IDENTITY & ACCESS MANAGEMENT

MANAGE PARTNER ORGANIZATIONS & APPROVERS
# Manage Partner Organizations and 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 screen](image1.png)

*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 screen](image2.png)

*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**.
   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.

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.

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](image)

*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.

![Manage Organization Approvers](image)

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.