

Local Admin & User Guide

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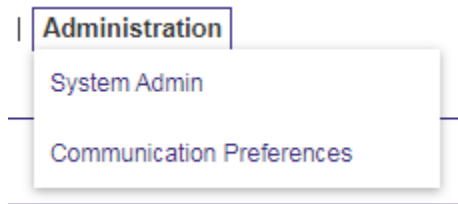
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Adding Users

After registering as the Local Administrator, you can add additional users to the Health Plan. Account confirmation is not required when a user is added by the Local Administrator.

1. From the Home screen, click **Administration** > **System Admin** from the top navigation menu.

Figure 13: Administration Menu



2. In the *User Maintenance* screen, click **Add User**.

Figure 16: User Maintenance Screen

User Maintenance

User Name	Office Security	Company Name
Doe, Jane	Main Office Contact	
Doe, Jon	User	

Add User

3. In the Add User screen, the following fields are available:

Note: The Local Administrator selects the username and the system will generate a temporary password that is sent to the local administrator. Not all fields on this page are required.

- First Name – enter the user’s first name
- Middle Initial – enter the user’s middle initial
- Last Name – enter the user’s last name
- E-Mail Address – enter the user’s e-mail address
- Title – enter the user’s title
- Office Phone – enter the office phone number
- Phone Ext – the office phone’s extension number, if applicable
- Office Fax – enter the office’s fax number

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- Username – chose a username for login
- Local Administrator – select if this user should be a Local Administrator

Figure 14: Add User Screen

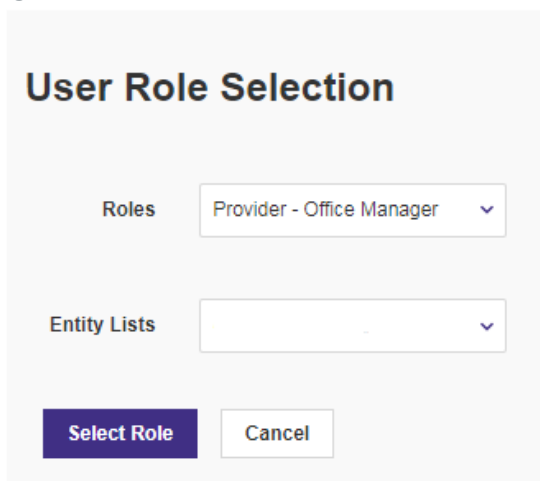
Add User

First Name	<input type="text"/>
Middle Initial	<input type="text"/>
Last Name	<input type="text"/>
E-mail Address	<input type="text"/>
Confirm E-mail Address	<input type="text"/>
Title	<input type="text"/> e.g., Office Manager
Office Phone	<input type="text"/>
Phone Ext	<input type="text"/>
Office Fax	<input type="text"/>
Username	<input type="text"/>
Local Administrator:	<input type="checkbox"/>

4. Click **Add** to proceed to the *User Role Selection* Screen
5. On the *User Role Selection* screen, select a role from the *Roles* dropdown menu and your organization from the *Entity Lists* dropdown menu.

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Figure 15: User Role Selection Screen



User Role Selection

Roles: Provider - Office Manager

Entity Lists:

Select Role Cancel

Note: Roles allow Health Partners Plans to assign the appropriate security access to users with varying job responsibilities. You must select a role to add user. Roles include:

- a. Eligibility Only
- b. Eligibility and Claims Only
- c. Eligibility, Claims and Authorizations Only
- d. Eligibility and Authorizations Only
- e. Local Administrator – access to all functionality and user administration
- f. Office Manager – user administration only

Note: user administration is the ability to add/edit/delete users.

6. Click **Select Role** to return to the *User Information* screen.
7. On the *User Information* screen, confirm all information is correct, then click submit. Once submitted, you will reach the *Healthcare Registration* screen.

Figure 16: Healthcare Registration Screen

Healthcare Registration for Health Partners Plans

HealthTrio connect Office User List

User Name	User ID	Office Security Level
Smith , Jane	smithjane	provider User

Note: Copy username from this page and share created password with new user. **Adding your user is not complete until you hit submit.**

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Creating Additional Local Administrators

Creating additional Local Administrators is a two-step process. First, a Local Administrator must give the user the Role that has access to the System Administration features. Second, a Local Administrator must give the user Local Administrator privileges in the System Administration screen.

Selecting a Local Administrator Role

As stated in the section “Adding Users”, a role must be selected when creating users. For Local Administration users, the Role Name is “Provider – Local Administrator”. Proceed with creating the Local Administrator account like you would any other User utilizing the Provider Portal.

Giving Local Administrator Privileges

A user’s account can only be granted Local Administrator privileges after it has been created. To modify the users access, follow these steps:

1. Hover over **Administration**, then click **System Admin** from the top navigation menu (see figure 15).
2. In the *User Maintenance* screen find the user who should be granted Local Administrator privileges and click their **Name** link

Figure 17: User Maintenance Screen

User Maintenance

User Name	Office Security	Company Name	Company ID Number	User ID	Last Login	Validated Through	User Status
Smith, Jane	Provider User	Test Company	123456	JaneSmith1234	07/27/2022	7/26/2023	Confirme

3. Once on the *User Information* screen, put a checkmark in the box next to **Local Administrator**.
4. Doing this will expand the screen to include the **Office Information**.
5. Fill out the Office Information section, then click the **Submit** button.

Figure 26: Local Administration Section

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Local Administrator:

Office Address

1234 E Fifth St

City

Pittsburgh

State Zip

PA ▾

15201

Organization Name

Test Company

Submit

Indicates required field