

# Senior Access Administrator (SAA) and Access Administrator (AA) Guide to User Management Tool

This tool is used by Senior Access Administrators (SAAs) and Access Administrators (AAs) to add, remove, and edit user profiles for the NPIs that they are administering.

## Opening the Access Management Tool

When the SAA or AA needs to maintain, edit, add, or remove a user(s) within their control, they can perform these activities on this page.

**Step 1:** Log into the Provider Portal – The SAA/AA can reach the Access Management screen by hovering over their name in the right corner of the screen or scrolling to the bottom of the page.

At the top of the page:



At the bottom of the page:



## Adding New Users

When a user needs access to the Tufts Health Plan Provider Portal, it is the responsibility of the SAA/AA to add access for the user. The SAA and AA have the ability to add the user by creating a new profile on their behalf.

**Step 1:** Proceed to the Access Management tool after logging into the Provider Portal.

### Access Management

Utilize the Access Management section to manage user access. With this tool, Senior Access Administrators and Access Administrators can locate and update access rights for all existing users and add new users as needed. Search by user details such as user name and email address or by provider to see a full list of users for each provider.

**Frequently Asked Questions**

- Can I update more than one user at a time?
- How do I access the users I manage?
- How do I find users with access to a certain provider?

SEARCH BY USERS

SEARCH BY PROVIDERS

APPLY BULK UPDATES

INACTIVE USER!

Search in one or multiple fields.

Full Name

Username

Email

Pending Approvals

All

CLEAR

SEARCH

### Users

Showing 0 out of 0 results.

Name	Username	Email	Highest Role	Pending Approvals
No data available in table				
Don't see who you're looking for? <a href="#">Add New User</a>				

Show 10 entries

Previous Next

**Step 2:** Click “Add New User.”

**Step 3:** Enter New User's Basic Information – The SAA/AA will be prompted to enter the new user's first name, last name, email address, phone number, and extension.

**Step 4:** Select New User's Role – The SAA/AA will select whether they want the new user to be an Access Administrator or an Access User. Access Administrators can assist the SAA/AA with reviewing other access requests, but Access Users are not able to reach the Access Management page to edit or create other user accounts.

## Reviewing Pending Access Requests from Users

When a user needs access to the Tufts Health Plan Provider Portal, it is the responsibility of the SAA or AA to review the access of the user. If an Access User creates their own profile, the request for access will be sent to the SAA/AA for the NPI. If the user is requesting to be an Access Administrator, the request must be reviewed by the Senior Access Administrator.

**Step 1:** Go to the Access Management page.

**Step 2:** Once on the page, there are a few ways a user can pull up a pending request:

- To pull all pending requests: Click the drop down under "Pending Approvals" and choose "Yes".
- To pull a specific request: Search the name of the pending user, search username, or search email.

**Step 3:** Once the pending request is pulled up, click the user's name to open the profile.

**Step 4:** To pull up the pending NPI requests:

- For users who report to multiple SAAs, select the SAA that you are reviewing for, or search by Provider NPI/Name to pull up the pending account.
- For users who report to one SAA, you can see the request without selecting anything further.

**Step 5:** Once the user can see the "Requested Access", the requesting user's NPI request and permissions request will appear. The reviewer will be able to approve the request as is or make alterations to the request by unchecking permissions that are not wanted and then approving or denying the request altogether.

## Performing Bulk Updates

This functionality is used when the SAA or AA wants to add multiple NPIs to a user or add one or more NPIs to multiple users at one time.

**Step 1:** Go into Access Management and select the “Apply Bulk Update” tab; then click “Begin Bulk Updates.”

The screenshot shows the 'Access Management' section. It includes a description of the tool and a 'Frequently Asked Questions' sidebar. The main navigation bar has four tabs: 'SEARCH BY USERS', 'SEARCH BY PROVIDERS', 'APPLY BULK UPDATES' (highlighted with a red box), and 'INACTIVE USERS'. Below the tabs, a text box explains the bulk update process, and a green 'BEGIN BULK UPDATES' button is highlighted with a red box.

**Access Management**

Utilize the Access Management section to manage user access. With this tool, Senior Access Administrators and Access Administrators can locate and update access rights for all existing users and add new users as needed. Search by user details such as user name and email address or by provider to see a full list of users for each provider.

**Frequently Asked Questions**

- Can I update more than one user at a time?
- How do I access the users I manage?
- How do I find users with access to a certain provider?

**SEARCH BY USERS   SEARCH BY PROVIDERS   APPLY BULK UPDATES   INACTIVE USERS**

Applying Bulk Updates allows you to apply permissions and/or provider access across multiple user accounts at once. Click the button below to begin the process of bulk updates.

**BEGIN BULK UPDATES**

**Step 2:** Select the provider(s) to add to the user(s). Search by Provider Name/ID or search by SAA. After entering the search criteria, click “Continue”.

The screenshot shows the 'Bulk Updates' section. It includes a description of the tool and a 'Frequently Asked Questions' sidebar. The main content area is titled 'Select a Provider' and contains a search bar for 'Provider Name/ID' and a dropdown for 'Select a Senior Access Administrator'. Below the search bar, there are 'CANCEL' and 'CONTINUE' buttons.

**Bulk Updates**

Utilize the Access Management section to manage user access. With this tool, Senior Access Administrators and Access Administrators can locate and update access rights for all existing users and add new users as needed. Search by user details such as user name and email address or by provider to see a full list of users for each provider.

**Frequently Asked Questions**

- Can I update more than one user at a time?
- How do I access the users I manage?
- How do I find users with access to a certain provider?

Select XYZ: Step 1 of 5

**Select a Provider**

Search for a provider to find their corresponding Senior Access Administrator (SAA), or select an SAA directly from the drop down.

**Provider Name/ID   Select a Senior Access Administrator**

Provider Name/ID   **Q** Select an SAA   **Q**

**CANCEL   CONTINUE**

**Step 3:** Select the users that this Bulk Update needs to be applied to by clicking the check box next to each user, or select all by clicking the box in the blue header to select all.

[illegible]

**Step 4:** Select the providers that this Bulk Update needs to be applied to by clicking the check box next to each provider, or select all by clicking the box in the blue header to select all.

## Bulk Updates

Utilize the Access Management section to manage user access. With this tool, Senior Access Administrators and Access Administrators can locate and update access rights for all existing users and add new users as needed. Search by user details such as user name and email address or by provider to see a full list of users for each provider.

### Frequently Asked Questions

[Can I update more than one user at a time?](#)

[How do I access the users I manage?](#)

[How do I find users with access to a certain provider?](#)

Grant Provider Access: Step 3 of 5

Select all providers you wish this group of users to have access to. If you do not wish to add additional provider access, you may skip this step or simply hit continue with any selections.

Search by Provider Name/ID

<input type="checkbox"/>	Provider Name	ID	Type
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

Show10entries

Previous

1

2

3

4

5

...

151

Next

CANCEL

GO BACK

CONTINUE

[SKIP THIS STEP >>](#)

**Step 5:** Select the permissions that this Bulk Update needs to be applied to, for each user in the Bulk Update.

**Bulk Updates**

Utilize the Access Management section to manage user access. With this tool, Senior Access Administrators and Access Administrators can locate and update access rights for all existing users and add new users as needed. Search by user details such as user name and email address or by provider to see a full list of users for each provider.

**Frequently Asked Questions**  
Can I update more than one user at a time?  
How do I access the users I manage?  
How do I find users with access to a certain provider?

Grant Permissions: Step 4 of 5

Select the appropriate box(es) to permit access: If a box is checked, this means the Providers will have access to these functions. Leaving a box unchecked will not remove a users access. If you do not wish to add additional permission access, you may skip this step or simply hit continue without selections.

<input type="checkbox"/> Actuarial Monthly	<input type="checkbox"/> Inpatient Notification Inquiry
<input type="checkbox"/> Actuarial Settlement	<input type="checkbox"/> Inpatient Notification Report
<input type="checkbox"/> Alternative Submission Method	<input type="checkbox"/> Inpatient Notification System
<input type="checkbox"/> Authorization Inquiry	<input type="checkbox"/> Lab Reports
<input type="checkbox"/> Authorized Inpatient Notification to Providers	<input type="checkbox"/> Membership Management
<input type="checkbox"/> Benchmark Report	<input type="checkbox"/> Office Visit Profile - #5
<input type="checkbox"/> CQM Reports	<input type="checkbox"/> PCHI Reports
<input type="checkbox"/> Cape Cod Referral Exception Form	<input type="checkbox"/> Pharmacy Performance Reports
<input type="checkbox"/> Care Plan / Central Enrollee Record	<input type="checkbox"/> Provider View SmartSheets
<input type="checkbox"/> Case Specific	<input type="checkbox"/> Read and Visible USFHP CQM Reports
<input type="checkbox"/> Claim Status Inquiry - Group	<input type="checkbox"/> Referral Inquiry
<input type="checkbox"/> Claim Status Inquiry - Single NPI	<input type="checkbox"/> Referral Submission
<input type="checkbox"/> Claims with Referrals Pending	<input type="checkbox"/> Senior Care Options
<input type="checkbox"/> Eligibility	<input type="checkbox"/> Submit Mental Health Service Request
<input type="checkbox"/> Externally Managed Inpatient Notification Updates	<input type="checkbox"/> View Actuate Reports
<input type="checkbox"/> Home Care Notification	

Select All | Clear All

CANCEL GO BACK CONTINUE SKIP THIS STEP >>

**Step 6:** Review all selected options and click “Submit” to finalize the Bulk Update request.

**Bulk Updates**

Utilize the Access Management section to manage user access. With this tool, Senior Access Administrators and Access Administrators can locate and update access rights for all existing users and add new users as needed. Search by user details such as user name and email address or by provider to see a full list of users for each provider.

**Frequently Asked Questions**  
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Review and Confirm: Step 5 of 5

Please review the details below and hit SUBMIT to complete your bulk update.

**Users**

**Providers**

**Permissions**

CANCEL GO BACK SUBMIT

## Editing User Permissions

Used to update which permissions users underneath them to the NPIs have access to. For example, if a user has access to referrals, but needs access to authorizations, the SAA/AA can go into Access Management and edit the permissions.

**Step 1:** Go to the Access Management page.

**Step 2:** Once on the page, there are a few ways that a user can pull up a user:

- Search by name
- Search by username
- Search by email address

**Step 3:** Once the user is pulled up, click the user’s name to open the profile.

**Step 4:** Go into the user's "Current Access" and click "Edit" next to the "Current Permissions" section.

The screenshot shows the 'CURRENT ACCESS' tab selected. Under 'User Role', it says 'Access User (AU)'. The 'Current Permissions' section has a blue 'edit' link next to it, which is highlighted with a red rectangular box. Below this, a text line states: 'These are the permissions which the user currently has access to:'. A list of permissions follows, arranged in two columns:

- Authorization Inquiry
- Authorized Inpatient Notification to Providers
- Eligibility
- Inpatient Notification Inquiry
- Inpatient Notification System
- Referral Inquiry
- Referral Submission
- Submit Mental Health Service Request

**Step 5:** Once the user clicks the edit button, the check boxes will appear. The SAA/AA can check or uncheck existing boxes to add or remove permissions. Upon completion of checking and unchecking the permissions, the SAA/AA can hit "Submit" to finalize the request.

The screenshot shows the 'Current Permissions (edit)' form. It starts with the title 'Current Permissions (edit)' and a sub-header 'These are the permissions which the user currently has access to:'. A red note states: 'Please Note: any changes to permissions will affect all providers in the table below.' Below this, there are two columns of permissions, each with a checked checkbox:

- ☒ Authorization Inquiry
- ☒ Authorized Inpatient Notification to Providers
- ☒ Eligibility
- ☒ Inpatient Notification Inquiry
- ☒ Inpatient Notification System
- ☒ Referral Inquiry
- ☒ Referral Submission
- ☒ Submit Mental Health Service Request

Below the permissions are links for 'Select All' and 'Clear All'. The next section is 'Available Permissions' with the text: 'These are additional permissions that are available for you to request. Select the appropriate box(es) to permit access:'. It lists two permissions with unchecked checkboxes:

- ☐ CQM Reports
- ☐ Read and Visible USFHP CQM Reports
- ☐ View Actuate Reports

Below these are links for 'Select All' and 'Clear All'. At the bottom are two buttons: 'CANCEL' (grey) and 'SUBMIT' (green).

## Editing User Roles

This functionality is used to edit a user from one role to another. For example, moving an Access Administrator down to an Access User or moving an Access User up to an Access Administrator.

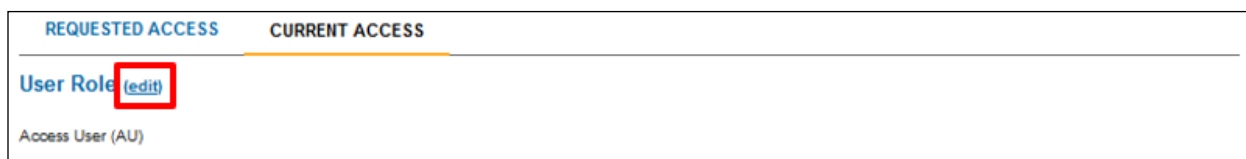
**Step 1:** Go into Access Management.

**Step 2:** Once on the Access Management page, there are a few ways that a user can pull up a user:

- a.) Search by name.
- b.) Search by username.
- c.) Search by email address.

**Step 3:** Once the user is pulled up, click the user's name to open the profile.

**Step 4:** Go into the user's "Current Access" and click "Edit" next to the "User Role" section.



The screenshot shows the 'CURRENT ACCESS' tab selected. Under the 'User Role' section, there is a link labeled '(edit)' which is highlighted with a red rectangular box. Below this, the text 'Access User (AU)' is visible.

**Step 5:** After clicking edit, a dropdown option will appear. From there, the SAA/AA selects between Access Administrator (AA) or Access User (AU).



The screenshot shows the 'CURRENT ACCESS' tab. The 'User Role' section now has a dropdown menu open. The dropdown list shows three options: 'Access User (AU)', 'Access Administrator (AA)', and 'Access User (AU)'. The first 'Access User (AU)' option is highlighted with a blue background.

**Step 5:** After selecting AA or AU access, click the "Submit" button to confirm the selection.

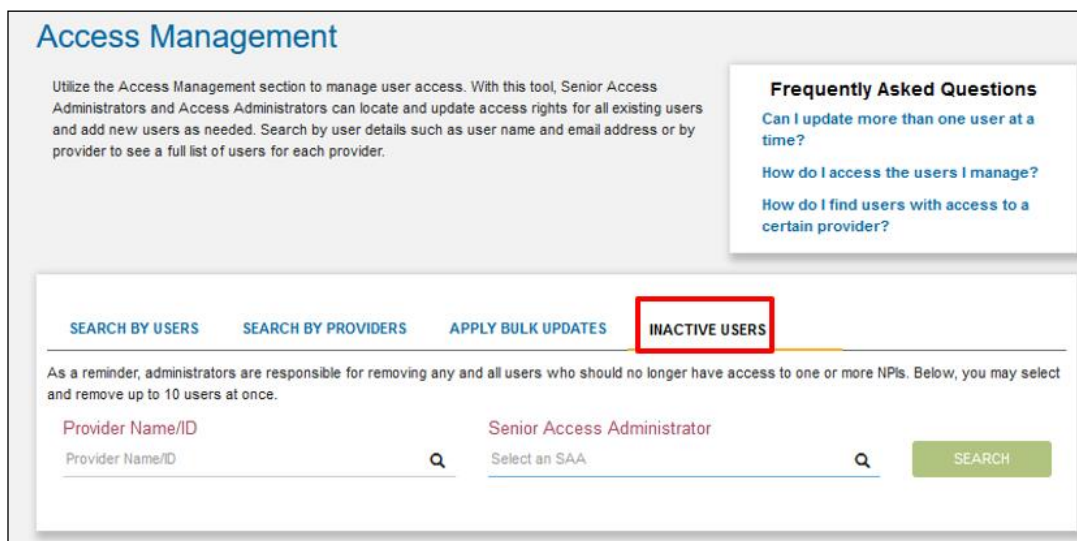


The screenshot shows the 'CURRENT ACCESS' tab. At the bottom of the form, there are two buttons: 'CANCEL' and 'SUBMIT'. The 'SUBMIT' button is highlighted with a red rectangular box.

## Reviewing Inactive Users

Utilized to update users with access for NPIs who may have become inactive.

**Step 1:** Pull up the Access Management screen, then click the tab for "Inactive Users".



The screenshot shows the 'Access Management' screen. At the top, there is a header with the title 'Access Management' and a description. Below the header, there are four tabs: 'SEARCH BY USERS', 'SEARCH BY PROVIDERS', 'APPLY BULK UPDATES', and 'INACTIVE USERS'. The 'INACTIVE USERS' tab is highlighted with a red rectangular box. To the right of the tabs, there is a 'Frequently Asked Questions' section with three questions. Below the tabs, there is a search bar with two input fields: 'Provider Name/ID' and 'Senior Access Administrator'. The 'SEARCH' button is highlighted with a green background.

**Step 2:** The SAA can search for the inactive users by:

- a.) Provider NPI
- b.) Provider Name
- c.) SAA

**Step 3:** Once the list is pulled up, the report will give you the information to pull up the user in the "Search By Users" tab to remove permissions and access.



## Removing Users

When a user no longer needs access to the Tufts Health Plan Provider Portal, it is the responsibility of the SAA or AA to remove the access of the user.

**Step 1:** Open Access Management and go into the “Search by User” or “Search by Providers” tab to pull up the user(s) who need to be removed. Click the name of the user to open the profile.

**Access Management**

Utilize the Access Management section to manage user access. With this tool, Senior Access Administrators and Access Administrators can locate and update access rights for all existing users and add new users as needed. Search by user details such as user name and email address or by provider to see a full list of users for each provider.

**Frequently Asked Questions**

- Can I update more than one user at a time?
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**SEARCH BY USERS** **SEARCH BY PROVIDERS** APPLY BULK UPDATES INACTIVE USERS

Search in one or multiple fields.

**Step 2:** To pull up the access of the user being reviewed:

- For users who report to multiple SAAs, select the SAA that you are reviewing for or search by Provider NPI/Name to pull up the access in the “Current Access” tab.
- For users who report to one SAA, you can view the access without selecting anything further in the “Current Access” tab.

**Step 3:** Check the boxes next to the NPIs that need access removed. (If you want to select all NPIs, check the box in the blue header section.)

**Step 4:** Once the appropriate boxes are checked, the “Remove Access” button will appear. Once all the applicable NPIs are selected, click “Remove Access” to submit and finalize the request.

**Step 5:** Once the NPIs have been removed by clicking the “Remove Access” button, the access will be terminated for the NPIs selected. If the SAA/AA wants to re-add access, they can do so later.

**REQUESTED ACCESS** **CURRENT ACCESS**

**User Role** ([edit](#))

Access User (AU)

**Current Permissions** ([edit](#))

These are the permissions which the user currently has access to:

- Authorization Inquiry
- Authorized Inpatient Notification to Providers
- CQM Reports
- Claim Status Inquiry - Group
- Claim Status Inquiry - Single NPI
- Eligibility
- Inpatient Notification Inquiry
- Inpatient Notification System
- Provider View SmartSheets
- Read and Visible USFHP CQM Reports
- Referral Inquiry
- Referral Submission
- Submit Mental Health Service Request
- View Actuate Reports

**Current Providers**

Search by Provider Name/ID

1 providers selected. [CANCEL](#)

**REMOVE ACCESS**

<input type="checkbox"/>	ID	Type	Name	Registered As	Registered Org	Role
<input checked="" type="checkbox"/>				IPA	-	AU
<input type="checkbox"/>				IPA	-	AU
<input type="checkbox"/>				IPA	-	AU
<input type="checkbox"/>				IPA	-	AU
<input type="checkbox"/>				IPA	-	AU
<input type="checkbox"/>				IPA	-	AU
<input type="checkbox"/>				IPA	-	AU
<input type="checkbox"/>				IPA	-	AU
<input type="checkbox"/>				IPA	-	AU
<input type="checkbox"/>				IPA	-	AU

Don't see who you're looking for? [Request New Provider](#)