ProviderInfoSource[®]



Provider User Guide

Manage Users

Chapter 17



ProviderInfoSource is an online tool that gives you and your staff immediate access to information pertinent to your practice

http://providerinfosource.healthlink.com

17.0 ADMINISTRATOR TOOLS – USER MANAGEMENT

17.1 Overview

This online feature allows you to create new Users, manage your Users and reset Passwords. You also may assign other Users as Administrators and delegate the appropriate access for each User. After completion of this User Management section, you should be able to complete the following tasks:

- 1. Successfully suspend, terminate, or reset password on a User account.
- 2. Successfully reactivate a Suspended User account.
- 3. Successfully restore a locked-out User account.
- 4. Successfully reset a Password.
- 5. Successfully update profile information in a User account.
- 6. Successfully change a User security level.
- 7. Successfully change a User type in *ProviderInfoSource*.

17.2 How to Change a User's Profile.

a. From the Secured Home Page, click the User Management tab (Figure 1).

	September 25, 2014 Welcome Knox Judith	
Click User Management	ProviderInfoSource*	
	and the second sec	
	Home Patient Eligibility Claim Status Payment Status User Management Programs and Services Forms and Manuals Policies and Procedures Utilization Management	
	Physicians, Hospitals, and other Healthcare Professionals HealthLink offers new claim status, eligibility, and other secured features.	
	 > 0 Pending Requests > 0 Unviewed Requests > 0 Viewed Requests (within Is 	
	Figure 1. Admin. Tools–User Management–Home Page Link.	
	Note: Super Users can view and manage all users created, including terminating and suspending Users. Provider Administrators can only view and manage users they create. Please contact your Provider Administrator if information is not displayed correctly.	
b. W ad	Vhen the Manage Users window displays (Figure 2), click the User ID of t ccount you want to change.	he
	Manage Users Manage Users Crease User User Type Status Administrator Imministrator Administrator Administrator Administrator Imministrator Immini	

Figure 2. Admin. Tools–User Management–Change User Profile–Select User ID.

17.0 Administrator Tools - User Management



UMN.6.039 ProviderInfoSource User Guide

c. Change User Profile – When the user's profile displays (Figure 3), make your changes to the User's profile information, and click the Submit button.

Manage My Users - User Profile
Suspend User Creation date: 2006-03-24 Terminate User User Type: Provider Administrator Reset Password Status: Active
User Profile First Name: * John Last Name: * Doe Work Phone: * 314 123 4567 ext. 1111 Email Address: * johndoe@abvzhealth.com
Allow Mail Contact: P By acceptance of this User Agreement HealthLink is permitted to send general information and/or other types of materials supporting HealthLink's business.
Access Rights Authorized to Create Additional Administrators:
Location InfoDepartment/Location:Customer ServiceTax ID Number:* 123456789Street Address:123 Pine St.Zip Code:* 123456
Login Info Security Question: What is your pet's name? Your answer: ******* Create User ID: ******* (6-12 characters, with a minimum of 4 alphabetic and 2 numeric characters) Password: ******* User Type: Image: Provider Administrator Image: Provider Standard User
Functional Access
Indicates a required field. Submit Cancel

Figure 3. Admin. Tools–User Management–Change User Profile–Update Info.

d. A message will confirm that the account has been updated (Figure 4).



Figure 4. Admin. Tools–User Management–Change User Profile–Confirmation.



17.3 How to Suspend a User's Account.

- a. From the Secured Home Page, click the User Management tab.
- b. Click the Manage My Users button in the upper left corner of the window.
- c. To suspend a User account, locate the User's User ID.
- d. Click Suspend User in the Action column (Figure 5).

Organization: A	BC Health							
User ID 🔝	First Name 🔺	Last Name 🔽	Department/Location 🔽	Creation date 🔽	User Type 🤝	Status 🔝	Administrator 🔽	Action
JaneDoe1234	Jane	Doe	Claims	2005-12-03	Provider Administrator	Active	Super User	Suspend Use Terminate Us Reset Passwo
JohnDoe1234	John	Doe	Claims	2006-03-17	Provider Standard User	Active	01 moreDolt	Suspend Use Terminate Us Reset Passwr

Figure 5. Admin. Tools–User Management–Suspend Account.

e. A message will confirm that the account has been suspended (Figure 6).

Account Suspender	Manage Users	
	The account for David Doe (DavidDoe1234) was suspended. It must be reactivated before it can be used.	
	Figure 6. Admin. Tools-User Management-Suspend Account-Confirmation	on.

17.4 How to Reactivate a Suspended Account

- a. From the Secured Home Page, click the User Management tab.
- b. Click the Manage My Users button.
- c. Locate the User's User ID, and click Reactivate in the Action column (Figure 7).



Figure 7. Admin. Tools–User Management–Reactivate Account.

d. A message will confirm that the account has been reactivated (Figure 8).



17.5 How to Terminate a User Account

- a. From the Secured Home Page, click the User Management tab.
- b. Click the Manage My Users button, located in the upper left corner of the window.
- c. Locate the User ID, and click Terminate User in the Action column (Figure 9).

WARNING:

Terminated accounts are permanently inactive and cannot be reactivated. If the account needs to be reactivated, a new account must be created. To create a new User account, please follow the user guide section on creating new users (15.0 Administrator Tools – Creating Users).

Manage Users								
Organizatior	1: 123456789				Set Maste	r Organizatior	n:	Submit
User ID 🔽	First Name 🔽	Last Name 🔺	Department/Location 🤝	Creation date 💙	User Type 🔽	Status 🔽	Administrator 🔽	Action
JohnDoe1234	John	Doe		2011-06-29	Provider Administrator	Terminated		
JohnDoe1234	John	Doe		2011-07-27	Provider Administrator	Reactivated	Super User	Suspend User Terminate User Reset Password

Figure 9. Admin. Tools–User Management–Terminate Account.

d. A message will ask if you are sure you want to terminate. If you are sure, click Submit (Figure 10).

Manage Us	lanage Users							
Creation date User Type: Status:	: 2012-01-04 Provider Administrator Active	John Doe (johndoe4444)						
You are about t	You are about to terminate John Doe's user account. You will NOT be able to reactivate the account once it is terminated. Are you sure you wish to continue?							
Submit G	ancel							

Figure 10. Admin. Tools–User Management–Terminate Account.



17.6 How to Reset a User's Password

- a. From the Secured Home Page, click the User Management tab.
- b. Click the Manage My Users button.
- c. To terminate a User account, locate the User's User ID.
- d. Click Reset Password in the Action column (Figure 11).

Manage	Users							Î
Organization	123456789				Set Maste	er Organizatior	n:	Submit
User ID 🤝	First Name 🤝	Last Name 📥	Department/Location 🤝	Creation date 🤝	User Type 🤝	Status 🔽	Administrator 🔻	Action
JohnDoe1234	John	Doe		2011-06-29	Provider Administrator	Terminated		
JohnDoe1234	John	Doe		2011-07-27	Provider Administrator	Reactivated	Super User	Suspend User Terminate User Reset Password

Figure 11. Admin. Tools–User Management–Reset Password Link.

e. When the message displays (Figure 12), deliver the temporary Password to the user. After login, the user will be prompted for a new permanent Password.

Manage	Manage Users								
🚹 Temp	A Temporary password (c5o4rn3rsq) was assigned to John Doe (JohnDoe1234)								
Organization	1: 123456789				Set Master Organization: Submit				
User ID 🗸	First Name 🔻	Last Name 📥	Department/Location 🗸	Creation date 🗸	User Type 🗸	Status 🗸	Administrator 🗸	Action	
JohnDoe1234	John	Doe		2011-06-29	Provider Administrator	Terminated			
JohnDoe1234	John	Doe		2011-07-27	Provider Administrator	Reactivated	Super User	Suspend User Terminate User Reset Password	

Figure 12. Admin. Tools–User Management–Reset Password.

Note: To keep an account from going inactive, every user should login at least once every 30 (thirty) days.



UMN.6.039

ProviderInfoSource User Guide

17.7 How to Set a Master Organization

Notes:This feature gives a provider the ability to perform claim status and patient eligibility searches on different Tax IDs tied to the same organization. Each user self-registers with their own Tax ID, then sets the master organization. The master organization can then view all claims and patients for those Tax IDs.

The master organization (Tax ID), and all its users, can view the patients and claims of the individual Tax IDs, but the individual Tax IDs cannot view the patients or claims of the master organization.

- a. After self-registering, login and click the User Management tab.
- b. In the upper right corner, type the master Tax ID and click Submit (Figure 13).

Manage Us	ers							
Organization:	742978769				Set Maste	r Organiza	ation: 123456789	Submit
User ID ❤ johndoe4444	First Name 🔽 John	Last Name 🔺 Doe	Department/Location 🤝	Creation date 2012-01-04	User Type ▽ Provider Administrator	Status V Active	Administrator Super User	Enter the Tax ID of the Suspend Terminate Master Organization.
Disclaimer: Yo ensure that ar has access to more than 30	u accept full re y and all past the system. He days, the acco	sponsibility to n Users who were althLink will not unt will be susp	naintain and manage the v granted use of the system be held responsible for U ended. HealthLink will cont	alidity of all Users. h by the provider a sers who are grant act the master adr	It is You or the master ad nd have terminated emplo ted access through You o ministrator or "Super User"	ministrator oyment with r other Use ' to reactiv	"s "Super User" n n a practice or ins er. If a User accou ate the account.	Reset Password responsibility to stitution no longer unt is inactive for

Figure 13. Admin. Tools–User Management–Reset Password Link.

- c. The link has been completed when the display reads "<u>Remove Link To Master</u> <u>Organization - <tax id></u>". The change takes effect immediately, and the master organization can view your patients and claims.
- d. To remove the link, simply go to the User Management tab, and click the link to remove. The master organization can no longer view your patients or claims.



17.8 Field Descriptions

Following are descriptions of the User Management windows fields.

a. Fields – Manage Users (Figure 14)

Manage	Users							
Organization	1: 123456789				Set Maste	er Organization	n:	Submit
User ID 🔽	First Name 🔽	Last Name 🔺	Department/Location 🔽	Creation date 🔽	User Type 🔽	Status 🔽	Administrator 🔻	Action
JohnDoe1234	John	Doe		2011-06-29	Provider Administrator	Terminated		
JohnDoe1234	John	Doe		2011-07-27	Provider Administrator	Reactivated	Super User	Suspend User Terminate User Reset Password

Figure 14. Admin. Tools–User Management–Manage Users Fields.

Table 1. Admin. Tools–User Management–Manage Users Fields.						
Field	Descriptions					
User ID	Each person who registers must create a User ID. Please see the field descriptions					
	at the end of the section on Creating Users for detailed requirements on User IDs.					
First Name	Type the first name of the user.					
Last Name	ype the last name of the user.					
Department/Location	ype the location or department of the user.					
Creation Date	This text box states the date this record was created.					
User Type	Displays the type of access you are providing for the user:					
	Admin (Administrator) – Administrators are allowed to create and manage					
	other Users and reset passwords.					
	User (Standard Users) – Standard Users have access rights to view eligibility					
	or claim status information as set up by their Administrator. Regular Users					
	may not create other User accounts or reset Passwords (except their own).					
	All users external to a provider organization are set up as standard users.					
Status	Displays one of four User Status types:					
	Active – Account is in an active status.					
	Locked Out – Account is locked-out. Please contact your office Administrator					
	if your account is locked-out. If you are the Administrator, please call					
	Customer Service at 800-624-2356					
	Suspended – Account is suspended. Please contact the office Administrator					
	if your account is suspended.					
	Terminated – Account has been terminated. Please contact the office					
	Administrator to have a new account set up.					
	Inactive – Account is inactive. Please contact your office Super User or					
	Administrator if your account is inactive.					
Administrator	Displays the name of each user's administrator.					
Action	Click any of the buttons in this column to Suspend, Terminate, Reactivate a User					
	's account or Reset a User's password.					
Suspend User	Click this button to suspend a person's account. This will prohibit access to					
	ProviderInfoSource and any of its features.					
Terminate User	Click this button to terminate a person's account. This is recommended when a					
	person leaves your office. This will prohibit access to ProviderInfoSource and any					
	of its features.					
Reset Password	Click this button to reset a person's Password. Terminated accounts cannot have					
	Passwords reset.					
Reactivate	Click this button to reactivate if a person's account is Locked Out or Suspended.					

17.0 Administrator Tools – User Management



b. Fields – <u>User Profile</u> (Figure 15)

Company Comp	tion date: 2005 12.01	
Suspend User Crea	nion date: 2005-12-01	Darid Doo (Darid Doo 1224)
Peed Peeuvord Stat	nype: Provider Standard Oser	Daviu Due (DaviuDue 1254)
These Password Stat	us. Active	
User Profile		
First Name: 🔷	> David MI:	
Last Name: >	> Doe	
Work Phone: 🔹	▶ 123 456. 7890 ext.	
Email Address: •	daviddoe@abchealth.com	
Location Info		
Department/Location	Claims	
Tax ID Number: 💦 🔸	123456789	
Street Address:	123 Pine Street	
Zip Code: •	• 63131	
Login Info		
Security Question:	What is your pet's name?	
Your answer:	*****	
Create User ID:	DavidDoe1234	
Password:	*****	
User Type:	C Provider Administrator 📀 Provider Standard User	
Functional Access		
» Functional Access	- Allows a user to view and request information in these areas.	
	🔽 Claim Status	
	✓ Patient Eligibility	
Indicates a require	d field.	

Figure 15. Admin. Tools–User Management–User Profile Fields.

|--|

Section	Field	Descriptions
User	First Name	The first name of the User.
Profile	MI	The middle initial of the User. Only one initial is allowed.
	Last Name	The last name of the User.
	Work Phone	The work phone number of the User, including extension (if applicable).
	Email Address	The email address of the User.
	Allow Mail	Permits HealthLink to send general information and/or other types of
	Contact	materials supporting HealthLink's business.
Location	Location /	The location or department the User belongs to at his/her office.
Info	Department	
	Tax ID Number	The 9-digit Tax Identification Number (TIN) of the physician, hospital or
		health care professional the User works for.
	Street Address	The work street address of the User.
	Zip Code	The work Zip Code of the User. The Zip Code assists
		ProviderInfoSource in selecting the correct HealthLink Network
		Specialist for the User's area.



UMN.6.039

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ProviderInfoSource User Guide

Security	Security	A drop-down menu records the User's chosen Security Question.
Info	Question	Questions may include:
		- What is your pet's name?
		- Where were you born?
		- What was the model of your first car?
		 What is your grandmother's first name?
		- What was the name of your grade school?
	Your Answer:	Records the User's answer to the chosen security question.
	User Type:	Records the User's assigned role in <i>ProviderInfoSource</i> .
		The User Type options are:
		- Administrator
		- User
Functional	Functional	Records the User's access to <i>ProviderInfoSource</i> . At least one value
Access	Access	must be assigned to a User account.
		The Functional Access options are:
		- Claim Status
		- Patient Eligibility

17.9 Frequently Asked Questions (FAQ)

If you were not able to complete an Administrator Tools–User Management task, this **Frequently Asked Questions (FAQ)** section offers you assistance. This section describes possible scenarios in which you may not be able to complete a task, along with the solutions to those scenarios.

Question:

What if I omit field entries?

Answer:

If you are changing a User account, and you omit any of the required fields, an error message will be displayed, prompting for the missing field entries. Any error fields that are not valid will be displayed in red. Click in the error fields, re-enter the valid information, and click Submit.

Question:

What if I choose a temporary password in an invalid format? **Answer:**

If the password format is not valid, *ProviderInfoSource* will redisplay the Create New User window. Re-enter a valid password password guidelines in the above table entry.

Question:

What if I accidentally terminate a User?

Answer:

Terminated accounts are permanently inactive. A new account must be created for the User.

17.0 Administrator Tools – User Management



Question:

How do I cancel changes to an account?

Answer:

If you are changing a User account (resetting Password, changing profile information, etc.), and you want to cancel your changes, click <u>Cancel</u> at any time before you click <u>Submit</u>. You will be asked to verify your cancellation. Answer Yes and all changes will be discarded.

Functional Access	
» Functional Access - Allows a user to	iew and request information in these areas.
ম	Claim Status
v	Patient Eligibility
» Indicates a required field.	
Submit « Previous Cancel	

Figure 16. Admin. Tools–User Management–Functional Access.

Question:

What if I accidentally cancel my changes?

Answer:

If you are changing a user account (resetting password, changing profile information, etc.), and you cancel at any time before clicking submitting, you will be asked to verify you want to cancel your changes. If you answer no, ProviderInfoSource returns to the point where you clicked <u>Cancel</u>. If you cancel while making a password change, and then answer No, *ProviderInfoSource* returns to the point where you clicked <u>Cancel</u>.

Question:

What if I am locked out of my own Administrator account? **Answer:** Please contact *ProviderInfoSource* Customer Service toll-free at 8

Please contact *ProviderInfoSource* Customer Service toll-free at 800-624-2356.

