ProviderInfoSource®

Provider User Guide

Create Users

Chapter 16

HealthLink®

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

http://providerinfosource.healthlink.com

16.0   ADMINISTRATOR TOOLS – CREATING USERS

16.1   Overview

The Administrator Tools function enables you to customize and manage access to your information. 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 finishing this Creating Users section, you should be able to do the following:

1. Successfully create a new User account

2. Successfully set User security level

3. Successfully set User's user type

16.2   How to Create a New User

a. After logging in, click the User Management tab

(
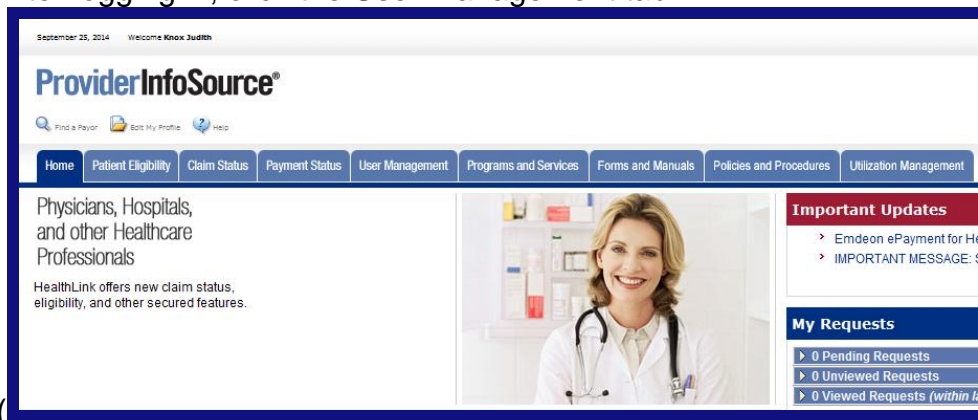
b. Figure 1).

Figure 1. Admin. Tools–Creating Users–Home Page Link.

c. When the User Management window opens, click the Create Users button.

> **Note:** The type of user account you can create depends on the type of access you have. Please review the following table to see the levels of user accounts. The following illustrations detail how to use a provider administrator to create a provider standard user.

Table 1. Admin. Tools–Creating Users–Account Types.

Organization	Account Type	Description
Provider Organization Accounts	**Provider Administrator**	Administrator Type: Provider Super User This user type is for a provider organization employee who has the checkbox checked giving authorization to create additional administrators. This user has administrator access to create and manage all organization users. Administrator Type: Provider Administrator This user type is for a provider organization employee who does <u>not</u> have the checkbox checked, therefore cannot create administrators. This user can create and manage standard users and individuals external to the organization.
	Provider Standard User	This user type is for a provider organization employee who can use *ProviderInfoSource*, but cannot view other users and has no administrator access.
	Individual External to Provider Organization	This user type is for someone outside the organization (i.e. Billing Service). If you select this type of account, then you must read and accept the **Access Authorization** window (Figure 3).

HealthLink.

1. Step 1 – User Type

When asked, "What type of account will the new user have?" click the appropriate option button (Figure 2), and click the Continue >> button.

Figure 2. Admin. Tools–Creating Users–Create New User.

Note: If you choose the Account Type Individual External to Provider Organization, the Responsibility and Liability window displays (Figure 3).You must read and accept this in order to create the user account.

Disclaimer:

You accept full responsibility to maintain and manage the validity of all users. It is you or the master administrator's "Super User" responsibility to ensure that any and all past users who were granted use of the system by the provider and have terminated employment with a practice or institution no longer has access to the system.

HealthLink will not be held responsible for users who are granted access through You or another User. If a User account is inactive for more than 30 days, the account will be suspended. HealthLink will contact the master administrator or "Super User" to reactivate.

Figure 3. Admin. Tools–Creating Users–External User.

2. Step 2 – User Profile

Figure 4. Admin. Tools–Creating Users–Provider Organization.

User Profile – In the User Profile section, type the First Name, MI (middle initial) Last Name, Work Phone, and Email Address information in the text boxes.

Access Rights – In the Access Rights section, choose what kind of access will be given to the new user.

> **Note:** The following Access Rights options may or may not display, depending on the type of user account.

Authorized to Create Additional Administrators – This checkbox determines whether the new user will be able to create administrators.

Administrator Type – This checkbox determines the type of account the new user will be given.

User's Administrator – This drop-down list allows the person creating the user account to specify which administrator will be assigned to the user. This ensures that administrators can only view their own users.

Location Info – In the Location Info section, type the User's Department Location and Location Street Address information in the text boxes.

Login Info – In the Login Info section, type the user's User ID (see requirements at the end of this section).

Functional Access – In the Functional Access section, check the areas you want to allow the User to view and request information. At least one of the Functional Access options must be checked.

1) Claim Status
2) Patient Eligibility

> **Note:** Temporary passwords for new user accounts are randomly generated and display when you click Submit. Deliver the User ID and temporary Password to the new user. For User ID and permanent Password requirements, please see the field descriptions at the end of this section.

Click Submit
After all required fields have been entered, click Submit. If all the information entered is confirmed, a confirmation message displays will be displayed (Figure 5).
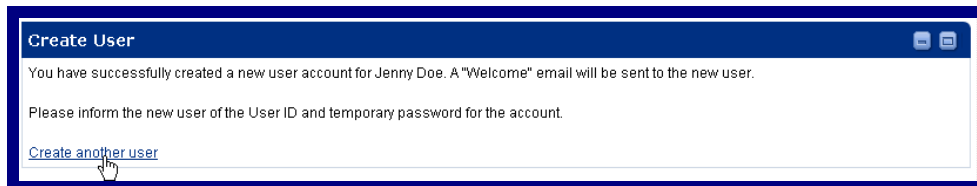

Figure 5. Admin. Tools–Creating Users–User Confirmation.

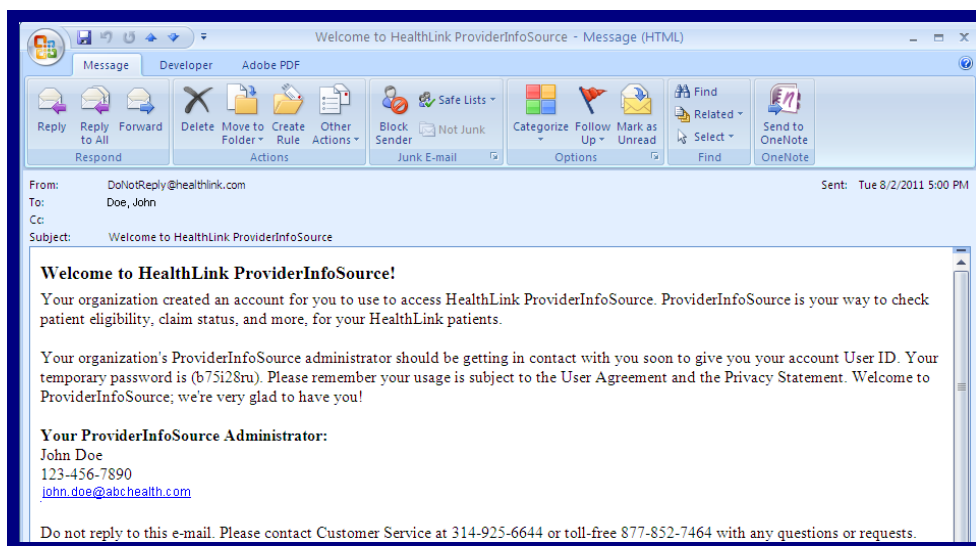The following email confirmation will be sent to the new User (Figure 6).

Figure 6. Admin. Tools–Creating Users–Email Confirmation.

3. Deliver Account Info to the User

After you have created the account, please notify the User that the new account has been created, and deliver the User ID and temporary Password to the User.

16.3   Field Descriptions
Following are descriptions of the fields that are displayed in the Administrator Tools–Creating Users windows.

a.   Fields – <u>Create User (Provider / HealthLink)</u> (Figure 7)

Figure 7. Admin. Tools–Creating Users–Provider / HealthLink Fields.

Table 2. Admin. Tools–Creating Users–Provider / HealthLink 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.
Access Rights	**Authorized to Create Additional Administrators**	Determines whether the new user will be able to create administrators.
	User's Administrator	This only displays when creating a standard user. Allows the Super User to specify which administrator will be assigned to the user, ensuring that administrators can only view their own users.

Location Info	Department / Location	The department or location of the User at his/her office.
	Street Address	The work street address of the User.
Login Info	User ID	This will be the User's permanent User ID. Following are the requirements: 1. 6 – 12 characters in length 2. Does not contain spaces or invalid characters 3. Does not start with a number 4. Does not start with two letters followed by all numbers. **Example:** "*Peas1289*" This User ID is 6-12 characters in length, with 4 letters and 4 numbers, and with no special characters.
	Password	When the user logs into the account for the first time, they will be asked to create a permanent Password. Following are the requirements: 1. Is 8 - 20 characters in length 2. Includes both letters and numbers 3. Does not contain 3 or more consecutive characters from your user ID 4. Does not consecutively repeat a number or letter more than twice 5. Does not contain spaces or special characters (&><"') **Example:** "**Spring1234**" This Password is 8-20 characters in length, with 6 letters and 4 numbers, and does not contain spaces or special characters.
Functional Access	Functional Access	Click one or both of these checkboxes to determine the User's access to *ProviderInfoSource*. At least one item must be assigned to a user's account. The Functional Access options are: - Claim Status - Patient Eligibility

HealthLink.

16.4   *Frequently Asked Questions (FAQ)*

If you were not able to complete an Administrator Tools–Creating Users 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 omit filling in any of the required fields, then an error message displays (Figure 8). Any invalid or missing entries display in red. Enter the valid information, and click Submit.
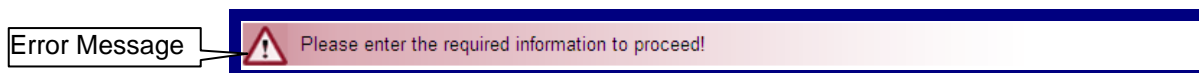
Error Message → ⚠ Please enter the required information to proceed!

Figure 8. Admin. Tools–Creating Users–New User Error.

Question:
What are the character requirements for creating a User ID or Password?
Answer:
Please see previous field descriptions for valid character requirements.

Question:
What if I enter a User ID or Password in an invalid format?
Answer:
Please see field descriptions for valid formats for User IDs and Passwords.

Question:
What if the temporary Password does not match the re-type temporary Password?
Answer:
The entries for Temporary and Re-type Temporary Passwords should match. If not, *ProviderInfoSource* will prompt you to re-enter.

Question:
What if I choose a User ID that is already being used?
Answer:
If the User ID is already being used, *ProviderInfoSource* will prompt for a different User ID. Please enter a different User ID.

HealthLink.