# MANAGE PARTNER ORGANIZATIONS & APPROVERS



**IDENTITY & ACCESS MANAGEMENT** 

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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**.

Provisioning Tools	Broadcasts
Manage Partner Organizations	
Access Management	In the HHS Enterprise Portal is a secure, easy-to-use interface for accessing or requesting access to dozens of state applications, services, and assets. View Details
Notifications	
Manage Access	
View Agreements	
Staff Management	
Manage Organization	
Applications	
eVPN	
OAG <sup>&amp;</sup>	
* *	J
	Help <sup>윤</sup>   Supported Browsers   FAQs   Contact Us   Internet Policy

Figure 1 Home screen

#### Add a Partner Organization

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

	Add Organization
rch for an existing Partner Organization by providing its name and/or Tax Identification Numbe	r.
Tax Identification Number	
Organization Name	
	Clear Search

Figure 2 Manage Partner Organizations

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

Organization Name *	Women's Health of Austin	
Tax Identification Number *	11223344556	
Description		
Contact Name *	Kaya Dylan	
Contact Phone *	512-555-5555	
Contact Email *	kaya.dylan@womenshealthaustin.org	
HHS Agency Sponsor *		Search Agency Sponsor
		Back Submit

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**.

Last Name	Phillips
First Name	
Username / EID	
Email Id	
Agency	HHSC
Location	
Employee Type	<b>T</b>
Include Inactive Users	
	Back Clear Search



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	<ul> <li>First Name</li> </ul>	♦ 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.

mage Partner Organizations			Add Organization
arch for an existing Partner Organization by providing its n	ame and/or Tax Identification Number.		
Tax Identification Nu	nber		
Organization N	ame Women's Health		
			Clear Search
Tax ID	)	+ Action	\$
11223344556 Women's Health of A	ustin	View Details   Modify   Mana	ge 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**.

, ,		
		<b>Manage Approvers</b>
Organization Name *	Women's Health of Austin	
Tax Identification Number *	11223344556	
Description		
		2
Contact Name *	Janice Shows	
Contact Phone *	512-555-5555	
Contact Email *	janice.shows@womenhealth.com	
HHS Agency Sponsor *		Search Agency Sponsor
		Back Submit
Contact Email * HHS Agency Sponsor *	janice.shows@womenhealth.com	Search Agency Sponsor

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.

Current list of Approvers for Women's Health of Austin (11223344556)						6 Add App	provers		
÷	User ID	÷	First Name	÷	Last Name	¢	Email	Action	
	arnoldwhite		Arnold		White		arnold.white@womenshealth.org	Remove 5	
									Back

Figure 8 Manage Organization Approvers

#### Remove an Approver

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

#### Add Approvers

- 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.

Search for an Approver by ent	ering criteria in one or more of the fields provided.	
Last Name		
First Name		
Username / EID		
Email		
		Back Clear Search
		Dack Cical Scarch

Figure 9 Add Organization Approver screen