

Job Aid – Generating One-Click Self-Registration Invites, Processing Incoming Registration Requests & Managing User Accounts

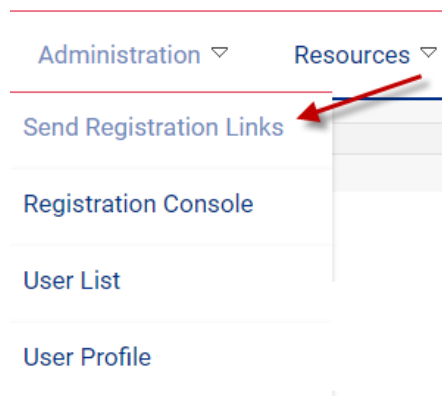
PART ONE: Generating One-Click Self-Registration Invite Emails

As an administrator you can generate One-Click Registration emails for your location. When new Provider users get a One-Click Registration email in their inbox, they can click the link and bypass the security question and role selection screens. They are taken directly to the create a username and password screen. Follow the steps outlined below.

Send Registration Links

STEP ONE

Navigate to the Send Registration Links page found in the Administration drop down on your menu bar.



You will be directed to the Self Registration Links page.

Self Registration Links

As the administrator for this provider office or clinic, you have the ability to generate a **one-click registration link** for one or more co-workers. Simply choose the correct Portal User Role, enter one or more emails (separated by commas), and the system will generate an email containing a self-registration link that is specific to each co-worker/email combination. The link, when clicked, will allow your co-worker to bypass the Provider Registration Security Question screens and the Select a Role screen, and immediately enter the Create Username/Password screen. Links expire after 24 hours. If a link has expired, just return to this screen and create a new one.

Email of New User: (For multiple emails, separate them with comma only, no space)

Provider Office: User Role:

[Generate Self Registration Link](#)

STEP TWO

Add the email address or addresses of the prospective provider user(s). For multiple emails, separate them with comma only, no space.

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Email of New User: (For multiple emails, separate them with comma only, no space)

Required

Provider Office: [Placeholder] ▼

User Role: Provider - Administrator ▼

STEP THREE

Select the appropriate choice from the provider office drop down. If the provider user should have TIN level visibility, select the TIN. If the provider user should have individual provider level visibility, select the providers name from the drop down.

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Email of New User: (For multiple emails, separate them with comma only, no space)

Required

Provider Office: [Placeholder] ▼

User Role: Provider - Administrator ▼

STEP FOUR

Select the appropriate user role for the new provider user(s). The available user roles are:

- Provider - Administrator - Access to Claims/EOPs/Eligibility/Panel Roster/Identifi Practice/Manage Portal User Accounts for their Location
- Provider - Portal User - Access to Claims/EOPs/Eligibility/Panel Roster/Identifi Practice
- Provider - Clerical User - Access to Claims/EOPs/Eligibility/Panel Roster

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Email of New User: (For multiple emails, separate them with comma only, no space)

Provider Office:

User Role:

STEP FIVE

Click the “Generate Self Registration Link” button to send the provider registration email(s).

Self Registration Links

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Email of New User: (For multiple emails, separate them with comma only, no space)

Provider Office:

User Role:

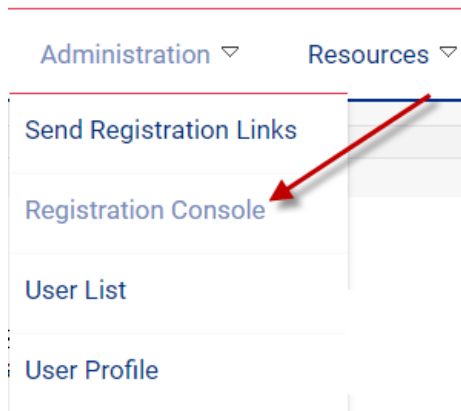
PART TWO: Processing Incoming Requests

Part of your role as an administrator is to approve or deny incoming provider registration requests for your office. Follow the steps outlined below.

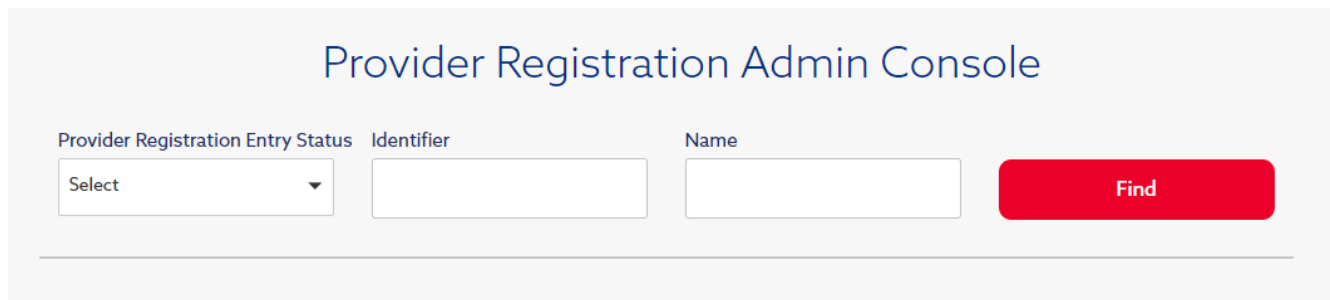
Registration Console

STEP ONE

Navigate to the Registration Console found in the Administration drop down on your menu bar.

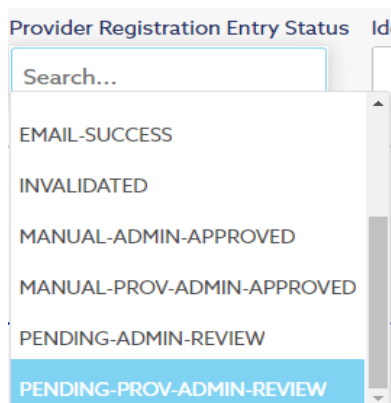


You will be directed to the Provider Registration Admin Console page.



STEP TWO

To review pending requests, select the PENDING-ADMIN-REVIEW status from the drop down and press Find. See below for an explanation of each Provider Registration Entry Status.



AUTO-APPROVED – Provided was able to register by validating themselves using a historical claim number

DECLINED – Registration request was manually denied

EMAIL-INT – One-click registration invite email initiated

EMAIL-SUCCESS – One-click registration invite accepted and provider user registered

INVALIDATED – Self-registration attempt was incomplete

MANUAL-ADMIN-APPROVED – Approved individual level requests

MANUAL-PROV-ADMIN-APPROVED – Approved TIN level requests

PENDING-ADMIN-REVIEW – Pending review (for those requesting individual level access)

PENDING-PROV-ADMIN-REVIW – Pending review (for those requesting TIN level access)

STEP THREE

Select the **Details** link next to the PENDING-PROV-ADMIN-REVIEW request.

Provider Registration Entry Status	Other Identifiers	Id Code Qualifier	Registered Provider Name	Date Submitted	Details
PENDING-PROV-ADMIN-REVIEW	113437602	24	Provider Test	02/18/2020 8:21:29 AM	Details

You will be directed to the Provider Registration Details page. Validate the information provided and the users identity at your location.

User Account Requested for:			
Provider No. T113437602	Other Identifiers 113437602	Provider/Organization 113437602	Account Type Non-Hospital Affiliated Clinic

Security Questions Answered:	
Claim No. none	Provider DOB

User Information:			
User Role Requested Provider - Self Registration User	Title N/A	Username testprov8	First Name Provider
	Middle Name N/A	Last Name Test	Email [REDACTED]
Phone N/A			

Back Approve Deny Modify

STEP FOUR

APPROVE

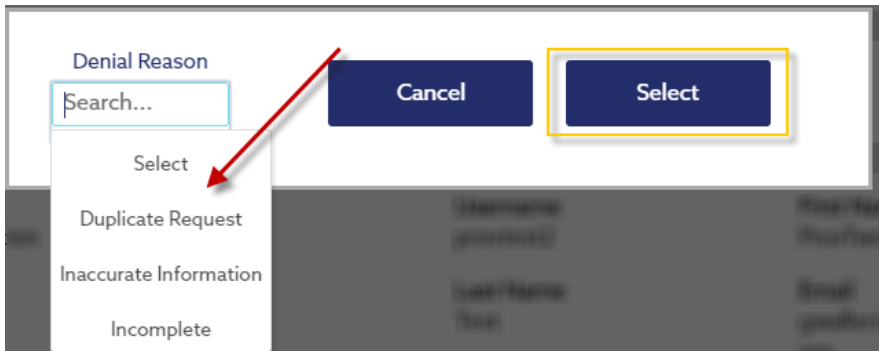


Click **Approve** to approve the request.

DENY



To deny the request, click **Deny**, choose a reason from the drop down, and press select.

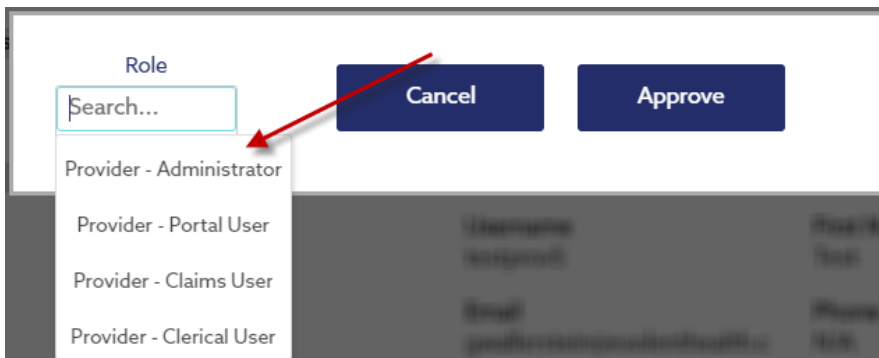


PLEASE NOTE: When a request is denied, the user who made the request will not be granted access to the Provider Portal. **This action cannot be undone.**

MODIFY



To approve the request but change the role the submitter requested, click **Modify**. Select the appropriate role and click Approve.



PART THREE: Managing User Accounts for your Office

As an administrator you will also be able to Add Users, Reset User's Passwords, Delete Users and Edit Users.

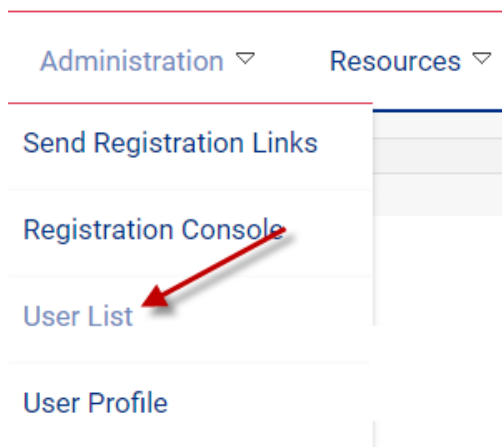
Add User

PLEASE NOTE: You can only create accounts at the same level that you are registered to. For example, if you are registered at the Tax ID level, you will only be able to create accounts at the Tax ID level.

To initiate registration for a provider user at the individual NPI level, please see the section in this job aid on **Generating One-Click Self-Registration Invite Emails**.

STEP ONE

Navigate to the User List page found in the Administration drop down on your menu bar.



STEP TWO

Select the "Add User" link found just above the "Results" section.



STEP THREE

Select the "Next" button.



STEP FOUR

Search for the employee by their Last Name. If you are unable to find an existing employee record, select the "Add Employee" link.

Search

Last Name

Search

Results [+ Add Employee](#)

Select	Name	Role	Title/Pos	Phone
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STEP FIVE

Enter the required fields and click the "Submit" button. Required fields are marked with a red *.

Add Provider Employee

Provider Name:

*Required Fields

Provider Type

* Last Name

* First Name

Middle Initial

Prov Employee No

Telephone

Fax

Email Address

Title/Position

Submit

You will now be returned to the "Provider Employee List" page.

STEP SIX

Search for the employee record you added and click the select link to the left of the employee name.

Results + Add Employee				
Select	Name	Role	Title/Pos	Phone
select	Test, Provider	Provider - Administrator		

STEP SEVEN

Fill out the required fields and click the “Submit” button.

User Information

* Last Name

* First Name

Middle Name

* User Role

* Username

* Password

* Confirm Password

Password Question 1

Password Answer 1

* Email

PLEASE NOTE: The user account has not been created but the portal will not send an automated email with the sign-on credentials. You will need to send the user the portal URL, their username, and the temporary password you have selected for them.

Reset User Password

STEP ONE

From the User List page, search for the name of the user whose password you would like to reset. You can press search to view all the users in your office.

STEP TWO

Click on the Users Name to open the User Detail page.

Results							Export + Add User
Name	Username	Office	Role	Locked	Lockout Time	Deleted	
Provider Test	testprov1		Provider - Administrator	N		N Delete	

STEP THREE

Select the “Reset Password” link located at the top right of the page.

User Detail

User Information

[Reset Password](#) [Edit User](#) [Delete User](#)

Name: Provider Test
Username: testuser1
Role: Provider Administrator

STEP FOUR

Click the "Reset Password" button.

Password Information

Password Question 1: What is the name of your pet?

Password Answer 1: ANSWER 1

Password Question 2:

Password Answer 2:

Password Question 3:

Password Answer 3:

[Reset Password](#)

STEP FIVE

You should now see a system generated temporary password next to the "New Password" field. Click "Submit" to save the transaction and send the temporary password to the email associated with the user's account.

[Reset Password](#)

New Password: yCyWE3

[Submit](#) [Cancel](#)

Delete User

STEP ONE

From the User List page, search for the name of the user you wish to deactivate. You can press search to view all the users in your office.

Search

First Name

Last Name

Username

User Role

Office

Locked

Deleted

Results

[Export](#) + [Add User](#)

Name	Username	Office	Role	Locked	Lockout Time	Deleted
Provider Test	testprov1	██████████	Provider - Administrator	N		N Delete

STEP TWO

Once you have located the user you wish to deactivate, press the Delete link.

Results

[Export](#) + [Add User](#)

Name	Username	Office	Role	Locked	Lockout Time	Deleted
Provider Test	testprov1	██████████	Provider - Administrator	N		N Delete

STEP THREE

Click the “Delete” button found near the bottom of the page.

Office ██████████

Locked N

Deleted N

Phone

Mobile Carrier

Mobile Phone Number

Primary Phone Number

PLEASE NOTE: The user account is now logically deleted and the user will no longer be able to sign in to their account.

Edit User

As an administrator, you can make updates to a user's Role, First Name, Last Name, Email, Phone, or Notification Preferences. Usernames cannot be changed. If a user needs to update their username for any reason, they will need to create a new account.

STEP ONE

From the User List page, search for the name of the user you wish to edit. You can press search to view all the users in your office.

Search

First Name

Last Name

Username

User Role

Office

Locked

Deleted

[Search](#)

Results

[Export](#) + [Add User](#)

Name	Username	Office	Role	Locked	Lockout Time	Deleted
Provider Test	testprov1	00000000	Provider - Administrator	N		N Delete

STEP TWO

Click on the Users Name to open the User Detail page.

Results

[Export](#) + [Add User](#)

Name	Username	Office	Role	Locked	Lockout Time	Deleted
Provider Test	testprov1	00000000	Provider - Administrator	N		N Delete

STEP THREE

Select the "Edit User" link located at the top right of the page.

User Detail

User Information

[Reset Password](#) [Edit User](#) [Delete User](#)

Name [Provider Test](#)

Username [testprov1](#)

Role [Provider - Administrator](#)

STEP FOUR

Make appropriate adjustments to the "User Information", "Phone", or "Preferences" section and click the "Submit" button at the bottom of the page.

User Information

*
First Name

Middle Name

*
Last Name

Username

*
User Role

Password Question 1

Password Answer 1

*
Email

Office

*
Locked

*
Deleted

Phone

Mobile Carrier

Mobile Phone Number