The “Adding User” How To provides instructions on:

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Add New User

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.

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**1a Portal Page**

**1b Click On**

**2a Maintain User Page**

**2b “Approved” Users**
3. Click on Add

4. Add User pop-up appears

5. Enter or review the data for each of the required "*" fields:
   a. Enter First Name
   b. Enter Last Name
   c. User Login ID will self populate but you can create your own ID
   d. Keep Batch User default
   e. Enter User’s Date of Birth (required for password reset) (mm/dd/yyyy)
   f. Enter Employee ID (12 number maximum, must be unique within the domain: do not use SSN)
   g. Today’s date appears in Start Date (You can change this date)
   h. 12/31/2999 appears in Expiration Date to indicate no end date (You can change this date)

6. Click on Next
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

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

12. To approve the new user:
   a. Click on box ✓ next to name
   b. Click on Approve
13. a. Pop-up appears  
   b. Click on OK

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

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

1. **a. From the Manage User Page**
   - Click on user name hyperlink

2. **User Details Page appears**
3. **Click on** drop down menu
4. **Select** Associated Profiles
5. a. Manage User Profiles Page appears
b. Click on Add

5b Click on

“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

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.

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

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.”
Change User Information

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

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
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

**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.
Option 2

5. Deactivate User. Enter today’s date in the expiration field to make it effective the next day.

6. Click on Save
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.

11. Click on Close

12. Managed User Page appears

13. User’s end date shows