To remove access for an organizational contact or the Access Manager role, contact the Bank at [wishportal@fhlbsf.com](mailto:wishportal@fhlbsf.com).

To add new Access Managers, a new [Community Investment Portal Access Authorization Form](#) must be completed to update an organization's complete list of authorized Access Managers. A maximum of four Access Managers can be authorized at any one time.

### **Non-Access Manager Users**

All other users should contact their designated Access Manager at their organization. Your Access Manager will be able to activate your profile following the steps above.

Once you have been informed that your profile is active, complete the following steps to set your password:

1. Navigate to the [Community Investment Portal log-in page](#).
2. Enter your email address where prompted.
3. Select "Forgot Password?"
4. You will then receive email instructions for setting your password.

For assistance, please email [wishportal@fhlbsf.com](mailto:wishportal@fhlbsf.com).