Introduction to SCAC Member Portal

Moderator: Susan Turkopuls
Presenter: Jennifer Haworth
South Carolina Association of Counties

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

Sign In

RICHLAND

••••••••

☑ Remember Me

SIGN IN

Forgot your password?
Haven't registered yet?

- From **sccounties.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

Manage Profile

⚠ Profile Home

Information & Settings

Edit Bio
Update your information and choose privacy settings for individual fields.

Preferences
View and manage preferences and notification settings for your account.

Sub-accounts
View and manage current Sub-accounts, send invitations.

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

Information & Settings

Edit Bio
Update your information and choose privacy settings for individual fields.

Sub-accounts
View and manage current Sub-accounts, send invitations.

OPTIONS	MEMBER NAME / ORGANIZATION
	Test AASubject, Richland County
	David A. Adams, Richland County
	Roxanne Ancheta, Richland County

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

Content & Features

Favorites
Manage your favorites and share them with the community.

Blogs
Post to your existing blogs, manage settings and create new blogs.

Photo Gallery
Post photos, manage albums, update captions and view your photos.

Professional Development
View current entries and professional development journal.

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

Return to Profile

Certifications/Programs | Journal Entries

Status: All Statuses Certification/Program: All Certifications/Programs
Credit Type: All Types Credits Earned: From: To:

APPLY FILTER

Export Entries (Unicode) Print Transcript Print Filtered Entries Email Transcript Add Entry

OPTIONS	STATUS	ENTRY DATE	DETAILS	CREDITS	EXPIRES	SCORE (%)
	Approved	4/18/2016	Institute of Government for County Officials - Level I Underwater Basket Weaving	3	Never	N/A
	Approved	4/18/2016	Institute of Government for County Officials - Level I Mickey Mouse Degree	3	Never	N/A

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)

View Upcoming Events

- 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

Member Search Results

🔍 Start New Search

You searched for:
- *All Records*
- Who match **ANY** of the following Member Types 'County, County Official, SCAC Staff, State Legislator, State Official'
- Having a Name containing 'Smith'

Map these results 🌐

| 28 RECORDS FOUND | SORT BY NAME ⊞ | GROUP |

Janie Cooper-Smith
2460 Hickory Dr
Orangeburg
South Carolina
29115-2611
803-534-6447
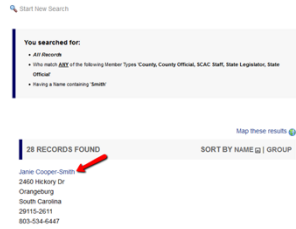
Perform A Directory Search

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

Janie Cooper-Smith

📄 Profile-Pages ➕ More 💬 Message 👤 Connect

Visit | Bio

Last updated: 12/1/2015
Ms. Janie Cooper-Smith
County Official
jcooper@orangeburg.county.org
| PROFESSIONAL INFORMATION

Orangeburg County   803 534-6447 (Phone)
Council Vice Chairman
2460 Hickory Dr
Orangeburg
South Carolina
29115-2611 United States
[Map]

MY
ASSOCIATES
(49)
Ben Brensch, Roger
Cleckley, Samuel Daly,
Sharon Fleener, Marcia
Gibson, Smiter Boone,
Gloria Breland, Herman
Brightman, Faith Carter,
Wendy B. Clark, Bill
Addison, Yiquara T
Adgerson, Gene Ball,
Roberta Bibbins, Andrea
Birkwall

| PERSONAL INFORMATION

| ADDITIONAL INFORMATION

Email_Friday_Report   No

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.)

Contact Us

Institute of Government:
    Leslie Jennings – ljennings@scac.sc

Registration and Invoicing:
    Pearl Khalif-Govan – pkhalif@scac.sc
    Tish Anderson – tanderson@scac.sc

Other questions:
    Jennifer Haworth – jhaworth@scac.sc

    Handouts available online at www.sccounties.org

_____

_____

_____

_____

_____

_____

_____