

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

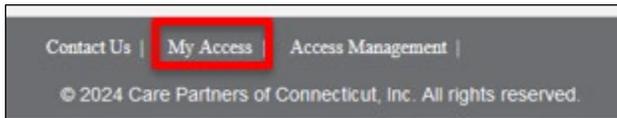
When the SAA or AA needs to maintain, edit, add, or remove a user(s) within their control, they can perform these activities on this page.

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:



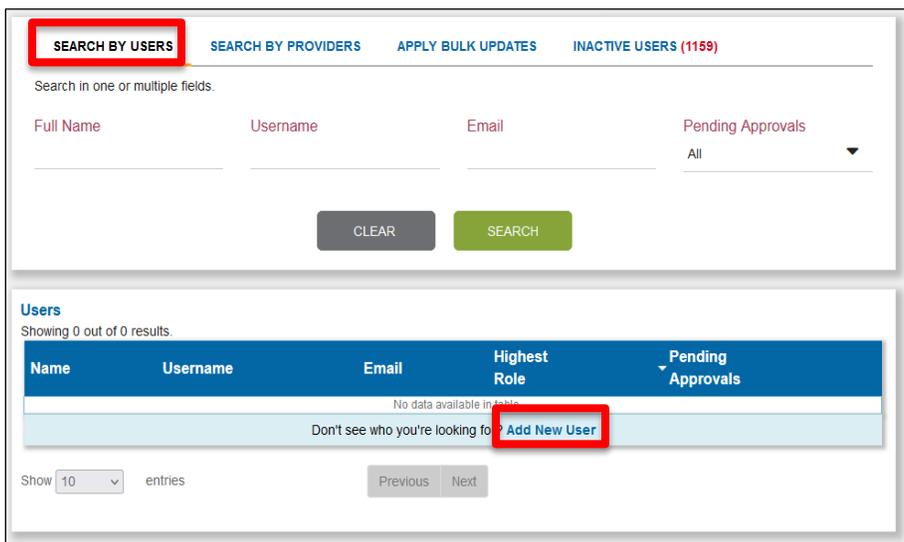
At the bottom of the page:



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.



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.

Add New User [Frequently Asked Questions](#)

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.

Enter User Info: Step 1 of 5

First Name Last Name Email

Phone (xxx) xxx-xxxx Ext. (Optional)

[CANCEL](#) [CONTINUE](#)

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.

Add New User [Frequently Asked Questions](#)

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.

Enter User Info: Step 2 of 5

Please select the type of access you would like to give this user:

Access Administrator (AA)
 Access User (AU)

[CANCEL](#) [Go BACK](#) [CONTINUE](#)

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:

- a.) To pull all pending requests: Click the drop down under "Pending Approvals" and choose "Yes".
- b.) 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:

- a.) 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.
- 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 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. At the top left, there is a heading 'Access Management' and a paragraph explaining the tool's purpose. To the right, a 'Frequently Asked Questions' box contains three questions. Below this is a navigation bar with four tabs: 'SEARCH BY USERS', 'SEARCH BY PROVIDERS', 'APPLY BULK UPDATES', and 'INACTIVE USERS'. The 'APPLY BULK UPDATES' tab is highlighted with a red box. Below the navigation bar, a paragraph explains that bulk updates allow applying permissions across multiple user accounts at once. At the bottom, a green button labeled 'BEGIN BULK UPDATES' is highlighted with a red box.

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. At the top left, there is a heading 'Bulk Updates' and a paragraph explaining the tool's purpose. To the right, a 'Frequently Asked Questions' box contains three questions. Below this is a progress indicator 'Select XYZ: Step 1 of 5'. The main content area is titled 'Select a Provider' and contains a paragraph explaining the search process. Below this are two search fields: 'Provider Name/ID' and 'Select a Senior Access Administrator'. The second field contains the text 'Select an SAA'. At the bottom, there are two buttons: 'CANCEL' and '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.

Select all users you wish to bulk update provider access and/or permissions for.

Search by User Details. (Email or Name)

<input type="checkbox"/>	Name	Email
<input type="checkbox"/>		

Show 10 entries Previous 1 Next

CANCEL GO BACK CONTINUE

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.

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"/>			

Show 10 entries Previous 1 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
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?

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:

- 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 "Current Permissions" section.

The screenshot shows a user interface with two tabs: "REQUESTED ACCESS" and "CURRENT ACCESS". The "CURRENT ACCESS" tab is active. Below the tabs, the "User Role" is listed as "Access User (AU)". The "Current Permissions" section has an "edit" link next to it, which is highlighted with a red square. Below this, a list of permissions is shown:

- 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 screen. It includes a "Please Note" warning: "Please Note: any changes to permissions will affect all providers in the table below." Below this, there are two columns of permissions. The first column contains permissions that are currently checked (indicated by blue checkmarks):

- Authorization Inquiry
- Authorized Inpatient Notification to Providers
- Eligibility
- Inpatient Notification Inquiry
- Inpatient Notification System

The second column contains permissions that are currently unchecked:

- Referral Inquiry
- Referral Submission
- Submit Mental Health Service Request

Below these are links for "Select All" and "Clear All".

Below the current permissions is the "Available Permissions" section, which includes permissions that are currently unchecked:

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

Below these are links for "Select All" and "Clear All". At the bottom of the form 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.

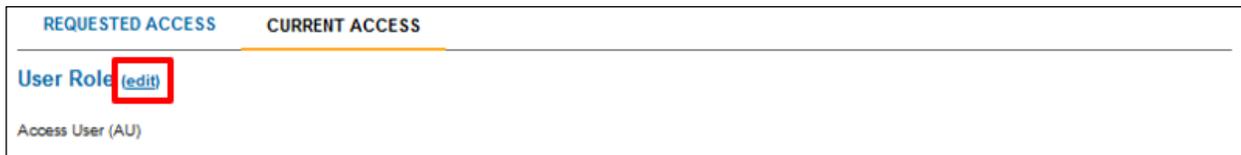
Step 1: Go into Access Management.

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.

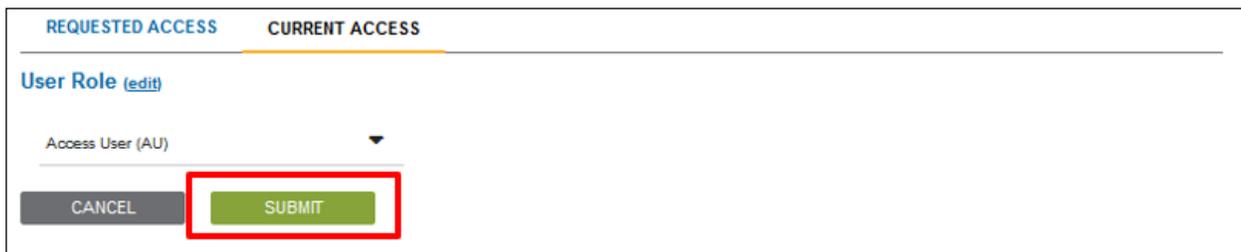
Step 4: Go into the user's "Current Access" and click "Edit" next to the "User Role" section.



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



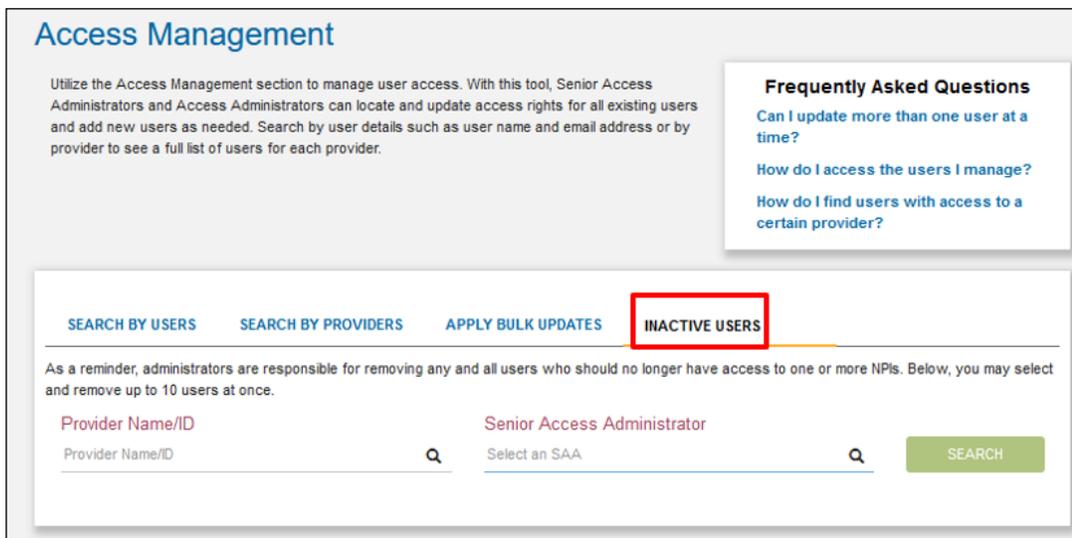
Step 5: After selecting AA or AU access, click the "Submit" button to confirm the selection.



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".



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

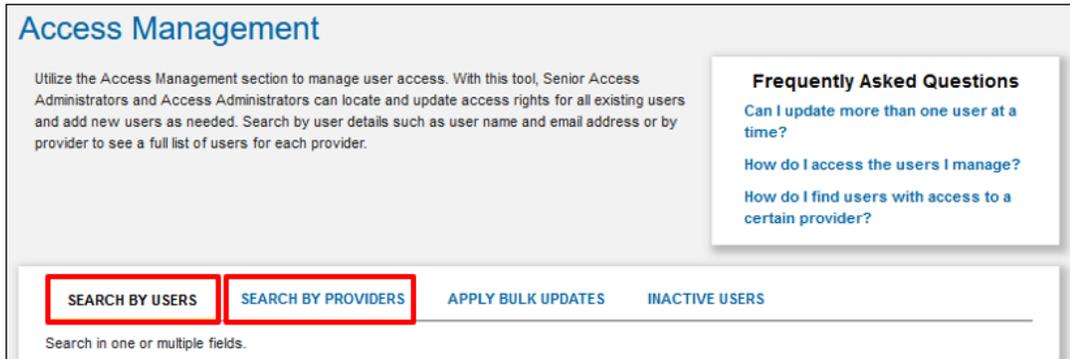
- a.) Provider NPI
- b.) Provider Name
- c.) SAA

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.



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.

