

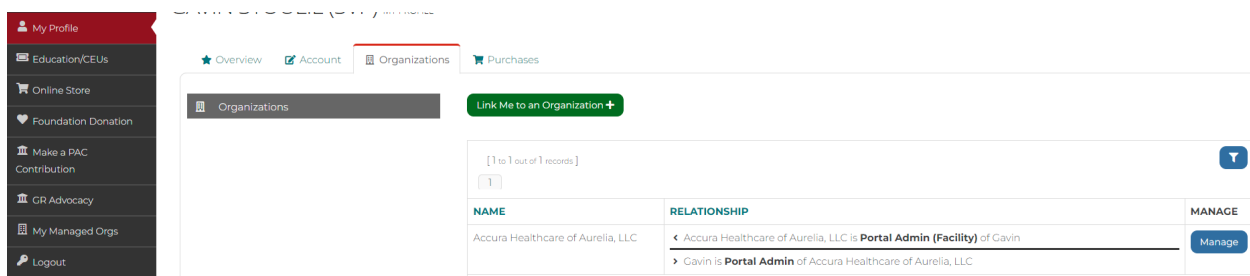
Portal Admin and Billing Contact Information

This training identifies what abilities a portal admin and billing contact have.

If you have portal admin or billing contact rights, you can oversee your organization. You can add/remove individuals from your organization, printing/paying for open invoices, and view staff CEUs.

Organization Profile – you can review the organization information that appears on the website, used for billing membership, and pay/print invoices.

Under **“My Profile”**, select the **“Organization”** tab, and click on the **“Manage”** button.



The screenshot shows the member portal interface. On the left is a navigation menu with options like My Profile, Education/CEUs, Online Store, Foundation Donation, Make a PAC Contribution, CR Advocacy, My Managed Orgs, and Logout. The main content area has tabs for Overview, Account, Organizations, and Purchases. The Organizations tab is active, showing a table with one record for Accura Healthcare of Aurelia, LLC. The table has columns for NAME, RELATIONSHIP, and MANAGE. The RELATIONSHIP column contains two entries: 'Accura Healthcare of Aurelia, LLC is Portal Admin (Facility) of Gavin' and 'Gavin is Portal Admin of Accura Healthcare of Aurelia, LLC'. A 'Manage' button is located in the MANAGE column for the first entry.

NAME	RELATIONSHIP	MANAGE
Accura Healthcare of Aurelia, LLC	Accura Healthcare of Aurelia, LLC is Portal Admin (Facility) of Gavin Gavin is Portal Admin of Accura Healthcare of Aurelia, LLC	Manage

Here you have access to the organization profile.

- Under the “**Overview**” tab you can update the organization’s primary email, website link, and make a payment (see how to pay an invoice).
- Under the “**Account**” tab you can review organization information such as county, district, and bed types. The additional info tab is for associate members. This shows what services the associate member is identified under on the website vendor finder.

The screenshot shows a user interface for an organization profile. At the top, there are four tabs: "Overview" (with a star icon), "Account" (with a pencil icon and highlighted in red), "Individuals" (with a person icon), and "Purchases" (with a shopping cart icon). Below the tabs, there are two main sections: "Organization Info" (with a document icon) and "Additional Info" (with a magnifying glass icon). The "Services" section is expanded, showing a table with one record. The table has a header "NAME ▲" and a row with the text "Contract Therapy Services". Above the table, it says "[1 to 1 out of 1 records]". There is a "1" in a box next to the record, and a "C" icon next to it.



Under the “**Individuals**” tab, a list of employees will appear. When you click on the “**manage**” button, you will be taken into the individual’s account.

ACCURA HEALTHCARE OF AURELIA, LLC MY ORGANIZATION

★ Overview Account **Individuals** Purchases

Individuals

[1 to 8 out of 8 records]

NAME	RELATIONSHIP	MANAGE	END RELATIONSHIP
Jessica Greene (Administrator - SNF/AL)	<ul style="list-style-type: none"> < Jessica is Billing Contact of Accura Healthcare of Aurelia, LLC > Accura Healthcare of Aurelia, LLC is Primary Billing Contact (Facility) of Jessica 	Manage	End Relationship

You can see what committees they serve on with IHCA:

★ Overview Account

Personal Info Contact Info **Committees** Education Credits

Active Committees Inactive Committees

[1 to 2 out of 2 records]

NAME ▲	REPRESENTING	POSITION	START DATE	END DATE
ICAL Quality Improvement		Committee Member	1/1/2019	
IHCA Quality Improvement		Committee Member	1/1/2019	



Iowa Health Care Association
 Iowa Center for Assisted Living
 Iowa Center for Home Care

You can view and print their credit transcript:

The screenshot shows a user account dashboard. At the top, there are two tabs: "Overview" (with a star icon) and "Account" (with a pencil icon). Below the tabs is a vertical list of menu items: "Personal Info", "Contact Info", "Committees", and "Education Credits". To the right of the menu is a table with three columns: "TYPE", "DESCRIPTION", and "NUMBER OF CRE".

Under the **"Purchases"** tab you can view and print invoices under the **"Recent Invoices"** section, see if your payment has been processed under **"Recent Payments"**, and see who is registered for an event under the **"Events"** section.

The screenshot shows a dropdown menu with the following options: "Recent Invoices", "Recent Payments", "Events", "Foundation Donations", "Credits", and "Payment Options".



My Managed Orgs – you can quickly view the staff roster

If you click on “My Managed Orgs” on the lefthand side toolbar, the screen will show you a “Roster” button to click on.

MY MANAGED ORGANIZATIONS

[1 to 1 out of 1 records]

NAME	CITY	STATE/PROVINCE	EMAIL	ROSTER
Accura Healthcare of Aurelia, LLC	Aurelia	Iowa		Roster

Click on the “Roster” button and the list of employees, billing contacts, and portal admins will appear. From here you are to add, edit, and remove individuals from your organization.

EMPLOYEES

ACTIONS

+ Add New Individual Search for Individual Edit Remove

If you have questions about the new Member Portal, please email info@iowahealthcare.org.

