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

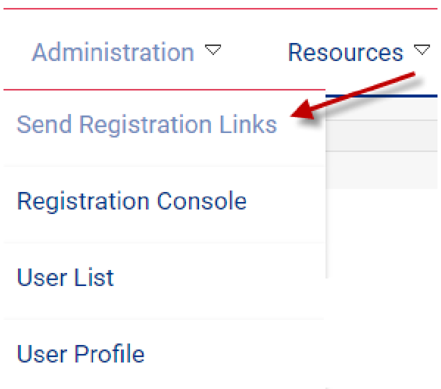
PART ONE: Generating One-Click Self-Registration Invite Emails

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.

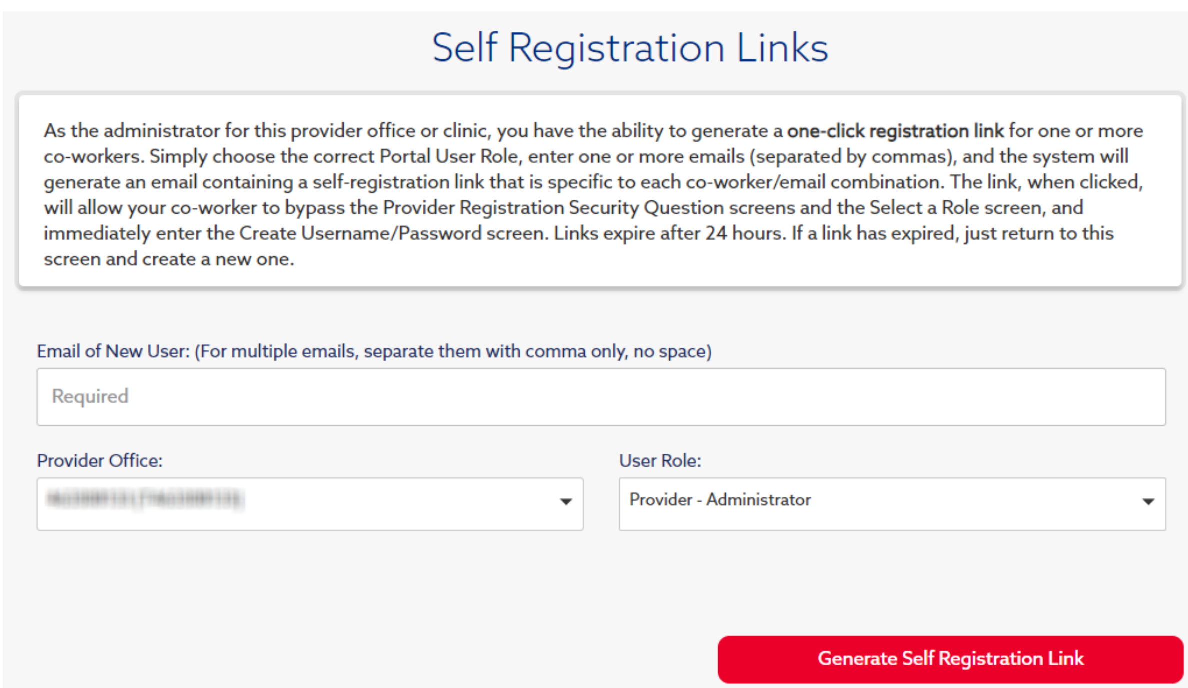
Send Registration Links

STEP ONE

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

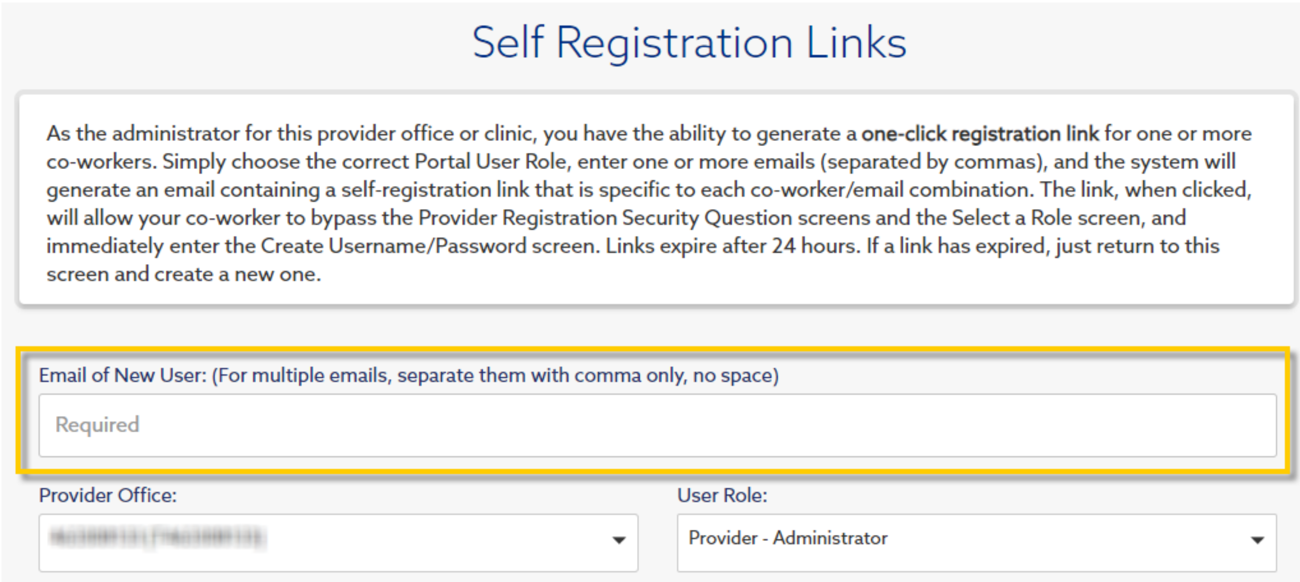


You will be directed to the Self Registration Links page.



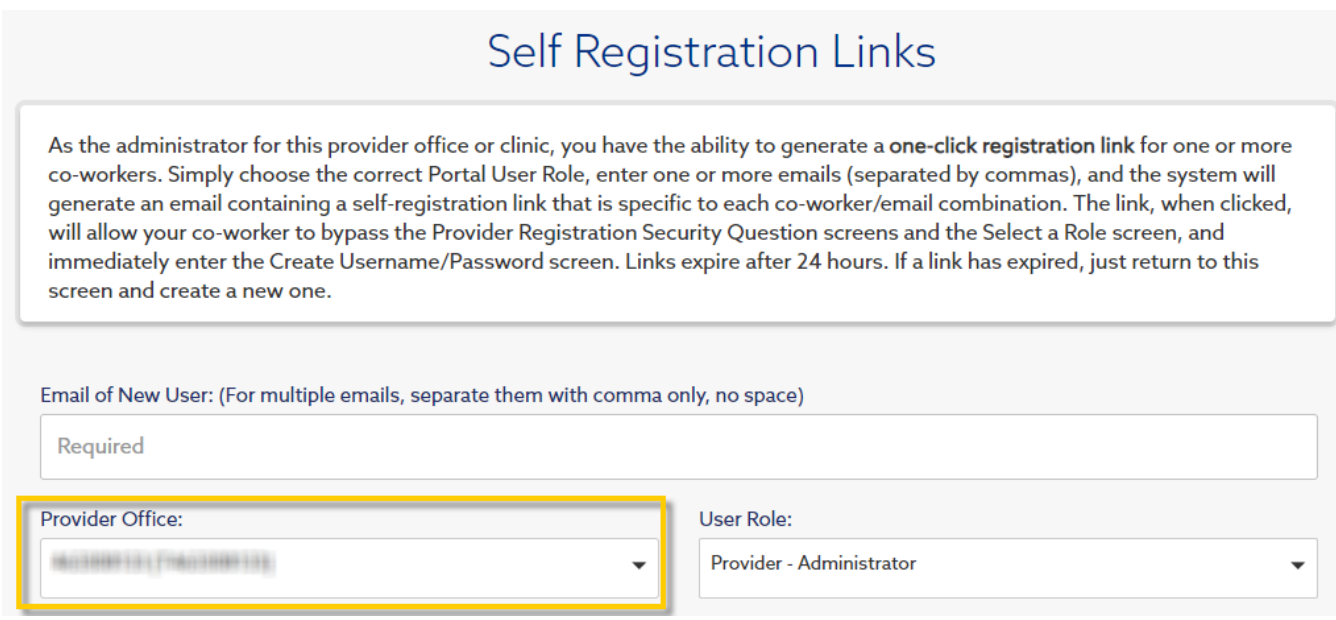
STEP TWO

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



STEP THREE

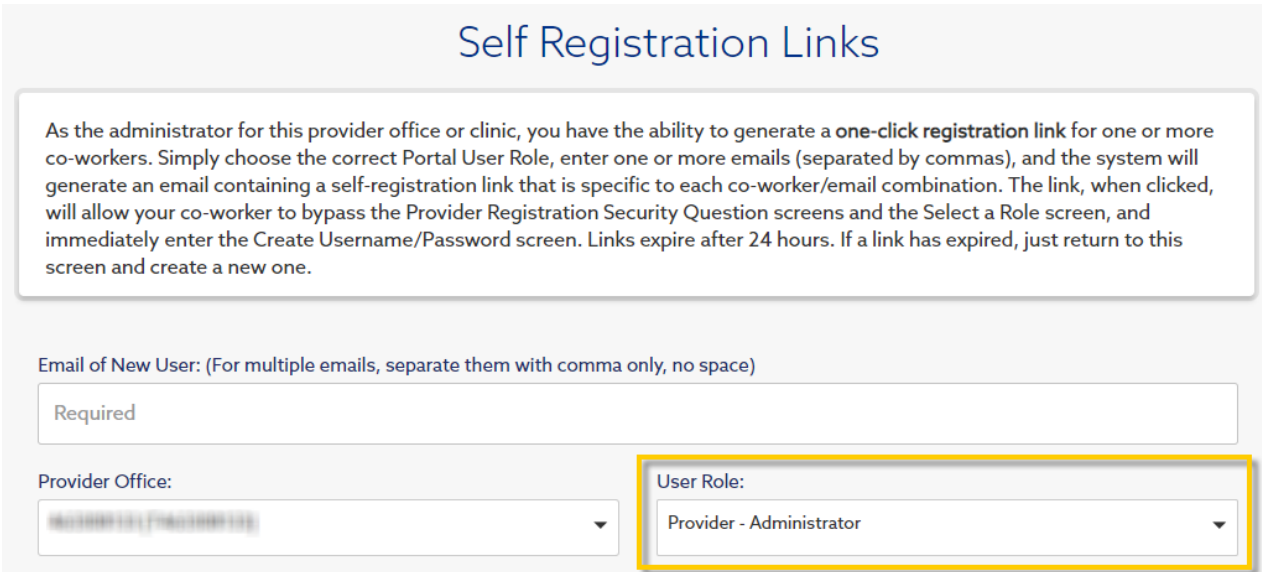
Select the appropriate choice from the provider office drop down. If the provider user should have TIN level visibility, select the TIN. If the provider user should have individual provider level visibility, select the providers name from the drop down.



STEP FOUR

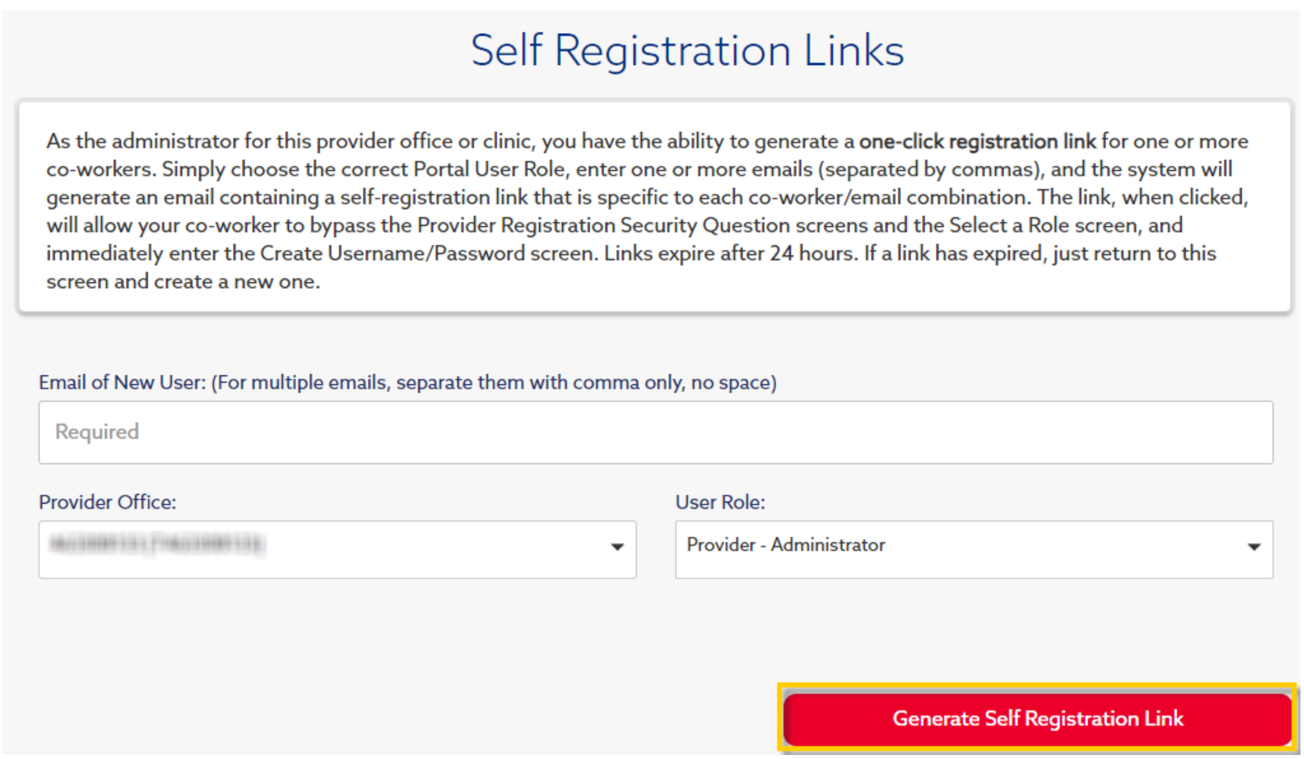
Select the appropriate user role for the new provider user(s). The available user roles are:

- 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



STEP FIVE

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



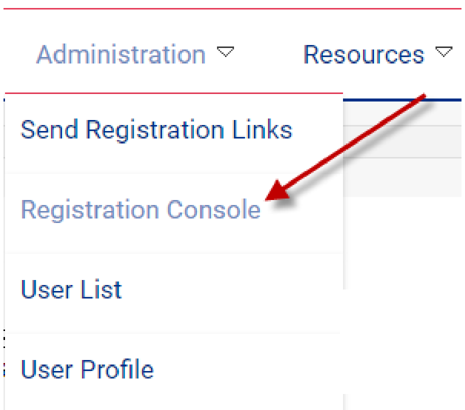
PART TWO: Processing Incoming Requests

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

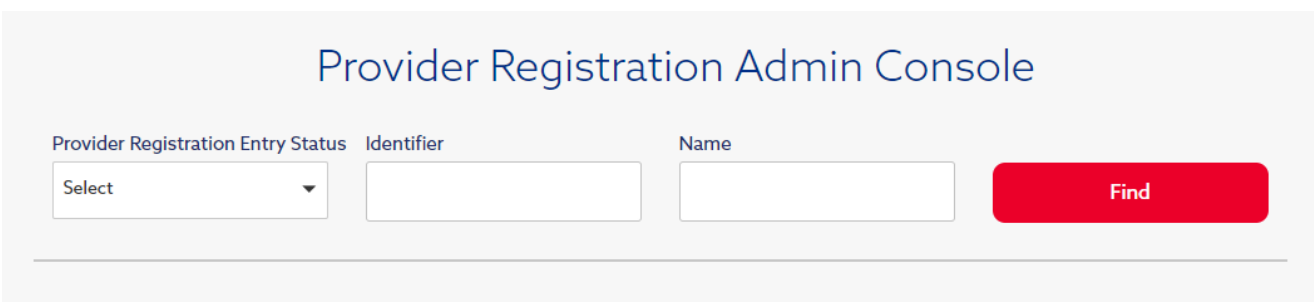
Registration Console

STEP ONE

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

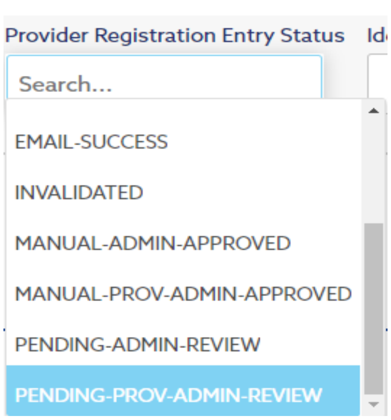


You will be directed to the Provider Registration Admin Console page.



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

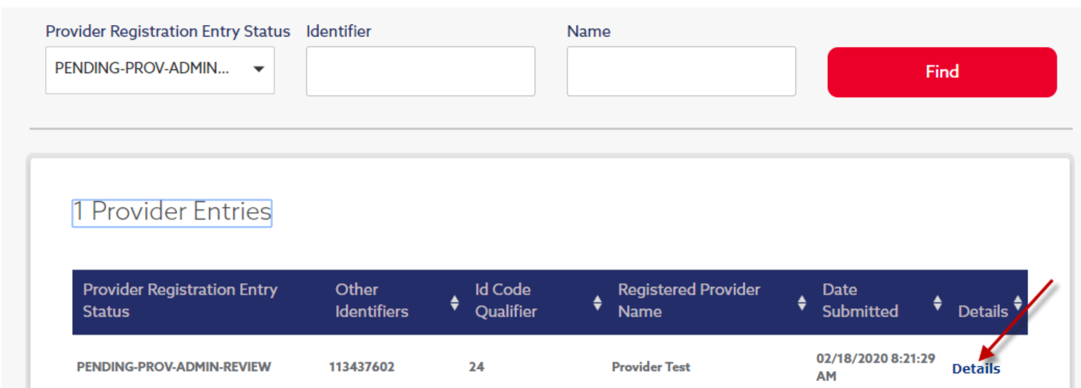
MANUAL-PROV-ADMIN-APPROVED – Approved TIN level requests

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

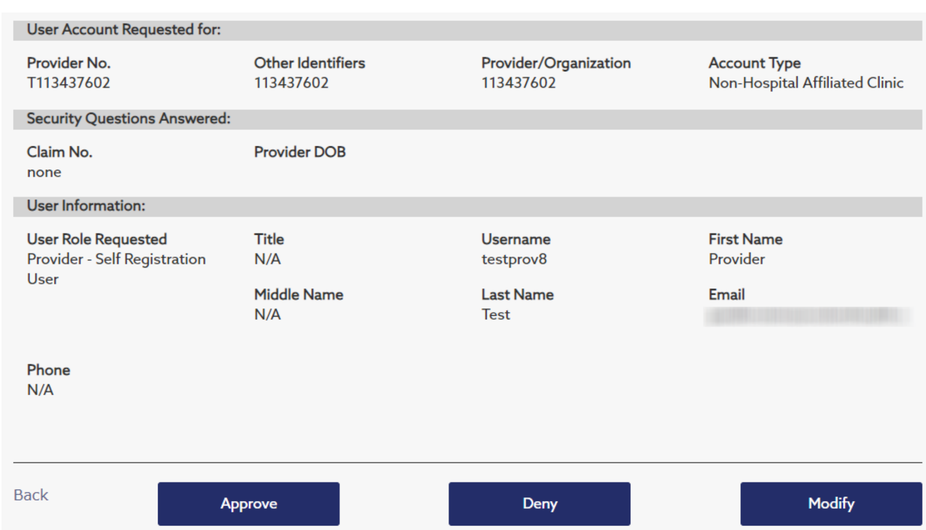
PENDING-PROV-ADMIN-REVIW – Pending review (for those requesting TIN level access)

STEP THREE

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



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



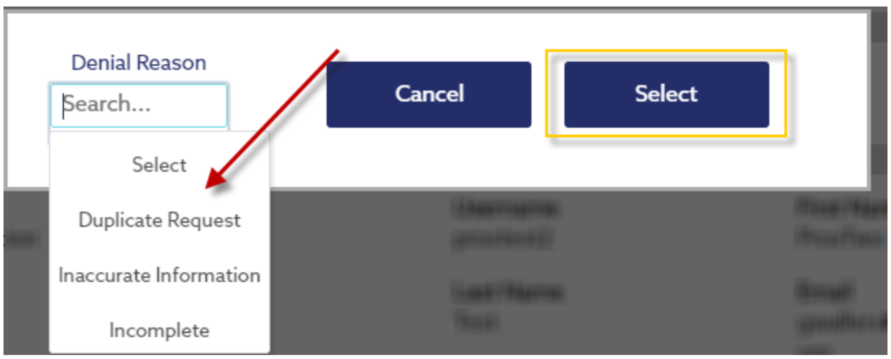
STEP FOUR

APPROVE

Click **Approve** to approve the request.

DENY

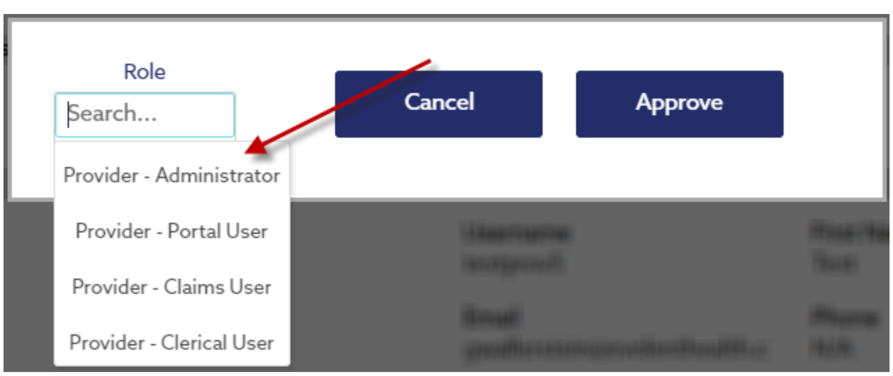
To deny the request, click **Deny**, choose a reason from the drop down, and press select.



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.

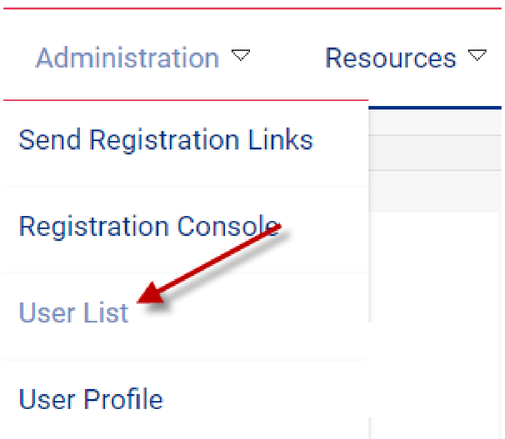
Add User

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.

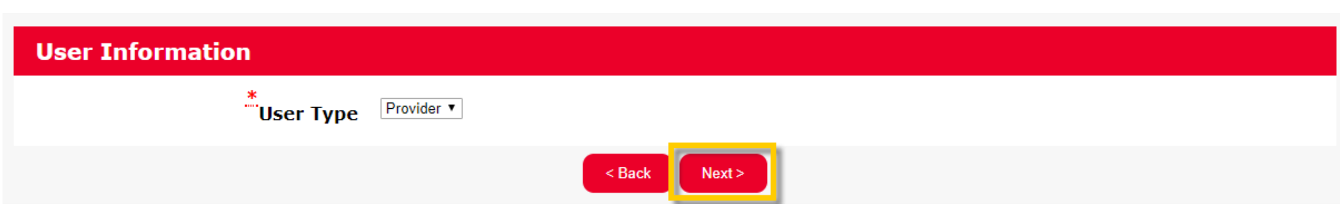


STEP TWO

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

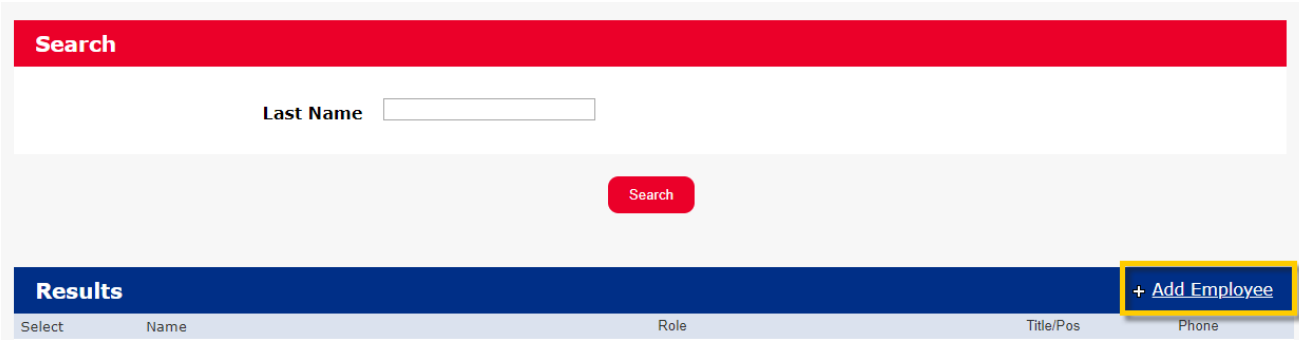
STEP THREE

Select the "Next" button.



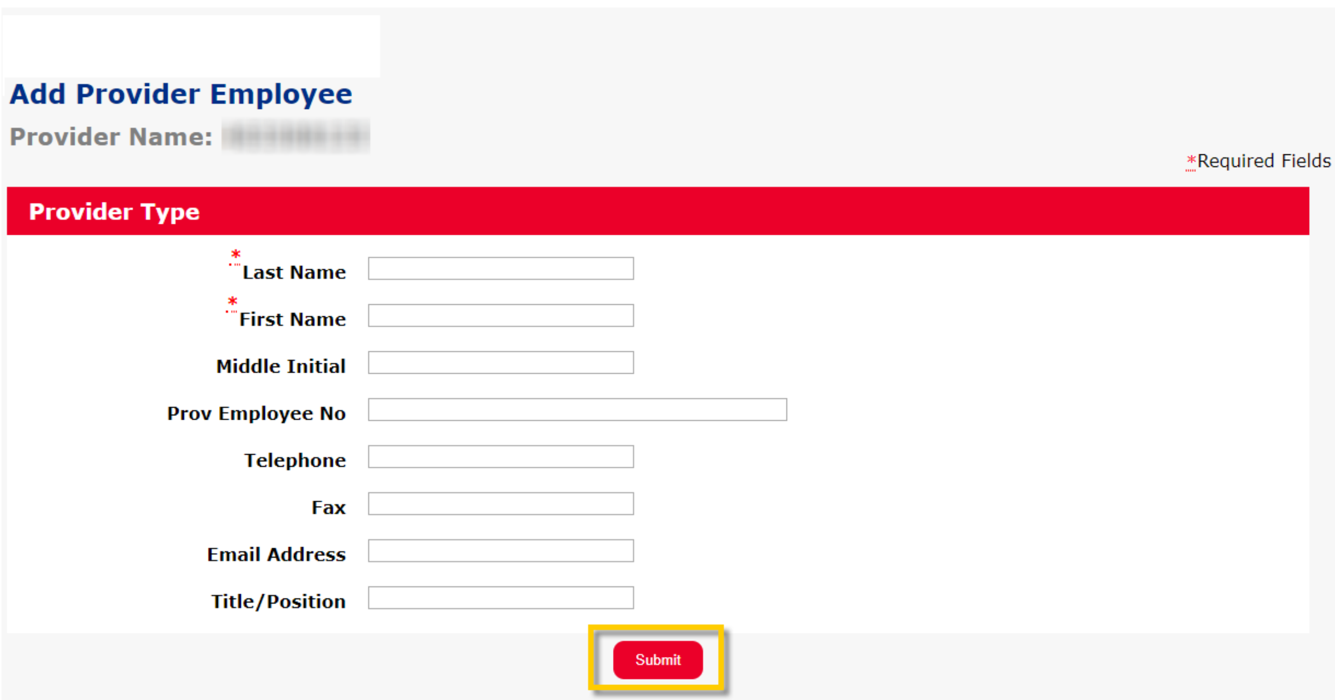
STEP FOUR

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



STEP FIVE

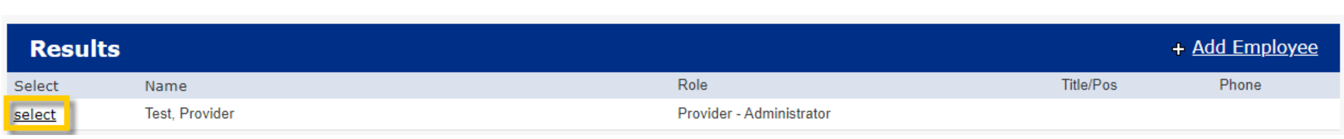
Enter the required fields and click the "Submit" button. Required fields are marked with a red *.



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

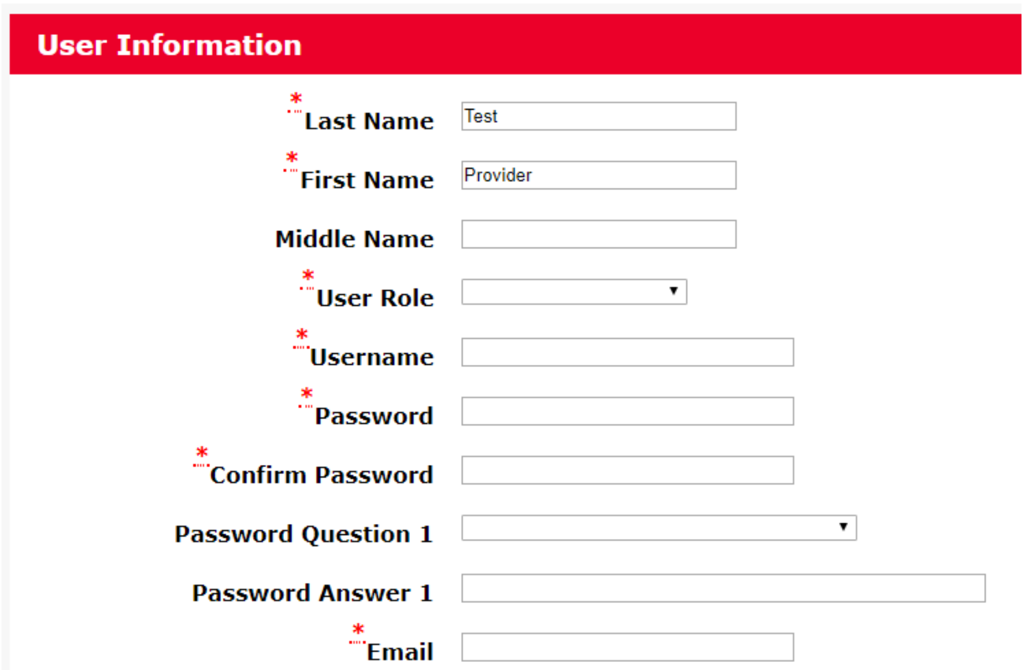
STEP SIX

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



STEP SEVEN

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



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.

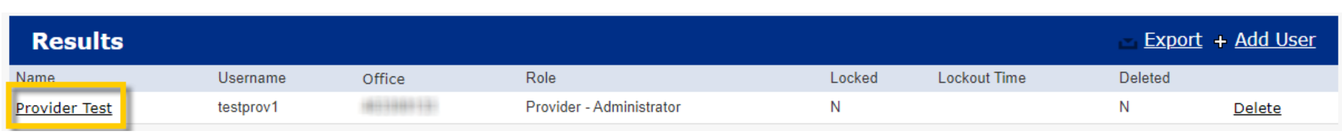
Reset User Password

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.

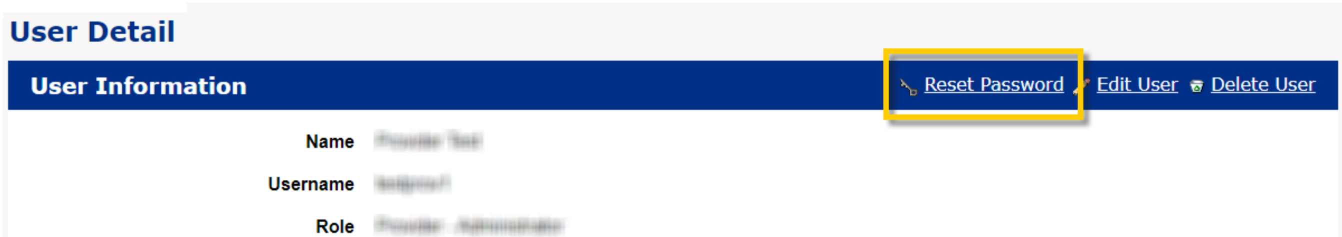
STEP TWO

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



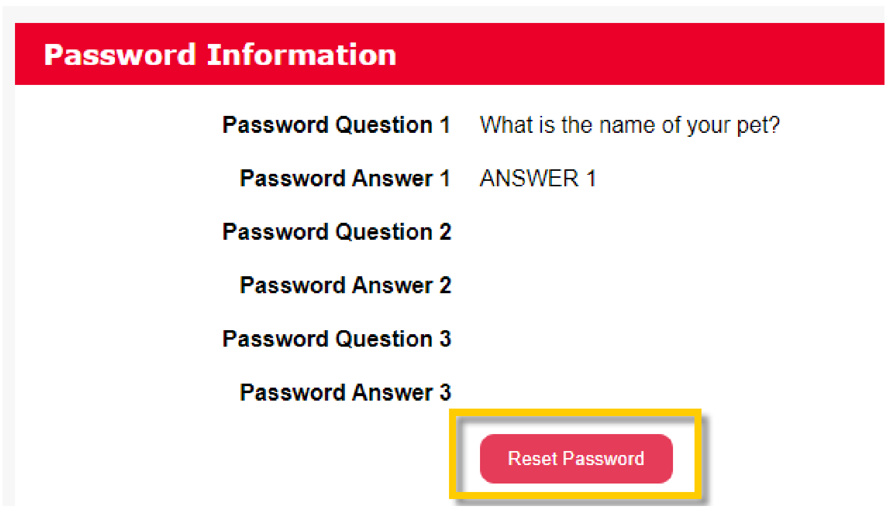
STEP THREE

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



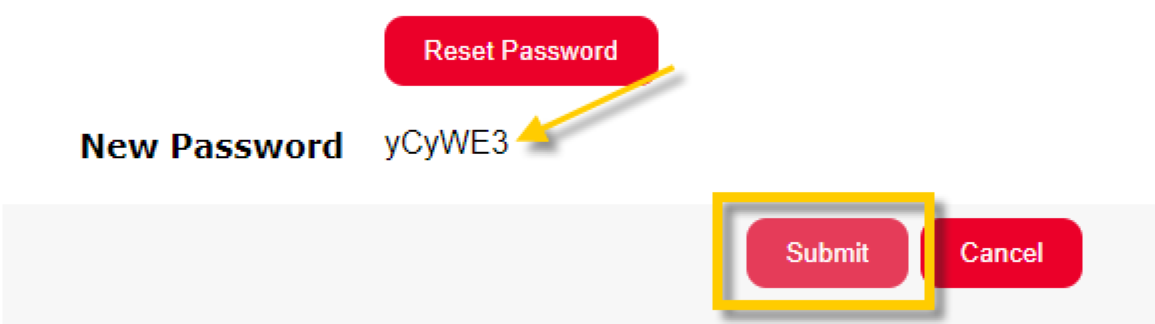
STEP FOUR

Click the “Reset Password” button.



STEP FIVE

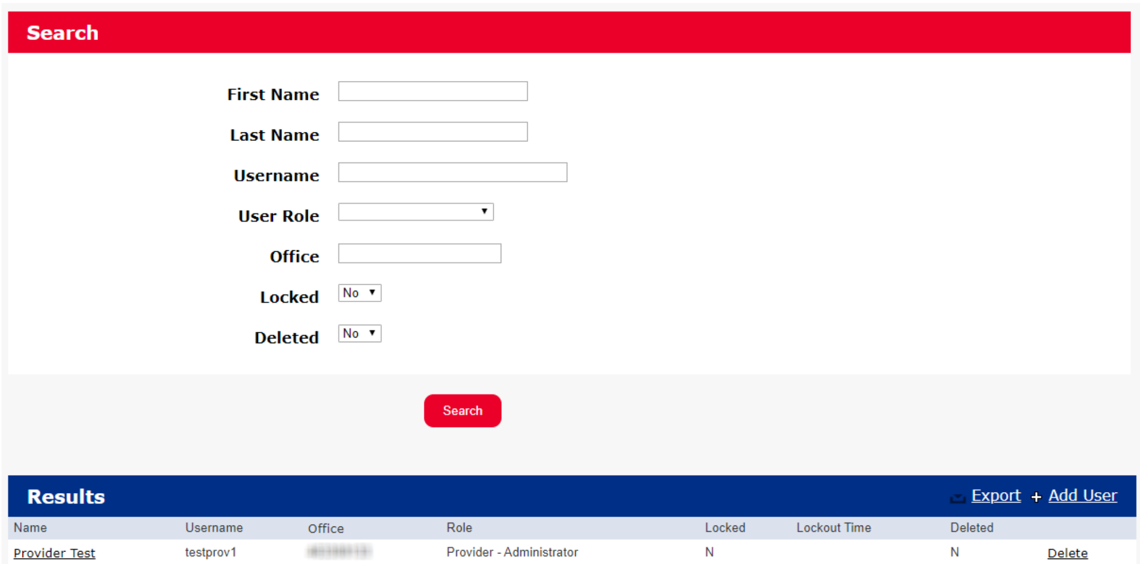
You should now see a system generated temporary password next to the “New Password” field. Click “Submit” to save the transaction and send the temporary password to the email associated with the user’s account.



Delete User

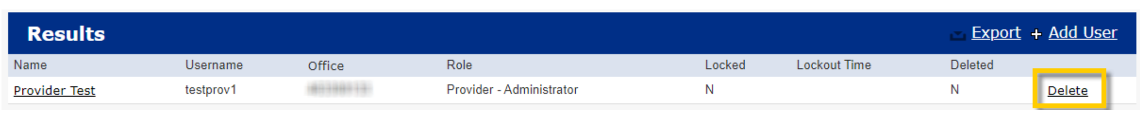
STEP ONE

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.



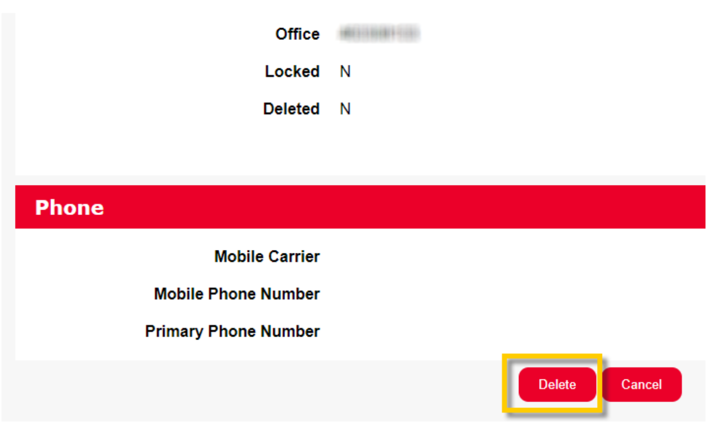
STEP TWO

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



STEP THREE

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



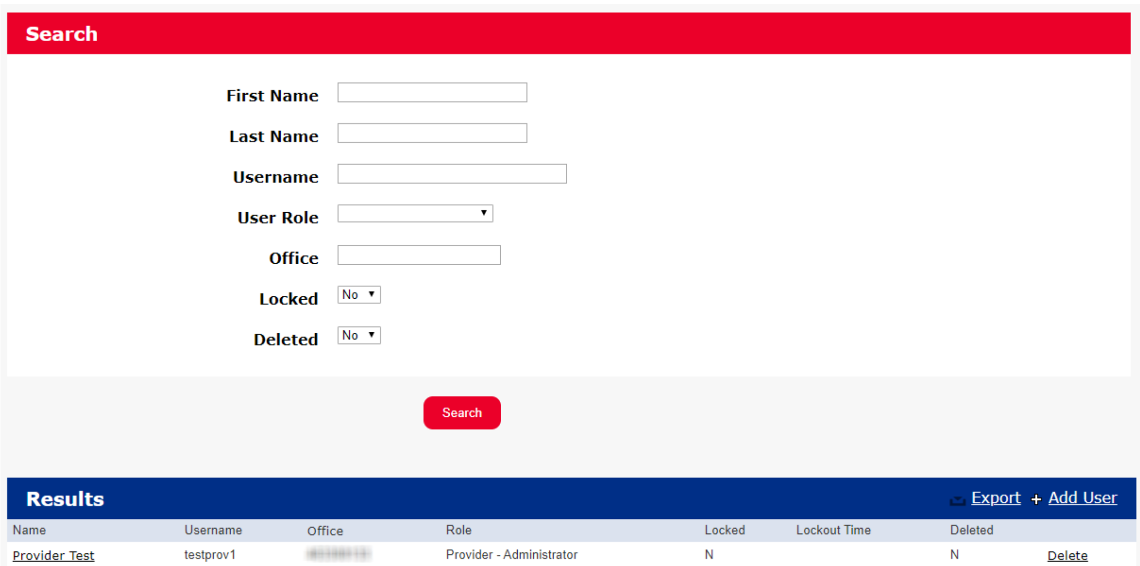
PLEASE NOTE: The user account is now logically deleted and the user will no longer be able to sign in to their account.

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.

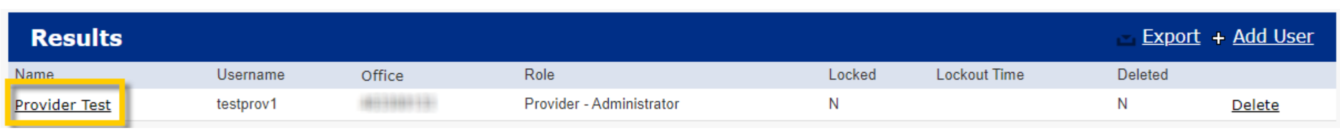
STEP ONE

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.



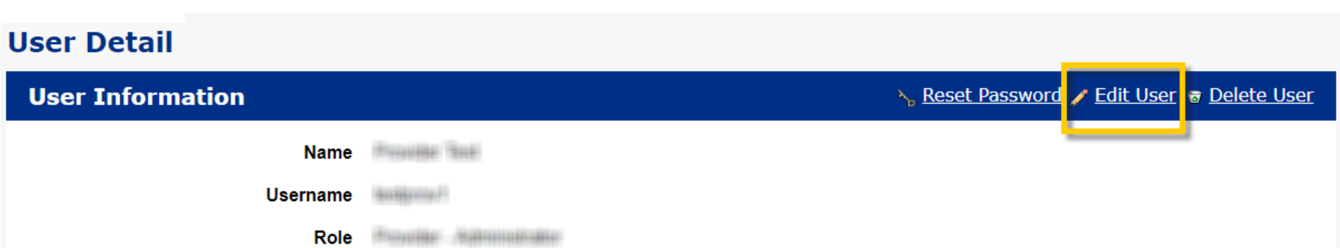
STEP TWO

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



STEP THREE

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



STEP FOUR

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