The "Adding User" How To provides instructions on:

Add New User

The System Administrator can add users to their domain (organization). By adding a user, the System Administrator is granting permission to the user to work within ProviderOne as a representative of their organization.

1. **a.** From the Portal Page
   b. Click on Maintain Users link

2. **a.** Maintain User page appears.
   b. The page default shows all the Approved Users within the domain.

1a Portal Page

Admin | **Hide/Max**

Change Password

Maintain Users ← **1b Click On**

2a Maintain User Page

2b "Approved" Users

	Name ▲▼	Domain Name ▲▼	Organization ▲▼	Status ▲▼	Start Date ▲▼	End Date ▲▼
☐				Approved	01/01/2013	04/30/2013

3. Click on Add

4. Add User pop-up appears

5. Enter or review the data for each of the required "*" fields:

a. **Enter** First Name

b. **Enter** Last Name

c. User Login ID will self populate but you can create your own ID

d. Keep Batch User default

e. **Enter** **User's** Date of Birth (required for password reset) (mm\dd\yyyy)

f. **Enter** Employee ID (12 number maximum, must be unique within the domain: do not use SSN)

g. Today's date appears in Start Date (You can change this date)

h. 12/31/2999 appears in Expiration Date to indicate no end date (You can change this date)

6. Click on Next

3 Click On

4 Add User Pop-up

5a Enter
5b Enter
5c
5d
5e Enter
5f Enter
5g
5h
6 Click on

7. Add User pop-up appears

8. Enter the data for each of the required "*****" fields:

  a. Enter Password (this will be the user's temporary password for their first log in to ProviderOne. The user will change it on their first log in.)

  b. Re-enter Confirm Password

  c. Enter Email (This email will be how ProviderOne will send the log in information to the user and for resetting passwords.)

  d. Enter Phone Number

  e. Other fields are optional

9. Click on Finish
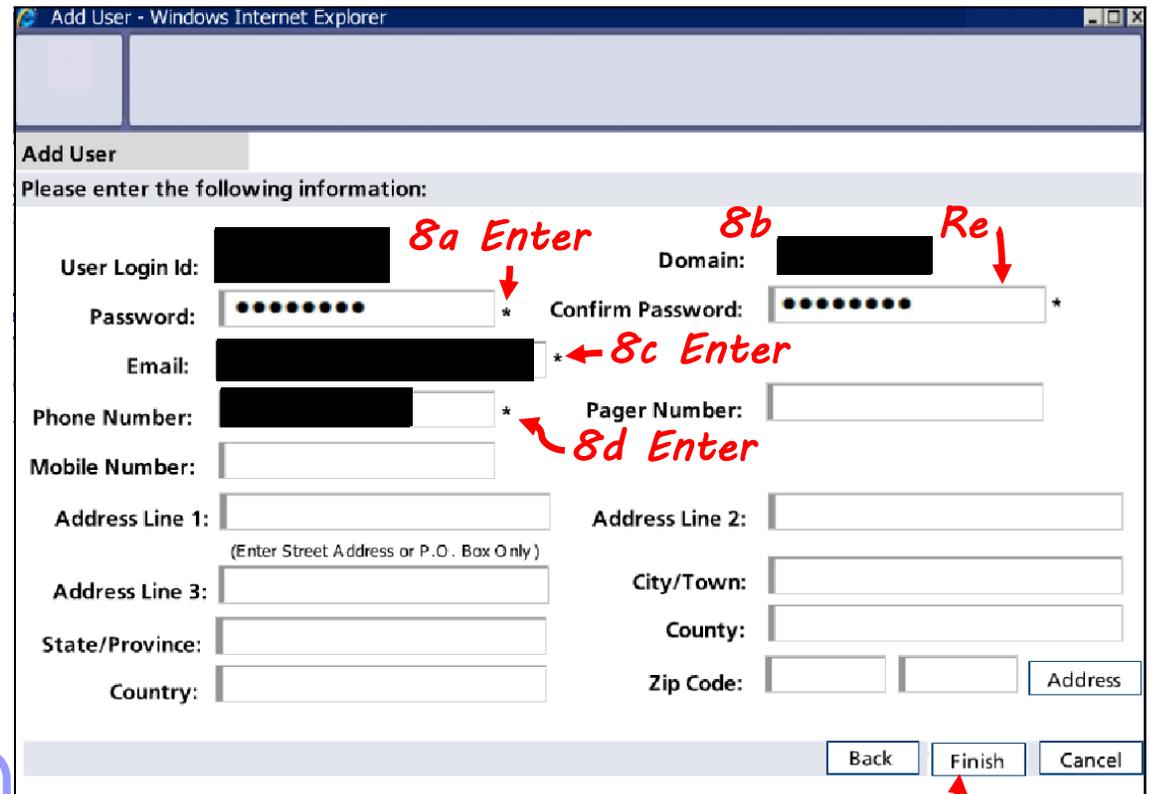
Password Requirements

- Cannot be the same as your last 3 passwords
- Must be at least 8 characters long
- Must contain at least one letter
- Must contain at least one number
- Must contain at least one of the following special characters:
  , . ! @ # $ % ^ & * ( ) _ + - < >

7 Add User Pop-up

Add User - Windows Internet Explorer

Add User

Please enter the following information:

User Login Id:

8a Enter   Domain: **8b   Re**

Password: •••••••• *   Confirm Password: •••••••• *

Email: *   **←8c Enter**

Phone Number: *   Pager Number:

8d Enter

Mobile Number:

Address Line 1:   Address Line 2:
(Enter Street Address or P.O. Box Only)

Address Line 3:   City/Town:

State/Province: County:

Country: Zip Code: Address

Back   Finish   Cancel

9 Click on

10. Manage User Page appears

11. Added user is In Review status

10 Manage User Page

11 →

12. To approve the new user:

   a. Click on box ☑ next to name

   b. Click on Approve

12b Click on

12a Click on

13. **a**. Pop-up appears

b. Click on OK

13a Pop-Up

13b Click on

14. Update Status Pop-up appears

a. "Approved" status

b. Note warning that "Associated profiles must be added and approved before user can access ProviderOne. You will do this in the next step.

c. Click on OK

14 Update Status Pop-Up

14b →

←14a

14c Click on
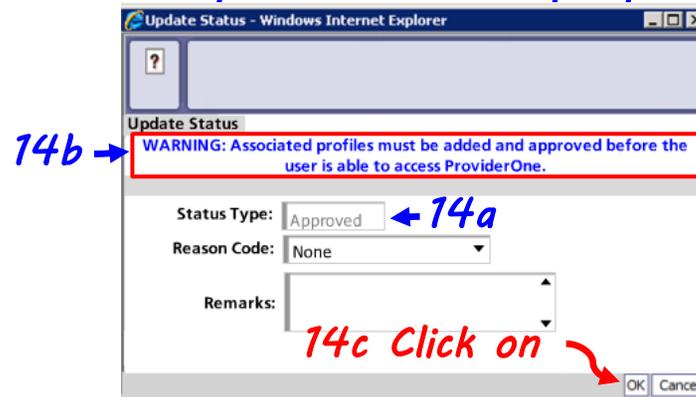
15. Approved status is shown. A user must be assigned a profile before they can access ProviderOne.

Manage User Page

15

The System Administrator assigns profiles to users within their domain. **Please Remember:** The profile acts as a "key", allowing the user access to different parts of the ProviderOne system on behalf of your domain (business). The social service profiles allow very broad authorities; in other words, by giving a user a profile you are granting the user the same authority as the System Administrator to bill and manage claims within ProviderOne.

1. a. From the Manage User Page

   b. Click on user name hyperlink

1a Manage User Page

1b Click On

2. User Details Page appears

3. Click on ▼ drop down menu

4. Select Associated Profiles

2 User Details Page

3 Click on

4 Select

5. a. Manage User Profiles Page appears

b. Click on Add

5a Manage User Profiles Page

5b Click on

"No Records Found!" is simply a default message displayed when no profiles have been added yet.

Most Social Service providers will generally see two profile options that can be assigned:

- **EXT Provider Social Service**: Allows a user to bill, manage claims, and access provider information.

- **EXT Provider System Administrator**: Profile is used to add and manage users within a domain.

Some providers will also have an EXT Provider Social Service Medical which allows a user to bill and manage medical claims.

6. Add New Profiles to User pop-up appears

7. Select a profile

8. Click on >>

9. Selected profile appears

10. Click on OK

6 Add New Profiles to User Pop-Up

Add User - Windows Internet Explorer   Links: --Select--

Add New Profiles to User:

User Name: Neel, Daniel

Start Date: 01/15/2013   **9**   End Date: 12/31/2999

7 Select → EXT Provider Social Services   EXT Provider Social Services
                EXT View Provider Social Services   >>
                EXT Provider Social Services Medica <

8 Click on

10 Click on

OK   Cancel
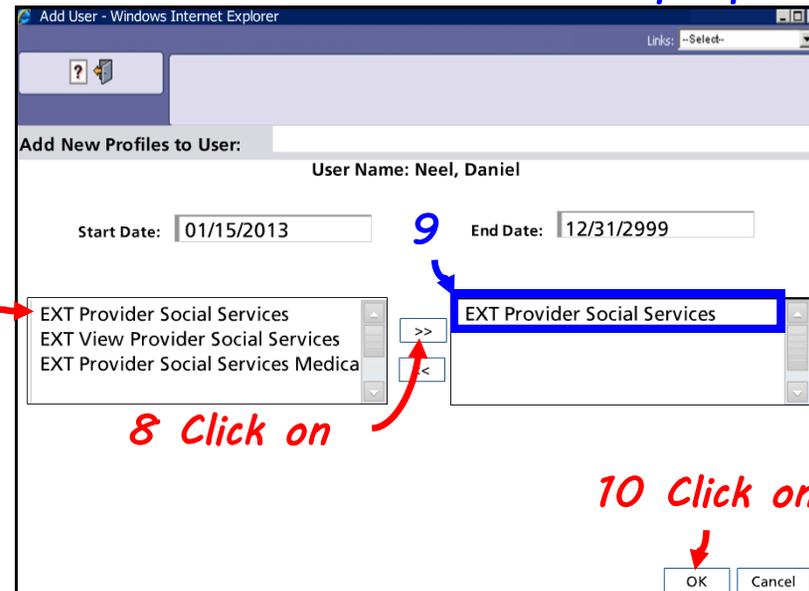
To remove a profile, use the << tab.

A user cannot work in ProviderOne without at least one profile activated.

11. Manage User Profiles List **appears**

12. **Click on** ⬇ drop down menu

13. **Select** All from the drop down menu

14. **Click on** Go

"All" shows all users within the domain regardless of their status. By default, ProviderOne will otherwise only show users in "Approved" status.

11 Manage User Profiles List

ProviderOne | My Inbox

Welcome ████████ You have logged in with **EXT Provider System Administrator** Profile.

Links: --Select--

Path: Provider Portal/ UserList/ UserDetails/ UserProfileList
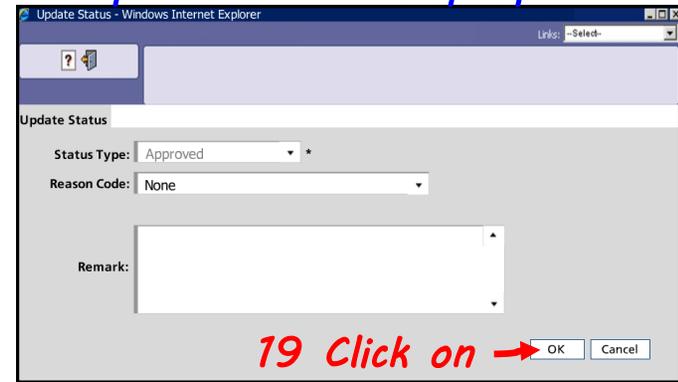
ProviderOne ID: ████████   **Name:** ████████

[Close] [Add] [Approve] [Reject]

12 Click on   *14 Click on*

Manage User Profiles:

Filter By: [　　　　▼] [　　　　　]   **With Status:** [Approved ▼] [Go]

13 Select

☐	Name ▲▼	Descri... ▲▼	Date ▼	End Date ▲▼	Status ▲▼

All
Approved
In Review
Rejected

No Reco...

15. The list changes to **show** new profile with a status of "In Review"

16. **Click on** box next ☑ to name

17. **Click on** Approve tab

17 Click on

[Close] [Add] [Approve] [Reject]

Manage User Profiles

Show: ---SELECT--- ▼

Filter By: [　　▼] [　　　] **With Status:** All ▼ [Go]

☐	Name △▼	Description ▲▼	Start Date ▲▼	End Date ▲▼	Status ▲▼
☑	EXT Provider Social Services	EXT Provider Social Services	10/27/2014	12/31/2999	In Review

<< Prev Viewing Page 1 Next >> [1] [Go] [Page Count] [SaveToXLS]

16

15

18. Update Status pop-up appears

18 Update Status Pop-up

19. Click on OK

19 Click on → OK

20 Click on

20. Status changes to |Approved

21. Click on Close

21

The new user can now work within ProviderOne. ProviderOne will use the email address provided for the new user to send the following information:

- Domain:
- User Name:
- Password:

After receiving the login information, the new user will need to follow the directions contained in the "Getting Started", the "Navigating" portion of "Navigating and Managing Data, and as needed, Solving Password and Login Issues."

The System Administrator can deactivate a user so that they cannot access ProviderOne. The user will still be listed in ProviderOne with an approved status but he/she will no longer have the ability to access the system.

1 Maintain User Page

1. From the Maintain User Page

2. Click on User's Name

3. The Maintain User Page appears

2 Click on

To change user information

4. The Systems Administrator can change the User's information (except for User Name) on the page.

5. Click on Save

6. Click on Close

3 User Details Page

5 Click on

6 Click on

4 Change

Deactivate a User

The System Administrator can deactivate a user so that they cannot access ProviderOne. The user will still be listed in ProviderOne with an approved status but he/she will no longer have the ability to access the system.

1 Maintain User Page

1. From the Maintain User Page

2. Click on User's Name

3. The Maintain User Page appears

2 Click on

Option 1

4. Deactivate User
   a. Click on Lock User check box
   b. Click on Save
   c. Click on Close

3 User Details Page

4b Click on

4a Click on

4c Click on

Note: Lock User: ☑

Means user is locked out of ProviderOne.

Path: Provider Portal/ UserList

ProviderOne ID: [redacted]   Name: [redacted]

User Details:

Field	
First Name:	Middle Name:
Last Name:	Lock User:
Date of Birth:	Domain:
EID:	User Type: Batch User
Username:	
Password:	Confirm Password:
Address Line 1:	Address Line 2:
(Enter Street Address or P.O. Box Only)	City/Town:
Address Line 3:	County:
State/Province:	
Country:	Zip Code:
Start Date: 01/15/2013	Expiration Date: 12/31/2999
Status: Approved	
Reason Code:	
Remarks:	

Option 2

5. Deactivate User. Enter today's date in the expiration field to make it effective the next day.

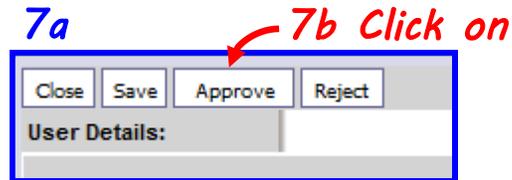**6.** Click on Save

User Details Page

6 Click on

5 Enter

7. **a**. The Approve and Reject buttons appears

   b. Click on Approve

7a

7b Click on

| Close | Save | Approve | Reject |

User Details:

8. **a**. Pop-up appears

   b. Click on OK

8a Pop-Up

Message from webpage

Record(s) approval will affect the period for associated entities. Do you want to continue?

OK   Cancel
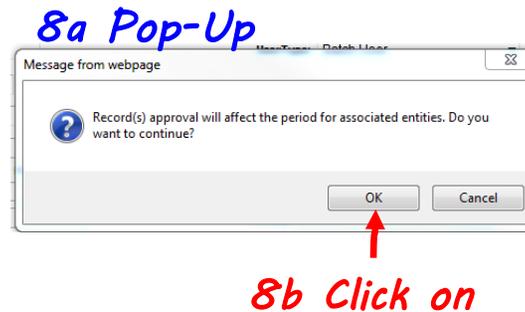
8b Click on

9. Update Status Pop-up appears

   a. Approved status

   b. Click on OK

9 Update Status Pop-up

Update Status

Status Type: Approved   *9a*
Reason Code: None

Remarks:

OK Cancel
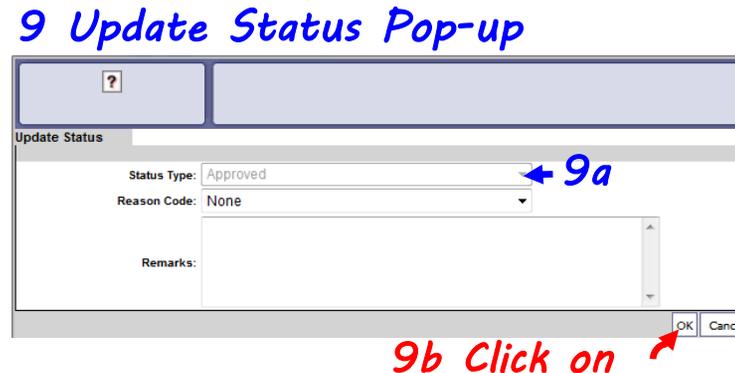
9b Click on

10. User Detail page appears showing only the Close and Save buttons

11. Click on Close

10 User Detail Page

11 Click on

12 Manage User Page

12. Managed User Page appears

13. User's end date shows

13