User Guide- Organization Members and Shared Applications

Overview

Organizations can now collaborate more easily within the Applicant Portal.

You can view organization members, invite coworkers to join, and work on applications created by other members of your organization.

View Organization Members

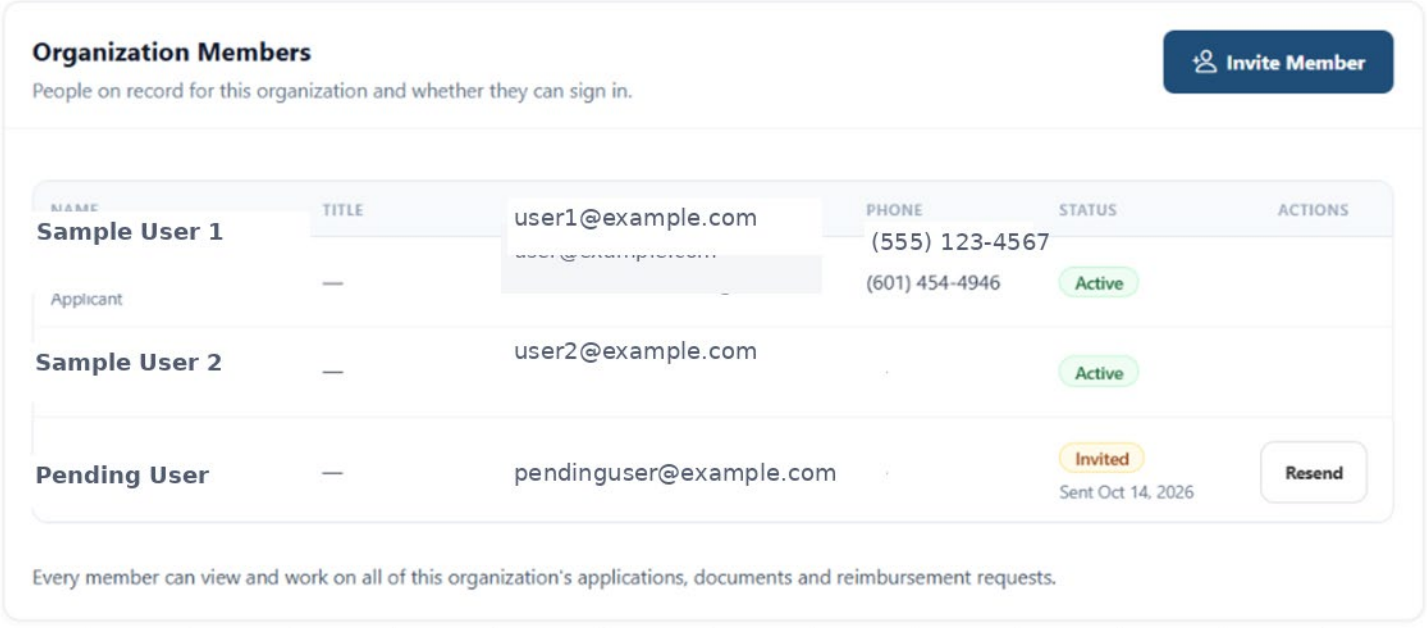
The **Organization Members** section shows everyone associated with your organization and whether they can sign in to the portal.

To view organization members:

1. Go to **My Organization**.
2. Scroll to the **Organization Members** section.

The list includes contact information and each member's access status.

Your account appears at the top of the list and is marked with a **You** badge.



Invite a New Member

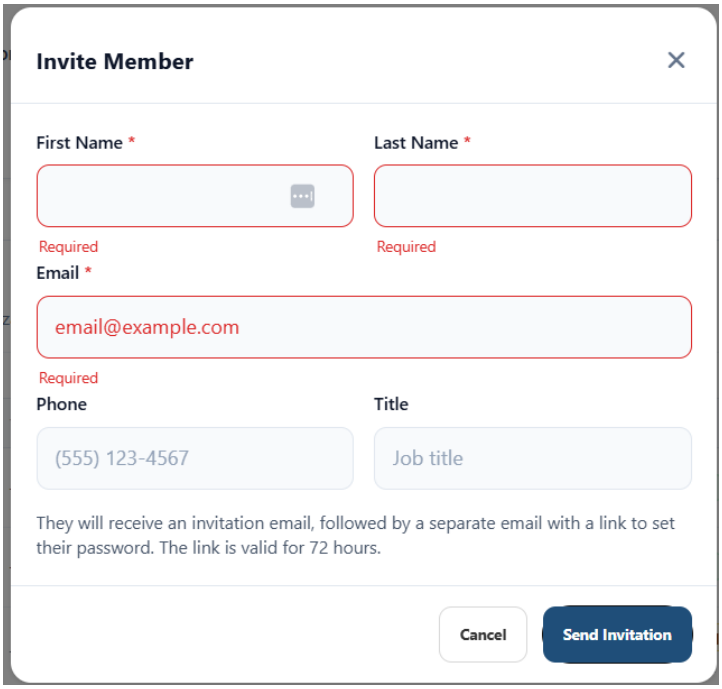
If a coworker needs access to the Applicant Portal, you can send them an invitation.

To invite a new member:

1. From the **Organization Members** section, select **Invite Member**.
2. Enter the person's details, with the name and email address required.
3. Select **Send Invitation**.

The new member appears in the Organization Members list with an **Invited** status.

Note: *An individual email address can only be associated with one organization. If the email address is already linked to another organization, the user cannot be invited until that association has been removed.*



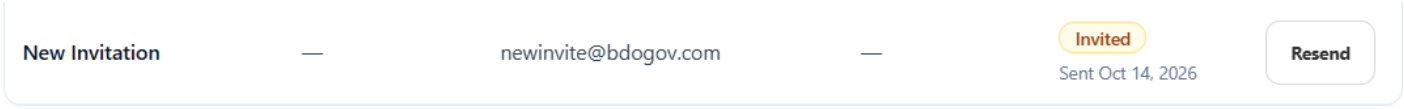
What Happens Next?

The invited user receives:

- An invitation email from **Canopy.Alert@horne.com**.
- A separate email with instructions for creating a password

Important: *The password setup link is valid for **72 hours**. If the link expires before the user completes the setup process, a new invitation will need to be sent.*

Once the user creates a password and signs in, they automatically gain access to the organization's applications.



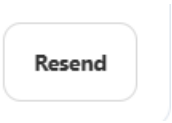
Resend an Invitation

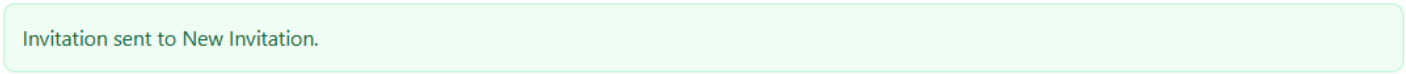
If a user has not completed account setup, you can send the invitation again.

To resend an invitation:

1. Locate the member with an **Invited** status.
2. Select **Resend**.

A new invitation email will be sent.



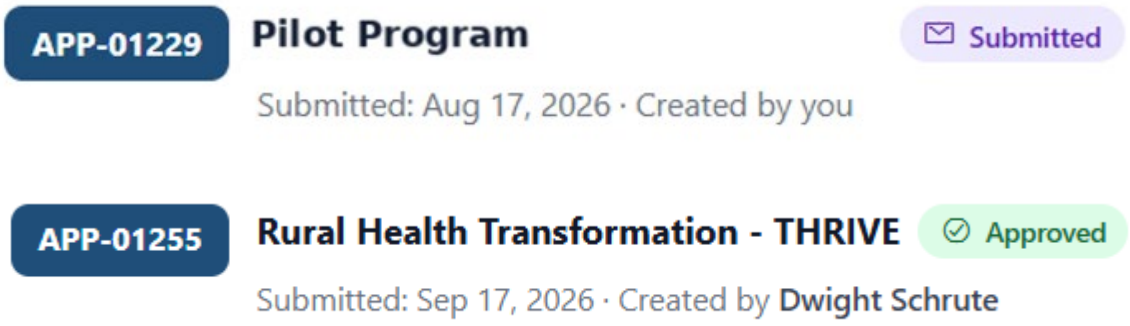


Find Shared Applications

Applications are now shared across your organization.

When viewing **My Applications**, you can see applications created by other organization members.

Each application includes a **Created by** label showing who started the application.



Continue Work Started by a Coworker

Any organization member can continue working on a draft application.

For example, if a coworker is unavailable, another member can open the application and continue where they left off.

Organization members can:

- Open shared applications
- Resume draft applications
- Submit draft applications
- Delete draft applications
- View submitted applications
- Print submitted applications

Join an Existing Organization

When a new applicant enters a Federal Tax ID Number that matches an existing organization, the system will notify them that the organization is already registered. The applicant will be provided with information on how to contact the organization's primary contact to request access.

Once access has been granted, signing in again by the new user will show them as already belonging to that organization.

This organization is already registered

An organization with this Federal Tax ID already exists, so a new one cannot be created. To be added to it, contact its primary contact and ask them to invite you from their My Organization page.

MyLegalEntity
Federal Tax ID Number: 12-3214232
Entity Type: Healthcare Provider

Primary contact
David
IT
davion123@Gmail.com
(123) 123-1234

Once you have been added you will receive an email. Then select Check Again, or sign out and sign back in.

Check Again | Sign Out