



MANAGE PARTNER ORGANIZATIONS & APPROVERS

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Manage Partner Organizations and Approvers

If you are an Organization Administrator, you can perform the following tasks on the portal:

- Search for partner organizations, and modify their information
- Add partner organizations
- Add or remove partner organization approvers

Start by clicking on the **Manage Partner Organizations** link under **Provisioning Tools** on the **Main Menu**.

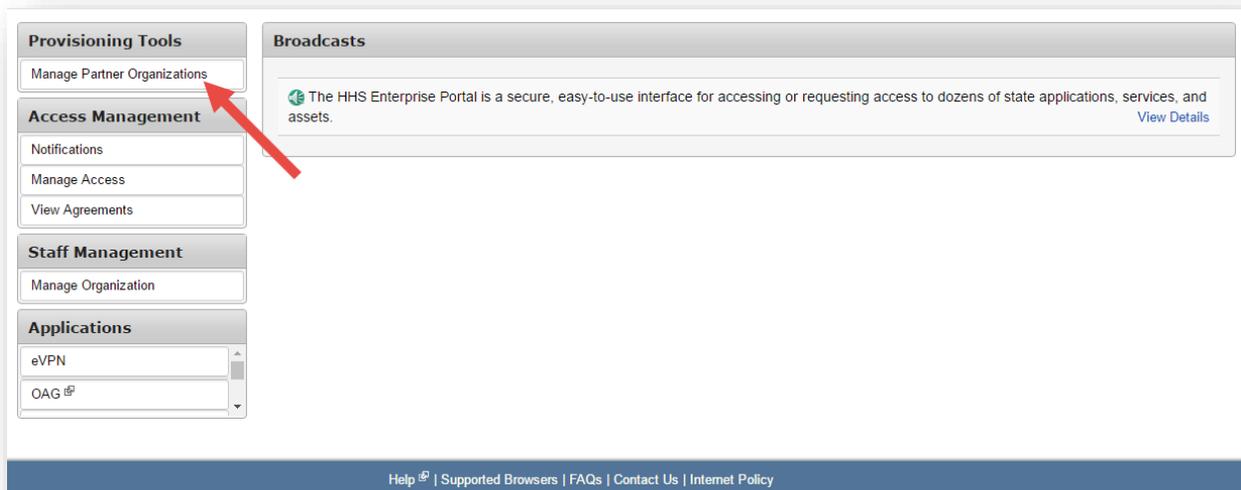
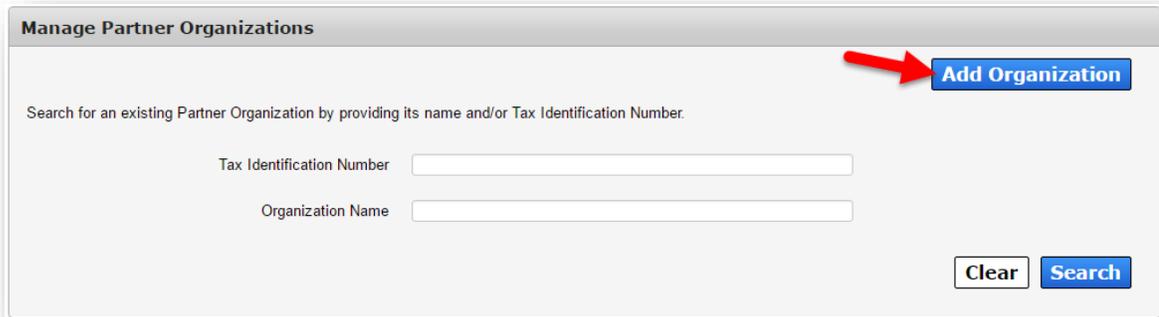


Figure 1 Home screen

Add a Partner Organization

1. On the **Manage Partner Organizations** screen, select **Add Organization**.



Manage Partner Organizations

Search for an existing Partner Organization by providing its name and/or Tax Identification Number.

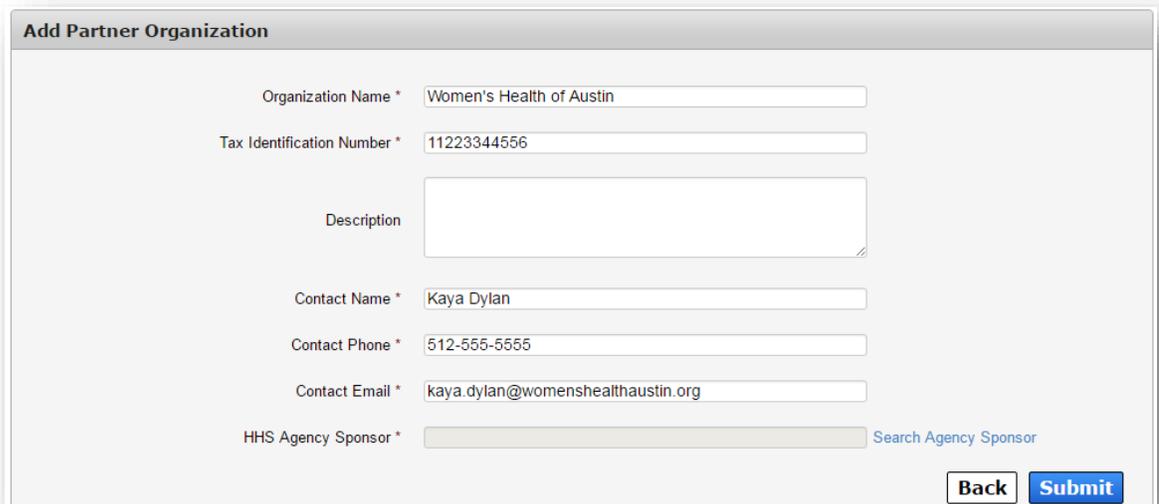
Tax Identification Number

Organization Name

[Add Organization](#)

Figure 2 Manage Partner Organizations

2. On the **Add Partner Organization** screen, enter the organization's details. All fields are required except for **Description**.



Add Partner Organization

Organization Name *

Tax Identification Number *

Description

Contact Name *

Contact Phone *

Contact Email *

HHS Agency Sponsor * [Search Agency Sponsor](#)

Figure 3 Add Partner Organization screen

3. To add an agency sponsor:
 - a. Select the **Search Agency Sponsor** lookup beside **HHS Agency Sponsor**.
 - b. On the **Search for User** screen, enter information in at least one field and select **Search**.

Search for User

Last Name

First Name

Username / EID

Email Id

Agency

Location

Employee Type

Include Inactive Users

Back **Clear** **Search**

Figure 4 Search for User screen

- c. Search results appear at the bottom of the page. Select the last name of the user to assign them as the HHS Agency Sponsor.

Last Name	First Name	Job Title	Agency	Location	Employee Type
Phillips	Katherine	Clerk	HHSC	FORT WORTH	Employee
Phillips	John	Program Specialist	HHSC	HOUSTON	Employee

Figure 5 Search for User with Results screen

What is an Agency Sponsor? An HHS employee who will receive communications regarding the partner organization until appropriate approvers have been assigned.

4. Click **Submit** on the **Add Partner Organization** screen (Figure 3 on p.3) to complete the process. The organization is now added to the system.

Search for a Partner Organization

On the **Manage Partner Organizations** screen (Figure 2 on p.3), enter the organization's Tax Identification Number and/or the name in the fields provided, then select **Search**.

TIP: If you are not 100% sure about the organization's full name, go ahead and enter what you do know. The system will likely return accurate search results based on your entry.

Search results appear at the bottom of the screen.

Manage Partner Organizations [Add Organization](#)

Search for an existing Partner Organization by providing its name and/or Tax Identification Number.

Tax Identification Number

Organization Name

Tax ID	Organization Name	Action
11223344556	Women's Health of Austin	View Details Modify Manage Approvers

Figure 6 Manage Partner Organizations with Search Results screen

View Partner Organization Details

Click **View Details** (1) inside the partner organization's row.

Modify Partner Organization Details

Click **Modify (2)** inside the partner organization's row on the **Manage Partner Organizations** screen (**Figure 6 on p.5**), which opens the **Modify Partner Organization** screen. Make the desired changes and click **Submit**.

Modify Partner Organization

4 **Manage Approvers**

Organization Name *

Tax Identification Number *

Description

Contact Name *

Contact Phone *

Contact Email *

HHS Agency Sponsor * [Search Agency Sponsor](#)

Back **Submit**

Figure 7 Modify Partner Organization

Manage Partner Organization Approvers

You can manage partner organization approvers in one of two ways:

- Click the **Manage Approvers** link (3) in the organization's row on the **Manage Partner Organizations** screen (Figure 6 on p. 5).
- Click **Manage Approvers** (4) on the **Modify Partner Organization** screen (Figure 7 on p.6).

Both actions take you to the **Manage Organization Approvers** screen.

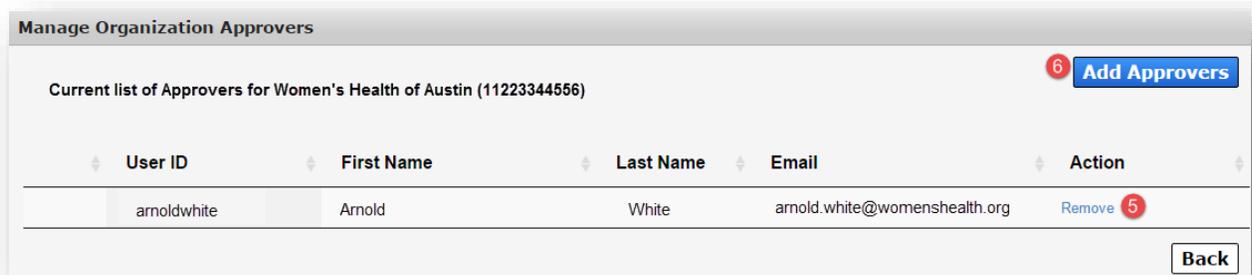


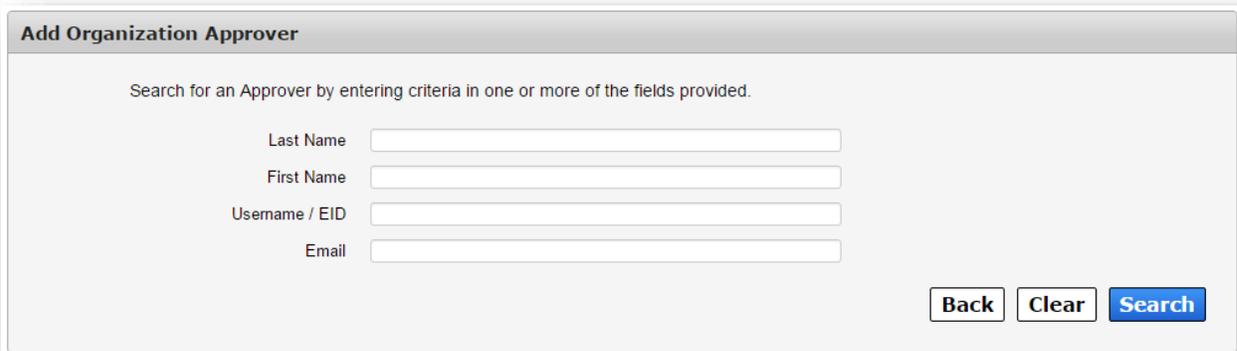
Figure 8 Manage Organization Approvers

Remove an Approver

Click **Remove** (5) in the row of the approver.

Add Approvers

1. Click **Add Approvers (6)** on the **Manage Organization Approvers** screen (Figure 8 on p.7), which opens the **Add Organization Approver** screen (Figure 9).
2. Search for an approver using at least one of the search criteria and click **Search**.
3. When the search results appear, click **Add as Approver** in the user's row to finalize the action.



Add Organization Approver

Search for an Approver by entering criteria in one or more of the fields provided.

Last Name

First Name

Username / EID

Email

Figure 9 Add Organization Approver screen