ProviderInfoSource®

Provider User Guide

Manage Groups

Chapter 18

HealthLink®

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

http://providerinfosource.healthlink.com

18.0 ADMINISTRATOR TOOLS – MANAGE GROUPS

18.1 Overview

The capability to create provider groups gives providers the ability to restrict access to claim data. Initially, all users within a provider organization are allowed to view claims for all providers within the organization. For many organizations, this arrangement is acceptable.

However, a provider organization with several physical locations may want to create a group for each individual location.

Creating provider groups is a simple process once the users who will be in each group are identified. The first step is to decide how to best to organize providers (by location, by department, etc.). This section will illustrate the process of creating a provider group and assigning providers and users.

18.2 How to Add and Configure a Group.

a. From the Secured Home Page, click the User Management tab.

Figure 1. Admin. Tools–Manage Groups–Home Page Link.

b. When the Manage Users window opens, click the Manage Groups button on the left side of the window (Figure 2).

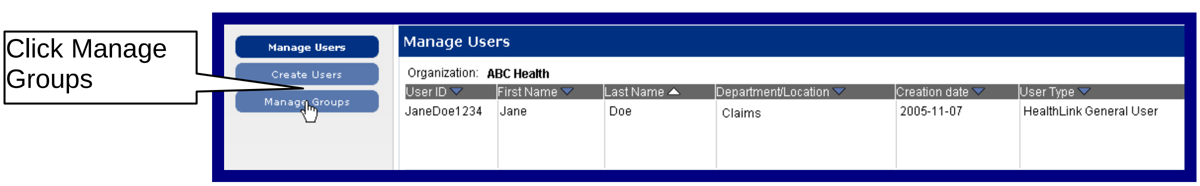

Figure 2. Admin. Tools–Manage Groups–Click Manage Groups.

c. When the Group Maintenance window opens, click the + button at the lower left corner of the window (Figure 3).

Example:	If your organization has three offices (North, South, and Central), but *ProviderInfoSource* lists only two offices, you can add the third office as a group.

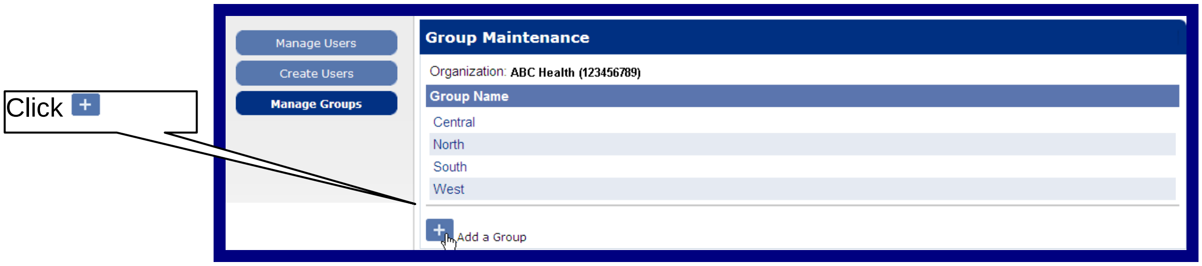

Figure 3. Admin. Tools–Manage Groups–Add Group.

d. Name the Group – When the New Group window opens (Figure 4), type the new group name (For example, “Central”).

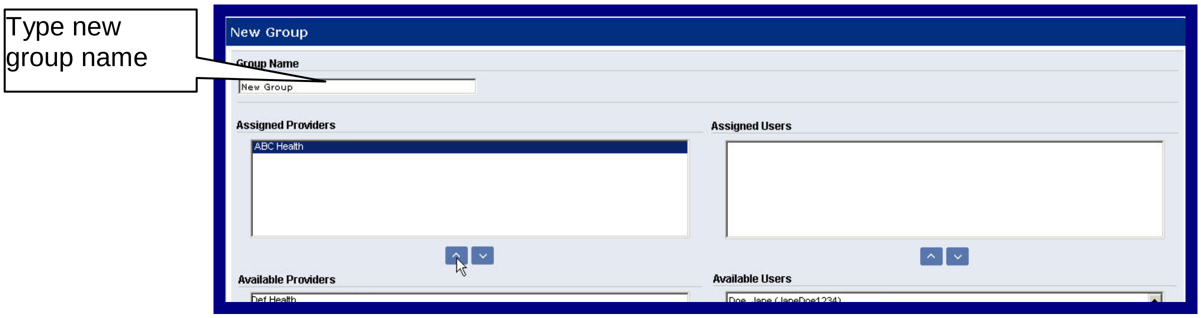

Figure 4. Admin. Tools–Manage Groups–Name Group.

e. Assign providers and users to the group by highlighting one or more values and clicking the up arrow (Figure 5).

Note:	To remove providers or users from a group, highlight one or more values in the list boxes and click the down arrow.

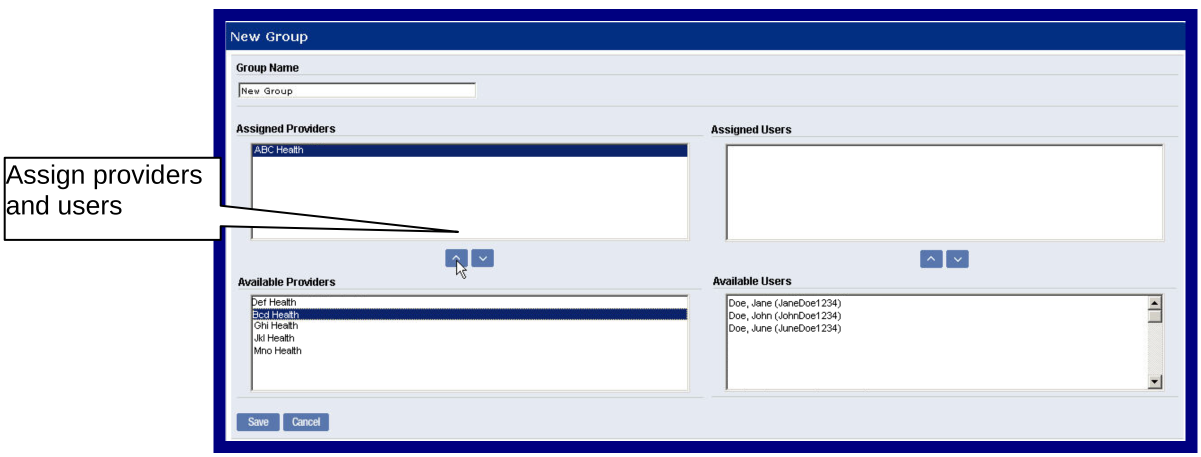

Figure 5. Admin. Tools–Manage Groups–Assign Providers.

> **Note:** The combination of assigned and available users represents all users in the provider organization.

f. Click the Save button when you are finished making changes.

18.3 How to Change an Existing Group.

a. From the Secured Home Page, click the User Management tab.

b. When the Manage Users window opens, click the Manage Groups button.

c. When the Group Maintenance window opens, click the desired Group Name (Figure 6).

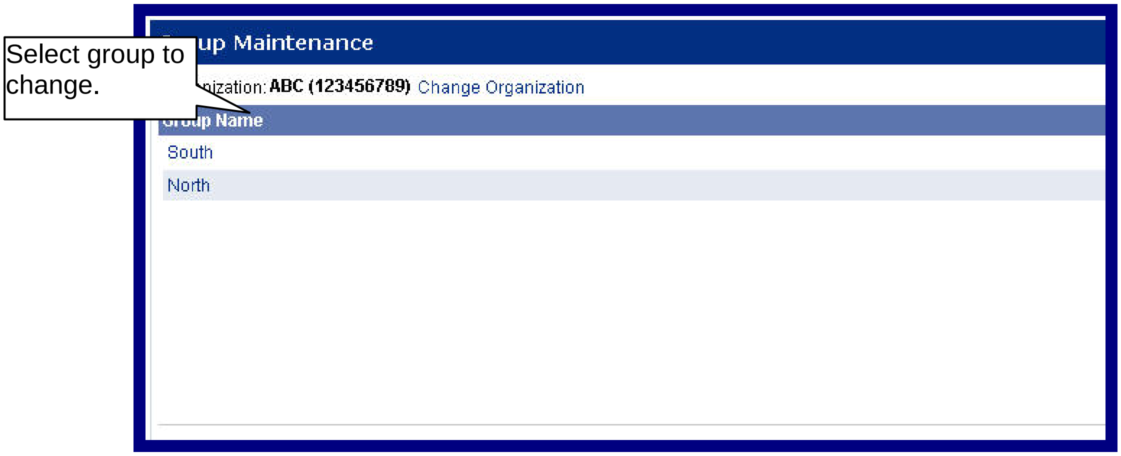

Figure 6. Admin. Tools–Manage Groups–Change Group.

d. When the Group Maintenance window opens, make your changes to the group. You may change the group name, assign providers, remove providers, assign users, remove users, etc.

e. When finished, click the Save button (Figure 7).

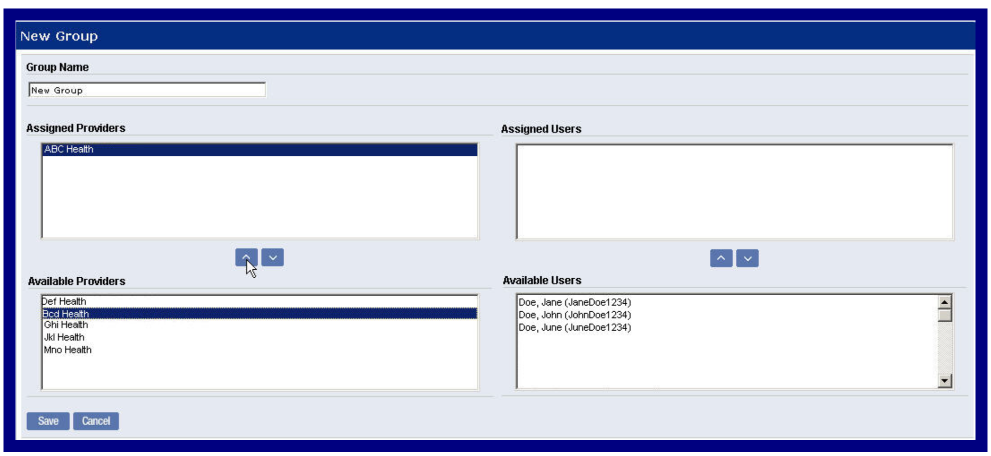

Figure 7. Admin. Tools–Manage Groups–Change Group Members.

18.4 How to Delete a Group

a. From the Secured Home Page, click the User Management tab.

b. When the Manage Users window opens, click the **Manage Groups** button.

c. When the Group Maintenance window opens, select the Group Name to be deleted.

d. Click the Delete button (Figure 8).

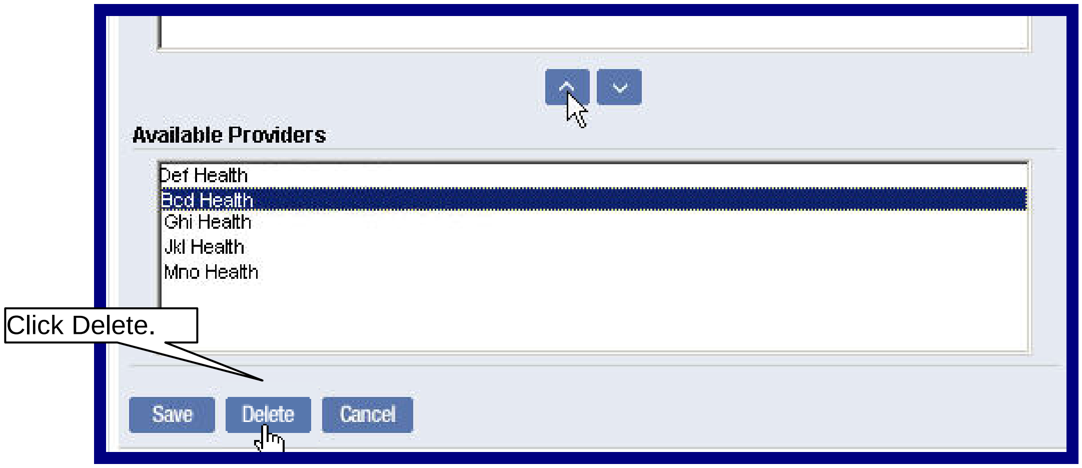

Figure 8. Admin. Tools–Manage Groups–Delete Group.

18.5 Frequently Asked Questions (FAQ)

Question:
What if I omit field entries?
Answer:
If you are changing a group, 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.