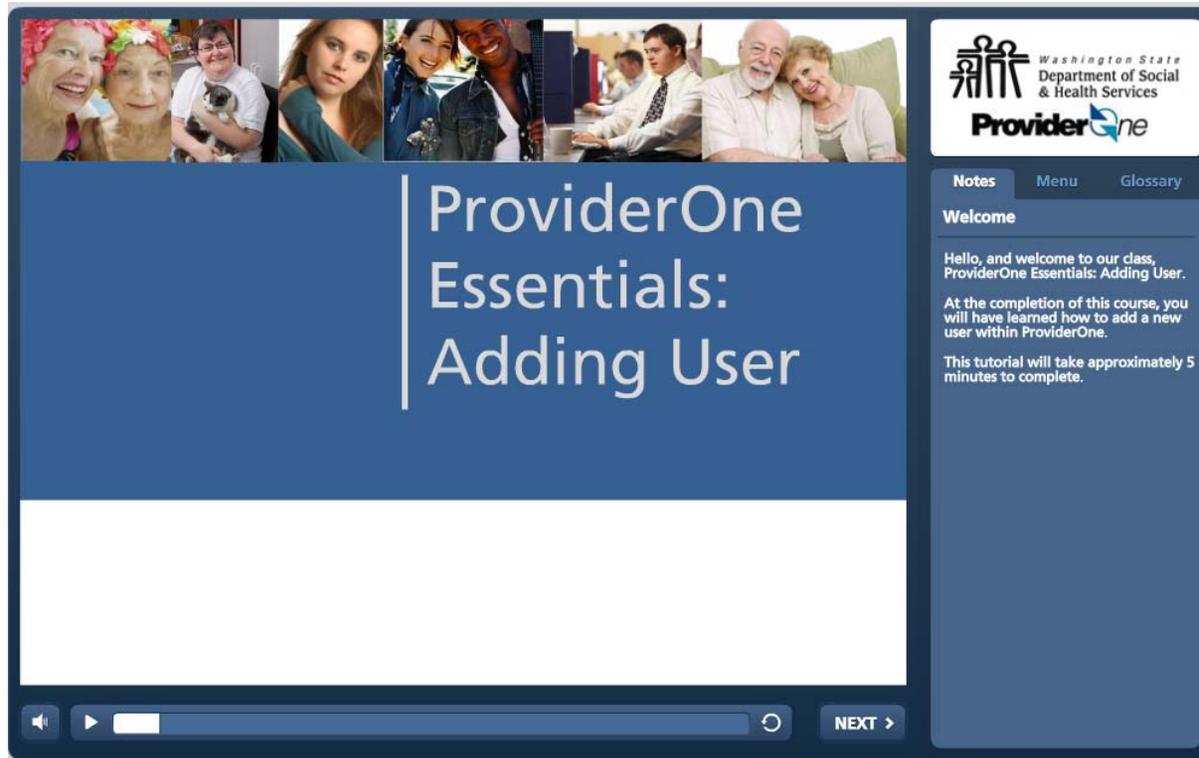


The “Adding User” How To provides instructions on:

- Add New User 2
- Assign Profile..... 7
- Change User Information 12
- Deactivate a User 13



Washington State
Department of Social
& Health Services
ProviderOne

Notes Menu Glossary

Welcome

Hello, and welcome to our class,
ProviderOne Essentials: Adding User.

At the completion of this course, you
will have learned how to add a new
user within ProviderOne.

This tutorial will take approximately 5
minutes to complete.

ProviderOne
Essentials:
Adding User

NEXT >

The System Administrator can add users to their domain (organization). By adding a user, the System Administrator is granting permission to the user to work within ProviderOne as a representative of their organization.

1. a. From the [Portal Page](#)
- b. **Click on** Maintain Users link

2. a. Maintain User page [appears](#).
- b. The page default shows all the [Approved Users](#) within the domain.

1a Portal Page

The screenshot shows the ProviderOne portal interface. At the top, it says 'Welcome Jones, Katherine. You have logged in with EXT Provider System Administrator Profile.' Below this, there are navigation links for 'Path: Provider Portal' and 'ProviderOne ID: 2011020' and 'Name: Katherine Jones'. The main content area is titled 'Provider Portal' and contains several sections: 'Online Services', 'Payments', 'Provider', 'Admin', 'Social Service Authorizations and Billing', 'Social Service Claim Inquiry', 'Social Service Claim Adjustment', and 'Social Service Billing Screen'. A red arrow points to the 'Maintain Users' link in the 'Admin' section. A blue box highlights the 'Admin' section with the text 'Admin Hide/Max Change Password Maintain Users ← 1b Click On'.

2a Maintain User Page

The screenshot shows the 'Maintain User' page. At the top, it says 'Welcome Jones, Katherine. You have logged in with EXT Provider System Administrator Profile.' Below this, there are buttons for 'Close', 'Add', 'Approve', and 'Reject'. The 'Manage User:' section has a 'Filter By' dropdown set to 'Approved' and a 'Go' button. Below this is a table with columns: 'Name', 'Domain Name', 'Organization', 'Status', 'Start Date', and 'End Date'. A blue arrow points to the 'Approved' filter dropdown.

2b "Approved" Users

Approved		Go				
<input type="checkbox"/>	Name	Domain Name	Organization	Status	Start Date	End Date
<input type="checkbox"/>	Katherine Jones	201102008	Katherine Jones	Approved	01/01/2013	04/30/2013

3. Click on Add

3 Click On

Manage User:

Filter By: [] And [] With Status: []

	Name	Domain Name	Organization	Status	Start Date	End Date
<input type="checkbox"/>	Katherine Jones	201102008	Katherine Jones	Approved	01/01/2013	04/30/2013

4. Add User pop-up appears

5. Enter or review the data for each of the required "*" fields:

- Enter First Name
- Enter Last Name
- User Login ID will self populate but you can create your own ID
- Keep Batch User default
- Enter User's Date of Birth (required for password reset) (mm\dd\yyyy)
- Enter Employee ID (12 number maximum, must be unique within the domain: do not use SSN)
- Today's date appears in Start Date (You can change this date)
- 12/31/2999 appears in Expiration Date to indicate no end date (You can change this date)

4 Add User Pop-up

Add User - Windows Internet Explorer

Add User

Please enter the following information:

First Name: Dan * *5a Enter* Middle Name: [] *5d*

Last Name: Neel * *5b Enter* User Type: Batch User *

User Login ID: NeelID * *5c* EID: 598896314 *

Date of Birth: 01/06/1972 * *5e Enter* Expiration Date: 12/31/2999 * *5f Enter*

Domain: 2000004

Start Date: 01/15/2013 * *5g* Status: In Review

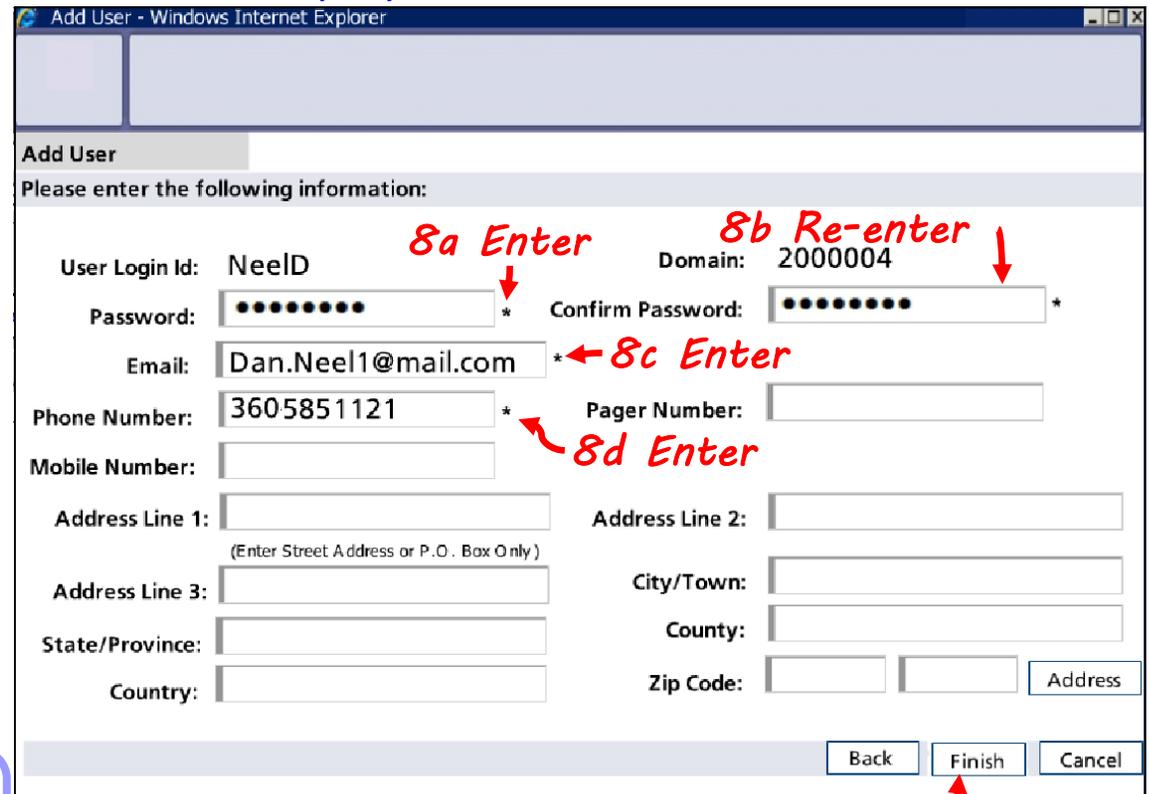
Comments: []

6 Click on

Next Cancel

7. Add User pop-up [appears](#)
8. Enter the data for each of the required "*" fields:
 - a. **Enter** Password (this will be the user's temporary password for their first log in to ProviderOne. The user will change it on their first log in.)
 - b. **Re-enter** Confirm Password
 - c. **Enter** Email (This email will be how ProviderOne will send the log in information to the user and for resetting passwords.)
 - d. **Enter** Phone Number
 - e. Other fields are optional
9. **Click on** Finish

7 Add User Pop-up



Password Requirements

- Cannot be the same as your last 3 passwords
- Must be at least 8 characters long
- Must contain at least one letter
- Must contain at least one number
- Must contain at least one of the following special characters:
 , . ! @ # \$ % ^ & * () _ + - < >

10. Manage User Page appears

11. Added user is In Review status

10 Manage User Page

Close Add Approve Reject

Manage User:

Filter By [] And [] With Status: []

All [] Go

<input type="checkbox"/>	Name	Domain Name	Organization	Status	Start Date	End Date
<input type="checkbox"/>	Katherine Jones	201102008	Katherine Jones	Approved	01/01/2013	12/31/2999
<input checked="" type="checkbox"/>	Neel, Daniel	201102008	Katherine Jones	In Review	01/15/2013	12/31/2999

<<Prev Viewing Page 1 Next>> 1 Go Page Count SaveToXLS

12. To approve the new user:

- Click on box next to name
- Click on Approve

Close Add Approve Reject

Manage User:

Filter By [] And [] With Status: []

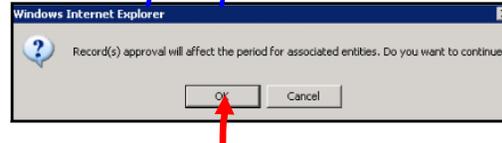
All [] Go

<input type="checkbox"/>	Name	Domain Name	Organization	Status	Start Date	End Date
<input type="checkbox"/>	Katherine Jones	201102008	Katherine Jones	Approved	01/01/2013	12/31/2999
<input checked="" type="checkbox"/>	Neel, Daniel	201102008	Katherine Jones	In Review	01/15/2013	12/31/2999

<<Prev Viewing Page 1 Next>> 1 Go Page Count SaveToXLS

13. a. Pop-up appears
- b. Click on OK

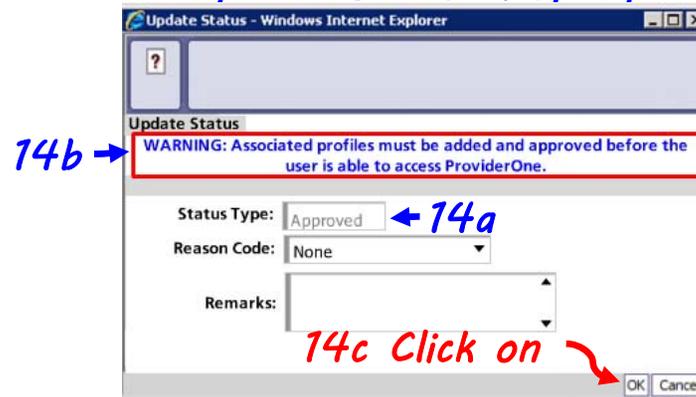
13a Pop-Up



13b Click on

14. Update Status Pop-up appears
 - a. "Approved" status
 - b. Note warning that "Associated profiles must be added and approved before user can access ProviderOne. You will do this in the next step."
 - c. Click on OK

14 Update Status Pop-Up



15. Approved status is shown. A user must be assigned a profile before they can access ProviderOne.

Manage User Page

<input type="button" value="Close"/> <input type="button" value="Add"/> <input type="button" value="Approve"/> <input type="button" value="Reject"/>						
Manage User:						
Filter By		And		With Status:		
All	Go					
<input type="checkbox"/>	Name	Domain Name	Organization	Status	Start Date	End Date
<input type="checkbox"/>	Katherine Jones	201102008	Katherine Jones	Approved	01/01/2013	12/31/2999
<input type="checkbox"/>	Neel, Daniel	201102008	Katherine Jones	Approved	01/15/2013	12/31/2999
<input type="button" value="«Prev"/> Viewing Page 1 <input type="button" value="Next»"/> <input type="text" value="1"/> <input type="button" value="Go"/> <input type="button" value="Page Count"/> <input type="button" value="SaveToXLS"/>						

15

The System Administrator assigns profiles to users within their domain. **Please Remember:** The profile acts as a “key”, allowing the user access to different parts of the ProviderOne system on behalf of your domain (business). The social service profiles allow very broad authorities; in other words, by giving a user a profile you are granting the user the same authority as the System Administrator to bill and manage claims within ProviderOne.

1a Manage User Page

1. a. From the [Manage User Page](#)
- b. **Click on** user name hyperlink

	Name	Domain Name	Organization	Status	Start Date	End Date
<input type="checkbox"/>	Katherine Jones	201102008	Katherine Jones	Approved	01/01/2013	12/31/2999
<input type="checkbox"/>	Neel, Daniel	201102008	Katherine Jones	Approved	01/15/2013	12/31/2999

1b Click On

2. User Details Page appears
3. **Click on** drop down menu
4. **Select** Associated Profiles

2 User Details Page

Path: Provider Portal/ UserList
 ProviderOne ID: 201102008 Name: Katherine Jones

Close Save Show: **---SELECT---**

User Details:

First Name: Daniel	Middle Name:
Last Name: Neel	Lock User: <input type="checkbox"/>
Date of Birth: 01/06/1972	Domain: 2000004
EID: 598896314	User Type: Batch User
Username: DaaN	Confirm Password:
Password:	

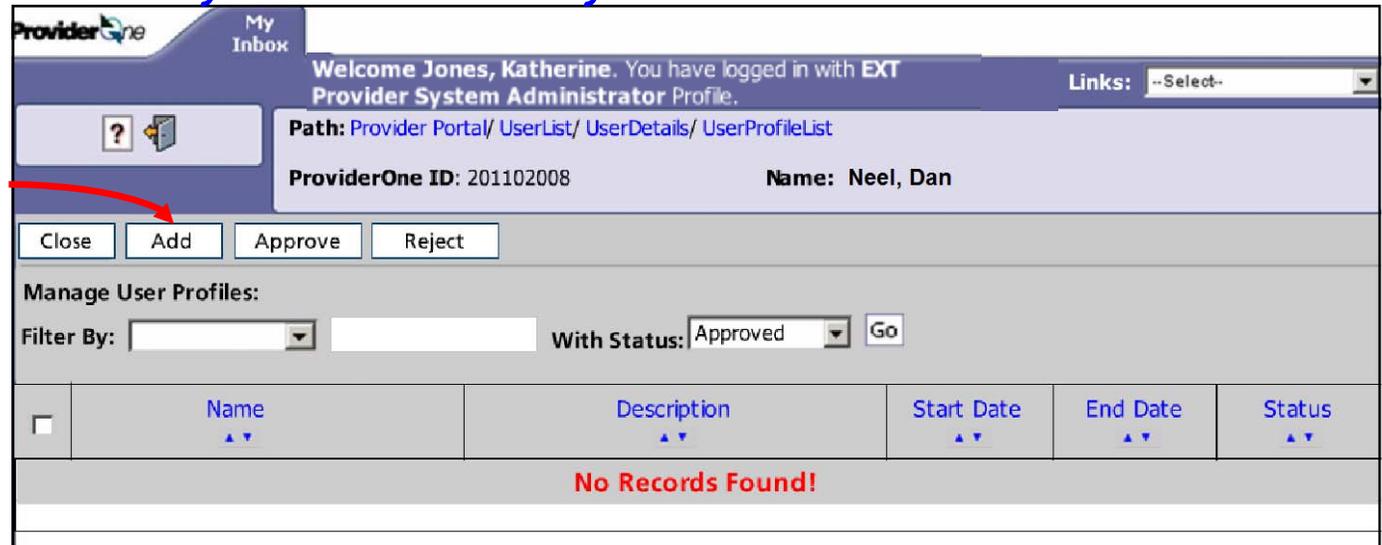
3 Click on

4 Select

5. a. Manage User Profiles Page appears
- b. **Click on Add**

5a Manage User Profiles Page

5b Click on



ProviderOne My Inbox

Welcome Jones, Katherine. You have logged in with EXT
Provider System Administrator Profile. Links: --Select--

Path: Provider Portal/ UserList/ UserDetails/ UserProfileList

ProviderOne ID: 201102008 Name: Neel, Dan

Close Add Approve Reject

Manage User Profiles:

Filter By: [] With Status: Approved Go

	Name	Description	Start Date	End Date	Status
No Records Found!					

“No Records Found!” is simply a default message displayed when no profiles have been added yet.

Most Social Service providers will generally see two profile options that can be assigned:

- **EXT Provider Social Service:** Allows a user to bill, manage claims, and access provider information.
- **EXT Provider System Administrator:** Profile is used to add and manage users within a domain.

Some providers will also have an EXT Provider Social Service Medical which allows a user to bill and manage medical claims.

6. Add New Profiles to User pop-up appears

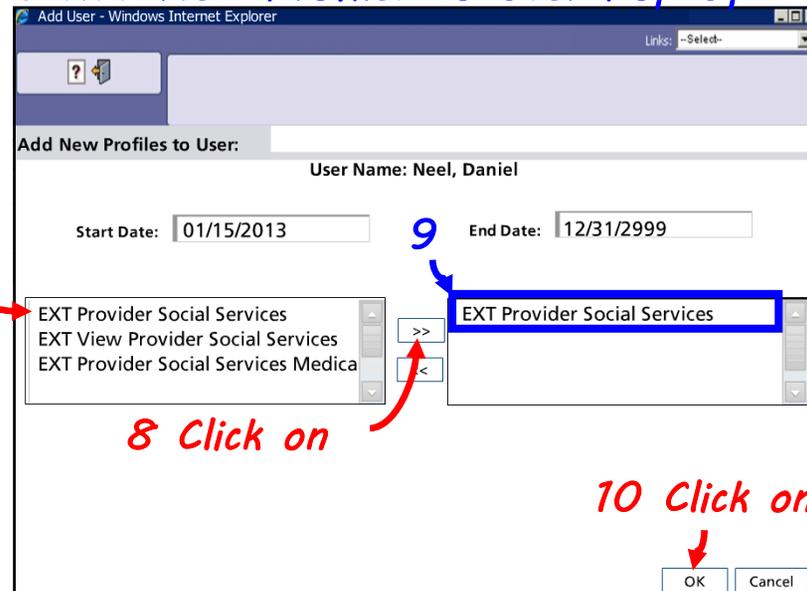
7. Select a profile

8. Click on

9. Selected profile appears

10. Click on OK

6 Add New Profiles to User Pop-Up



To remove a profile, use the tab.

A user cannot work in ProviderOne without at least one profile activated.

11. Manage User Profiles List appears
12. Click on drop down menu
13. Select All from the drop down menu
14. Click on Go

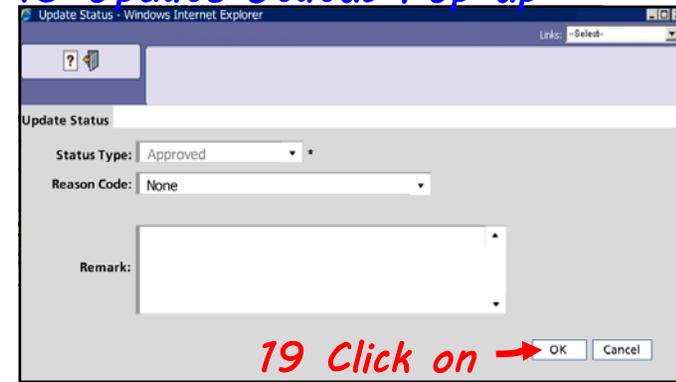
“All” shows all users within the domain regardless of their status. By default, ProviderOne will otherwise only show users in “Approved” status.

11 Manage User Profiles List

15. The list changes to show new profile with a status of “In Review”
16. Click on box next to name
17. Click on Approve tab

18. Update Status pop-up appears

18 Update Status Pop-up



19. Click on OK

20. Status changes to Approved



21. Click on Close

The new user can now work within ProviderOne. ProviderOne will use the email address provided for the new user to send the following information:

- Domain:
- User Name:
- Password:

After receiving the login information, the new user will need to follow the directions contained in the “Getting Started”, the “Navigating” portion of “Navigating and Managing Data, and as needed, Solving Password and Login Issues.”

The System Administrator can deactivate a user so that they cannot access ProviderOne. The user will still be listed in ProviderOne with an approved status but he/she will no longer have the ability to access the system.

1. From the [Maintain User Page](#)
2. Click on User's Name
3. The Maintain User Page appears

1 Maintain User Page

	Name	Domain Name	Organization	Status	Start Date	End Date
<input type="checkbox"/>	Katherine Jones	201102008	Katherine Jones	Approved	01/01/2013	12/31/2999
<input type="checkbox"/>	Neel, Daniel	201102008	Katherine Jones	Approved	01/15/2013	12/31/2999

2 Click on

To change user information

4. The Systems Administrator can change the User's information (except for User Name) on the page.
5. Click on Save
6. Click on Close

3 User Details Page

Path: Provider Portal/ UserList
 ProviderOne ID: 201102008 Name: Katherine Jones

Close Save Show: --SELECT--

User Details:

First Name: Daniel Middle Name:

Last Name: Neel Lock User:

Date of Birth: 01/06/1972 Domain: 2000004

EID: 598896314 User Type: Batch User

Username:

Password:

Address Line 1:

Address Line 2:

Address Line 3:

State/Province:

City/Town:

Country:

County:

Zip Code: Address

Start Date: 01/15/2013 Expiration Date: 12/31/2999

Status: Approved

Reason Code:

Remarks:

5 Click on

4 Change

6 Click on

Close Save

User Details:

The System Administrator can deactivate a user so that they cannot access ProviderOne. The user will still be listed in ProviderOne with an approved status but he/she will no longer have the ability to access the system.

1. From the [Maintain User Page](#)
2. **Click on** User's Name
3. The Maintain User Page appears

1 Maintain User Page

	Name	Domain Name	Organization	Status	Start Date	End Date
<input type="checkbox"/>	Katherine Jones	201102008	Katherine Jones	Approved	01/01/2013	12/31/2999
<input checked="" type="checkbox"/>	Neel, Daniel	201102008	Katherine Jones	Approved	01/15/2013	12/31/2999

2 Click on

Option 1

4. Deactivate User
 - a. **Click on** Lock User check box
 - b. **Click on** Save
 - c. **Click on** Close

Note: Lock User:

Means user is locked out of ProviderOne.

4b Click on

4c Click on

3 User Details Page

Path: Provider Portal/ UserList
 ProviderOne ID: 201102008 Name: Katherine Jones

Close Save Show: --SELECT--

User Details:

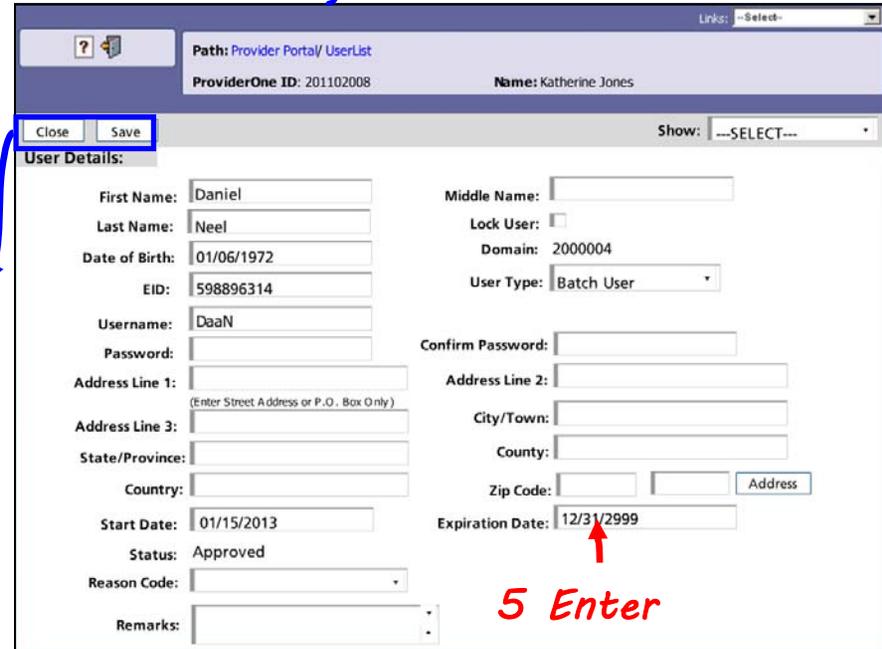
First Name: Daniel Middle Name:
 Last Name: Neel Lock User: **4a Click on**
 Date of Birth: 01/06/1972 Domain: 2000004
 EID: 598896314 User Type: Batch User
 Username: DaaN Confirm Password:
 Password: Address Line 2:
 Address Line 1: Address Line 3:
(Enter Street Address or P.O. Box Only) City/Town:
 State/Province: County:
 Country: Zip Code: Address
 Start Date: 01/15/2013 Expiration Date: 12/31/2999
 Status: Approved
 Reason Code:
 Remarks:

Option 2

- Deactivate User. **Enter** today's date in the expiration field to make it effective the next day.
- Click on Save**



User Details Page



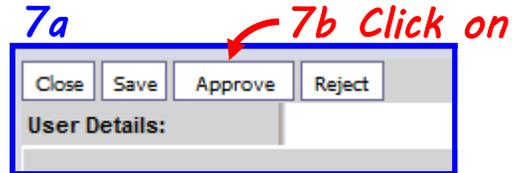
Path: Provider Portal/ UserList
ProviderOne ID: 201102008 Name: Katherine Jones
Links: --Select--
Close Save Show: --SELECT--

User Details:

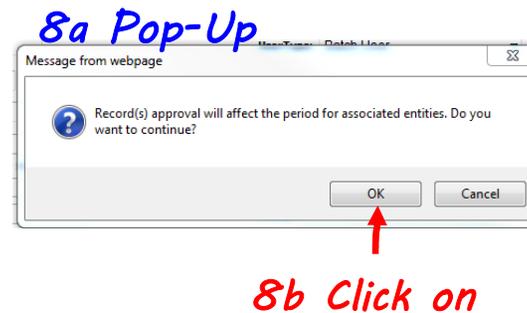
First Name:	Daniel	Middle Name:	
Last Name:	Neel	Lock User:	<input type="checkbox"/>
Date of Birth:	01/06/1972	Domain:	2000004
EID:	598896314	User Type:	Batch User
Username:	DaaN	Confirm Password:	
Password:		Address Line 1:	
Address Line 1:		Address Line 2:	
Address Line 2:		Address Line 3:	
Address Line 3:		City/Town:	
State/Province:		County:	
Country:		Zip Code:	
Start Date:	01/15/2013	Expiration Date:	12/31/2999
Status:	Approved		
Reason Code:			
Remarks:			

5 Enter

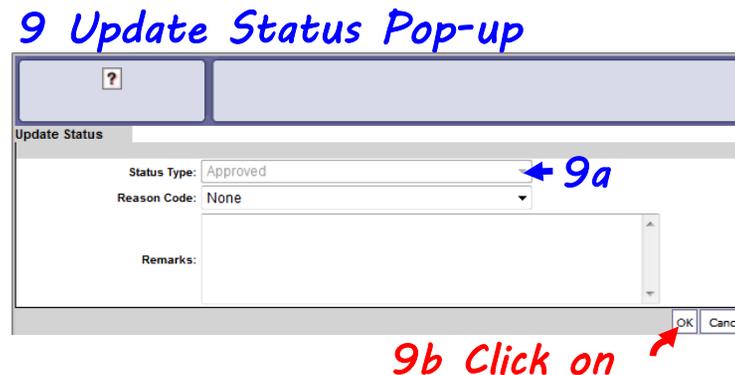
7. a. The Approve and Reject buttons appears
b. Click on Approve



8. a. Pop-up appears
b. Click on OK



9. Update Status Pop-up appears
a. Approved status
b. Click on OK



10. User Detail page appears showing only the Close and Save buttons

10 User Detail Page

11. Click on Close

11 Click on

12. Managed User Page appears

12 Manage User Page

<input type="button" value="Close"/> <input type="button" value="Add"/> <input type="button" value="Approve"/> <input type="button" value="Reject"/>						
Manage User:						
Filter By			And		With Status:	
All					Go	
<input type="checkbox"/>	Name	Domain Name	Organization	Status	Start Date	End Date
<input type="checkbox"/>	Katherine Jones	201102008	Katherine Jones	Approved	01/01/2013	12/31/2999
<input type="checkbox"/>	Neel, Daniel	201102008	Katherine Jones	Approved	01/15/2013	12/16/2014

<<Prev Viewing Page 1 Next>> 1 Go Page Count SaveToXLS

13. User's end date shows

13