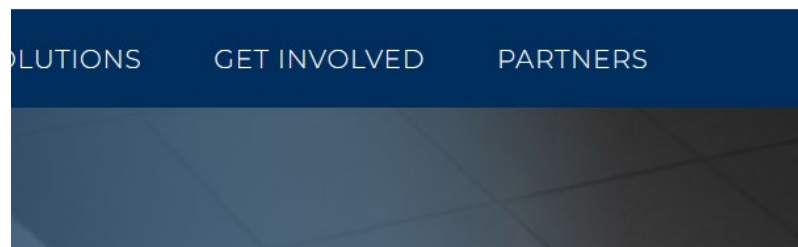
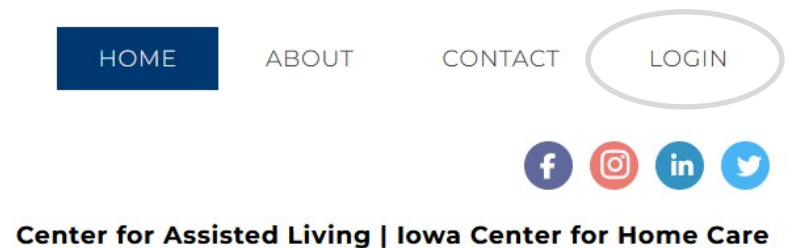


Portal Admin and Billing Contact Information

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 print staff CEUs.

First, visit <https://members.iowahealthcare.org/> and login. This can be found on the IHCA website in the top-right corner of the screen (Please see below).



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 'My Profile' page with the 'Organizations' tab selected. The page includes a sidebar with navigation options: My Profile, Education/CEUs, Online Store, Foundation Donation, Make a PAC Contribution, GR Advocacy, My Managed Orgs, and Logout. The main content area has tabs for Overview, Account, Organizations, and Purchases. Below the tabs is a 'Link Me to an Organization +' button. A table displays one record for 'Accura Healthcare of Aurelia, LLC' with a 'Manage' button. The table has columns for NAME, RELATIONSHIP, and MANAGE.

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



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

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.

★ Overview ✎ Account 👤 Individuals 🛒 Purchases

📄 Organization Info
➡ Additional Info

⚙️ Services

[1 to 1 out of 1 records]

1	C
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NAME ▲

Contract Therapy Services

1

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 education credits:

The screenshot shows a user account dashboard with two tabs: "Overview" (with a star icon) and "Account" (with a pencil icon). The "Account" tab is active. On the left, there is a vertical menu with four items: "Personal Info", "Contact Info", "Committees", and "Education Credits" (which is highlighted with a dark background). 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 items: "Recent Invoices" (with a clipboard icon), "Recent Payments" (with a dollar sign icon), "Events" (with a calendar icon), "Foundation Donations" (with a heart icon), "Credits" (with a clipboard icon), and "Payment Options" (with a document icon).



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 Member Portal, please email info@iowahealthcare.org.

