Introduction to SCAC Member Portal
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Agenda
• Why The Change
• Access the Database
• Portal Homepage Actions
• View/Register for Upcoming Events
• Perform a Directory Search
• Going Forward/Questions

Terminology/Why The Change?
• Terminology:
  – Master account: the county’s record in the database
  – Sub-account: the county official’s/employee’s record in the database

• To offer true online registration and payment options to our membership
• To allow all members to have access to the database (with varying degrees of permissions/abilities)
  – Make changes to sub-account contact information; view invoices, payments, and history; and view professional development programs.
Access The Database

- From [scounties.org](http://scounties.org), click on “Member Portal” at the top right of the screen,
- Sign in with username and password
  - Username and password to be sent under separate email in 24-48 hours
- Upon first sign-in, may be asked to verify profile preferences

Portal Homepage Actions

- My Profile
- Upcoming Events (registration)
- Member Directory Search

My Profile — Manage Profile

- Information & Settings
- Invoicing, Payments & History
- Content & Features
- Community
  - Not fully-functioning at this time
- Networking & Careers
  - Not fully-functioning at this time
Information & Settings

• Edit bio in order to make changes to county contact information
• “Preferences” refers to features not yet functional

Sub-Accounts

• View and edit sub-account bios
• Sign in as sub-accounts
• Actions to be reserved for SCAC staff:
  – Suspend accounts no longer in public service

When Signed in as Sub-account Records

• Invoices
  – View, print, and pay invoices
    1. Log in as the county
    2. From the county’s parent record log in as the child (person with the invoice)
    3. Go to the portal homepage by clicking the SCAC logo
    4. Select Manage profile from the My Profile section
    5. Select Invoices from the Invoicing, Payments & History section
    6. Filter by status: Open
    7. Check box next to appropriate invoice then click Pay Selected Invoices
    8. Fill out the credit card information and click Submit Payment
When Signed in as Sub-account Records

• Professional Development
  – View progression in professional development programs (ex. Institute of Government for County Officials Level I)
  1. Log in as the county
  2. From the county’s record log in as the sub-account (person with the invoice)
  3. Go to the portal homepage by clicking the SCAC logo
  4. Select Manage profile from the My Profile section

When Signed in as Sub-account Records

• Professional Development
  – Able to filter based on the specific certification and/or the credit type, if you’d like
  – Able to print transcript based on filtering
    • If no filter, all courses will appear
    • Will need to allow pop-ups in order to view/print transcript

When Signed in as Sub-account Records

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When Signed in as Sub-account Records

*We are currently unable to include graduation dates on the transcript, but the dates on which the credits were earned are available.

View Upcoming Events

- Click on Upcoming Events (registration)
- Export event to calendar
- Register for event – When logged in, contact information will be auto-populated
- Click event title for more info
Registering for Events
1. Select Upcoming Events (registration)
2. Find the event on the Community Calendar and click on the event name and then "Register" - or just click "Register" where it appears under the event
3. Fill out the fields and select “Save & Finalize Registration”
1. If you are logged in, your information will auto-populate.
2. When allowed to register multiple attendees, you’ll select the “Save & Add Another Attendee” before finalizing.
4. Enter Payment information and select Proceed to Confirmation
1. Credit cards accepted: AMEX, Discover, Master Card, Visa

Perform A Directory Search
• Click on Member Directory Search

Perform A Directory Search
• Enter search criteria and click Continue
— Currently name search doesn’t include nicknames — try searching using partial first, middle or last names in these instances
Perform A Directory Search

- Click member name
  - Minimize the map if necessary

Perform A Directory Search

- View member bio
  - Professional Title
  - Email Address
  - Employer
  - Personal Info
    - Ex. Spouse
  - Additional Info
    - Ex. Receives Friday Report via email

Going Forward

- As previously noted, not all features are fully-functioning at this time
  - Features will be rolled out as they are developed
  - Standard Operating Procedures (SOPs) are being developed as a guide for users
- Suggestions for improvements are welcome

- Questions?
  (Questions can be entered in the Question pane.)
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