



Guide Sheet: OR Administration – PartnerHub User Roles and Responsibilities



Applicable Area(s):

- Operational Review
- PartnerHub (External)



For Use By:

- Providers



Before You Start:

- Confirm your assigned role with the Primary Contact and/or Delegate for this specific Provider.
- You will receive an email titled: “**Role Assignment(s) Notification in PartnerHub**” once your role is assigned.

Note: Only users assigned as **Primary Contact** or **Delegate Administrator** will see the **Manage Users** menu after logging into PartnerHub.



Steps:

A user may be assigned one or more roles depending on their organizational needs. Your assigned role(s) determines your access level and responsibilities in PartnerHub.

1. **Primary Contact**

The Primary Contact is the main organizational lead for the Operational Review.

Responsibilities:

- a. Demonstrate compliance with Operating Agreement standards.
- b. Upload required information and notes to meet the minimum requirements for each Operational Review element.

- c. Administer PartnerHub user accounts (up to **five active users**) including creating, assigning roles, deactivating and granting access.
- d. Ensure the Provider Questionnaire is completed and regularly modified if there are any changes.
- e. Tracks the Progress on the Operational Review, along with the important dates such as Open date, Submission due date and site visit date.
- f. Implement required Action Plans resulting from the Operational Review.
- g. Receive all relevant PartnerHub email notifications for the organization and share this information with relevant users in the organization.
- h. Collaborate with the Portfolio Manager to complete the Operational Review.

2. **Delegate Administrator**

The Delegate Administrator supports the Primary Contact and provides coverage when they are unavailable.

Responsibilities:

- a. Perform the same administrative functions as the Primary Contact when acting on their behalf.
- b. Manage user accounts as required.

Important Notes:

- a. This role **does not receive PartnerHub email notifications**.
- b. Only one Delegate Administrator may be assigned at a time.
- c. This role is not intended to replace the Primary Contact in broader accountability or governance activities.

3. **Primary Board Member**

The Primary Board Member is a mandatory role that must be assigned by the Provider in PartnerHub. This role provides governance oversight for the Operational Review and carries accountability that cannot be delegated.

Responsibilities:

- a. Maintain fiduciary oversight, which cannot be delegated
- b. Receive relevant PartnerHub email notifications
- c. Sign the **General Declaration form** in PartnerHub before the submission deadline.
- d. Review the Operational Review Preliminary Report, Report with Action Plan and Closure Report.
- e. Be involved if there are any appeals and escalations.
- f. Ensure all information submitted to BC Housing is true and accurate to the best of their knowledge.

Important Note:

- a. This is a required contact field and must be completed by the Provider in PartnerHub.
 - b. Only **one Primary Board Member** may be assigned at a time.
 - c. The General Declaration form only needs to be signed once per Operational Review by a Board Member.
4. **Board Member**
Board members support the Primary Board Member in fulfilling governance responsibilities.

Responsibilities:

- a. Share similar fiduciary responsibilities as the Primary Board member.
- b. Work with Primary Board member in ensuring submission accuracy.
- c. May sign the **General Declaration form** in PartnerHub before the Submission deadline.

Important Note:

- a. This role **does not receive PartnerHub email notifications**.

5. **Contributing User**

Contributing users provide support in Operational Review activities; they may act as subject matter experts in adding information for Elements or in Addressing Action items assigned during the Operational Review.

Responsibilities:

- a. Support the Primary Contact with document uploads and information submission.
- b. Assist with implementing Operational Review Action Plan items when requested.

For example, they may be tasked with completing the IT Risk Questionnaire and upload supporting information for **Element 1.2.f** or upload rent calculation documentation for **Element 4.1.1.c** to the BC Housing Rent Desk, if applicable.



Next Steps:

- Verify that your assigned role(s) is correct in PartnerHub.
- If assigned as **Primary Contact or Delegate Administrator**, confirm that the **Manage Users** feature is visible on the top and left menus.
- All roles should be able to access the **Standard and Element menu** to review element details requirements, upload documents and add relevant notes.



See Also:

- OR Administration-Register as a New User (KA-01041)
- OR Administration-Log in to External PartnerHub (KA-01001)
- OR Administration – Assign a Delegate Administrator
- OR Administration – Assign a Primary Board Member
- OR Demonstrate – Document Submission
- OR Demonstrate – Complete IT Risk Questionnaire for Element 1.2f
- OR Demonstrate – Sign the Declaration