

[Adding Portal Users](#)

Portal Users are Family Members and Advocates who need to view and sign forms outside of CHOICES. Portal Users can be added through the main CHOICES application screen or through a specific individual.

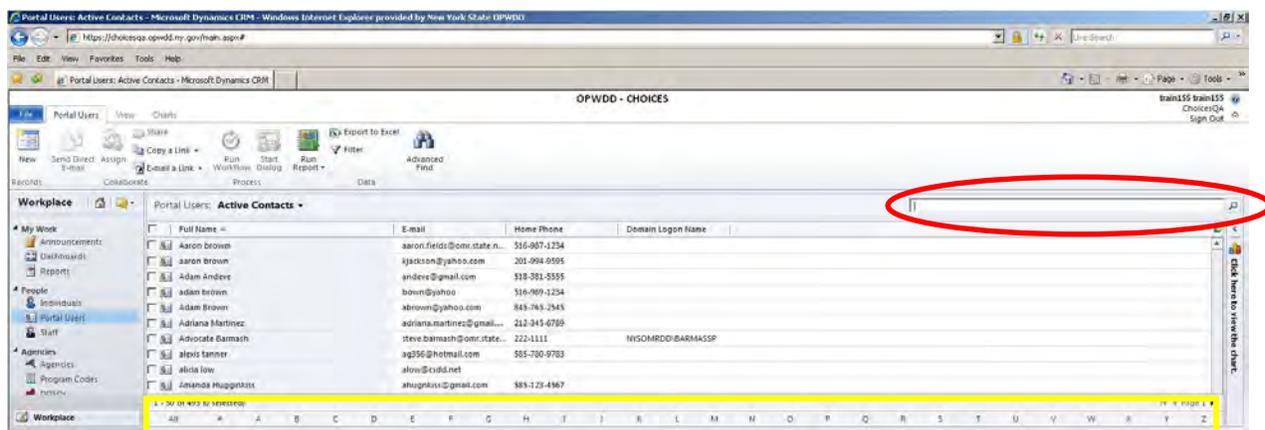
Portal Users

To view all Portal Users, start in the **Workplace** column. Under the **People** section click on the “**Portal Users**” link.



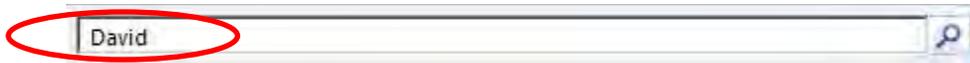
All current Portal Users will be displayed in the main part of the screen.

You can search for a specific Portal User by name either in the **Search for records** field, or you can narrow the search down by clicking a letter at the bottom.



Portal User exists in CHOICES

In this example, we will search for someone that is currently a Portal User in CHOICES. Type either the first or last the name of the Portal User that you're looking for in the **Search for records** field, and then click the **Search** button .

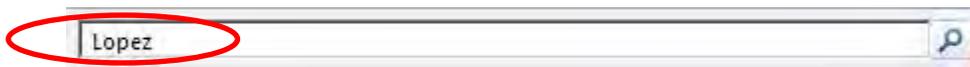


A list matching our search displays. Here, we can double-click the name of the person that we want to add as a Portal User.

Portal Users: Search Results ▾			
<input type="checkbox"/>	Full Name ▲	E-mail	Home Phone
<input type="checkbox"/>	 Barbara Davidson	bbdavidson123@hotmail.com	518-555-9876
<input type="checkbox"/>	 David Crockett	rememberthealamo@alamo.com	210-782-5266
<input type="checkbox"/>	 David Tassone	david.tassone@opwdd.ny.gov	555-555-2157
<input type="checkbox"/>	 Harry David	harry.n.david918@aol.com	518-555-1234
<input type="checkbox"/>	 Larry David	larry@hbo.com	818-555-4567

Portal User does not exist in CHOICES

In this example, we will search for someone that is **not** currently a Portal User in CHOICES. Type either the first or last name of the Portal User that you're looking for in the **Search for records** field, and then click the **Search** button .

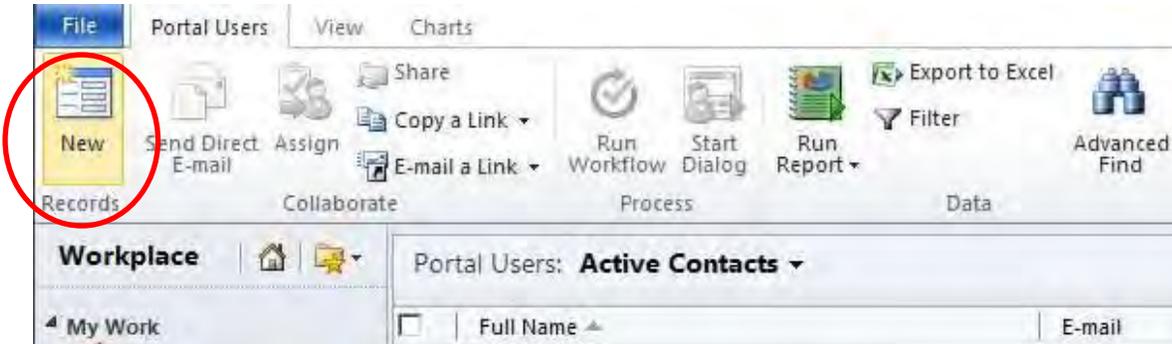


In this case a screen appears that says No Portal User records are available in this view.

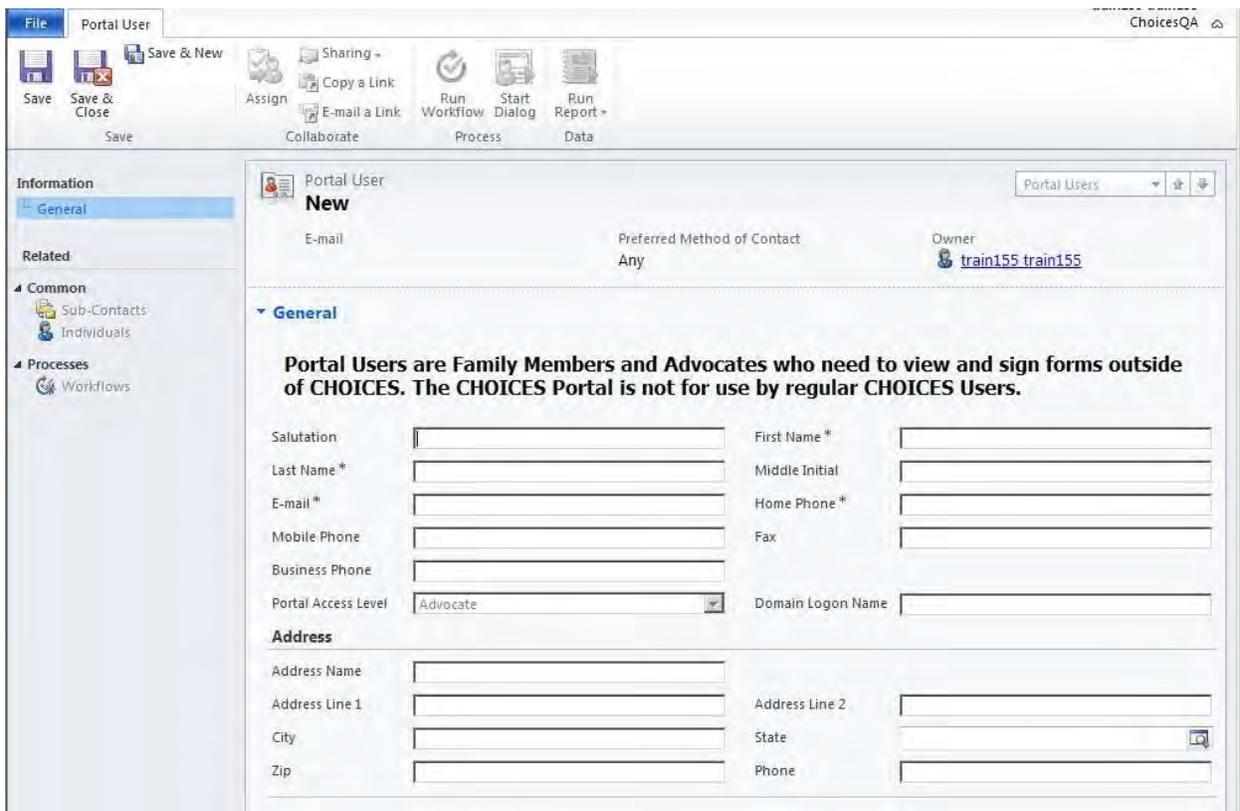
Portal Users: Search Results ▾			
<input type="checkbox"/>	Full Name ▲	E-mail	Home Phone
			

Creating a Portal User

To add a new Portal User in CHOICES, click the **New** button in the upper left hand portion of the screen.



The **User Portal: New Information** screen appears.

A screenshot of the 'User Portal: New Information' screen. The top menu bar includes 'File', 'Portal User', and 'ChoicesQA'. Below this is a ribbon with buttons for 'Save', 'Save & Close', 'Save & New', 'Assign', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', and 'Run Report'. The main area is titled 'Portal User New' and shows the 'General' tab. The form includes fields for 'E-mail', 'Preferred Method of Contact' (set to 'Any'), and 'Owner' (train155 train155). Below this is a section for 'Portal Users are Family Members and Advocates who need to view and sign forms outside of CHOICES. The CHOICES Portal is not for use by regular CHOICES Users.' The form has several required fields marked with a red asterisk (*): 'First Name *', 'Last Name *', and 'E-mail *'. Other fields include 'Salutation', 'Middle Initial', 'Home Phone *', 'Mobile Phone', 'Fax', 'Business Phone', 'Portal Access Level' (set to 'Advocate'), 'Domain Logon Name', 'Address Name', 'Address Line 1', 'Address Line 2', 'City', 'State', 'Zip', and 'Phone'.

The **First Name**, **Last Name** and **E-mail** fields are **required** as denoted by the red asterisk (*).

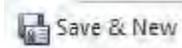
Complete as much information as possible. When you are finished, you can either **Save**, **Save and Close** or **Save and New**.



Saves the Portal User.

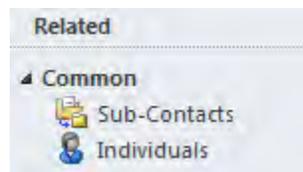


Saves the Portal User and closes the information screen.



Saves the Portal User, and opens a new information screen where a new Portal User can be entered.

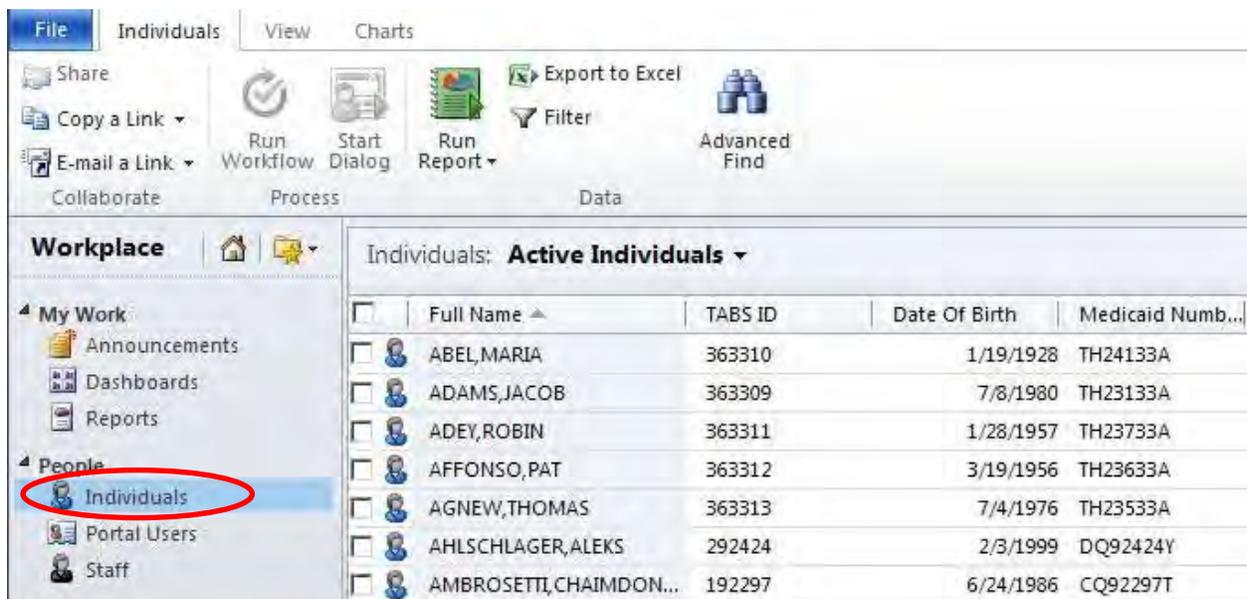
In this example, we'll click **Save** to save the Portal User, but keep the screen open. Once this happens, the **Sub-Contacts** and **Individuals** links become enabled in the Related section.



The **Individuals** link allows you to add an Individual to this Portal User.

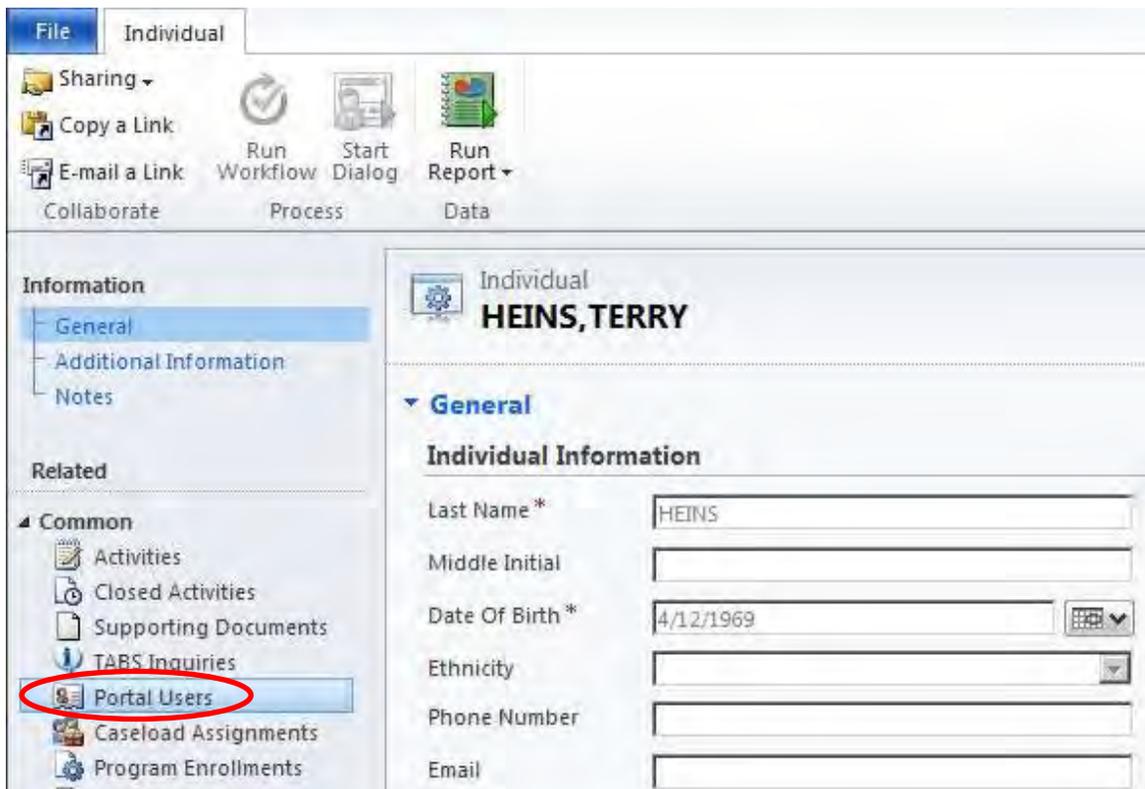
Associating a Portal User with an Individual

To associate an existing Portal User with an Individual, start in the **Workplace** column. Under the **People** section click on the **Individual** link.

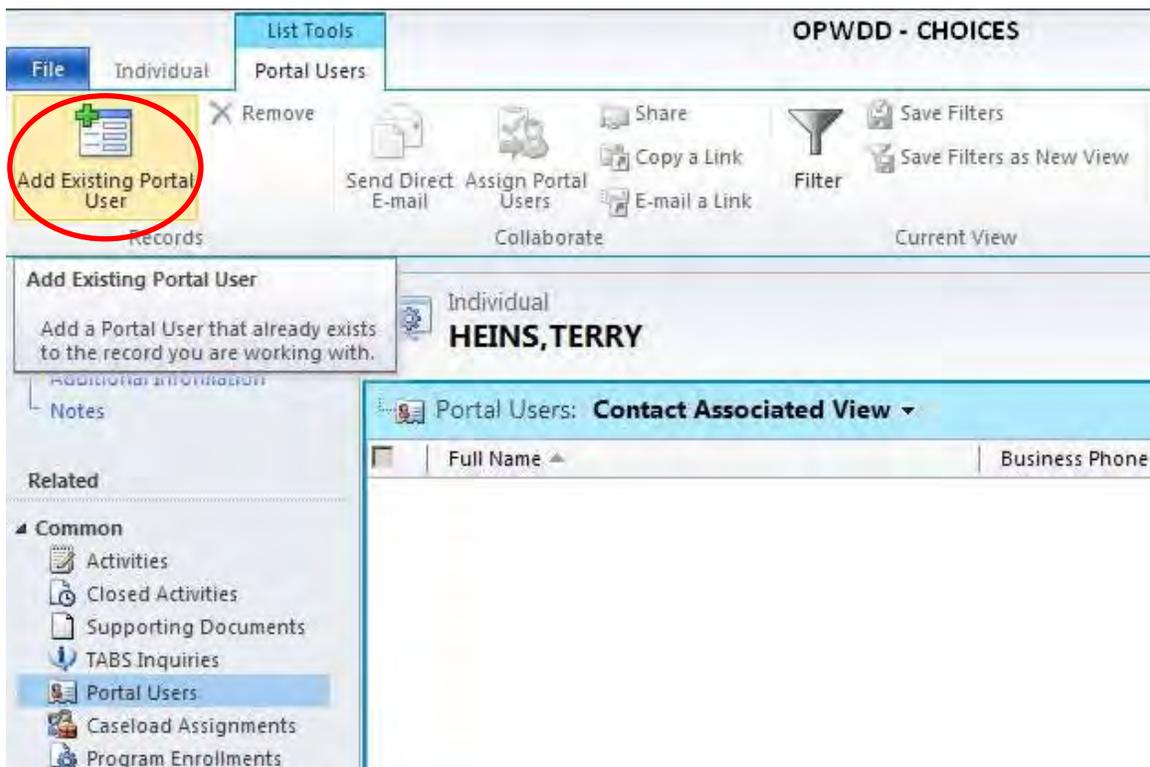


Look for the Individual in the **Search for records** field, and then double click their name to bring up their Individual Profile screen.

From the **Individual** profile screen click the **Portal User** link.

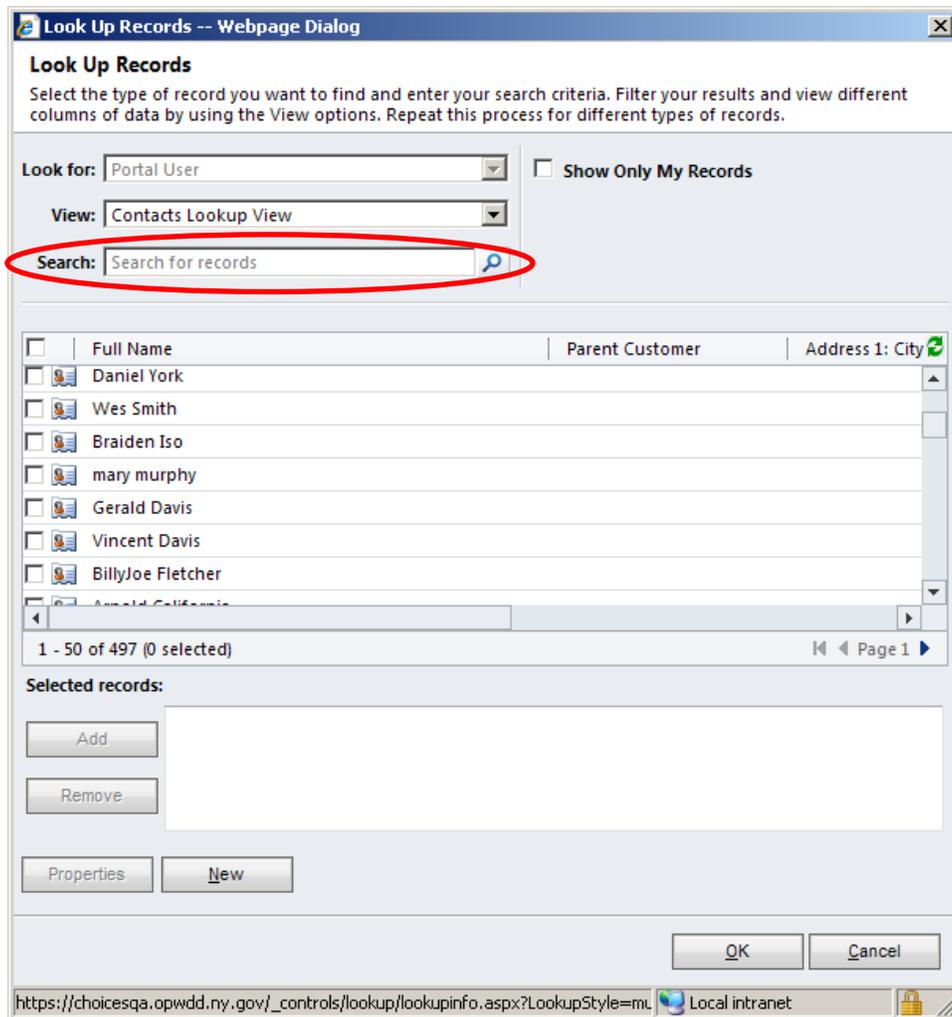


Click **Add Existing Portal User** in the upper left hand portion of the screen.

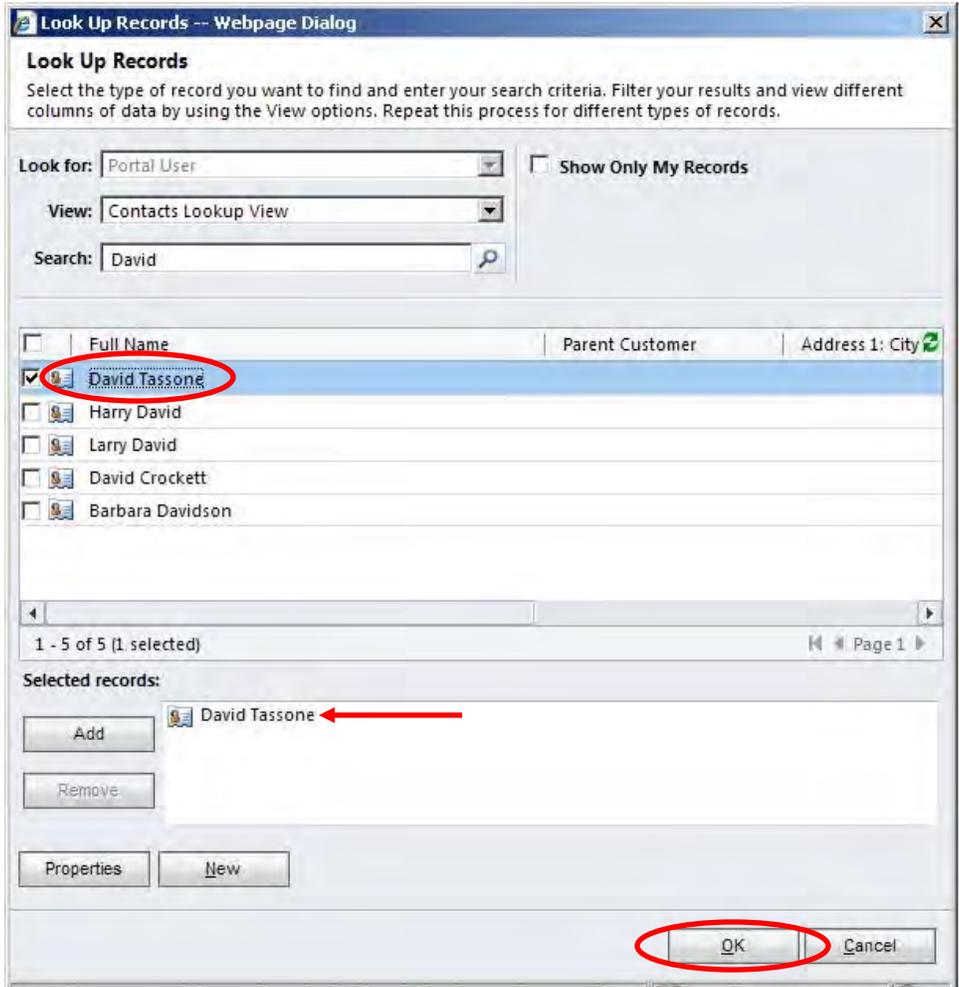


The **Look Up Records** dialog box displays.

Enter a Portal User name in the **Search for records** field and then click the **Search** button. 



When the search results are returned, click on the Portal User's name so that it appears in the Selected records field, and then click the **OK** button.



The Portal User is now listed in the Individual's Portal User list.

