OHCA
OREGON HEALTH
CARE ASSOCIATION

Oregon's Voice for Long Term Care & Senior Housing

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OHCA MEMBER PORTAL TRAINING: MANAGE STAFF

This training identifies how to manage your organization's individual contacts/staff on the OHCA member resource portal, MemberSuite.

Update and Manage Your Organization's Staff

1. Login to the OHCA online member portal at: http://bit.ly/OHCAMemberPortal.
   a. If you do not have a login, refer to the training "OHCA Member Portal Training - Portal Information - Create an Individual Login Account."
2. If you have access to edit your organization, you may see the "Multiple Identities Detected" page. Select your organization and click "Continue."
   a. Please note, individuals who are designated as the following roles have access to edit their organization's information and to manage staff within the member resource portal:
      - For **assisted living facility, resident care facility, nursing facility, skilled nursing facility organizations,** the designated relationship types that have access to log into portal are "administrator," "accounting/billing," "support staff," and "owner-operators".
      - For **in home care, home health agency** and **senior retirement housing organizations**, the designated relationship types that have access to log into portal are "administrator," "accounting/billing," "support staff," "owner-non operators," and "Owner-operators."
      - For **operator** organizations, the designated relationship types that have access to log into portal are "administrator," "accounting/billing," and "support staff."
      - For **business partner** organizations, the designated staff type that have access to log into portal are "Sponsorship contact," "accounting/billing," and "support staff."

Home >
Multiple Identities Detected

It looks like the account you've logged into has the right to manage more than one customer in our system. Please choose the customer you'd like to login as. When you login as this customer, everything you do will be on behalf of this customer - this includes making payments, viewing invoices, registering for events. You can switch between identities by using the drop down list at the top of your screen.
Select an identity:
◉ Sample User (Individual)
○ Sample ALF (Organization)

[Continue]

3. If you do not see the "Multiple Identities Detected" page, simply click on your organization's name on your portal page.

Welcome to Oregon Health Care Association

🌐 **My Profile**
Your Customer ID: 12375
Sample User
Sample ALF
111 main street
Portland, OR 97219

Preferred Contact #: (503) 726-5260
Email: SampleUser@ohca.com
Login ID: SampleUser@ohca.com (change)

⚙ Edit My Information   ⚙ Change Password

You are linked to 1 other record(s). You can login as them to update or review their account information:
• Sample ALF (Organization)

My Membership
Status: Member
Member Since: -
Expiration: 6/30/2018
Type: Assisted Living Facility
• Join/Renew OHCA

💲 **My Account**
Outstanding Balance: $15.00
Last Payment: No payments on file.
• Make a Payment
• Manage Saved Payment Options
• Manage Installment Plans
• View Account History

📅 **Events, Education, and Exhibits**
Last Registration: Sample Event
• Browse Events
• View My Past Events

My CEU Credits
Year-to-date Credits: 9.0
Total # of Credits: 9.0
• View My CEUs

4. Once you are on your organization's portal page, click "Manage Organization Contacts."
5. The "Manage Organization Contacts" page allows you to manage the individuals connected to your organization.

Manage Contacts for Sample ALF

Current Contacts

ID	Name	Email Address	Relationship			
10634	Carol Grebin	cgrebin@ohca.com	Other Relationship	(edit)	(change relationship)	(delete)
13137	Carol Grebin	cgrebin@ohca.com	Contact	(edit)	(change relationship)	(delete)
109092	Ginny Burdick	sampleALF@ohca.com	Senate Legislator	(edit)	(change relationship)	(delete)
109092	Margaret Doherty	sampleALF@ohca.com	House Legislator	(edit)	(change relationship)	(delete)
12375	Sample User	SampleUser@ohca.com	Administrator	(edit)	(change relationship)	
109092	Suzanne Bonamici	sampleALF@ohca.com	Congressional Legislator	(edit)	(change relationship)	(delete)

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6. Here, you can edit, delete, or change relationships of the contacts in the OHCA member resource portal that are tied to your organization.
   a. **IMPORTANT NOTE: Please do NOT edit or delete any of the "Legislator" relationship contacts (ie Senate Legislator, House Legislator, Congressional Legislator).** These contacts are the lawmakers for your organization. Their association with your organization is an important part of our advocacy efforts. We use this data for internal purposes and, unfortunately, cannot hide or remove this data from your organization's portal page. If you have any questions about this data, please contact OHCA.
7. On this page you can also add individuals for your organization by selecting "Add a Contact."

Tasks

- Add a Contact
- Go Home
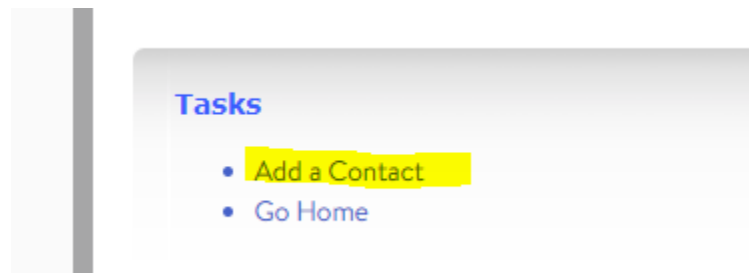
8. To add a contact input the individual's email and contact type and click "Continue." If the individual is already in our system you can connect them to your organization.

Home >
Add a Contact to Sample ALF

If we can, we're going to add an existing contact to your organization by using the email address. If the email doesn't exist, we'll ask you for additional information.

Email Address:* SampleUser2@ohca.c
Contact Type:*   Caregiver/CNA/CMA ▼

Continue   Cancel

9. If the individual is not in our system, you can add them by adding in their first name and last name. Then select the box "Would you like to send this individual an invitation to login?"
10. Click "Continue" and then click "Add Contact."
11. You will be redirected to your "Manage Contacts" page. You can navigate back to your organization portal page by selecting "Home" or "Go Home."