



Creating users and adding profiles

Provider Relations Unit
2018

ProviderOne system requirements

- Make sure you are using one of the following and your popup blockers are turned **OFF**:

Computer operating systems	Internet browsers
Windows <ul style="list-style-type: none"> • 10 • 8.1 • 8 • 7 	Internet Explorer <ul style="list-style-type: none"> • 11 • 10
Macintosh <ul style="list-style-type: none"> • OS 10.12 Sierra • OS X 10.11 El Capitan • OS X 10.10 Yosemite 	Google Chrome <ul style="list-style-type: none"> • 55.0.2883 • 54.0.2840
	Firefox <ul style="list-style-type: none"> • 50.0.2 • 45.5.1 ESR
	Safari <ul style="list-style-type: none"> • 10.0.1

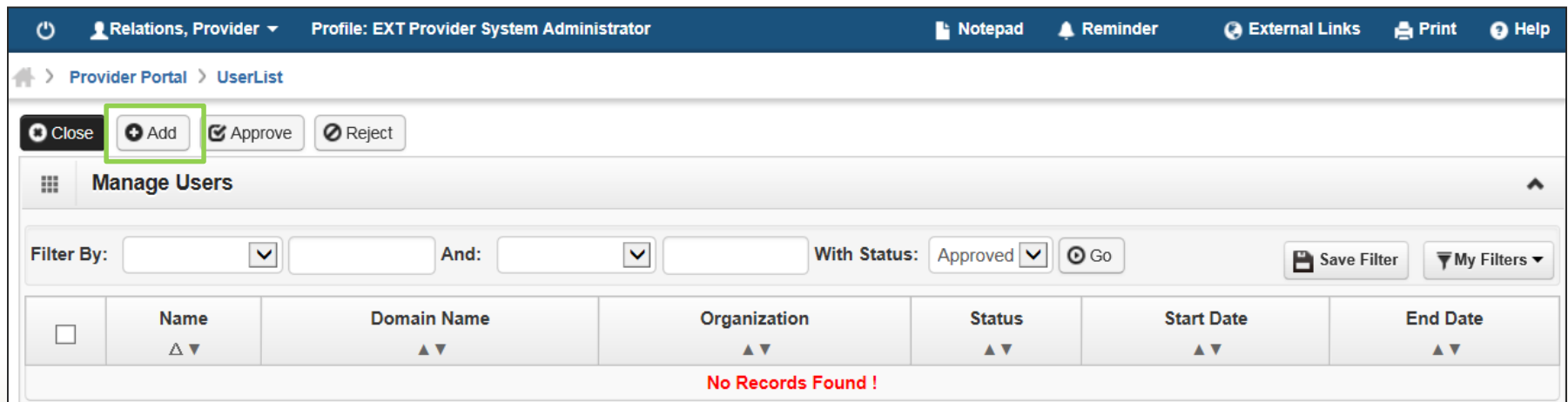
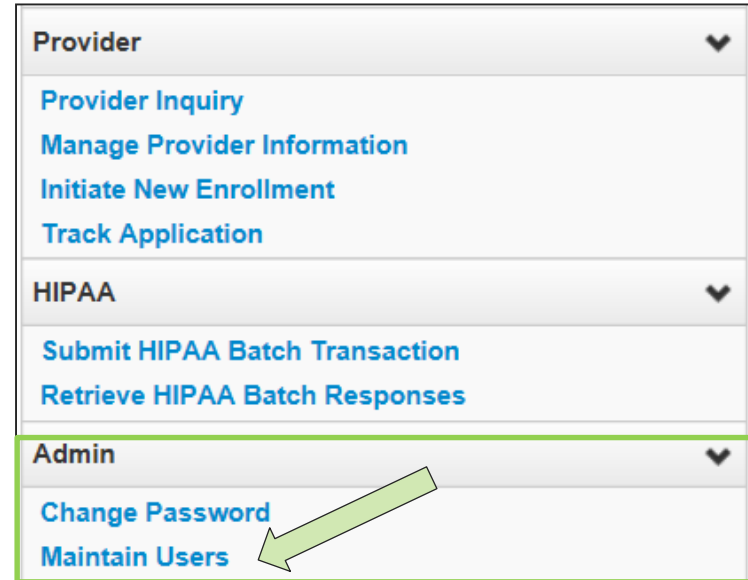
ProviderOne users

- HCA establishes System Administrators for your domain/NPI
 - The System Administrator is responsible for setting up users within their organization.
 - System Administrators assign profiles to users as necessary.
 - Staff can be assigned one or more security profiles to meet their job duties and provide them the level of access necessary in the system.
 - **Please note:** Each person that accesses ProviderOne must have their own user account. Generic or shared user accounts are not HIPAA compliant and are not allowed.

Visit the [ProviderOne Security](#) web page.

How to set up a user

- Log in with the **EXT Provider System Administrator** Profile.
- Click on **Maintain Users**.
- The system now displays the User List screen.
- Click on the **Add** button.



How to set up a user

- Required fields (*) for adding a user:
 - First Name
 - Last Name
 - User Login ID – is required but auto populates once name is entered
 - User Type – is required but default is Batch User
 - Date of Birth – must be entered MM/DD/CCYY
 - EID – must be different for each user
 - Start Date – will auto-populate with date user is added
 - Expiration Date – default is 12/31/2999
 - Password - this is a temporary password that should not be given to the user. It is only used to complete the Add User page.
 - Confirm the same password
 - Email for the user where initial login credentials will be sent and for use in the future for password resets
 - Phone Number – enter without dashes

See next slides for screen shots of the Add User fields.

How to set up a user

- Adding a user:

Add User

Please enter the following information:

First Name: *

Last Name: *

User Login ID: *

Date of Birth: *

Middle Name:

User Type: Batch User *

EID: *

Expiration Date: 12/31/2999 *

Domain Name: 9999999

Start Date: 01/05/2016 *

Status: In Review

Comments:

- Fill in all required boxes as described on previous slide.
- Click the **Next** button.

How to set up a user

- Complete remaining required fields on 2nd page:

The screenshot shows a web form titled "Add User:". The form contains several input fields: "User Login ID: NameP", "Password:" (with an asterisk), "Email:" (with an asterisk), "Phone Number:" (with an asterisk), "Mobile Number:", "Address Line 1:" and "Address Line 2:" (with a note "(Enter Street Address or PO Box Only)"), "Address Line 3:", "City/Town:", "State/Province:", "County:", "Country:", and "Zip Code:". At the bottom right, there are three buttons: "Back", "Finish", and "Cancel". The "Finish" button is highlighted with a green box, and a green arrow points to it. A blue callout box is overlaid on the form, containing the following password requirements:

- Must be at least eight characters long
- Must contain a letter
- Must contain a number
- Must contain at least one of the following special characters: , . ! @ \$ % ^ & * () _ + - < >

- Click the **Finish** button.

How to set up a user

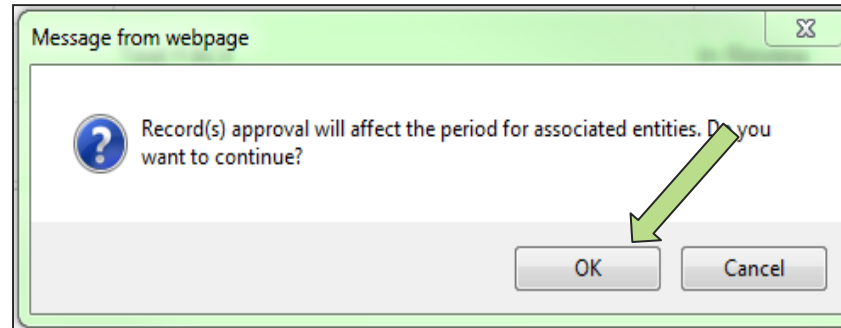
- To display the new user:
 - In the **With Status** dropdown, select **In Review** and click **Go**.
 - The user's name is displayed with In Review status.
 - Click the box next to the user's name, then click the **Approve** button.

The screenshot shows the 'Manage Users' interface. At the top, there are buttons for 'Close', '+ Add', 'Approve' (highlighted with a green box), and 'Reject'. Below this is a 'Filter By' section with two dropdown menus and an 'And:' label. The 'With Status' dropdown is set to 'In Review' and is also highlighted with a green box. A green arrow points from the 'Approve' button to the 'With Status' dropdown. Below the filter section is a table with columns: Name, Domain Name, Organization, Status, Start Date, and End Date. The first row of the table has a checked checkbox next to the name 'Name, Pretend'. At the bottom, there is a 'View Page: 1' section with a 'Go' button, a '+ Page Count' button, and a 'SaveToXLS' button. The 'Viewing Page: 1' text is displayed in the center, and navigation buttons for 'First', 'Prev', 'Next', and 'Last' are on the right.

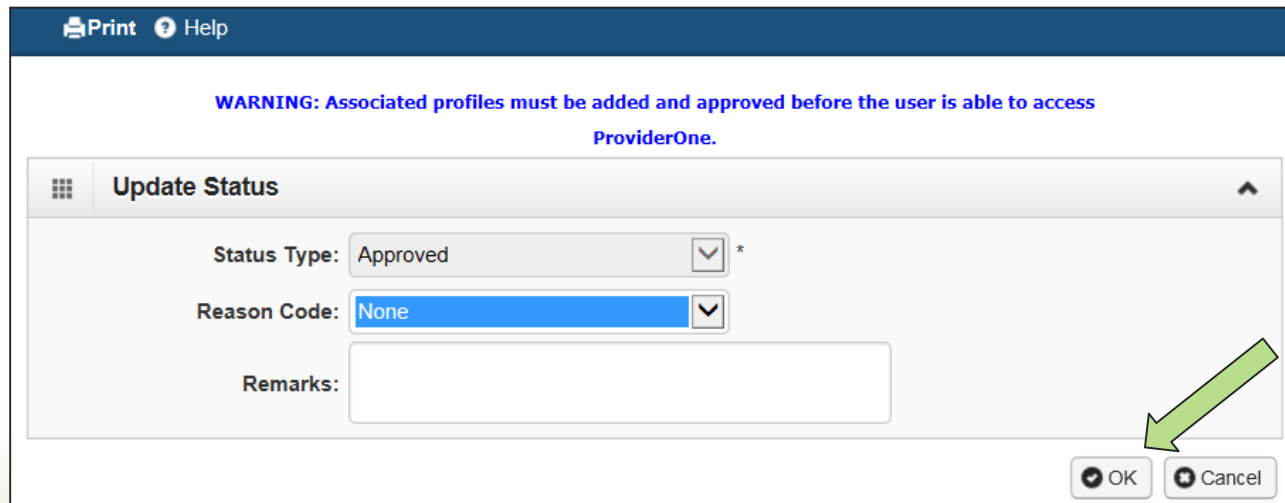
Name	Domain Name	Organization	Status	Start Date	End Date
<input checked="" type="checkbox"/> Name, Pretend	9999999	Test FAOI	In Review	11/30/2015	12/31/2999

How to set up a user

- Once approved, a dialogue box will pop up, click **Ok**.



- Once clicked, another window will appear warning you that profiles must be added for this new user. Click **Ok** to complete approval.



How to set up a user

- The user is now in **Approved** status.

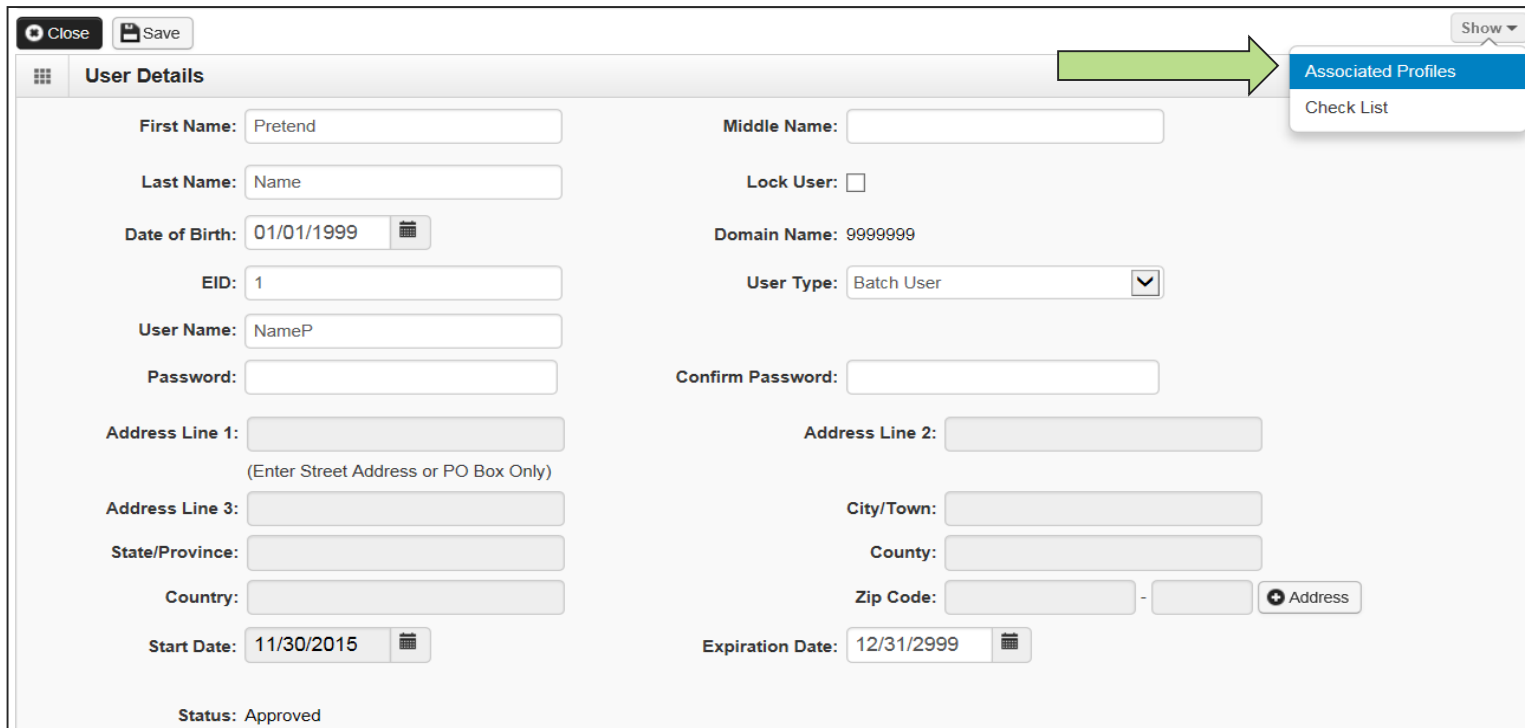
The screenshot shows the 'Manage Users' interface. At the top, there are buttons for 'Close', 'Add', 'Approve', and 'Reject'. Below this is a 'Filter By' section with dropdown menus and a 'With Status' dropdown set to 'Approved'. A table lists user information, with the 'Status' column for the user 'Name, Pretend' highlighted in green. The table has columns for Name, Domain Name, Organization, Status, Start Date, End Date, LastName, and FirstName. At the bottom, there are navigation controls including 'View Page: 1', 'Go', 'Page Count', 'SaveToXLS', and 'Viewing Page: 1'.

	Name	Domain Name	Organization	Status	Start Date	End Date	LastName	FirstName
<input type="checkbox"/>	Name, Pretend	9999999	Test FAOI	Approved	11/30/2015	12/31/2999	Name	Pretend

- Click on the **User Name** to access their user account and tell ProviderOne the functions they will perform in the system.

How to set up a user

- Adding Profiles:
 - On the Show menu click on **Associated Profiles**.



The screenshot shows a 'User Details' form with the following fields and values:

- Close** (button), **Save** (button)
- Show** (dropdown menu) - Opened, showing **Associated Profiles** (highlighted) and **Check List**.
- First Name:** Pretend
- Last Name:** Name
- Date of Birth:** 01/01/1999
- EID:** 1
- User Name:** NameP
- Password:** (empty)
- Confirm Password:** (empty)
- Middle Name:** (empty)
- Lock User:**
- Domain Name:** 9999999
- User Type:** Batch User
- Address Line 1:** (empty)
- Address Line 2:** (empty)
- Address Line 3:** (empty)
- City/Town:** (empty)
- State/Province:** (empty)
- County:** (empty)
- Country:** (empty)
- Zip Code:** (empty) - (empty) **+ Address** (button)
- Start Date:** 11/30/2015
- Expiration Date:** 12/31/2999
- Status:** Approved

How to set up a user

- Adding Profiles:
 - Click on the **Add** button to select profiles.

User Login: NameP Name: Name,Pretend

Close Add Approve Reject Show

Manage User Profiles

Filter By: Filter By With Status: All Go Save this filter My Filters

	Name	Description	Start Date	End Date	Status
No Records Found !					

How to set up a user

- Adding Profiles:

The screenshot shows a web application window titled "Add New Profiles to User". At the top, there are "Print" and "Help" icons. Below the title bar, the "User Name" is set to "Name.Pretend". The "Start Date" is "12/15/2015" and the "End Date" is "12/31/2999".

There are two main sections: "Available Profiles" and "Associated Profiles".

Available Profiles:

- EXT Provider EHR Administrator
- EXT Provider Eligibility Checker
- EXT Provider Eligibility Checker-Claims Submitter
- EXT Provider File Maintenance
- EXT Provider File View Only
- EXT Provider Managed Care Only
- EXT Provider Social Services Medical
- EXT Provider Social Services
- EXT Provider Upload Files
- EXT Provider Upload and Download Files

Associated Profiles:

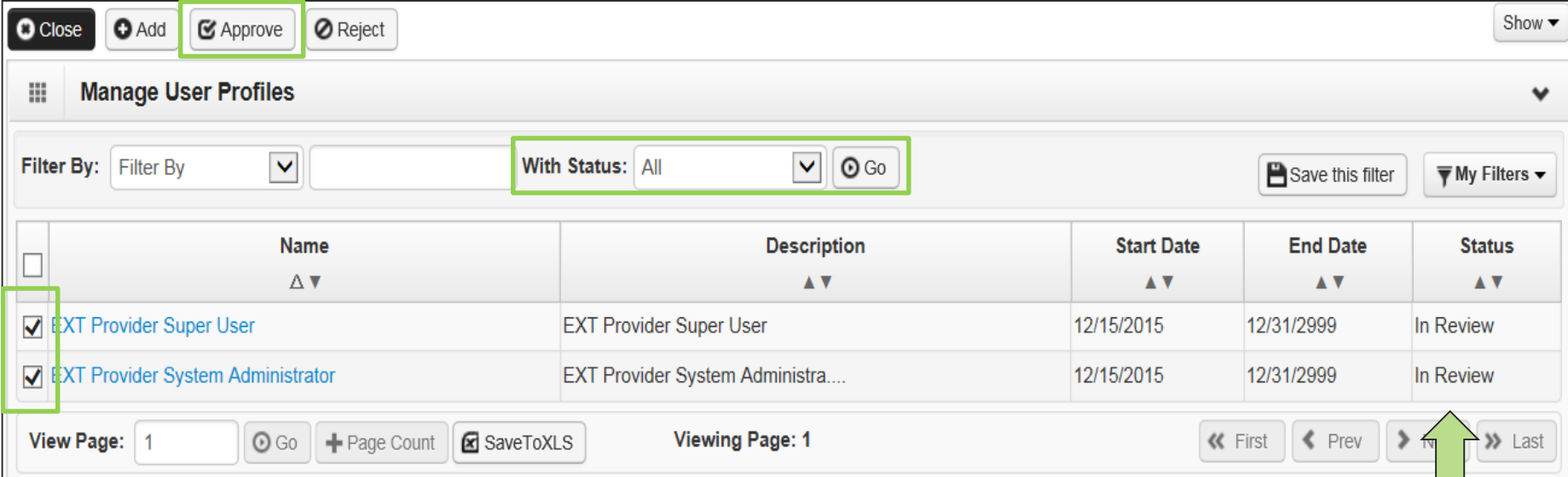
- EXT Provider System Administrator
- EXT Provider Super User

Green arrows indicate the workflow: one arrow points to the double arrow button (»») between the two profile lists, and another arrow points to the "OK" button at the bottom right.

- Highlight Available Profiles desired.
- Click **double arrow button** and move to Associated Profiles box then click the **OK** button.

How to set up a user

- Adding Profiles:



Close Add **Approve** Reject Show

Manage User Profiles

Filter By: Filter By With Status: All Go Save this filter My Filters

	Name	Description	Start Date	End Date	Status
<input checked="" type="checkbox"/>	EXT Provider Super User	EXT Provider Super User	12/15/2015	12/31/2999	In Review
<input checked="" type="checkbox"/>	EXT Provider System Administrator	EXT Provider System Administra...	12/15/2015	12/31/2999	In Review

View Page: 1 Go Page Count SaveToXLS Viewing Page: 1 First Prev Next Last

- To Display the new profiles:
 - The **With Status** dropdown box should state **All**. Click **Go**.
 - The profiles are displayed with **In Review** status.
 - Click the box next to the profile name, then click the **Approve** button.

How to set up a user

- Once approved a dialogue box will pop up, click **Ok**.

Print Help

Update Status

Status Type: Approved *

Reason Code: None

Remarks:

OK Cancel

Page ID: dlgUpdateStatusEntity(Common) Environment: UAT (Beta) ID: app02_01Server Time: 01/11/2016 11:28

How to set up a user

- The profile statuses are now **Approved**.

The screenshot shows a web application interface for managing user profiles. At the top, there are buttons for 'Close', 'Add', 'Approve', and 'Reject'. Below this is a 'Manage User Profiles' section with a filter bar. The filter bar includes a 'Filter By' dropdown, a search input, a 'With Status' dropdown set to 'All', and a 'Go' button. There are also 'Save this filter' and 'My Filters' options. The main content is a table with the following columns: Name, Description, Start Date, End Date, and Status. Two user profiles are listed, both with a status of 'Approved'. The 'Status' column for both rows is highlighted with a green box. At the bottom, there is a pagination bar showing 'View Page: 1', 'Go', '+ Page Count', 'SaveToXLS', 'Viewing Page: 1', and navigation buttons for 'First', 'Prev', 'Next', and 'Last'.

	Name	Description	Start Date	End Date	Status
<input type="checkbox"/>	EXT Provider Super User	EXT Provider Super User	12/15/2015	12/31/2999	Approved
<input type="checkbox"/>	EXT Provider System Administrator	EXT Provider System Administra....	12/15/2015	12/31/2999	Approved

- Click **Close** to return to User Details.

How to set up a user

- Setting up a user's password – password requirements:
 - Must be at least eight characters long
 - Must contain a letter
 - Must contain a number
 - Must contain at least one of the following special characters: , . ! @ \$ % ^ & * () _ + - < >
 - Password will expire every 120 days
 - Password cannot be the same as the last five passwords

See next slides for screen shots of the User Details fields.

How to set up a user

- Setting up a user's password
 - Enter a new temporary password and click **Save** and then **Close**.
 - This is the temporary password to provide to the new user.

The screenshot shows a user setup form with the following fields and values:

- User Login Id: NameP
- Close (button)
- Save (button)
- User Details (tab)
- First Name: Pretend
- Last Name: Name
- Date of Birth: 01/01/1999
- EID: 1
- User Name: NameP
- Password: (empty)
- Confirm Password: (empty)
- Address Line 1: (empty)
- Address Line 2: (empty)
- Address Line 3: (empty)
- State/Province: (empty)
- Country: (empty)
- Start Date: 11/30/2015
- Expiration Date: 12/31/2999
- Status: Approved

A callout box on the right lists password requirements:

- Must be at least eight characters long
- Must contain a letter
- Must contain a number
- Must contain at least one of the following special characters: , . ! @ \$ % ^ & * () _ + - < >

Green arrows point from the callout box to the Password and Confirm Password fields.

How to manage a user

- How to lock or end date a user:

User Details

Close Save

First Name: Pretend

Last Name: Name

Date of Birth: 01/01/1999

EID: 1

User Name: NameP

Password:

Address Line 1:

(Enter Street Address or PO Box Only)

Address Line 3:

State/Province:

Country:

Start Date: 11/30/2015

Status: Approved

Middle Name:

Lock User:

Domain Name: 9999999

User Type: Batch User

Confirm Password:

Address Line 2:

City/Town:

County:

Zip Code: - Address

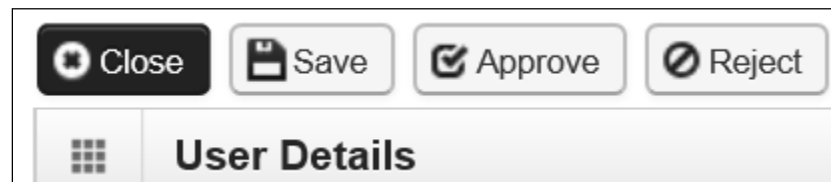
Expiration Date: 12/31/2999

To lock or unlock a User, click this box.
Users can also be end dated.

- Click **Save** and then **Close**.

How to manage a user

- If you have end dated the user, this change must be approved.
- Once you click Save, an Approve button will appear in the upper left corner of the User details screen.



- Click approve to finalize this change.

Error messages

Error Message	Definition	Solution
Warning: Invalid Login password. Try again.	The password entered was incorrect.	Enter the correct password or contact your system administrator to reset the password.
Warning: Invalid Login UserID. Try again.	The user ID (i.e. username, login ID) is incorrect.	Enter the correct user ID. The user ID is case sensitive.
Warning: Invalid Domain Name. Try again.	The domain name (i.e. domain number) is incorrect.	Enter the correct domain name (i.e. domain number).
Warning: This EID already exists in this domain.	When adding a new user, the EID (employee ID number) is the same as another user assigned to this domain.	The employee ID number must be unique. Enter a different number for the employee ID to proceed.

Error messages

Error Message	Definition	Solution
Warning: No User Profiles assigned to the User. Please contact Administrator.	There are no security profiles assigned to the user account	The system administrator will need to add user profiles to the account. The user cannot log in until the profiles are added.
Unable to complete request. Error Message: Unable to perform the specified SQL query.	This error normally occurs when a claim is being submitted, when the user uses the back arrow on the browser, or clicks the X in the upper right corner.	Turn off popup blockers on your browser and only use buttons or commands within the ProviderOne screens.
Warning: User ID is locked in the system. Please contact the System Administrator.	The user account is locked.	Use the “unlock” instructions on the ProviderOne Security webpage or contact the system administrator.
Warning: Password Recovery answer does not match with the one in the system. Please try again.	The answer to your secret question is incorrect.	Enter the correct answer or contact the system administrator to reset the password.

Important resources

- ProviderOne Security email: provideronesecurity@hca.wa.gov
- ProviderOne Security phone: 1-800-562-3022 extension 59991

ProviderOne Security assists in setting up the initial login credentials of a domain's System Administrator and can assist with password resets for System Administrator's only. For all other issues or questions:

- Medical Assistance Customer Service Center:
 - Provider general questions – hours 7-4:30 pm
 - Provider claim line – hours 8 am to 12 Noon and 1:30-3:30 pm
 - 1-800-562-3022
 - [Web form](#) for submitting questions via email
- More training resources available on the [ProviderOne Resources webpage](#).