ProviderInfoSource®

Provider User Guide

Manage Users

Chapter 17

HealthLink®

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).

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. When the Manage Users window displays (Figure 2), click the User ID of the account you want to change.

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

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.

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).

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

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

Figure 6. Admin. Tools–User Management–Suspend Account–Confirmation.

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.

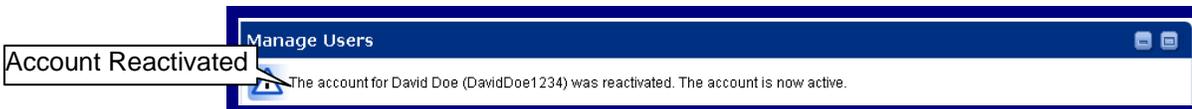d. A message will confirm that the account has been reactivated (Figure 8).

Figure 8. Admin. Tools–User Management–Reactivate Account–Confirmation.

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).

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).

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).

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.

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.

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.

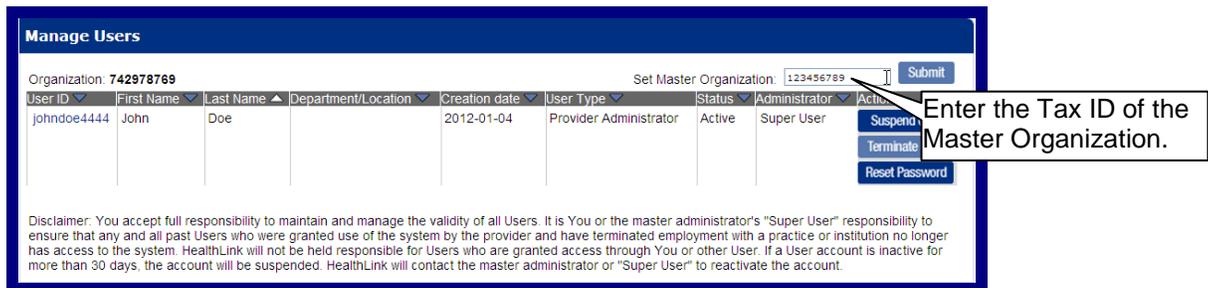b. In the upper right corner, type the master Tax ID and click Submit (Figure 13).

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

c. The link has been completed when the display reads "*Remove Link To Master Organization - <tax id>*". 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 – <u>Manage Users</u> (Figure 14)

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	Type the last name of the user.
Department/Location	Type 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.

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

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

Table 2. Admin. Tools–User Management–User Profile Fields.

Section	Field	Descriptions
User Profile	First Name	The first name of the User.
	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 Contact	Permits HealthLink to send general information and/or other types of materials supporting HealthLink's business.
Location Info	Location / Department	The location or department the User belongs to at his/her office.
	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.

Security Info	Security Question	A drop-down menu records the User's chosen Security 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 *ProviderInfoSource*. The User Type options are: - Administrator - User
Functional Access	Functional Access	Records the User's access to *ProviderInfoSource*. At least one value 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.

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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 Cancel at any time before you click Submit. You will be asked to verify your cancellation. Answer Yes and all changes will be discarded.
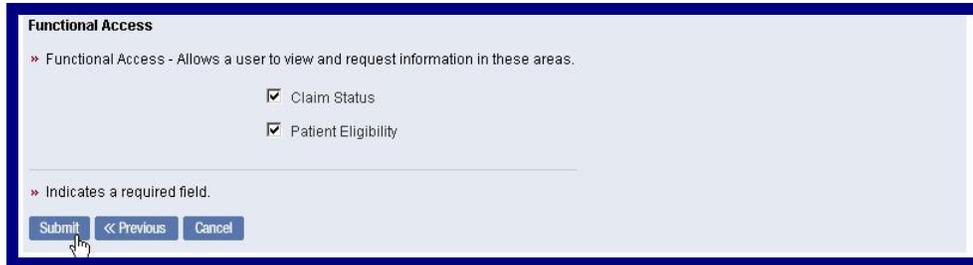

Figure 16. Admin. Tools–User Management–Functional Access.

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 Cancel. If you cancel while making a password change, and then answer No, *ProviderInfoSource* returns to the point where you clicked Cancel.

Question:
What if I am locked out of my own Administrator account?
Answer:
Please contact *ProviderInfoSource* Customer Service toll-free at 800-624-2356.

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