Quick Reference Guide: Senior Access Administrator (SAA) and Access Administrator (AA) Guide to User Management Tools

This guide is to assist the Senior Access Administrator and Access Administrators to

ACCESSING USERMANAGENT TOOL

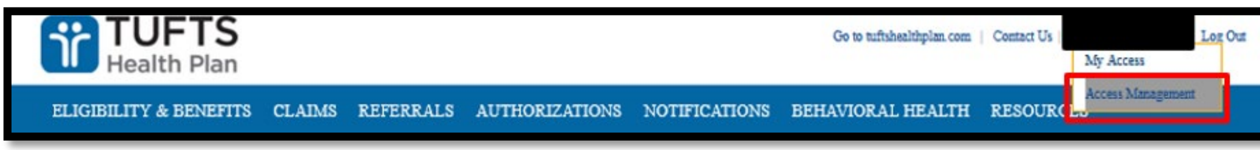
This tool is used by Senior Access Administrators (SAA) and Access Administrators (AA) to add, remove, and edit user's profiles for the NPIs that they are administrating.

Accessing the Access Management Tool

When the Senior Access Administrator or Access Administrator needs to maintain, edit, add, or remove the user(s) within their control, they can use this page to do all these activities.

Step 1: *Accessing Access Management after logging into Provider Portal* – The Senior Access Administrator or Access Administrator can access the access management screen by either 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:



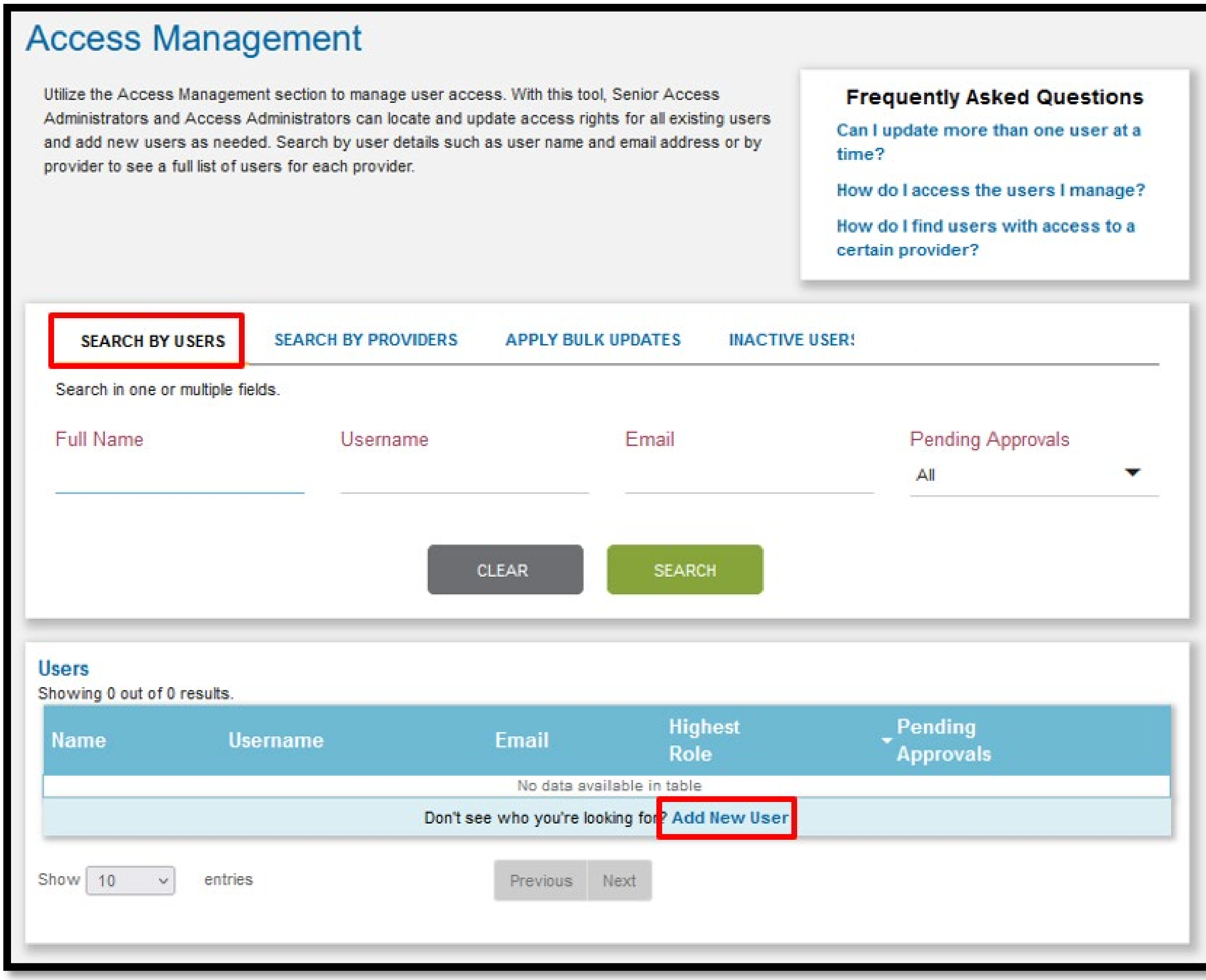
At the bottom of the page:

How to Add New Users

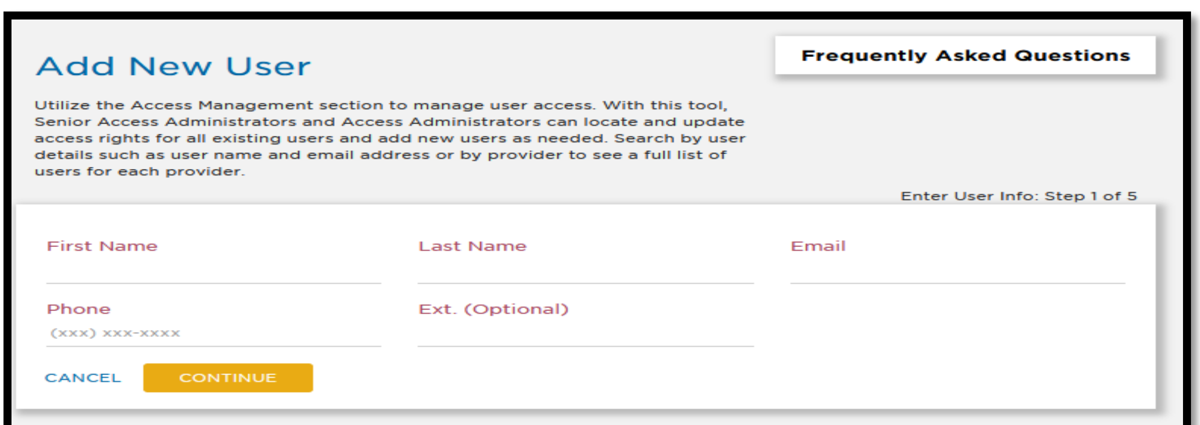
When a user needs access to the Tufts Health Plan provider portal, it is the responsibility of the SAA or AA to add the access of the user. The SAA or AA have the ability to add the user by creating a new profile on their behalf. This section of the guide is to assist and walk the SAA/AA through performing this function.

Step 1: *Proceed to the Access Management tool after logging into Provider Portal* – The Senior Access Administrator or Access Administrator can access the access management screen by either hovering over their name in the right corner of the screen or scrolling to the bottom of the page.

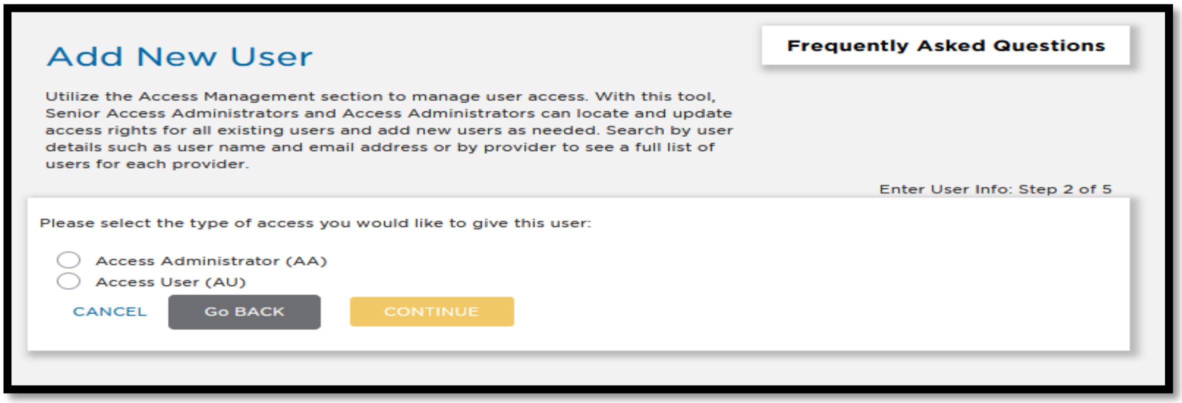
Step 2: *Click "Add New User"* – The Senior Access Administrator or Access Administrator proceeds to click "Add New User".



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



Step 4: *Select the New User's New Role* – The SAA/AA will select whether they want the new user to be an access administrator or an access user. Access Administrators will be able to assist the SAA/AA with reviewing other access requests, but the Access Users are not able to access the access management page to edit or create other user's 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 and AA(s) for the NPI. If the user is requesting to be an access administrator, the request must be reviewed by the senior access administrator.

Ordered list:

Step 1: Have the SAA/AA go into access management.

Step 2: Once on the access management page, there a few ways of a user can pull up a pending request:

- **a.) To Pull All Pending Requests**: If you want to pull all pending requests up, click the drop down under "Pending Approvals" and choose "yes"
- **b.) To Pull A Specific Request**: If the SAA/AA is pulling up a specific pending request, you can 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

- **a.) for user's 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.
- **b.) for users who report to one SAA**, you can see the request without selecting anything further.

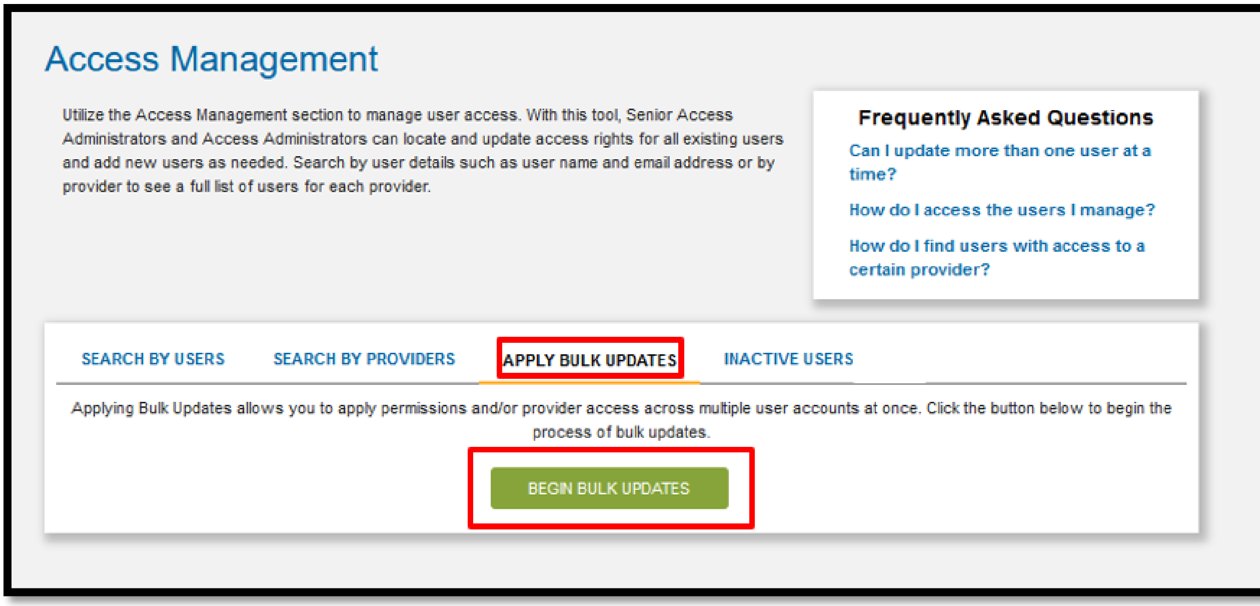
Step 5: Once the user can see the "Requested Access", the requesting user's NPI request and permissions request will appear. The reviewer will be able to approve request as is or make alterations to the request by unchecking permissions that are not wanted and then approving or denying the request altogether.

Performing a Bulk Update

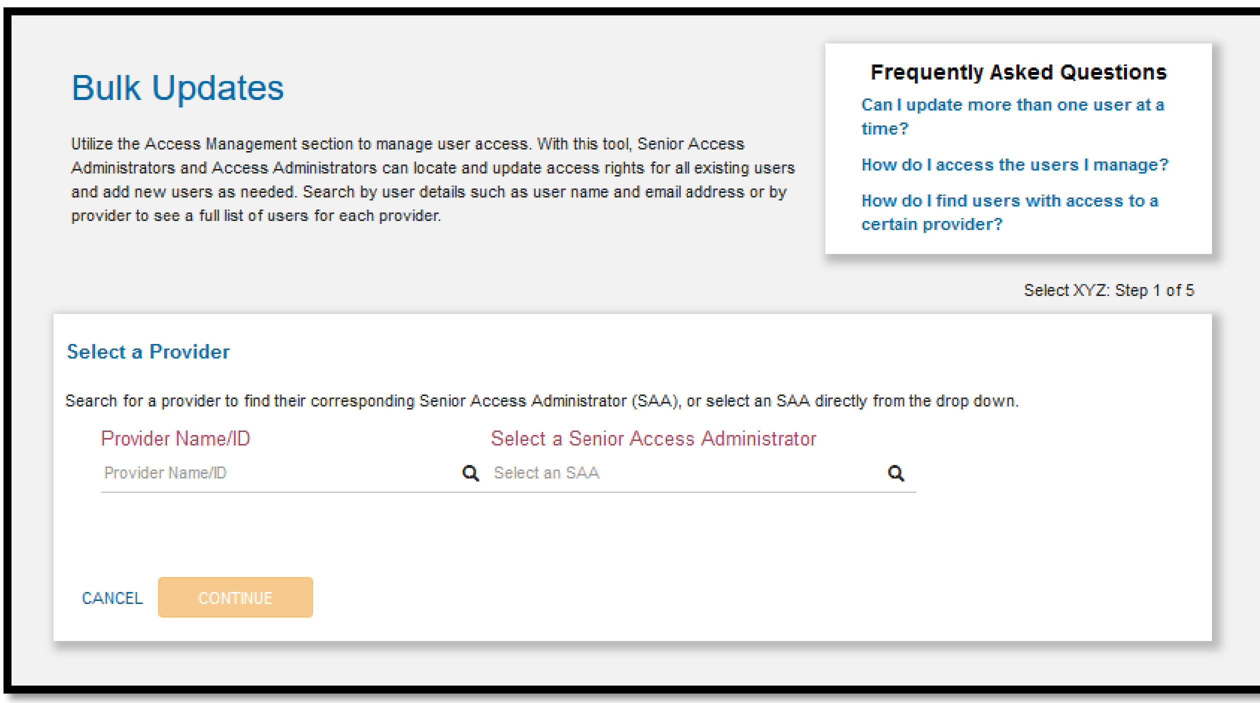
This functionality is used when the SAA or AA wants to update by adding multiple NPIs to a user or add one or more NPI(s) to multiple users at one time.

Ordered list:

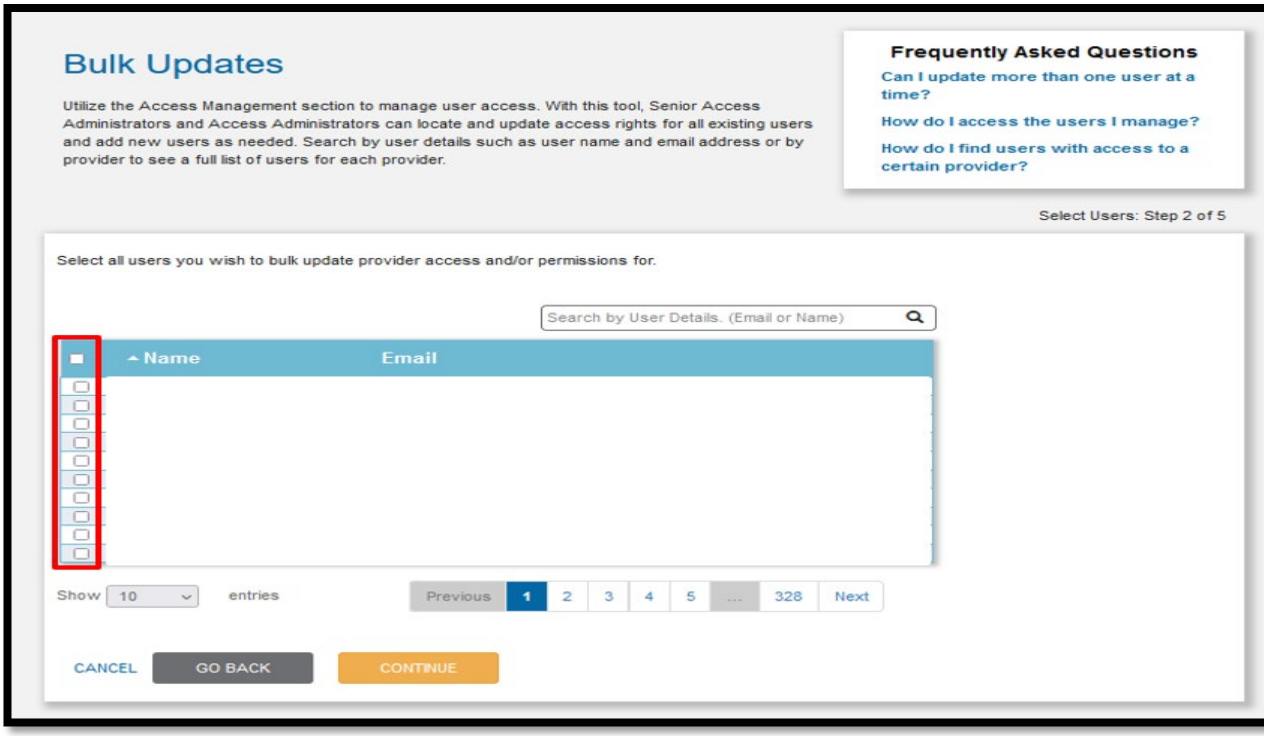
Step 1: Go into Access Management and select the "Apply Bulk Update" tab then click "Begin Bulk Updates"



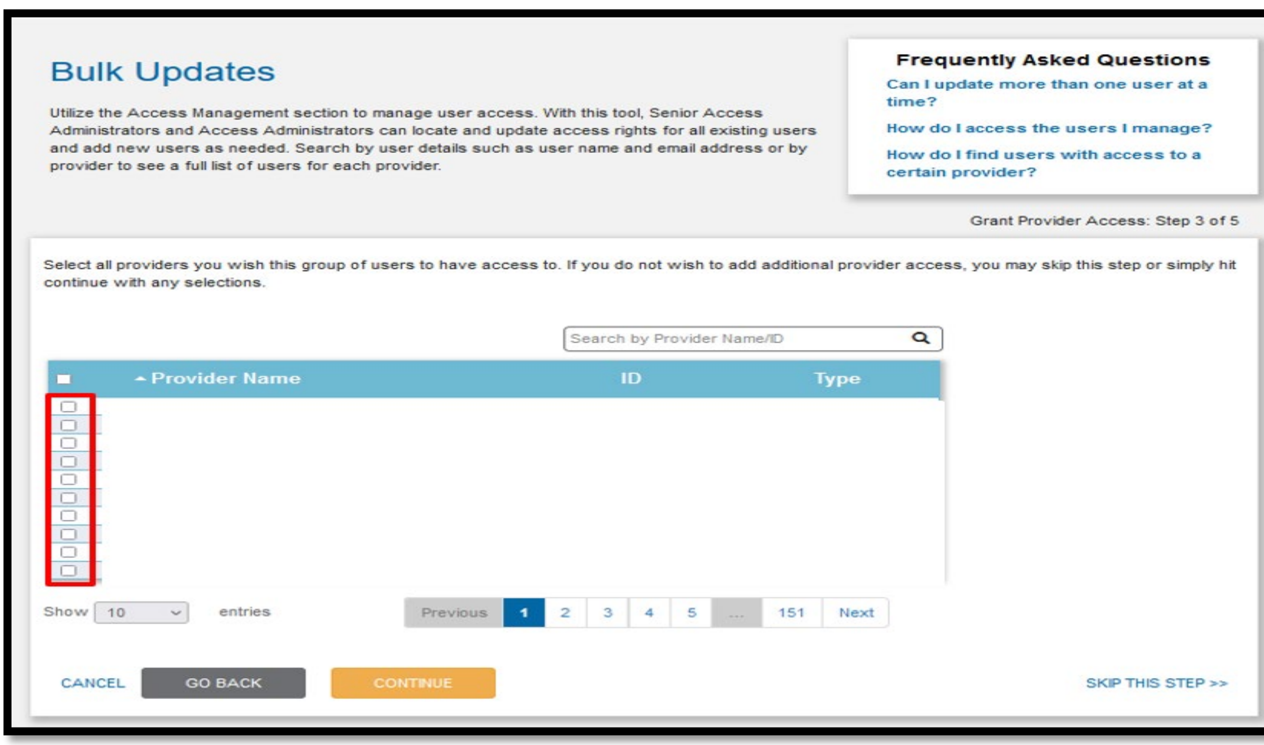
Step 2: *Selecting the Provider(s) to add to the user(s)*: user can search by Provider Name/ID or searching the SAA. After putting in the search criteria, click "Continue".



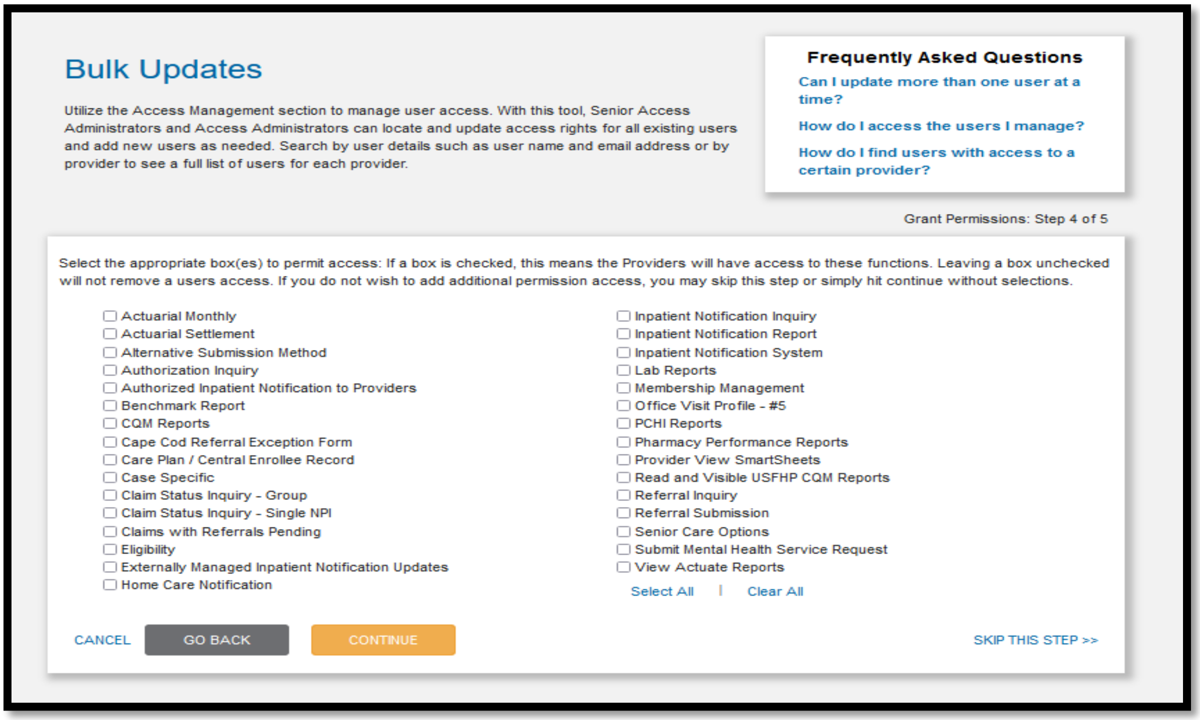
Step 3: Select the users that this bulk update needs to be applied to by clicking the check box by each user or selecting all by clicking the box in the blue header to select all.



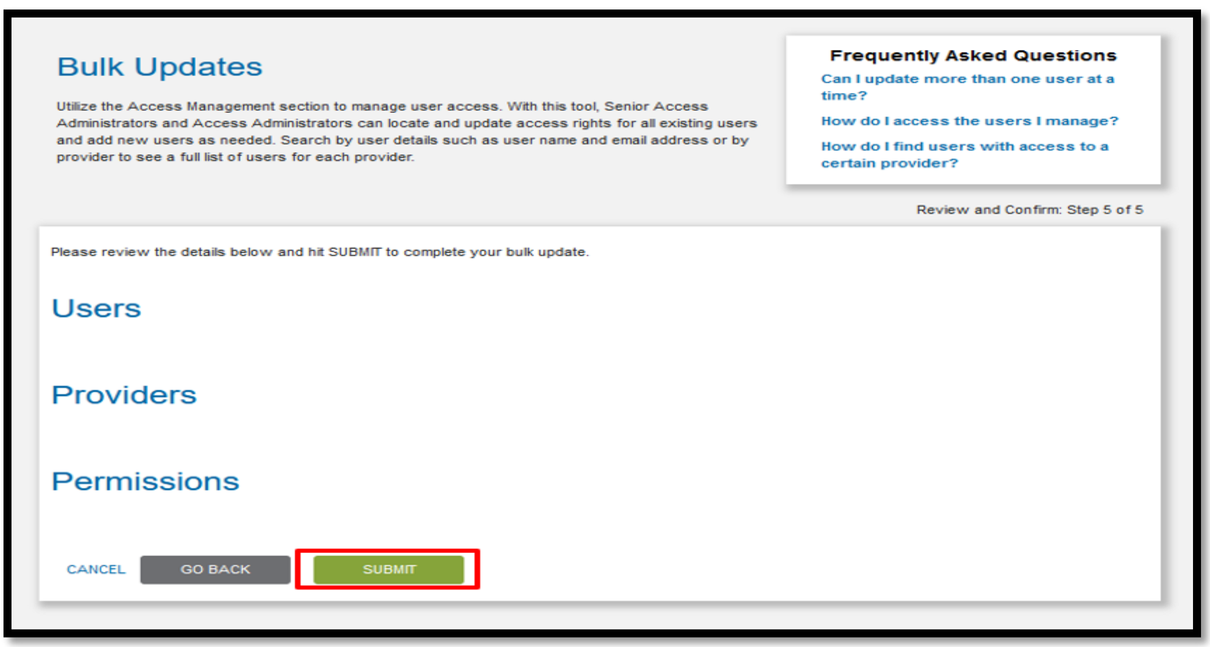
Step 4: Select the providers that this bulk update needs to be applied to by clicking the check box by each provider(s) or selecting all by clicking the box in the blue header to select all.



Step 5: Select the permissions that this bulk update needs to be applied to each user in this Bulk Update.



Step 6: Review all selected options and click submit to finalize the Bulk Update request.



Editing User Permissions

When the SAA or AA wants to update what permissions users underneath them to the NPIs they 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

Ordered list:

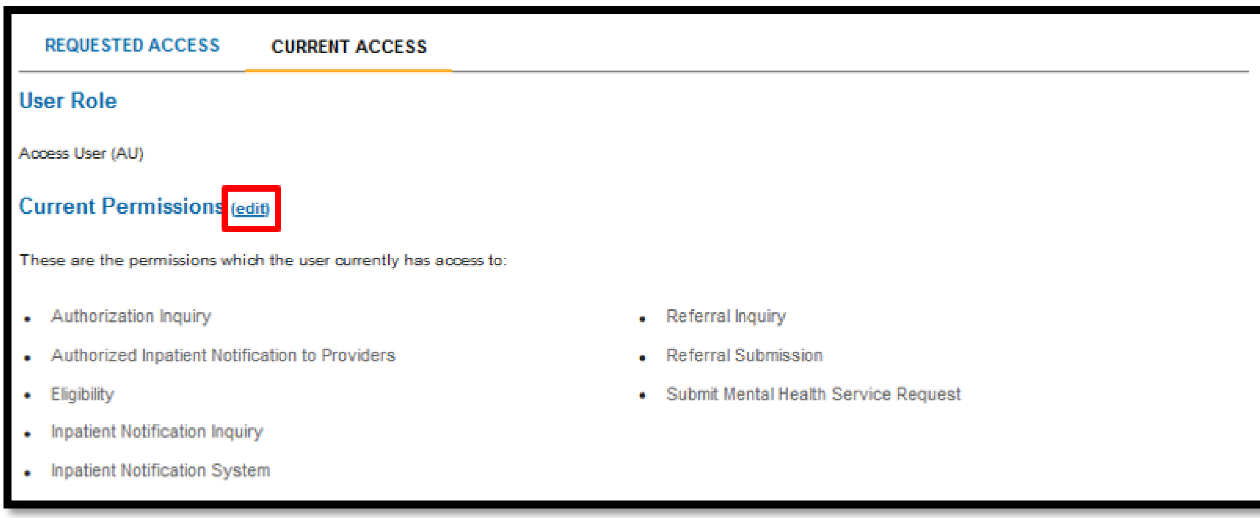
Step 1: Have the SAA/AA go into access management.

Step 2: Once on the access management page, there a few ways of a user can pull up a user:

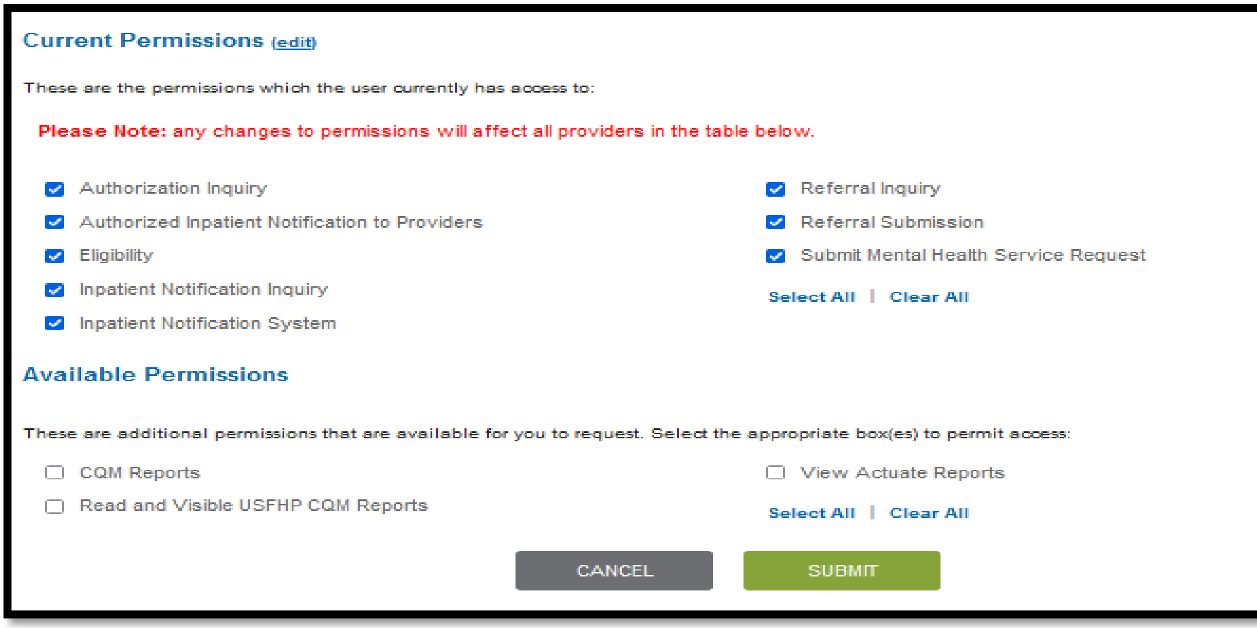
a.) searching by name
b.) searching by username
c.) searching by email address

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.



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.



Editing a User's Role

This functionality 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.

Ordered list:

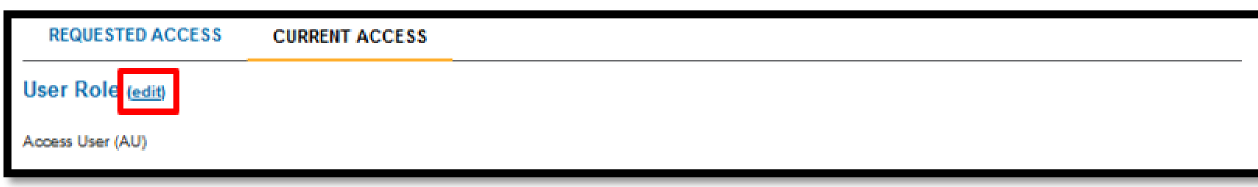
Step 1: Have the SAA/AA go into access management.

Step 2: Once on the access management page, there a few ways of a user can pull up a user:

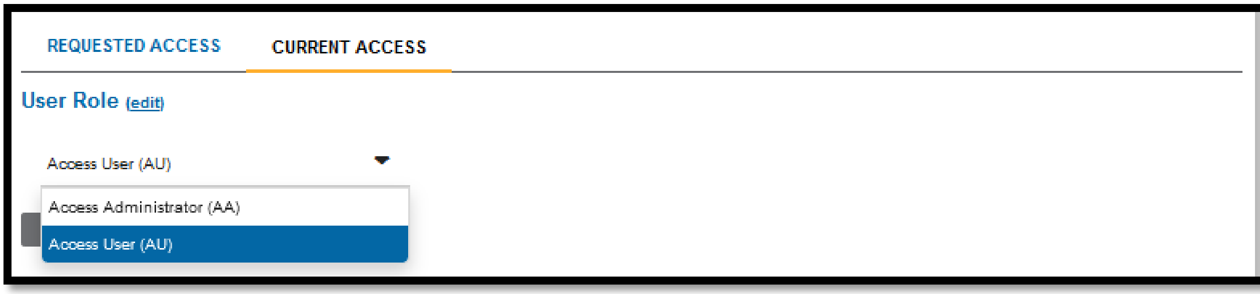
a.) searching by name
b.) searching by username
c.) searching by email address

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.



Step 5: After hitting edit, a dropdown option will appear. The SAA/AA can select between AA or AU to make the user for the NPIs involved.



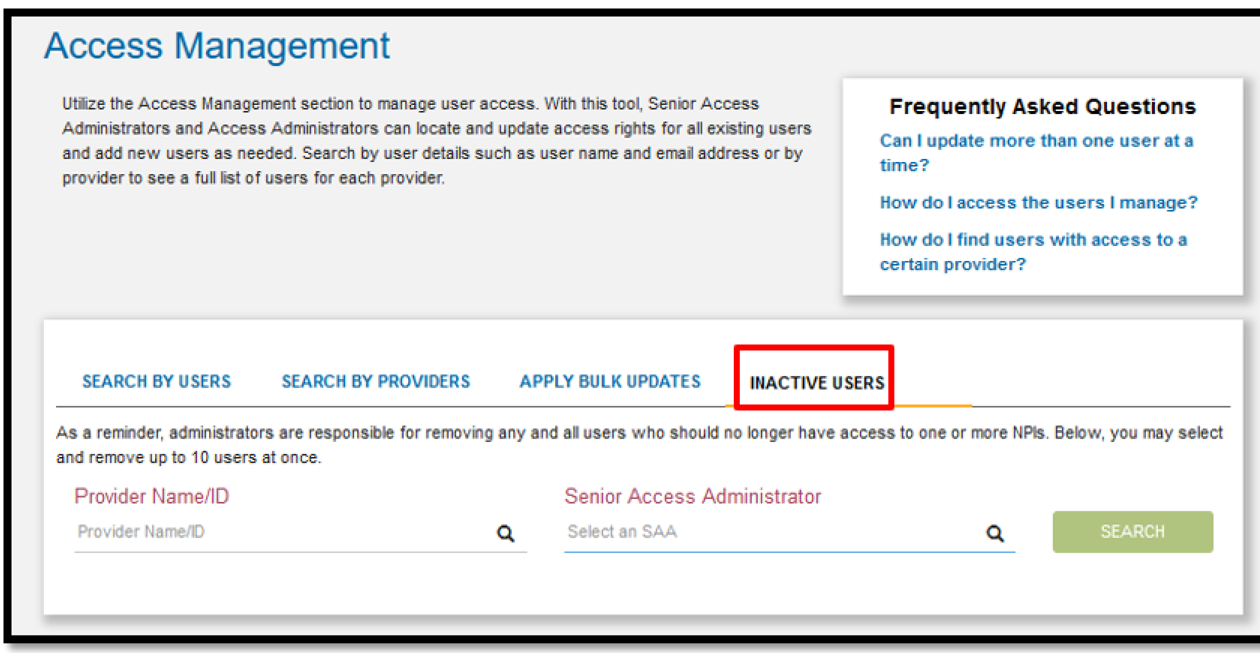
Step 5: After picking between AA or AU access, click the "Submit" button to confirm the selection.

Reviewing Inactive Users

When the SAA or AA wants to update users with access for NPI(s) who may have become inactive due to leaving the company or being on leave of absence.

Ordered list:

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



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

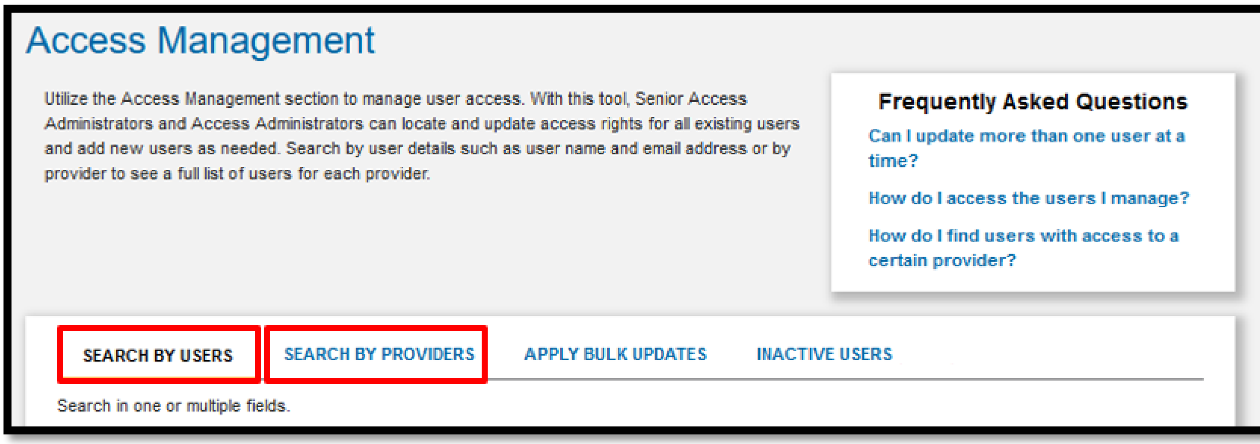
a.) Provider NPI

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. This section of the guide is to assist and walk the SAA/AA through performing this function.

Ordered list:
Step 1: Open "Access Management" and go into either the "Search by User" or "Search by Providers" tabs to pull up the user(s) who need to be removed. Click the name of the user to open the profile.



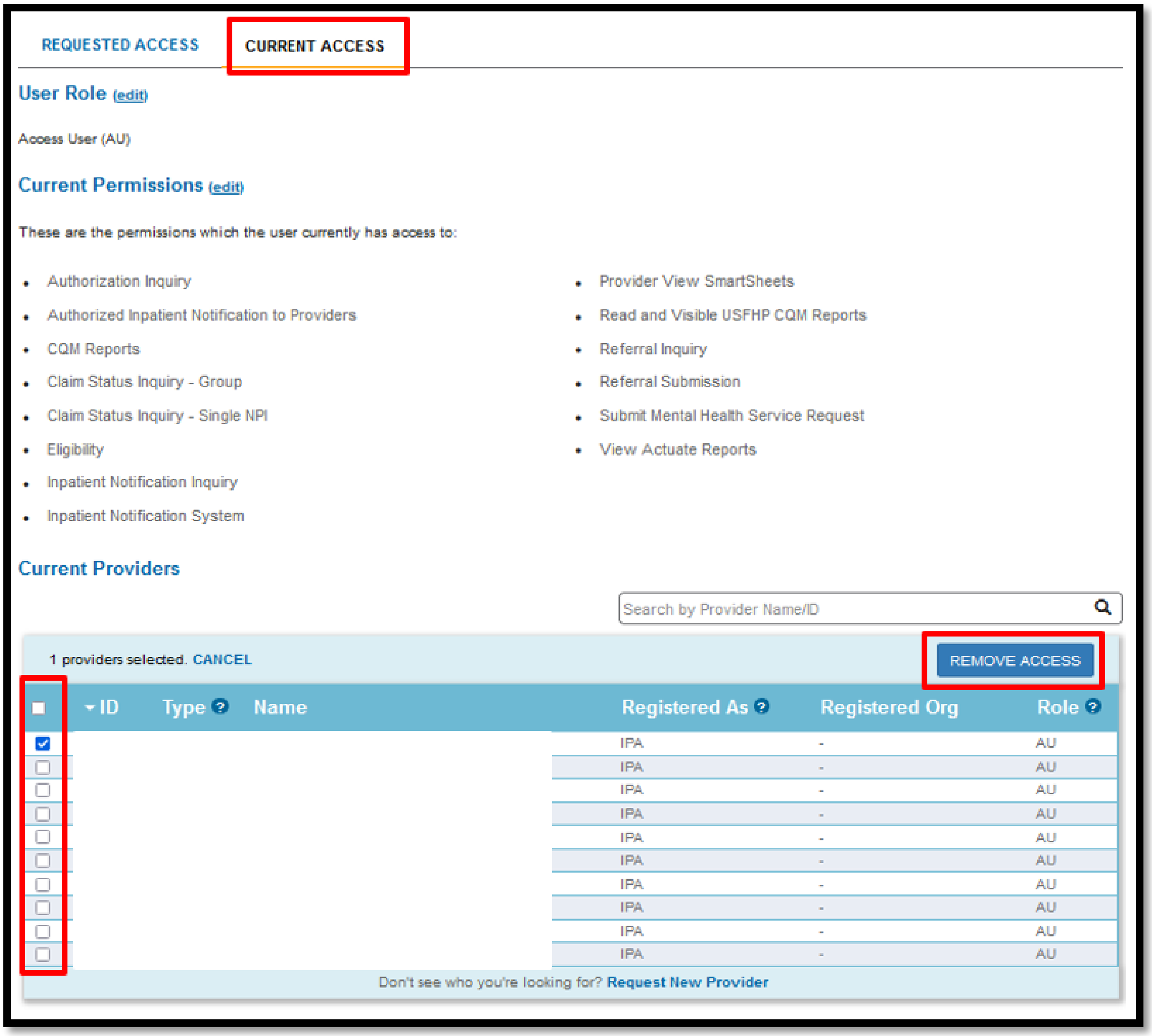
Step 2: To pull up the access of the user being reviewed:

a.) For user's 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"
b.) For users who report to one SAA, you can see the access without selecting anything further in the "Current Access" tab

Step 3: Check the boxes next to the NPI(s) 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 NPI(s) are selected, please 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 NPI(s) selected. If the SAA/AA want to re-add access, they are able to 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
ID
Type
Name
Registered As
Registered Org
Role
IPA
AU
Don't see who you're looking for? Request New Provider