

Sending Portal Invitations & Managing Staff Information

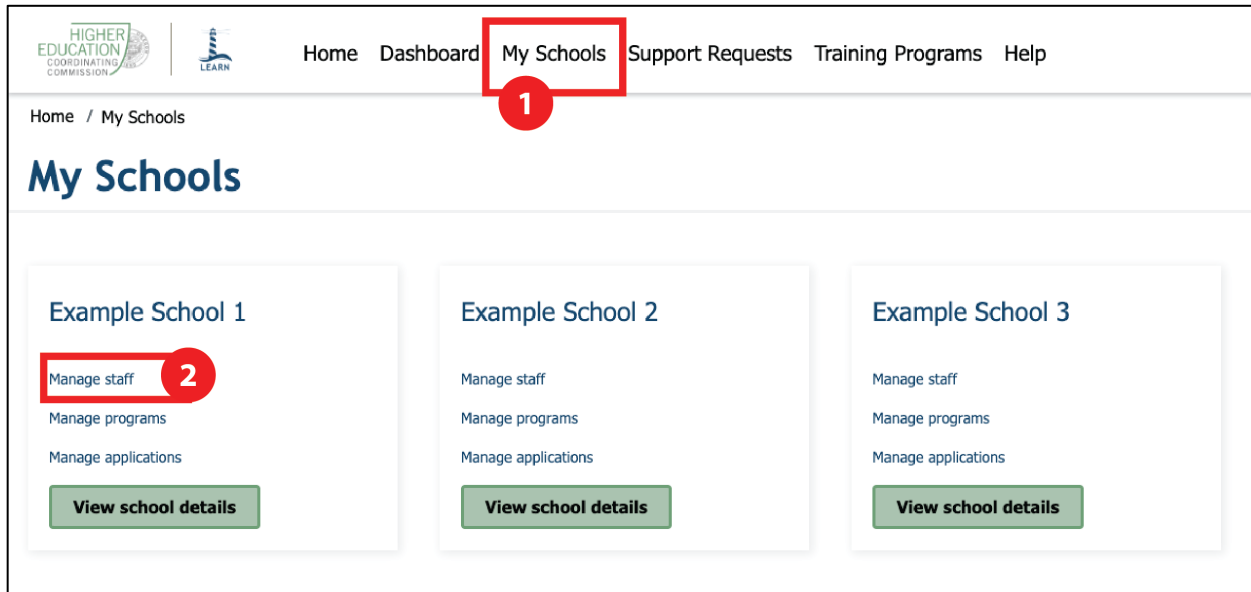
Some LEARN Portal users have the ability to invite members of their organization to create a Portal Account and can also update the contact information for individuals that are listed within their organization. Updates may include general information, such as email or phone number, or adjustments to an individual's relationship to the organization. Changes to the Primary contact for an organization can only be made by staff members within the Higher Education Coordinating Commission (HECC), which can be requested by submitting a Support Request through the LEARN Portal.

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Locating Staff Information

To locate your organization's staff information, log into your Portal Account, click **My Schools** in the top menu bar, and select **Manage staff** from the options listed under the organization name (pictured below).



Home / My Schools

My Schools

Example School 1

Manage staff

Manage programs

Manage applications

View school details

Example School 2

Manage staff

Manage programs

Manage applications

View school details

Example School 3

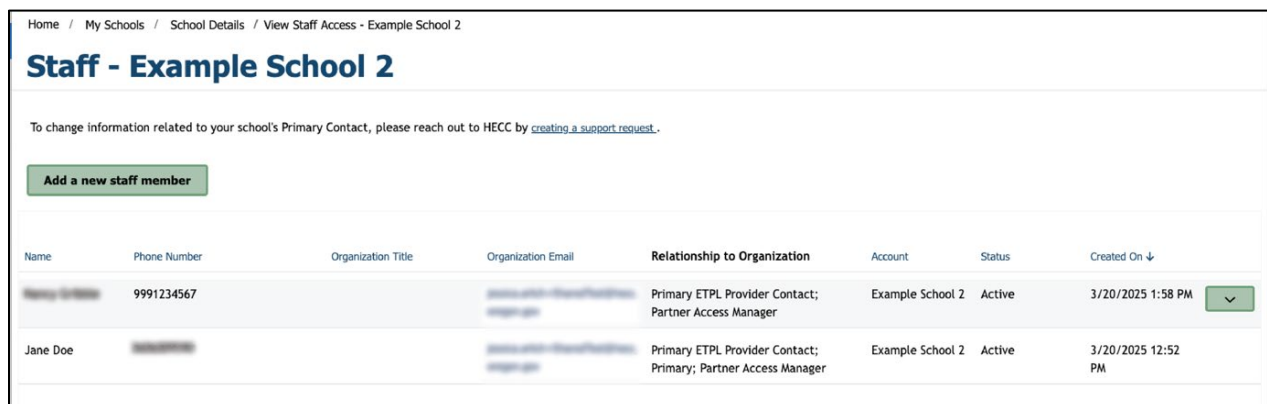
Manage staff

Manage programs

Manage applications

View school details

Here, you can view a list of existing staff members, including their contact details and relationship to the organization (example below).



Home / My Schools / School Details / View Staff Access - Example School 2

Staff - Example School 2

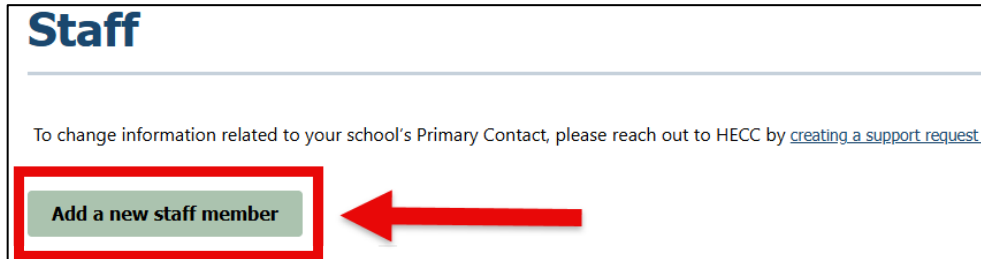
To change information related to your school's Primary Contact, please reach out to HECC by [creating a support request](#).

Add a new staff member

Name	Phone Number	Organization Title	Organization Email	Relationship to Organization	Account	Status	Created On ↓
Nancy Smith	9991234567			Primary ETPL Provider Contact; Partner Access Manager	Example School 2	Active	3/20/2025 1:58 PM
Jane Doe				Primary ETPL Provider Contact; Primary; Partner Access Manager	Example School 2	Active	3/20/2025 12:52 PM

Adding New Staff Members

To add a new staff member to your organization, click **Add a new staff member** (pictured below), which will open a form in a pop-up window.



Staff

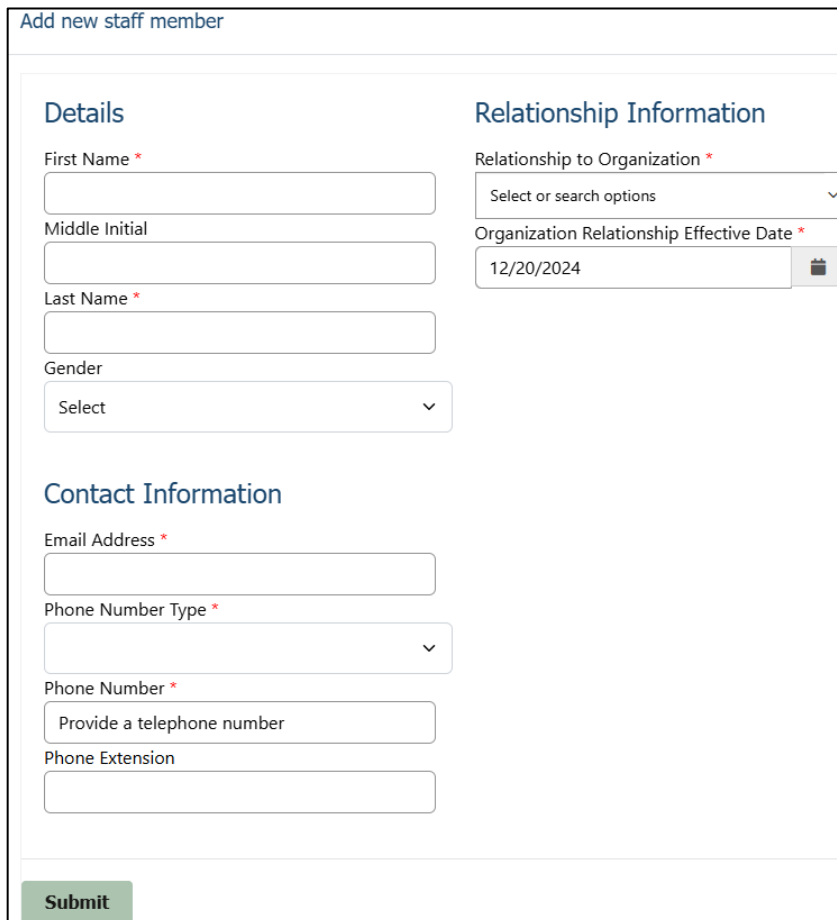
To change information related to your school's Primary Contact, please reach out to HECC by [creating a support request](#).

Add a new staff member

Complete the form (pictured below), ensuring all required fields (indicated by a red asterisk*) are populated and click **Submit**.

TIP: The options and details for **Relationship to Organization** are as follows (select all that apply):

- **Primary ETPL Provider Contact:** Can create, edit, and view Eligibility Applications and view the organization's programs and staff.
- **ETP Program Coordinator:** Can create, edit, and view Eligibility Applications.
- **Program Contact:** Does not grant access to any organization information in the Portal.



Add new staff member

Details

First Name *

Middle Initial

Last Name *

Gender

Select

Relationship Information

Relationship to Organization *

Select or search options

Organization Relationship Effective Date *

12/20/2024

Contact Information

Email Address *

Phone Number Type *

Phone Number *

Provide a telephone number

Phone Extension

Submit

The new staff member will now be listed under the organization (**NOTE:** you may need to refresh your screen, and it may take a minute or so for them to appear); however, this does not automatically invite them to create a LEARN Portal account. See the “Sending Portal Invitations” section below for more information. Staff members can be listed without having access to the Portal.

Duplicate Detection

If the LEARN system detects that the added staff member may be a duplicate, a message will appear near the top of the page stating that the request to add the staff member has been submitted to HECC for review. The LEARN system may detect a duplicate for a variety of reasons, including that the individual already exists in the Portal associated to another organization or as an individual learner.

The request to add staff member: John Doe has been submitted to HECC for review. Upon verification, the contact will be listed on View Staff page. [Reference support request: CAS-01191-R4X0Z3](#) X

Upon verification, the contact will be listed on the View Staff page. You will also be provided with a reference number and link to the associated Support Request. Click the Support Request link to view the details or add additional comments.

Request Details

[Back To Support Requests](#)

Overview

Request ID

CAS-01191-R4X0Z3

Associated Account

Example School 2

Subject

Other





Description

Duplicate contact was detected when a requested from portal.

Case opened for HECC Review.
Additional contact details provided:
Relationship Effective date: 03-21-2025
Relationship Type: ETP Program Coordinator

Sending Portal Invitations

To send a Portal invitation, locate the existing staff member you want to invite from the staff list, click the drop-down icon in the far-right corner of their contact information, and select **Edit** (example below), which will open a form in a pop-up window.

Brad Dunn		Primary ETPL Provider Contact	Brit's Training School	Active	1/3/2025 12:06 PM	 <div>  Edit  Deactivate </div>
Trish Collins		ETP Program Coordinator; Primary ETPL Provider Contact; Program Contact	Brit's Training School	Active	1/3/2025 12:04 PM	

Invite Status

At the bottom of the form, you can see if the individual has already received an invitation by viewing their **Invite Status**. Statuses may be any of the following:

- **Blank:** No invitation has ever been sent, so check "Yes" to invite the contact to create an account for the first time.
- **Sent:** Invitation has already been sent and is pending acceptance, so no need to send a new one.
- **Resent:** Invitation has been resent (likely after an expiration) and is pending acceptance, so no need to send a new one.
- **Expired:** The invitation was sent but was not accepted and it has expired. Send a new invitation if Portal access is still needed
- **Redeemed:** The invitation has been accepted, and they already have a Portal account. Do not send a new one.

If the Invite status is blank, select **Yes** for **Invite Contact To Create Portal Account** (pictured below; this field will default to No until it is manually updated) and click **Submit**.

Invite Contact To Create Partner Portal Account





☒ No
 ☐ Yes

Submit

Upon clicking submit, an email will be sent to the individual's listed email address inviting them to create their Portal account.

Updating Staff Contact Information

The process for updating staff members' contact information is very similar to sending a Portal invitation. Select the staff member from the list that you want to edit, click the drop-down icon in the far-right corner of their contact information, and select **Edit** (example below), which will open a form in a pop-up window.

Brad Dunn		Primary ETPL Provider Contact	Brit's Training School	Active	1/3/2025 12:06 PM	
						 Edit
						 Deactivate
Trish Collins		ETP Program Coordinator; Primary ETPL Provider Contact; Program Contact	Brit's Training School	Active	1/3/2025 12:04 PM	

Make your edits and click **Submit** to save your changes.

Updating Primary Contact information

Changes to the Primary contact for an organization can only be made by staff members within the Higher Education Coordinating Commission (HECC), which can be requested by submitting a Support Request through the LEARN Portal. Click the link provided at the top of the Staff page (pictured below) to create a Support Request.

Home / My Schools / School Details / View Staff Access

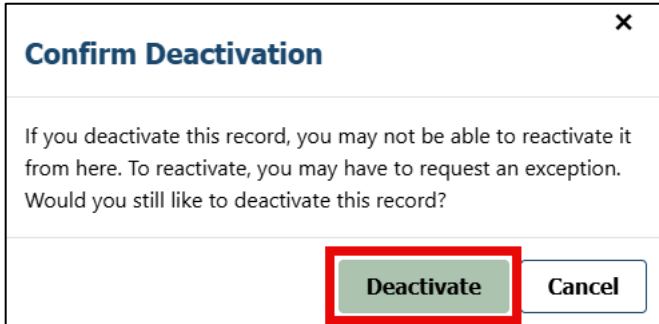
Staff

To change information related to your school's Primary Contact, please reach out to HECC by [creating a support request](#).

Deactivating a Staff Member Record

To deactivate an individual who is no longer a staff member at your organization, locate them in the staff list, click the drop-down icon in the far-right corner of their contact information, and select **Deactivate** (example below), which will open a pop-up confirmation window.

The confirmation window notes that if you deactivate the record, you may not be able to reactivate it from the Portal and may need to request an exception. To proceed, click Deactivate.

A screenshot of a 'Confirm Deactivation' dialog box. The title bar says 'Confirm Deactivation' with a close button (X) in the top right. The main text reads: 'If you deactivate this record, you may not be able to reactivate it from here. To reactivate, you may have to request an exception. Would you still like to deactivate this record?'. At the bottom, there are two buttons: 'Deactivate' (highlighted with a red rectangle) and 'Cancel'.

The deactivated individual will no longer appear in the staff list for the organization. If they created a LEARN Portal Account, they will retain access to their account but will not be able to view information pertaining to the organization they were formerly associated with in the LEARN Portal.