

This document is for Provider Administrators of the UCare Provider Portal. Other users should view the Provider Portal User Guide.

It shows the steps for executing User Management functionality in the new Provider Portal.

A key for formatting in this document is as follows:

- *Italic font* – indicates something seen in the system. Things like headers, field names and titles on buttons.
- **Bold font** – indicates what you are taking an action on, for example, the button or link to be clicked or the text to be entered.

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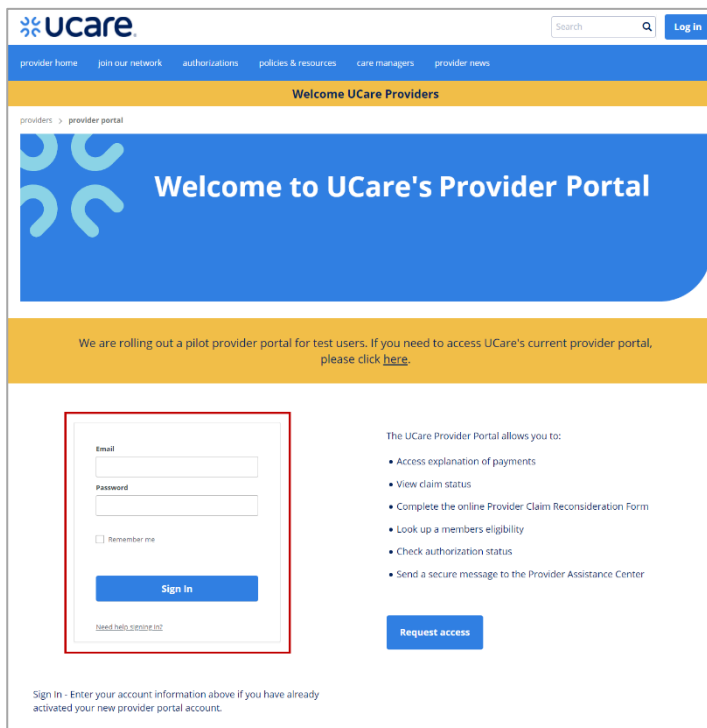
## Sign into Provider Portal

After setting up your new access per the UCare Provider Admin Setup Guide, go to the Provider Portal login page on the UCare website.

Enter the following information into the *Sign In* box:

- **Email**
- **Password**

Then, click the **Sign In** button.



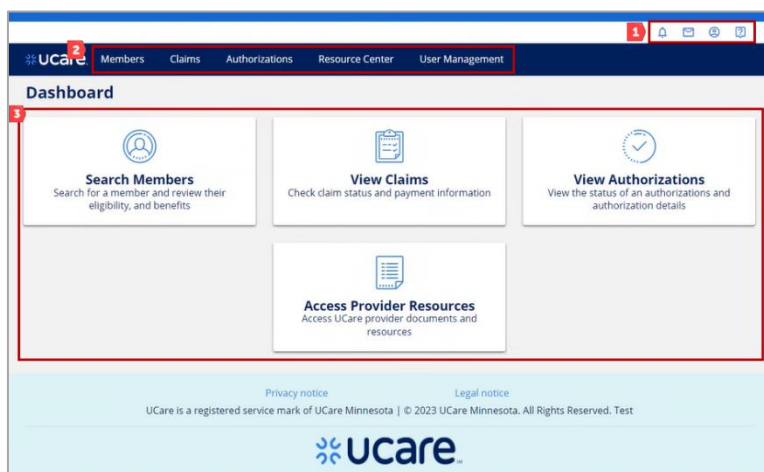
## Provider Portal Homepage

The Homepage of the UCare Provider Portal is referred to as the *Dashboard*.

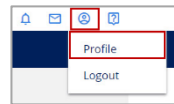
Several areas help the user navigate the functionality they may wish to access:

1. Navigation tools
2. Dashboard header row
3. Dashboard tiles

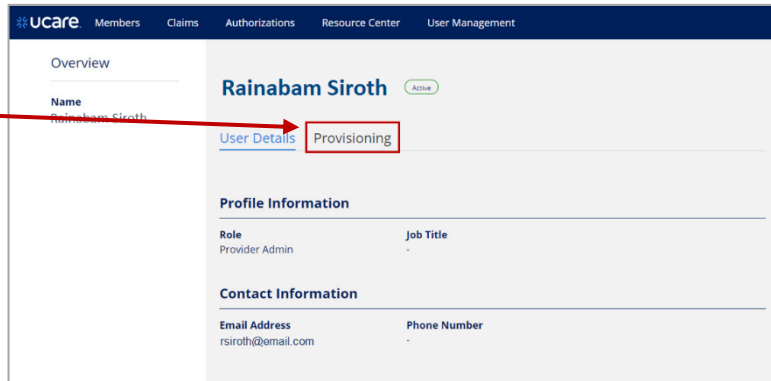
On the next page we will examine your profile. Further explanation of the areas outlined here are elaborated on in the Provider Portal User Guide.



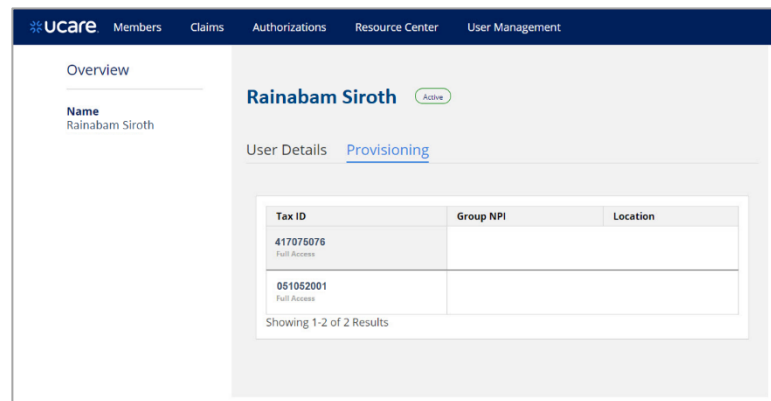
Click **Profile** to view the details of your user profile.



To confirm the TINs you administer, click on the **Provisioning** tab.



Here you will see all TINs for which you are the Administrator. You are given *Full Access* to the TINs by the UCare Administrator.



## User Management

Under *User Management* the Provider Admin can add and edit the user profiles and access rights for each of your organization's Tax ID Number(s) (TIN) that the Provider Admin oversees.

Click the **User Management** link on the header row to go to the *Manage Portal Users* page.

### User Management

First Name	Last Name	Email Address	Role	Status
test	test	ucareproviderportal+77@gmail.com	Provider Financial Office Staff	Pending
UCARE	PROVIDER	ucareproviderportal+40@gmail.com	Provider Admin	Active
Test 1	Test 3	ucareproviderportal+42@gmail.com	Provider Admin	Active
sdkjfs	azlsjdf	aldskfj@lskjdf.com	Provider Office Staff	Pending

## Add a New User

To add a new user to your organization from the *Manage Portal Users* page, click the **New User** button.

When adding a User from a third-party entity, the decision to provide access is up to your organization. You are able to set up a new third-party user after submitting a Third-Party Authorization form found [here](#).

**NOTE:** If there is ever a need to remove access from a user, our recommended Best Practice is to set that user's access back to *No Access* as you see on this image.

View further explanation in the section called [No Access Permissions](#).

First Name	Last Name	Email Address	Role	Status
Ann	Hill	ucareproviderportaluat+05@gmail.com	Provider Admin	Active
Deneace	Tucek	dtucek@ucare.org	Provider Office Staff	Provisioned
Linmathusa	Mansurich	lmansurich@email.com	Provider Office Staff	Provisioned

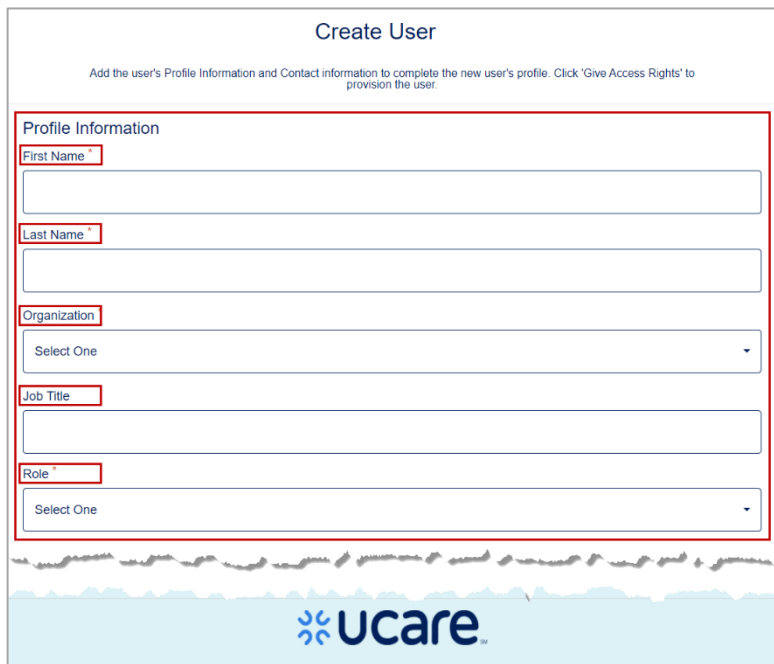
Enter the new user's *Profile Information* and *Contact Information* as outlined below.

Profile Information:

- **First Name**
- **Last Name**
- **Organization**
- **Job Title** = [use "Third-Party" for a third-party user]
- **Role** = choices are either: User, or Financial User.

Users can access all portal functions except confidential financial and care management reports. Most individuals will be set up with this profile.

Financial Users can access all portal functions, including confidential financial and care management reports.



**Create User**

Add the user's Profile Information and Contact information to complete the new user's profile. Click 'Give Access Rights' to provision the user.

**Profile Information**

First Name \*

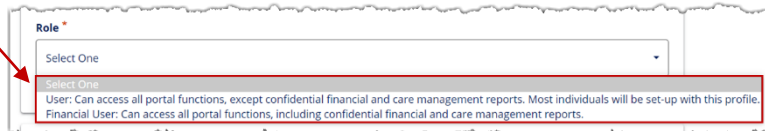
Last Name \*

Organization

Job Title

Role \*

Ucare logo



Role \*

Select One

Select One

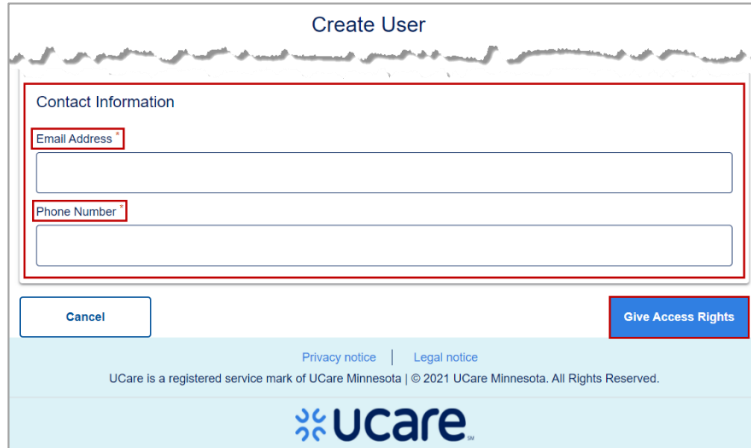
User: Can access all portal functions, except confidential financial and care management reports. Most individuals will be set-up with this profile.

Financial User: Can access all portal functions, including confidential financial and care management reports.

## Contact Information:

- **Email Address**
- **Phone Number**

After completing all the required fields, click the **Give Access Rights** button.



Create User

Contact Information

Email Address


Phone Number

Cancel

Give Access Rights

[Privacy notice](#) | [Legal notice](#)

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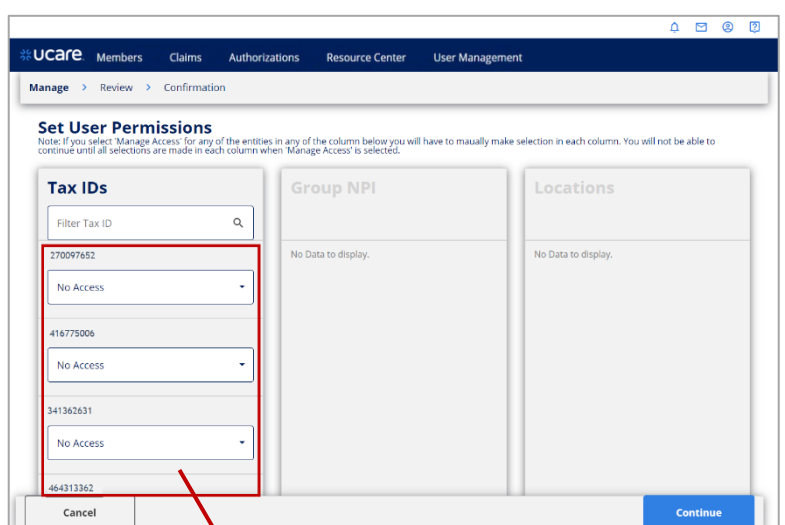


## Set User Permissions

The new user may be given rights (provisioned) to see data, for any of the *Tax IDs* (TINs) the Provider Admin oversees. A listing of those TINs will show in the first column.

New user access rights default to *No Access*. Notice that with *No Access* at the Tax ID level, the user also has no access to the lower levels of the provider structure – *Group NPI* and *Locations*.

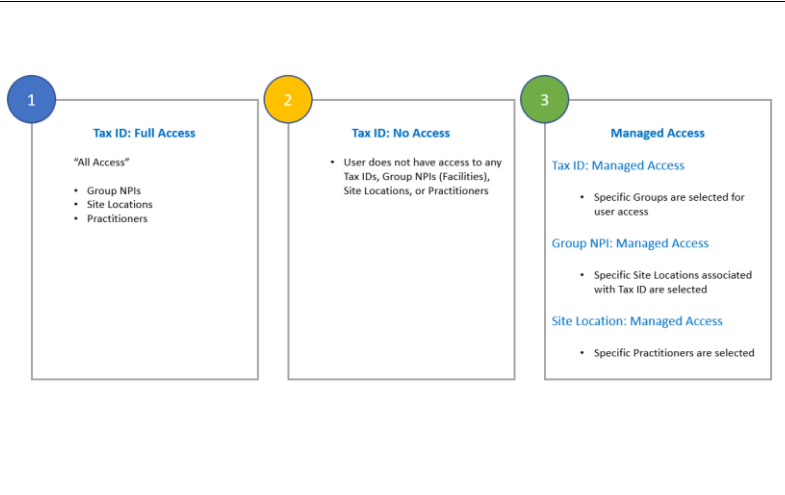
A drop-down list under the TIN shows three options; *No Access*, *Managed Access* and *Full Access*.



## Access Levels Explained

Provisioning the user can happen at multiple levels from a broad approach that assigns access based on the TIN, to a very granular location-level access.

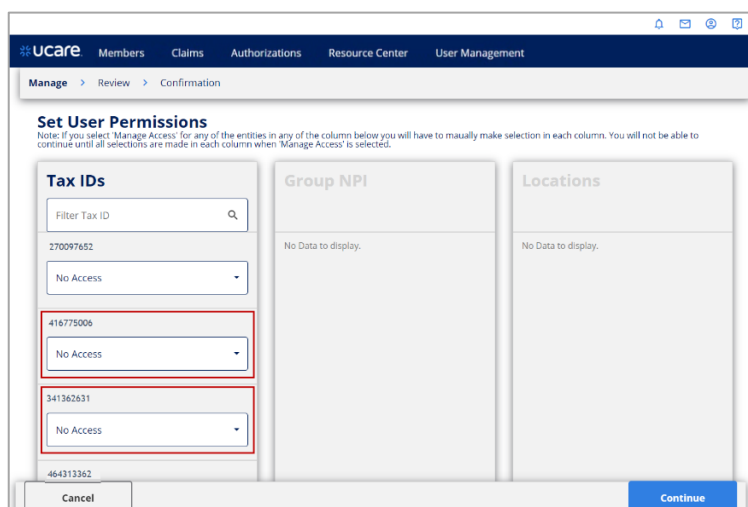
Users can have *No Access*, or *Full Access* to Group NPI and Site Locations for the Tax IDs, or *Managed Access* to only specific Group NPI and Site locations for the TINs.



## Set User Permissions – (continued)

For this new user, permissions will be set for the two TINs outlined: **416775006** and **341362631**.

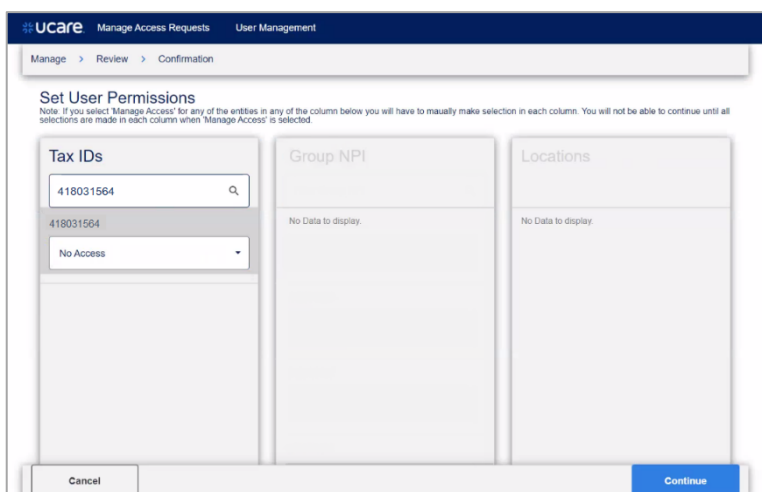
In this example permissions will be granted with Full Access and Managed Access respectively.



## No Access Permissions

Before showing the steps to set permissions, it is important to understand the user profile is essentially non-functioning until you set their access to one or more TINs.

If there is ever a need to remove access from a user, our recommended Best Practice is to set that user's access back to *No Access* as you see on this image.



For the first TIN, **416775006**, click into the drop-down field and change *No Access* to **Full Access**.

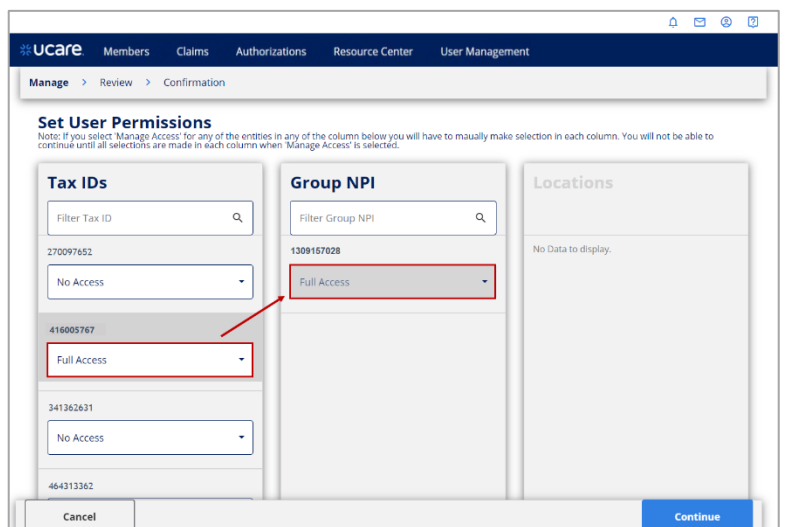




## Full Access Permissions

All Group NPIs and Locations associated with this TIN will default to *Full Access*.

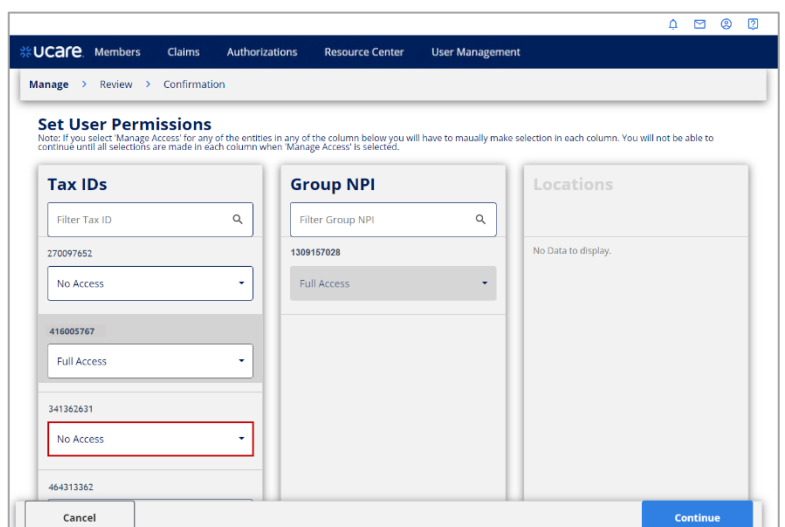
In this example there is just one Group NPI associated with this TIN – 1309157028. This Group NPI has defaulted to *Full Access*.



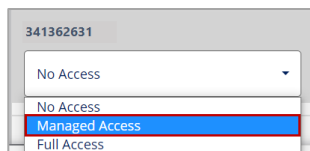
## Managed Access Permissions

Choosing *Managed Access* allows the Provider Admin the ability to set access rights for each of the subsequent levels (Group NPI and Location(s)).

To demonstrate how this works, we now set the TIN 341362631 to Managed Access.



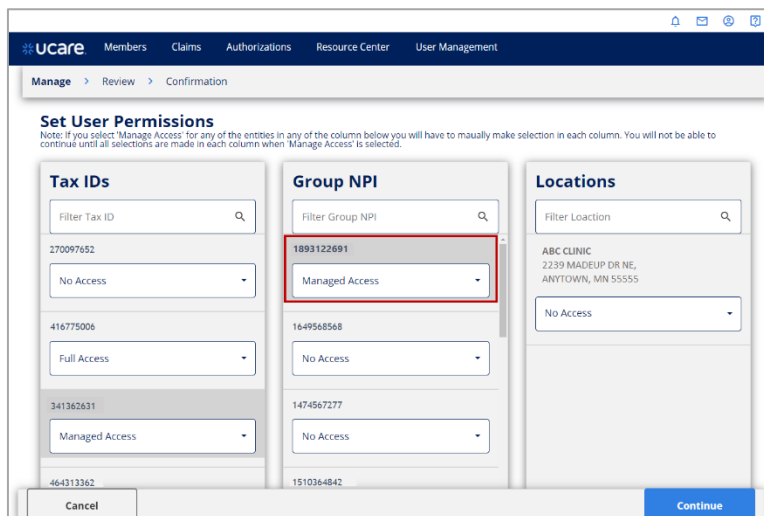
Click into the drop-down field for the TIN and select **Managed Access**.



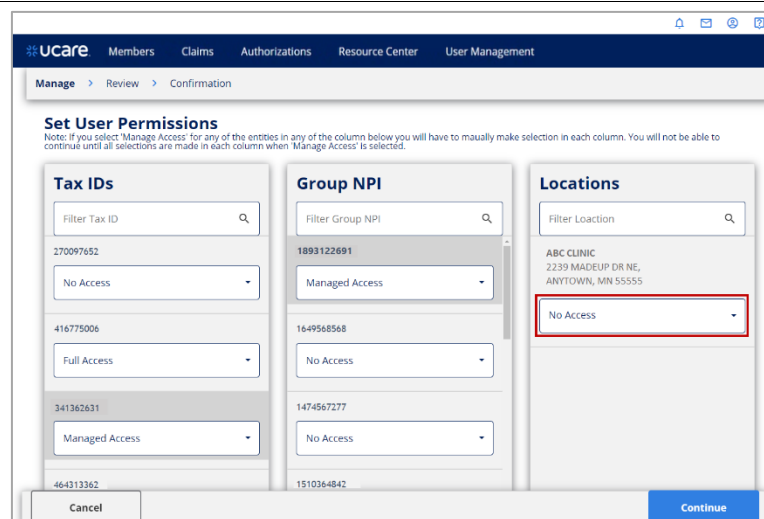
Now that the TIN has *Managed Access*, the user access can be set for each of the associated Group NPIs.

Example: Group NPI, *1893122691* has just been set with *Managed Access*. As it is dark, you can see it is “selected,” which means the *Locations* displayed in the next column belong to this Group NPI. In the *Locations* column, you see just one location. By default, it has *No Access* but that can be changed.

If the Group NPI is set to *No Access*, all associated *Locations* will display with *No Access*. This would be the case if either *1649568568* or *1474567277* were selected.

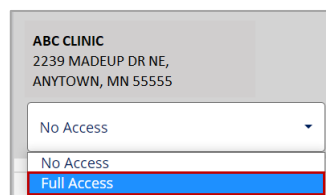


Next, the access for the one location associated with Group NPI *1893122691* – *ABC CLINIC* can be changed.

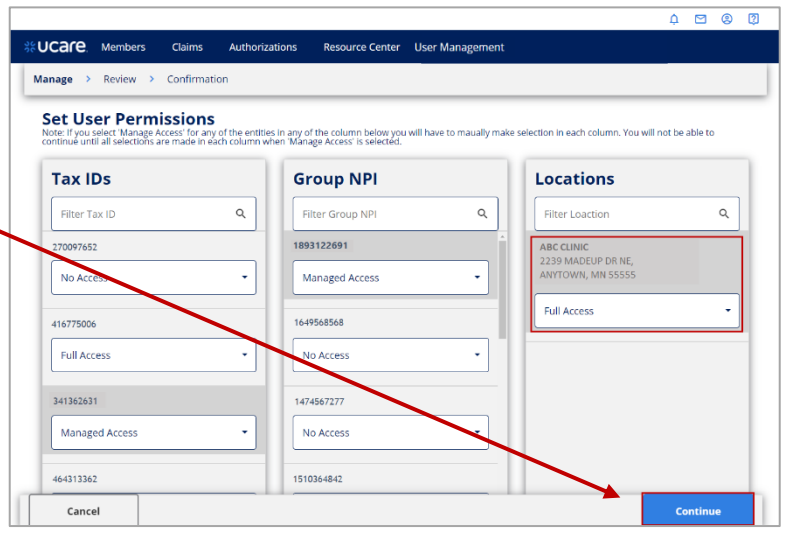


At the location level there are only two access choices: *No Access* or *Full Access*.

Click into the drop-down field and change *No Access* to **Full Access**.



When you have set all the user permissions that are needed, click the **Continue** button.



**Ucare** Members Claims Authorizations Resource Center User Management

Manage > Review > Confirmation

### Set User Permissions

Note: If you select 'Managed Access' for any of the entries in any of the columns below, you will have to manually make selection in each column. You will not be able to continue until all selections are made in each column when 'Managed Access' is selected.

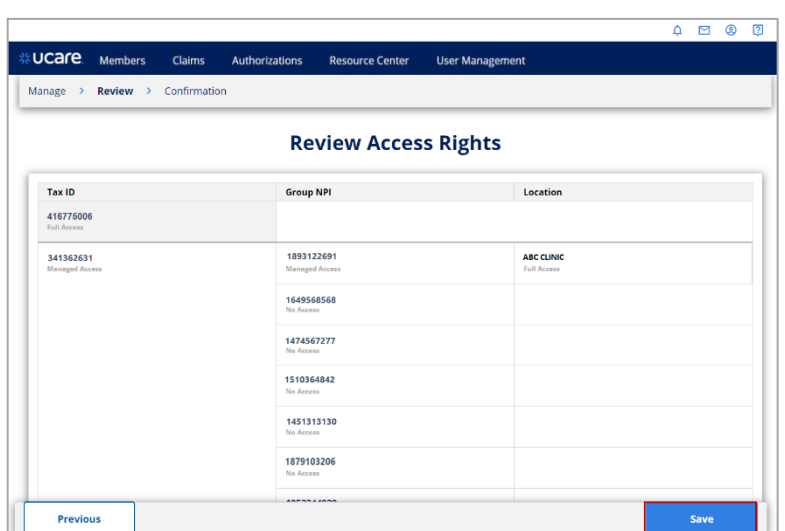
Tax IDs	Group NPI	Locations
Filter Tax ID	Filter Group NPI	Filter Location
370097652 No Access	1893122691 Managed Access	ABC CLINIC 2239 MADEUP DR NE, ANYTOWN, MN 55555 Full Access
416775006 Full Access	1649568568 No Access	
341362631 Managed Access	1474567277 No Access	
464313362	1510364842	

Cancel Continue

## Review Access Rights

After selecting *No Access*, *Full Access*, or *Managed Access* for all three access levels (*Tax IDs*, *Group NPIs*, and *Locations*) and having clicked **Continue** (previous step), you may review the rights you have set. If you see that further changes are needed, go back and do that by clicking **Previous**.

If everything looks the way you intended, click the **Save** button.



## Access Rights Updated

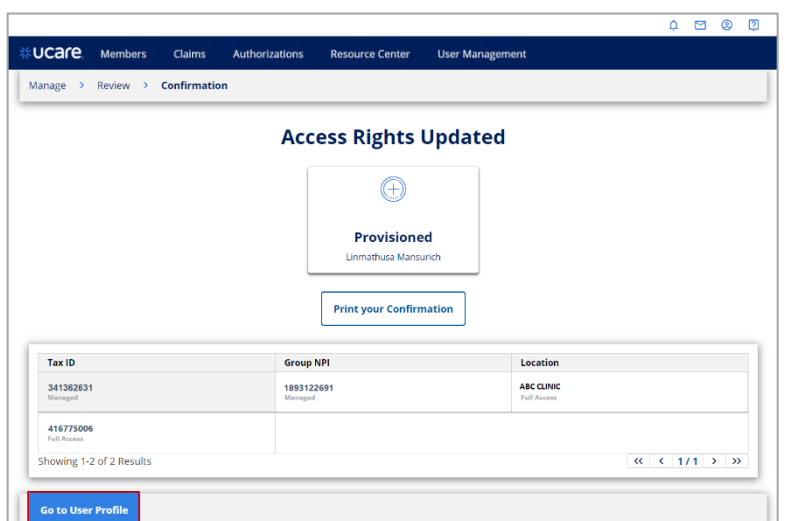
After saving, you will receive an *Access Rights Updated* confirmation page.

Notice the user's name is displayed under the word *Provisioned*.

You may also print this confirmation.

Next, all *Tax IDs*, *Group NPIs* and *Locations* the user has been given access to are listed on the page.

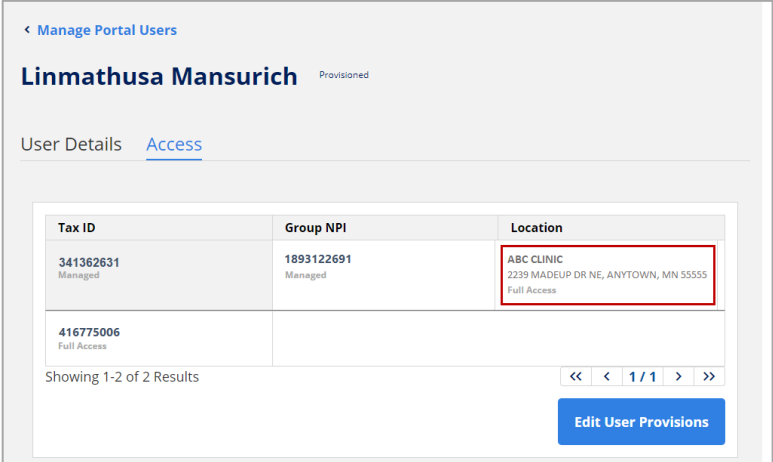
Finally, the *Go to User Profile* button displays in the lower left corner of the page. It is recommended you **go to the user profile** to double-check the user provisions.



## *Double-check User Profile*

Once you have returned to the user record, you may find you have to click the **Access** tab to view the user provisions.

Review the user's access carefully. If necessary, click **Edit User Provisions** to return to "edit mode" where changes may be made



< Manage Portal Users

**Linmathusa Mansurich** Provisioned

User Details [Access](#)

Tax ID	Group NPI	Location
341362631 <small>Managed</small>	1893122691 <small>Managed</small>	ABC CLINIC 2239 MADEUP DR NE, ANYTOWN, MN 55555 Full Access
416775006 <small>Full Access</small>		

Showing 1-2 of 2 Results

<< < 1 / 1 > >>

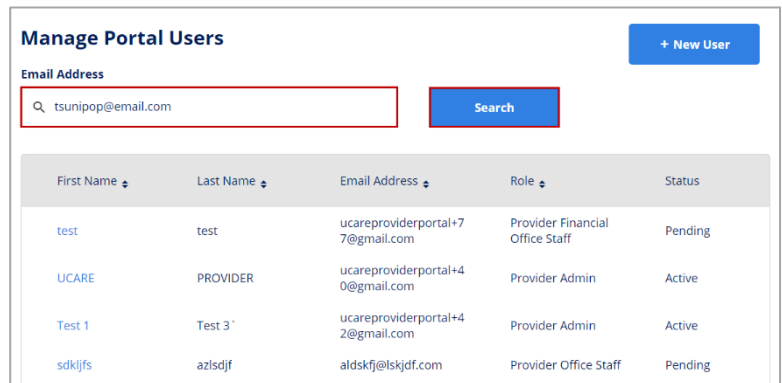
[Edit User Provisions](#)

## Search for an Existing User

To locate a user that was previously set up, enter the following information:

- **Email address**

Then click the **Search** button.



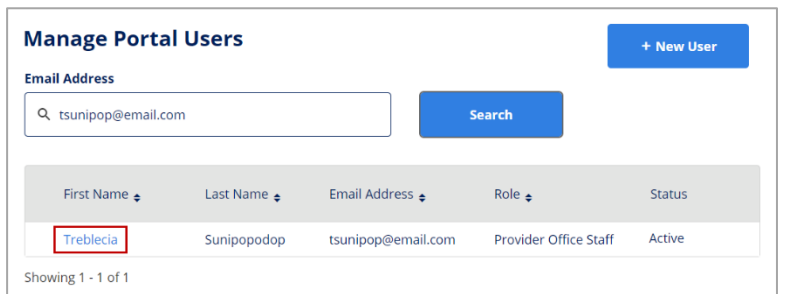
**Manage Portal Users** + New User

Email Address

 Search

First Name	Last Name	Email Address	Role	Status
test	test	ucareproviderportal+77@gmail.com	Provider Financial Office Staff	Pending
UCARE	PROVIDER	ucareproviderportal+40@gmail.com	Provider Admin	Active
Test 1	Test 3	ucareproviderportal+42@gmail.com	Provider Admin	Active
sdkjfs	azlsdjf	aldskjf@lskjdf.com	Provider Office Staff	Pending

In the results list, click the **First Name** of the user.



**Manage Portal Users** + New User

Email Address

 Search

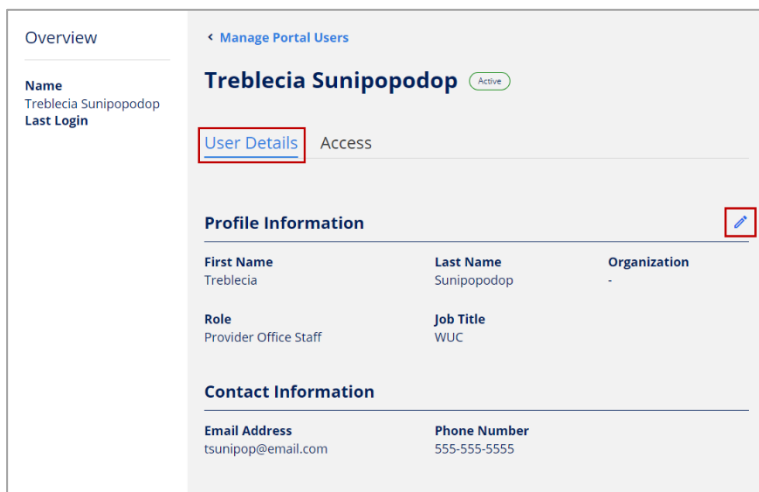
First Name	Last Name	Email Address	Role	Status
Treblecia	Sunipopodop	tsunipop@email.com	Provider Office Staff	Active

Showing 1 - 1 of 1

## View User Details

The user record opens to the *User Details* page, which displays the user's profile and contact information.

Click the **edit icon**  to make any changes.



## Edit User Details

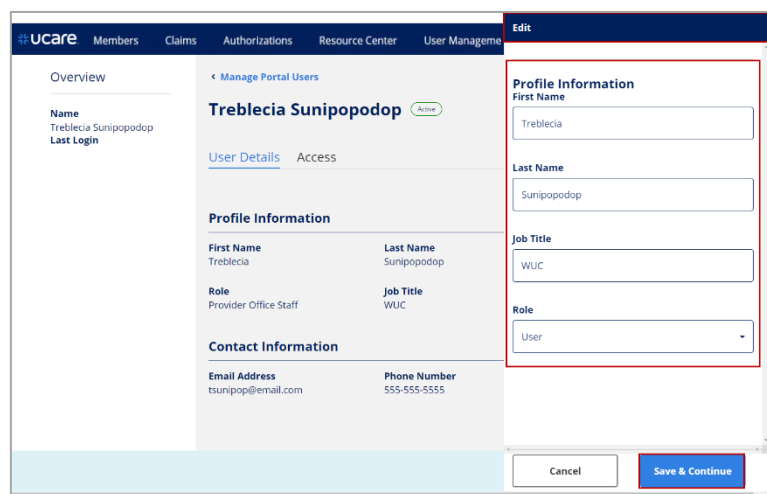
Make any changes needed to the **Profile Information** fields (*First Name, Last Name, Job Title or Role*).

There is no way to change a user's email address. If the email address is no longer accurate, a new user will have to be created.

First, you will have to remove access for the user with incorrect email. See [No Access Permissions](#) for steps on how to remove access. Then create a new user with the correct email address.

When updates are complete, click the **Save & Continue** button.

To change the user's phone number, call PAC.



## View Access Details

Click the **Access** tab to switch to the provisioning page for the user.

The screenshot shows the 'Access' tab selected for user Treblecia Sunipopodop. The 'Access' tab is highlighted with a red box. Below the tabs, there are sections for Profile Information and Contact Information.

Profile Information		
<b>First Name</b> Treblecia	<b>Last Name</b> Sunipopodop	<b>Organization</b> -
<b>Role</b> Provider Office Staff	<b>Job Title</b> Administrative Assistant	

Contact Information	
<b>Email Address</b> tsunipop@email.com	<b>Phone Number</b> 555-555-5555

## Edit Access Details

On the Access page, you can see the *Tax ID*, *Group NPIs*, and *Locations* this user has been given access to on this page.

To make changes to this user's access, click the **Edit User Provisions** button.

The screenshot shows the 'Access' tab with a table of user provisions. The 'Edit User Provisions' button is highlighted with a red box.

Tax ID	Group NPI	Location
418091960 Managed	1627491012 Managed	U OF BW MEDICAL CENTER BROOKLINE (PSYCH UNIT) Full Access
416509275 Full Access		

Showing 1-2 of 2

<< < 1 / 1 > >>

**Edit User Provisions**



Using the same steps as [provisioning a newly created user](#), make changes to the permissions this user will have going forward.

When finished updating the user's access, click the **Continue** button.

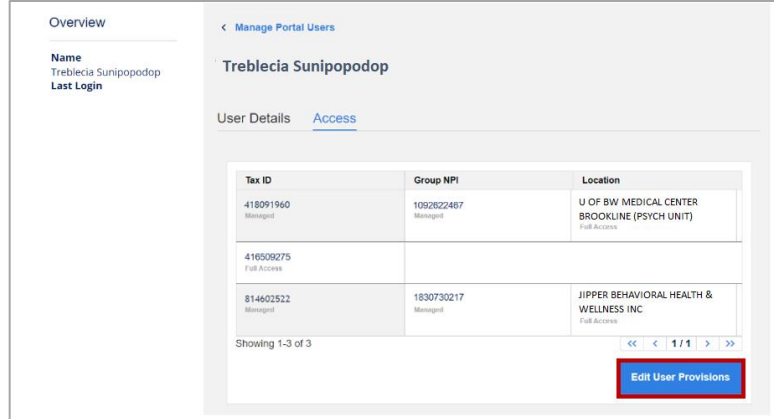
After saving your changes, you will have the chance to view a page showing the updated access rights you just provisioned.

It is best practice to click on the **Go to User Profile** button to double-check the user provisions.

Review and confirm changes have been made.

## Add Another TIN

If a user requires access to an additional TIN and that TIN is one you already administer, you will search for the TIN. First get into “edit mode” by clicking **Edit User Provisions** button.



Overview

< Manage Portal Users

**Treblecia Sunipopodop**

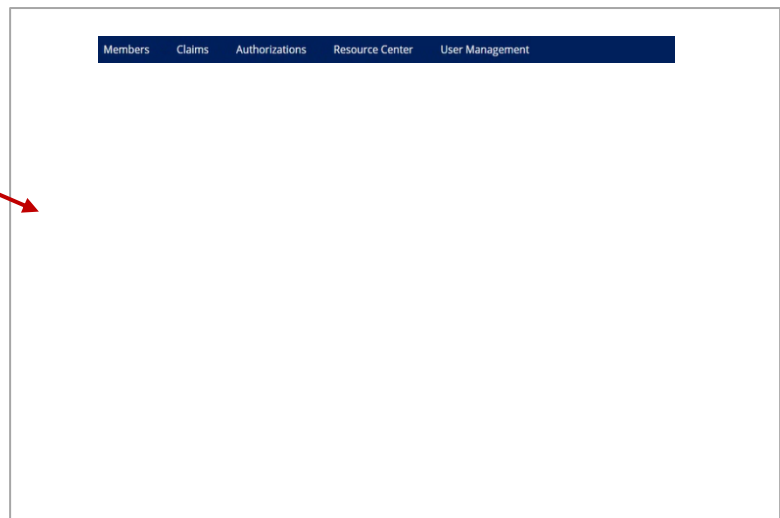
User Details [Access](#)

Tax ID	Group NPI	Location
418091960 <small>Managed</small>	1092822467 <small>Managed</small>	U OF BW MEDICAL CENTER BROOKLINE (PSYCH UNIT) <small>Full Access</small>
416509275 <small>Full Access</small>		
814602522 <small>Managed</small>	1830730217 <small>Managed</small>	JIPPER BEHAVIORAL HEALTH & WELLNESS INC. <small>Full Access</small>

Showing 1-3 of 3

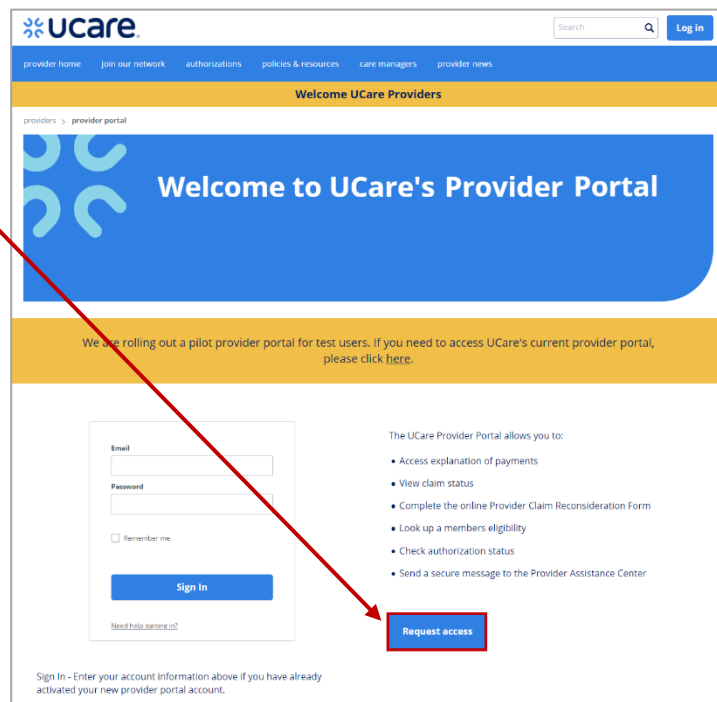
[Edit User Provisions](#)

Search for the TIN in the field marked *Filter Tax ID*.

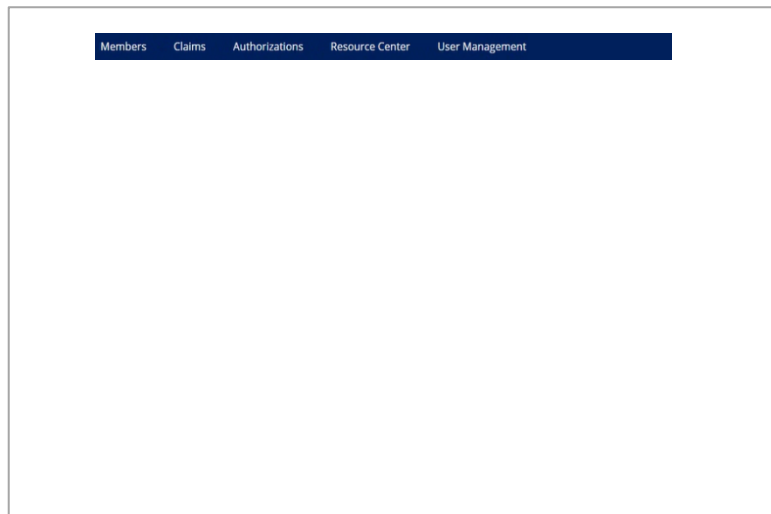



Members Claims Authorizations Resource Center **User Management**

If you do not already administer the TIN requested, you can request access from the UCare Administrator using the *Request Access* button on the login page.



Access to the TIN should be given approximately 5 – 7 days after you request it. You will then be able to find that TIN from the user's *Set User Permissions* page and provision as appropriate.



For more information, click the  icon in the portal or call the Provider Assistance Center (PAC).