Alberta.ca Account for Organizations Reference Guide



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Overview

Alberta's government is making changes to how organizations access our services through Alberta.ca Account for Organizations. This document outlines how to sign in with an existing account, create a new account, add a new organization, manage an account and manage an organization.

Signing in

If you have an existing Alberta.ca Account for Organizations, you will be able to sign in using your current credentials (i.e., your old username and password).

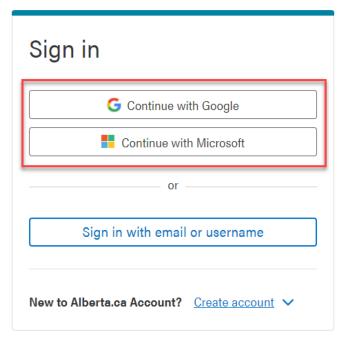
To sign in, go to: https://account.alberta.ca/ui/sign-in.

Signing in with different email accounts

You can now sign in with your every day email address and password. When you go to sign in to Alberta.ca Account for Organizations, you will have the option to 'Continue with Google' or 'Continue with Microsoft'. Select the appropriate option to be redirected to the appropriate sign in page without having to create a new account specific to our platform. The experience will be different depending on your email provider.

WELCOME TO

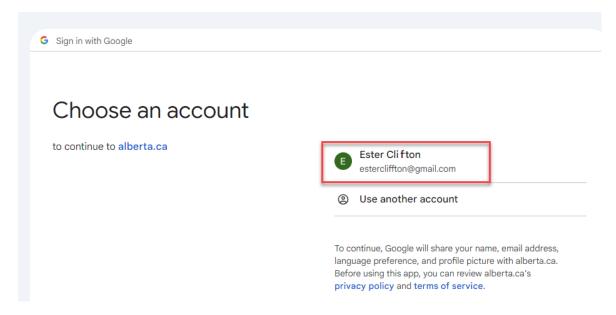
Alberta.ca Account



Terms of Use 2

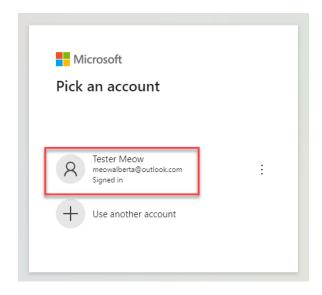
Google G-Suite Account

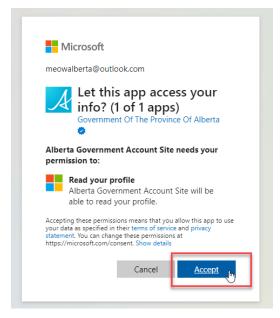
If you have a Google account, you will be prompted to sign in with your Google account. Below are some of the prompts you might see. Simply follow the prompts to sign in.



Microsoft M365 Account

If you have a Microsoft account, you will be prompted to sign in with your Microsoft account. Below are some of the prompts you might see. Simply follow the prompts to sign in.





Other Accounts

If you are signing in with an email account that does not prompt for automatic sign in, you may have to confirm you own that email address. You will receive an email notification with a link requesting that you confirm your account. You will need to click the link within 30 minutes, before the link expires. If the link expires, you will need to reinitiate the process.

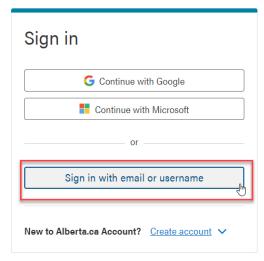
Signing in with an email address and password

1. To sign in using the email address associated with your Alberta.ca Account for Organizations, click on 'Sign in with email or username'.

*If you do not know the email address associated with your account, but do know your old username, please see 'Sign in with your username' section.

WELCOME TO

Alberta.ca Account

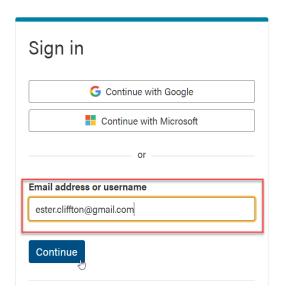


Terms of Use ☐

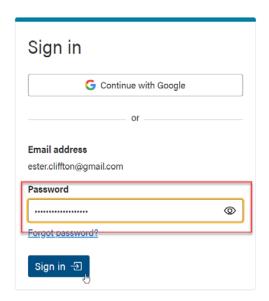
2. Enter the email address associated with your account and click 'Continue'. Enter your password and click 'Sign in'.

WELCOME TO

Alberta.ca Account



Welcome back



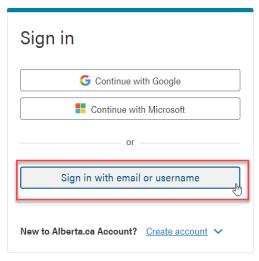
Signing in with your username

 If you forgot the email address associated with your Alberta.ca Account for Organizations, but do know your old username and password, you will be able to sign in using these credentials. Click on 'Sign in with email or username'.

*Only usernames that were unique across Alberta.ca Account and Alberta.ca Account for Organizations will remain usable. If you receive an error message, your old username may not have been unique. Please try your email address or Contact us.

WELCOME TO

Alberta.ca Account

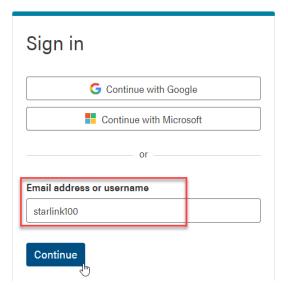


Terms of Use ☑

2. Enter your username and click 'Continue'. Enter your password and click 'Sign in'.

WELCOME TO

Alberta.ca Account

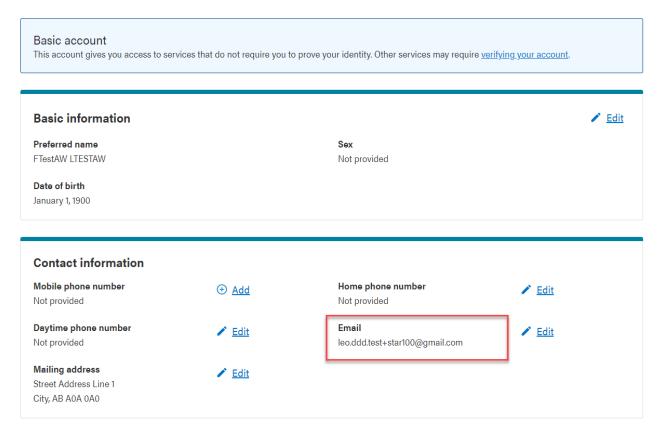


Welcome back



3. You will be taken to the My Account screen, where you will be able to see your contact information, including your email address associated with your account for future sign in.

Welcome, FTestAW LTESTAW

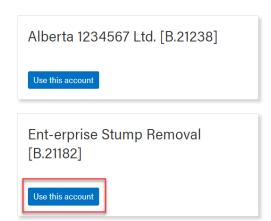


Signing in when associated with multiple organizations

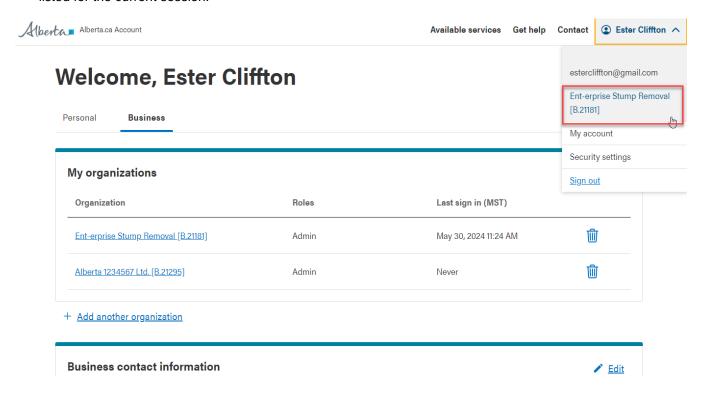
You can now represent multiple organizations under the same account and email address.

1. If your account has been successfully connected to multiple organizations, you will be prompted to select which organization you want to operate for this session. Click 'Use this account' to select the organization.

Choose staff account



2. You will now be signed in under that specific organization and be redirected to the My account page. Click on the 'Business' tab to view your organizational information. To confirm that you are operating under the correct organization, click on the arrow beside your name in the top-right corner and you will see the organization listed for the current session.



3. To operate on behalf of another organization, simply end the session by signing out. Then, upon sign in you will be prompted to select your organization again.

Creating a new account

If you are new to Alberta.ca Account for Organizations, you can create a new account using your current workplace email address and password. The experience will be different depending on your email provider.

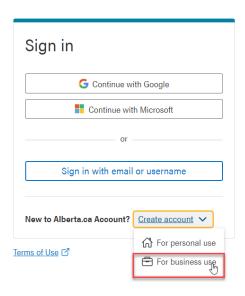
Creating a new account with your existing credentials

To create a new account, go to the Alberta.ca Account page.

1. Click on 'Create account' and select 'For business use'.

WELCOME TO

Alberta.ca Account



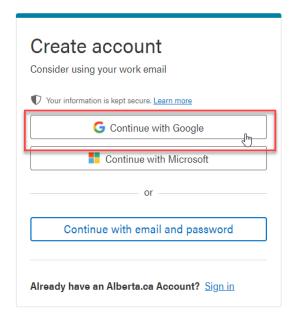
2. You will be provided with the option to 'Continue with Google / Microsoft'. Select the appropriate option for you. The below example shows a Google G-Suite Account. You also have the option of <u>Creating an account with an email address and password</u>.

WELCOME TO

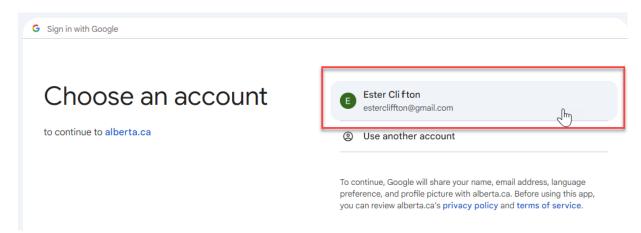
Alberta.ca Account

An easy and secure way to access your government services.



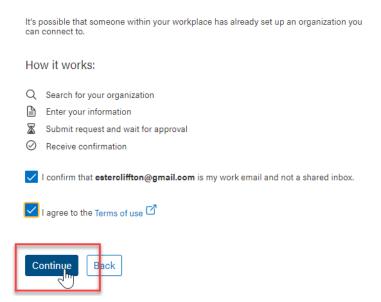


3. You will be prompted to select an account to use.



4. You will now be prompted to connect to your organization. Confirm your email address, agree to the Terms of Use and click 'Continue'.

Connect to your organization

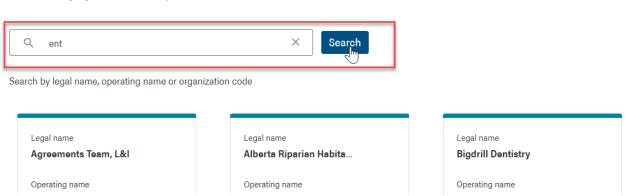


5. Begin typing your organization name in the search field. Click 'Search' to view the results.

*You will need to enter at least three characters in your search. Search results are limited to the first 15 results and are listed in alphabetical order by Legal name. If your search returns too many results, try refining your search by including more characters. You can also ask your administrator (admin) for the organization code, such as "B.1234".

Search for your business organization

Find an existing organization to link to your Alberta.ca account



6. Select your organization from the list and click 'Select' to continue.

*If you do not see your organization in the list, or if you are looking to add your organization for the first time, please see the 'Adding a new organization' section.

Search for your business organization

Find an existing organization to link to your Alberta.ca account

Q ent- X Search

Search by legal name, operating name or organization code

Legal name
Ent-erprise Stump Rem...

Operating name
Ent-erprise Stump Rem...

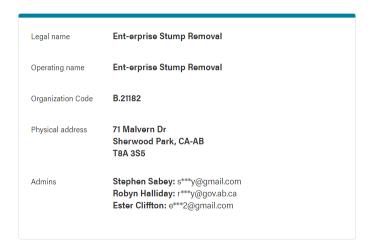
Organization Code
B.21182

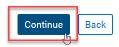
Admin(s)
Stephen Sabey, Robyn ...

7. Confirm the organization you selected is correct by reviewing the details. Click 'Continue' to proceed.

Confirm organization details

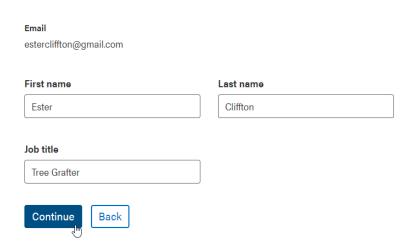
Please review the selected organization's information carefully before proceeding with your connection request.





8. You will be prompted to enter your business contact information. This should be the information you use to communicate on behalf of your organization. Click 'Continue' to proceed.

Confirm your business contact information



9. You will see a list of your organization's admins. Click 'Submit request' to send the request to your admins.

*If you do not recognize the admins listed, please contact your organization to confirm your selection is correct. If the admins listed are no longer with your organization, please contact us for assistance.

Confirm admins

You will need the approval of at least one admin below to finish this process.

Your request will be sent to:

- Stephen Sabey (s***y@gmail.com)
- Robyn Halliday (r***y@gov.ab.ca)
- Ester Cliffton (e***2@gmail.com)

If this information is incorrect, contact your admin to update it.

If you don't see any valid approvers, contact us at 1-844-643-2789.

- I am acting as an authorized representative or staff member of this organization and will only use this account for performing related duties.
- I will keep this account secure and will not share it with others.



10. You will receive a confirmation that your request was submitted. Click 'Continue to My account'.

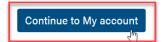
* Note the expiration date of your request. If your request is not approved before the expiration date, you will need to submit a new request. Alternately, you can request your admin initiate the process. See 'Adding staff to your organization' section.

Request submitted

Your request has been sent to:

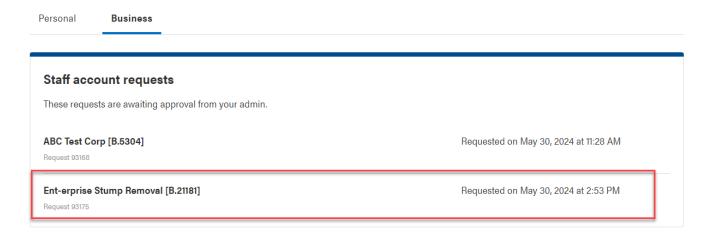
- Stephen Sabey (s***y@gmail.com)
- Robyn Halliday (r***y@gov.ab.ca)
- Ester Cliffton (e***2@gmail.com)

Note, this request will expire in 30 days. Please reach out to these admins if you do not get a confirmation before **Jun 12, 2024**



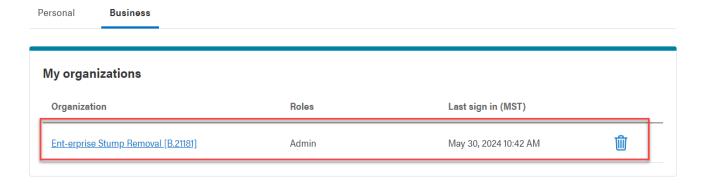
11. You will now be taken to the My account page. Under the 'Business' tab you will see your pending request.

Welcome, Ester Cliffton



- 12. Once your organization's administrator approves your request, you will receive an email notification.
- 13. You will now see your organization listed in the 'Business' tab under the 'My organizations' section.

Welcome, Ester Cliffton



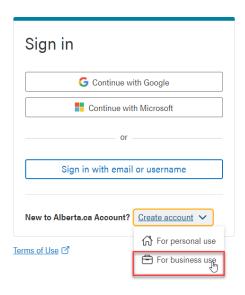
Creating a new account with an email address and password

To create a new account using your email address and a password specific to Alberta.ca Account, go to the Alberta.ca Account page.

1. Click on 'Create account' and select 'For business use'.

WELCOME TO

Alberta.ca Account



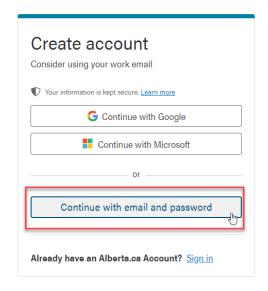
2. Select 'Continue with email and password'.

WELCOME TO

Alberta.ca Account

An easy and secure way to access your government services.





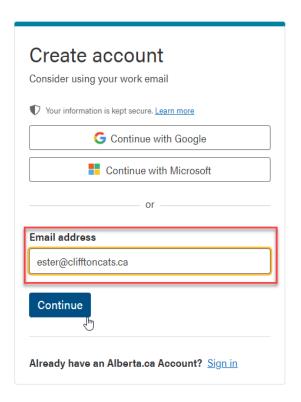
3. Enter your email address and click 'Continue'.

WELCOME TO

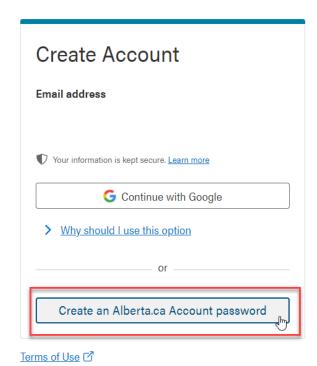
Alberta.ca Account

An easy and secure way to access your government services.





4. If you are prompted to 'Continue with Google / Microsoft', you can click 'Create an Alberta.ca Account password' to continue to set a password specific to Alberta.ca Account.

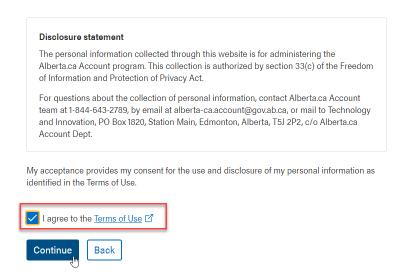


Alberta.ca Account for Organizations

5. Read and agree to the Terms of Use. Click 'Continue'.

Terms of Use

Please accept the Terms of Use to continue.



- 6. You will be sent an email to the email address provided that will contain a password creation link. Click on the link in the email to confirm your email address and to be redirected to create a password.
- 7. Enter a password for your account. Click 'Save and continue'.

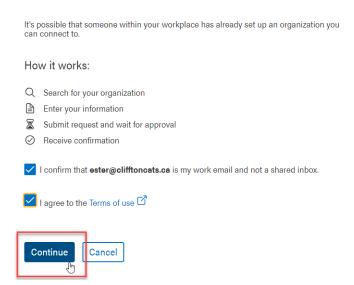


Create password

Email ester@clifftoncats.ca Password Your password must be: At least 8 characters At least 1 upper case letter At lease 1 numerical or special character Confirm password Save and continue

14. You will now be prompted to connect to your organization. Confirm your email address, agree to the Terms of Use and click 'Continue'.

Connect to your organization



15. Begin typing your organization name in the search field. Click 'Search' to view the results.

*You will need to enter at least three characters in your search. Search results are limited to the first 15 results and are listed in alphabetical order by Legal name. If your search returns too many results, try refining your search by including more characters. You can also ask your administrator (admin) for the organization code, such as "B.1234".

Search for your business organization

Find an existing organization to link to your Alberta.ca account

A ent

Search

Search by legal name, operating name or organization code

Legal name

Agreements Team, L&I

Operating name

Operating name

Operating name

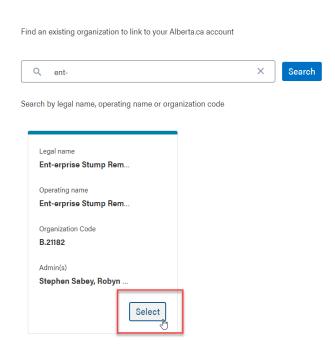
Operating name

Operating name

16. Select your organization from the list and click 'Select' to continue.

*If you do not see your organization in the list, or if you are looking to add your organization for the first time, please see the 'Adding a new organization' section.

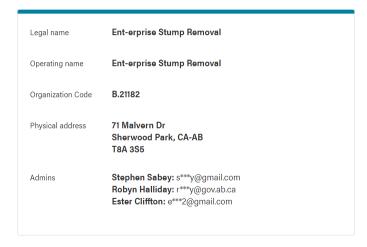
Search for your business organization



17. Confirm the organization you selected is correct by reviewing the details. Click 'Continue' to proceed.

Confirm organization details

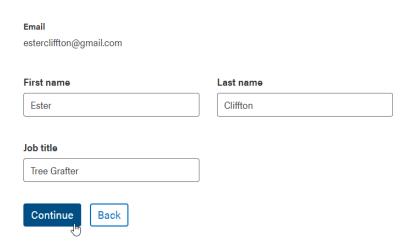
Please review the selected organization's information carefully before proceeding with your connection request.





18. You will be prompted to enter your business contact information. This should be the information you use to communicate on behalf of your organization. Click 'Continue' to proceed.

Confirm your business contact information



19. You will see a list of your organization's admins. Click 'Submit request' to send the request to your admins.

*If you do not recognize the admins listed, please contact your organization to confirm your selection is correct. If the admins listed are no longer with your organization, please contact us for assistance.

Confirm admins

You will need the approval of at least one admin below to finish this process.

Your request will be sent to:

• Stephen Sabey (s***y@gmail.com)

• Robyn Halliday (r***y@gov.ab.ca)

• Ester Cliffton (e***2@gmail.com)

If this information is incorrect, contact your admin to update it.

If you don't see any valid approvers, contact us at 1-844-643-2789.

- I am acting as an authorized representative or staff member of this organization and will only use this account for performing related duties.
- I will keep this account secure and will not share it with others.



- 20. You will receive a confirmation that your request was submitted. Click 'Continue to My account'.
- * Note the expiration date of your request. If your request is not approved before the expiration date, you will need to submit a new request. Alternately, you can request your admin initiate the process. See 'Adding staff to your organization' section.

Request submitted

Your request has been sent to:

• Stephen Sabey (s***y@gmail.com)

• Robyn Halliday (r***y@gov.ab.ca)

• Ester Cliffton (e***2@gmail.com)

Note, this request will expire in 30 days. Please reach out to these admins if you do not get a confirmation before Jun 12, 2024



21. You will now be taken to the My account page. Under the 'Business' tab you will see your pending request.

Welcome, Ester Cliffton



- 22. Once your organization's administrator approves your request, you will receive an email notification.
- 23. You will now see your organization listed in the 'Business' tab under the 'My organizations' section.

Welcome, Ester Cliffton



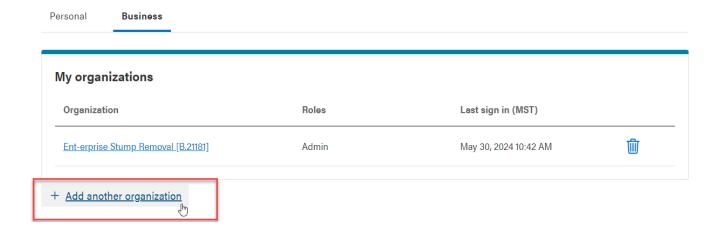
Adding an organization to Alberta.ca Account for Organizations

Adding a new organization

If you do not see your organization listed in Alberta.ca Account, you can add it. Please confirm with your organization that it is not listed under another name. To add a new organization, go to Alberta.ca Account.

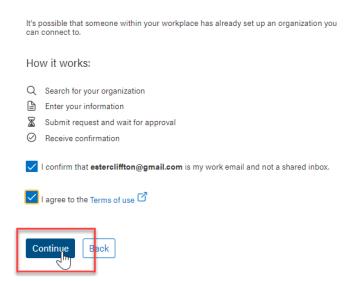
1. Sign in to your Alberta.ca Account for Organizations. Under your 'Business' tab, click on 'Add another organization' located below the 'My organizations' section.

Welcome, Ester Cliffton



2. You will now be prompted to connect to your organization. Confirm your email address, agree to the Terms of Use and click 'Continue'.

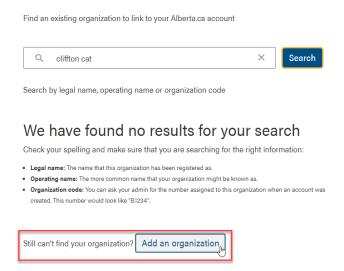
Connect to your organization



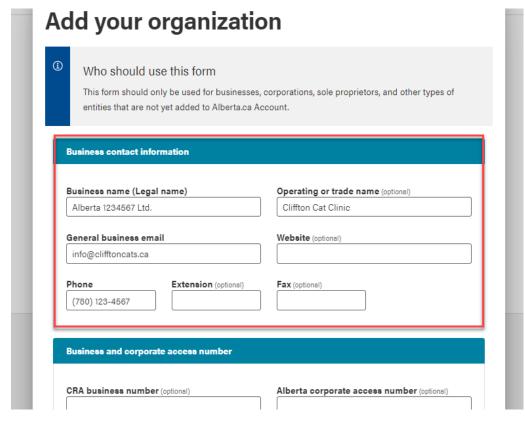
3. Verify that your organization is not already listed. Begin typing your organization name in the search field. Click 'Search' to view the results. Click 'Add an organization' to continue.

*If you discover that your organization is already listed, please join that organization. If you have lost access to this organization, please contact the <u>Alberta.ca Contact Centre</u> for assistance.

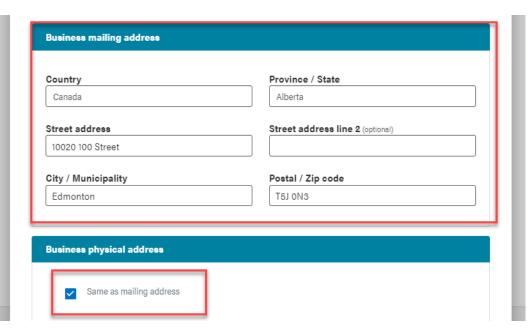
Search for your business organization



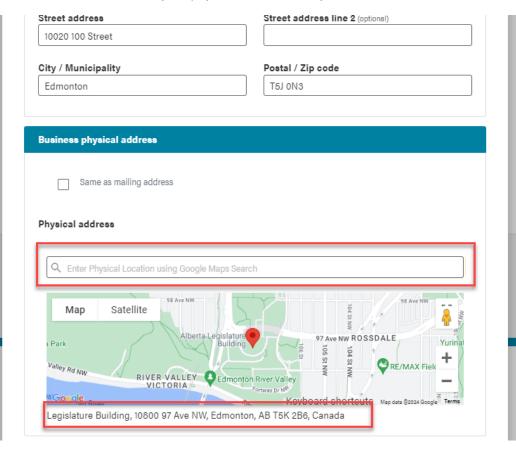
4. The 'Add your organization' form will pop up. Begin filling in the form by entering your organization's contact information.



- 5. Add your business mailing and physical addresses.
 - a. If your mailing and physical addresses are the same, click on the 'Same as mailing address.'



b. If your mailing and physical addresses are not the same, enter your physical address in the 'Physical address' search bar by typing your address. The location will appear in the drop-down menu. Select your physical address and you will see it listed below the Google map.

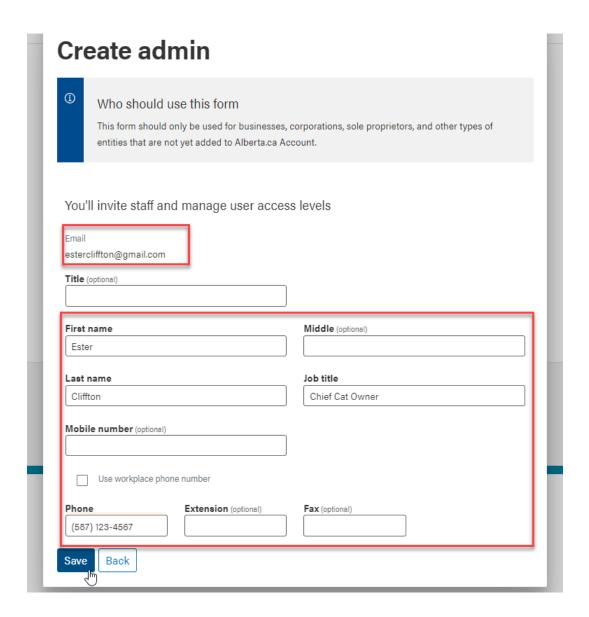


- 6. Click 'Continue' once complete.
- 7. You will now be prompted to add yourself as the first administrator for this organization, which is explained in the next section. This is a default feature so that an organization is created with at least one administrator. It is recommended that an organization have at least two administrators. More information can be found in 'Managing your organization.'

Setting up the administrator

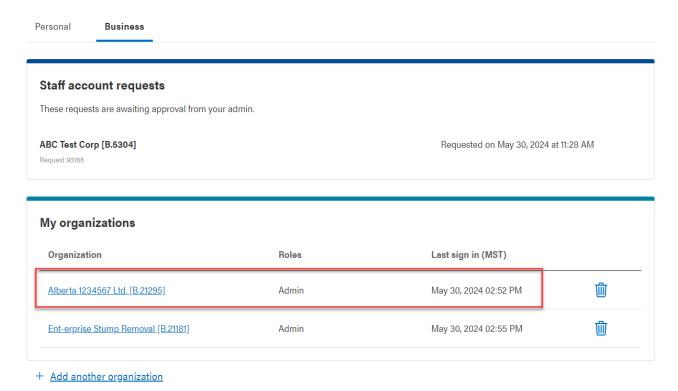
Once your organization is added, you will see the prompt to 'Create admin'. You will notice that your email address is already populated.

1. Begin by filling out the contact information form. This should be the contact information you use to interact on behalf of your organization. The mandatory 'Phone number' field is the shared line for your organization, whereas the optional 'Mobile number' is for a direct line to the individual. Once complete, click on 'Save'.

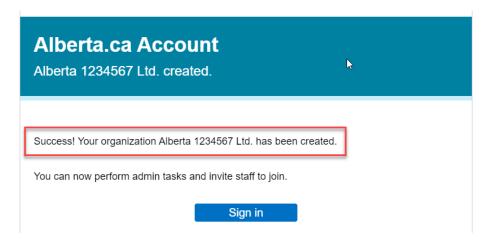


2. Under the 'Business' tab, you will now see your newly created organization listed under 'My organizations'.

Welcome, Ester Cliffton



3. You will receive an email confirming that the organization was created successfully in Alberta.ca Account for Organizations.



4. You will also receive an email confirming that your admin account was successfully created.

Alberta.ca Account Welcome to your Alberta.ca Account Hello Ester, Welcome to your Alberta.ca Account for Alberta 1234567 Ltd.. You now have access to participating government programs and services with a single sign on. Sign in Maximize the benefits of your account with these features:

- **Convenience:** Your single account provides easy access to services, eliminating the need for multiple passwords.
- Control: Enjoy the flexibility of accessing <u>services and programs</u> from thecomfort of your own home, at a time that suits you.
- Efficiency: Save time by managing all your services in one place.

Managing your account

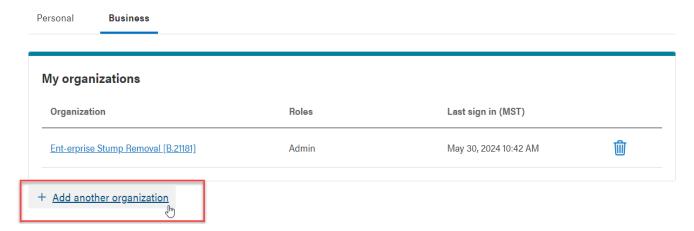
Now that you can sign in to Alberta.ca Account for Organizations, you are ready to manage your account and explore new features such as submitting a staff account request.

Connecting to an organization

To connect to an organization, go to the Alberta.ca Account page.

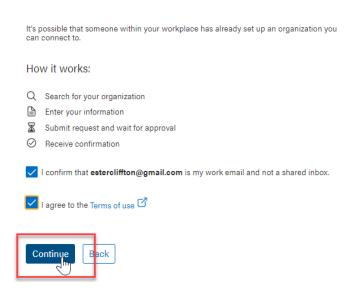
- 1. Sign in to your Alberta.ca Account for Organizations.
- 2. Sign in to your Alberta.ca Account for Organizations. Under your 'Business' tab, click on 'Add another organization' located below the 'My organizations' section.

Welcome, Ester Cliffton



3. You will now be prompted to connect to your organization. Confirm your email address, agree to the Terms of Use and click 'Continue'.

Connect to your organization



4. Begin typing your organization name in the search field. Click 'Search' to view the results.

*You will need to enter at least three characters in your search. Search results are limited to the first 15 results and are listed in alphabetical order by Legal name. If your search returns too many results, try refining your search by including more characters. You can also ask your administrator (admin) for the organization code, such as "B.1234".

Search for your business organization

Find an existing organization to link to your Alberta.ca account

Q ent

X Search

Search by legal name, operating name or organization code

Legal name

Agreements Team, L&I

Operating name

Operating name

Operating name

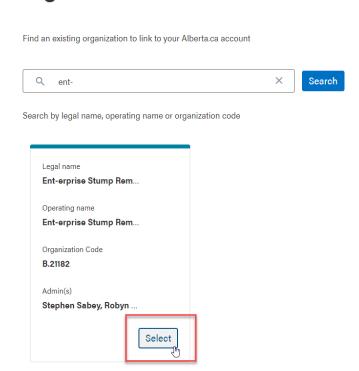
Operating name

Operating name

5. Select your organization from the list and click 'Select' to continue.

*If you do not see your organization in the list, or if you are looking to add your organization for the first time, please see the 'Adding a new organization' section.

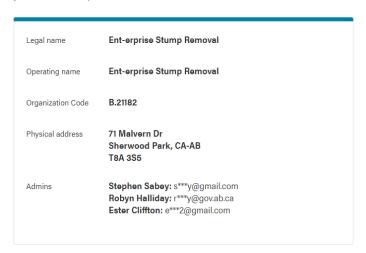
Search for your business organization



6. Confirm the organization you selected is correct by reviewing the details. Click 'Continue' to proceed.

Confirm organization details

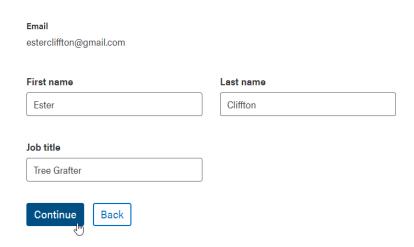
Please review the selected organization's information carefully before proceeding with your connection request.





7. You will be prompted to enter your business contact information. This should be the information you use to communicate on behalf of your organization. Click 'Continue' to proceed.

Confirm your business contact information



8. You will see a list of your organization's admins. Click 'Submit request' to send the request to your admins.

*If you do not recognize the admins listed, please contact your organization to confirm your selection is correct. If the admins listed are no longer with your organization, please contact us for assistance.

Confirm admins

You will need the approval of at least one admin below to finish this process.

Your request will be sent to:

- Stephen Sabey (s***y@gmail.com)
- Robyn Halliday (r***y@gov.ab.ca)
- Ester Cliffton (e***2@gmail.com)

If this information is incorrect, contact your admin to update it.

If you don't see any valid approvers, contact us at 1-844-643-2789.

- I am acting as an authorized representative or staff member of this organization and will only use this account for performing related duties.
- I will keep this account secure and will not share it with others.



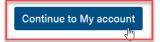
- 9. You will receive a confirmation that your request was submitted. Click 'Continue to My account'.
- * Note the expiration date of your request. If your request is not approved before the expiration date, you will need to submit a new request. Alternately, you can request your admin initiate the process. See 'Adding staff to your organization' section.

Request submitted

Your request has been sent to:

- Stephen Sabey (s***y@gmail.com)
- Robyn Halliday (r***y@gov.ab.ca)
- Ester Cliffton (e***2@gmail.com)

Note, this request will expire in 30 days. Please reach out to these admins if you do not get a confirmation before **Jun 12, 2024**



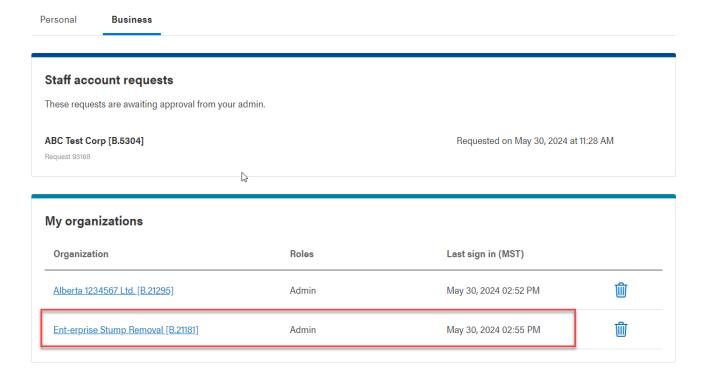
24. You will now be taken to the My account page. Under the 'Business' tab you will see your pending request.

Welcome, Ester Cliffton



- 25. Once your organization's administrator approves your request, you will receive an email notification.
- 26. You will now see your organization listed in the 'Business' tab under the 'My organizations' section.

Welcome, Ester Cliffton

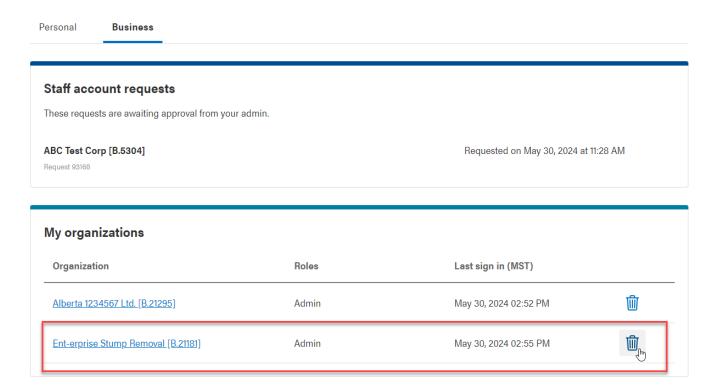


Disconnecting from an organization

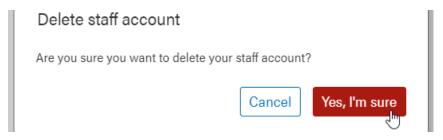
To disconnect from an organization, go to the Alberta.ca Account page.

- 1. Sign in to your Alberta.ca Account for Organizations.
- 2. Under your 'Business' tab, in the 'My organizations' section, delete your connection by clicking the delete icon next to the organization you want to disconnect from.

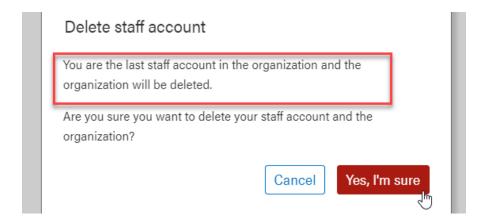
Welcome, Ester Cliffton



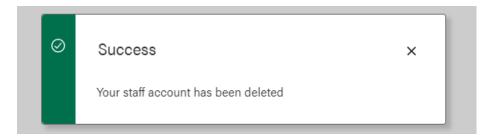
3. A pop-up will confirm that you want to disconnect by asking if you are sure you want to delete your staff account. Click 'Yes, I'm sure'.



*If you are the last remaining connection to an organization, this function will also delete the organization from Alberta.ca Account for Organizations. The pop-up confirmation will state this.



4. You will then get a pop-up confirming the action.



5. When you exit the pop-up, you will be signed out of Alberta.ca Account for Organizations and be brought back to the sign in page. If you had more than one organization connection, you will be able to sign in again and interact under that organization.

Managing your organization

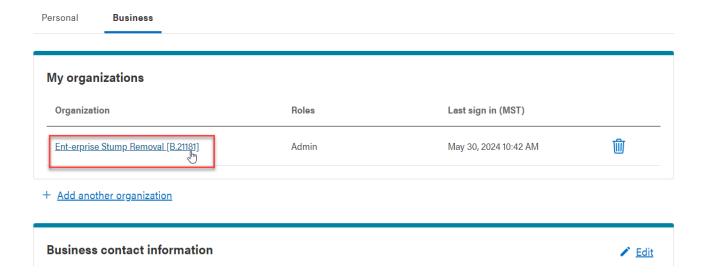
Now that you can sign in to Alberta.ca Account for Organizations, you are ready to manage your organization and explore new features such as accepting a request to connect.

Adding staff to your organization

To add additional personnel to your organization, go to the Alberta.ca Account page.

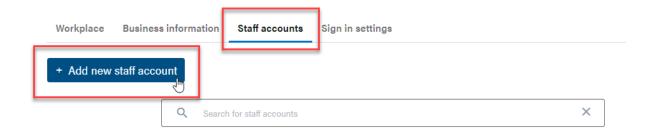
1. Sign in to your Alberta.ca Account for Organizations. Under your 'Business' tab, locate the 'My organizations' section and select the organization that you would like to add staff to by clicking on the organization name.

Welcome, Ester Cliffton



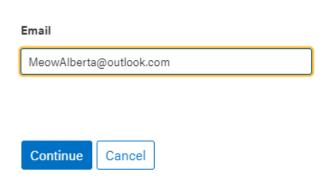
2. Click on the 'Staff accounts' tab. Then, click on 'Add new staff account'.

Ent-erprise Stump Removal [B.21182]

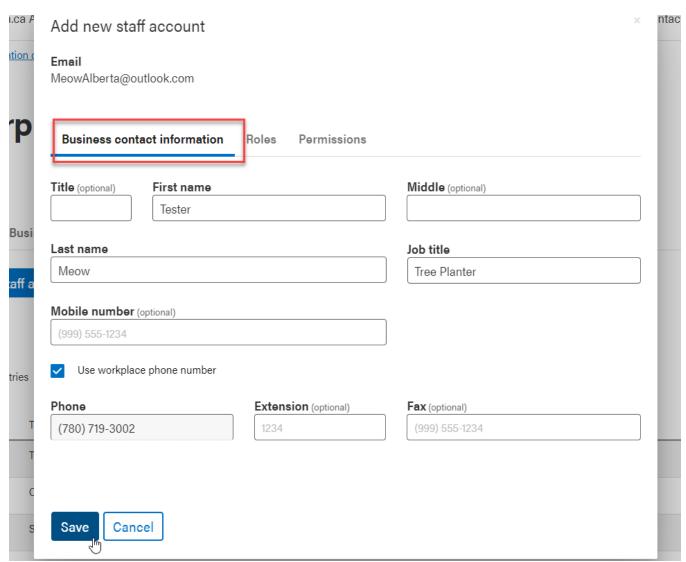


3. Enter the staff member's email address. This should be the email address they use to communicate on behalf of your organization. Click 'Continue' to proceed to the next step.

Add new staff account

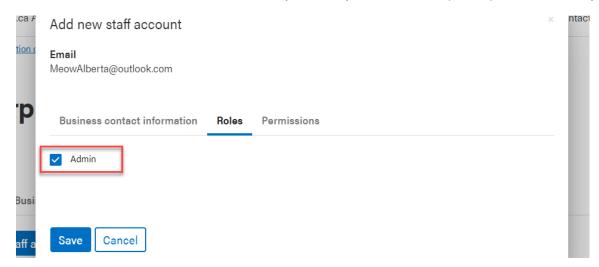


4. Enter the staff member's business contact information. If the staff member already has an existing Alberta.ca Account for Organizations, their business contact information will be pre-populated.



5. Under the 'Roles' tab, you will have an option to make this staff member an 'Admin.' Click the 'Admin' box to grant this individual administrator privileges to your organization.

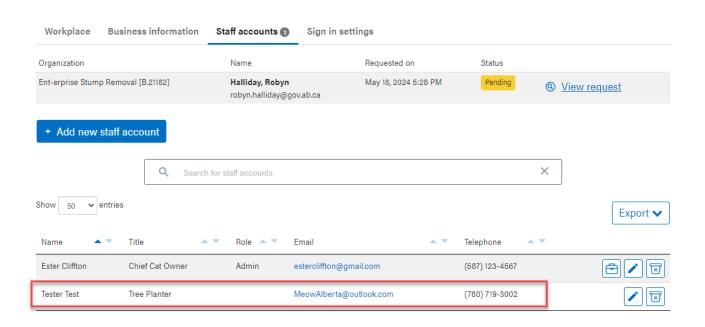
*The 'Permissions' tab is for future functionality. Currently, there are no separate permissions that you can apply.



6. Once you confirm the account details are correct, click 'Save'. You will see your new staff member in your list of 'Staff accounts'.

*If this individual already has an Alberta.ca Account for Organizations, then they will receive an email notification that they have been successfully added to your organization. If this individual did not already have an account, they will receive an account creation notice in their email. They will have 30 days to complete their account set up.

Ent-erprise Stump Removal [B.21182]



Approving a 'Connect to an organization' request

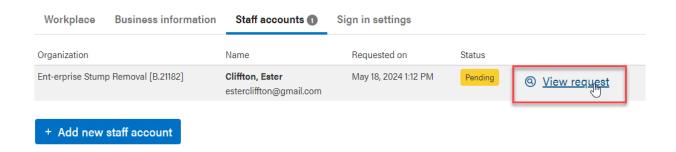
If you are an admin of an organization, you will receive an email notification when a Connect to an organization request is created for your organization. The admins will have 30 days to review the request before it expires. At that point, a new request would need to be submitted.

1. To review a request, click on the 'Review' button to start the process directly from your inbox. Alternately, sign in to your account and click on the notification bell. This will take you to the 'Staff accounts' where you can see all pending requests.

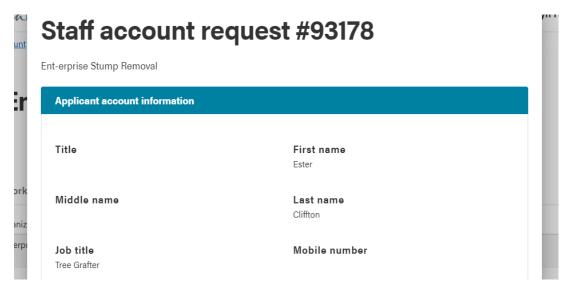


You will see the request waiting and pending review. Click on 'View request'.

Ent-erprise Stump Removal [B.21182]



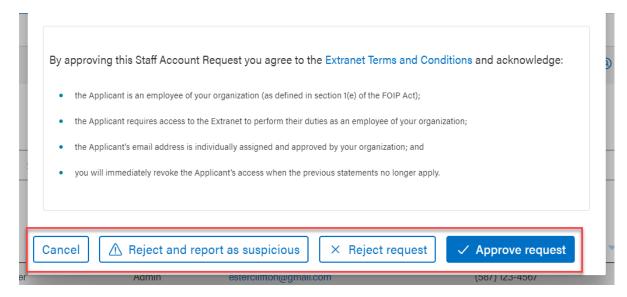
3. On the next screen you will be able to review the applicant's information.



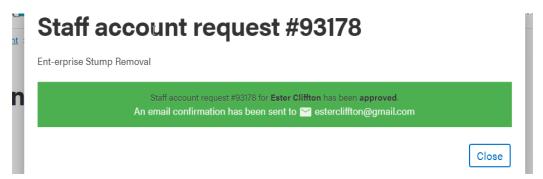
4. You will have an option to make this staff member an 'Admin.' Click the 'Admin' box to grant this individual administrator privileges to your organization in Alberta.ca Account for Organizations.



5. At the bottom of the form, you will see options available to approve or reject the request. You can also reject a request and report it as suspicious if you have concerns about its origins. If you're not ready to make a decision, you can 'Cancel' to exit the screen. Read the Terms and Conditions prior to approving a request.



6. Once you approve the request, you will receive a confirmation message. You will be able to see the new staff member under your organization's 'Staff accounts' tab.



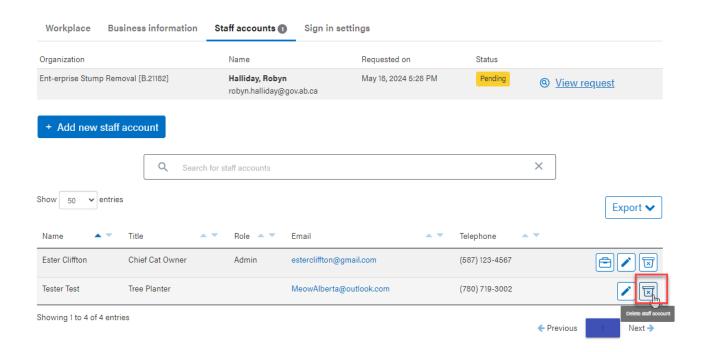
7. The individual will receive an email notifying them that their request has been approved.

Removing a staff account

If you are an admin of an organization, you are responsible for maintaining staff accounts. This includes revoking access to individuals who have departed your organization or no longer require access.

- Sign in to your Alberta.ca Account for Organizations. Under your 'Business' tab, locate the 'My organizations' section and select the organization by clicking on the organization name.
- 2. Click on the 'Staff accounts' tab to see a list of your current staff accounts.
- 3. Identify the staff account(s) that is no longer required and click on the 'Delete staff account' icon.

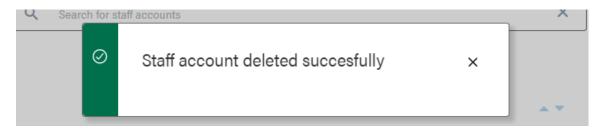
Ent-erprise Stump Removal [B.21182]



4. A pop up box will appear to confirm that you would like to remove this staff account from your organization. Click 'Yes, I'm sure'.

Delete staff account Are you sure you want to delete this staff account? Cancel Yes, I'm sure

5. You will then get a pop up confirmation that the account has been removed.

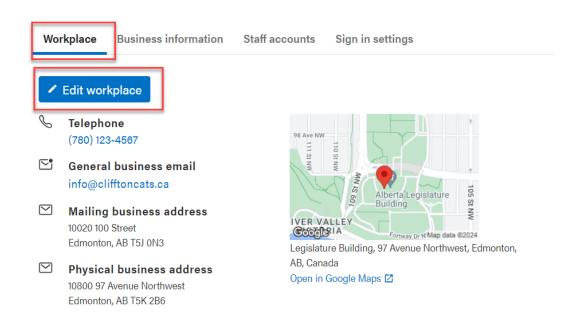


Updating and adding organization information

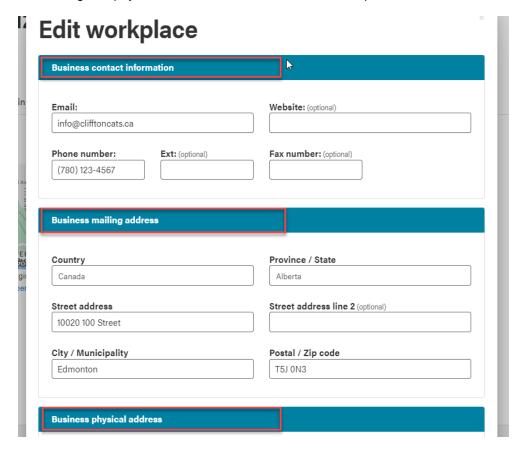
If you are an admin of an organization, you are able to update and add additional information for that organization.

- 1. Sign in to your account by going to the Alberta.ca Account page.
- 2. Under the 'Business' tab, click on your organization name under 'My organizations'. The 'Workplace' tab displays your business contact information. Click on 'Edit workplace' to edit.

Alberta 1234567 Ltd. [B.21238]

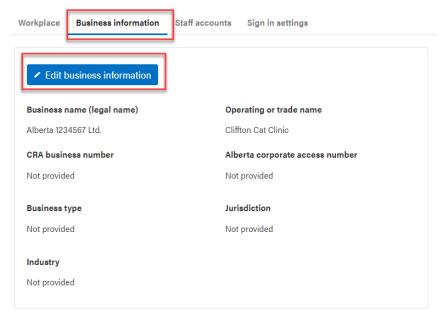


3. A new screen will pop up where you will be able to edit your business contact information, including the mailing and physical addresses. Click 'Save' once complete.

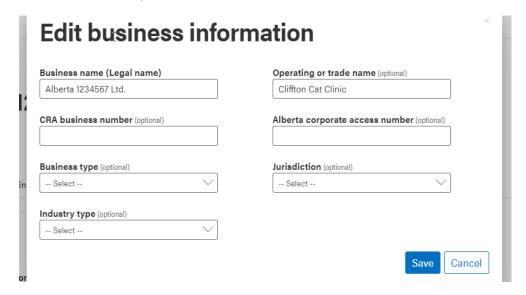


4. Under the 'Business information' tab, click on 'Edit business information' to update the information.

Alberta 1234567 Ltd. [B.21238]



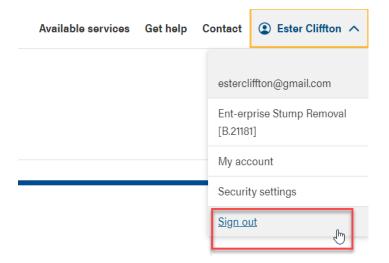
5. A new screen will pop up where you will be able to your business name, operating name, and business numbers. You can also add additional information such as business type, jurisdiction, or industry type. Click 'Save' once complete.



Further Assistance

Signing out

To sign out, click on your name in the top-right corner and select 'Sign out'.



Deactivating your account

You deactivate your Alberta.ca Account for Organizations by calling the contact centre at 1-844-643-2789. You will need to provide the email address for your account. Once your account is deactivated, you will no longer be able to sign in and access online services.

Reporting a compromised account

If you think your account has been compromised, sign in and change your password immediately. Call the contact centre at 1-844-643-2789.

Contact us for assistance

To receive technical assistance or ask questions about your Alberta.ca Account for Organizations, you can reach us by:

Contact Centre Phone at: 1-844-643-2789

Contact Centre Email at: alberta-ca.account@gov.ab.ca

Website at: https://account.alberta.ca/ui/account/help