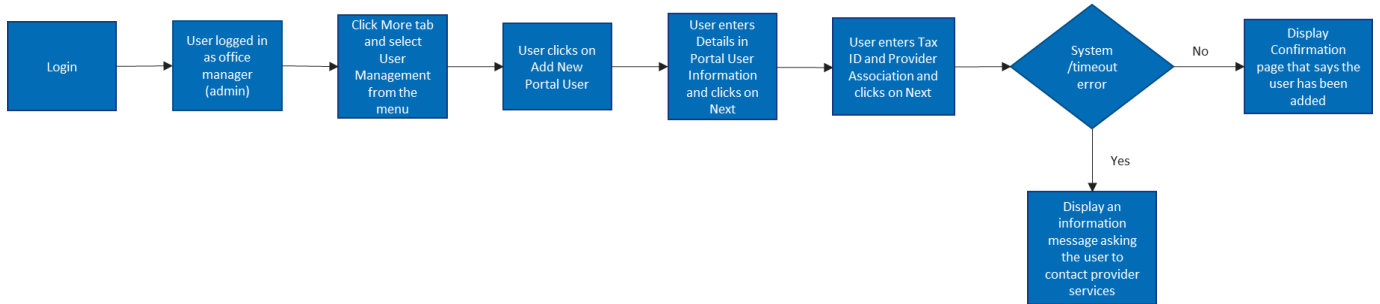


Provider Portal User Management Create a User

Quick Reference Guide




This Quick Reference Guide (QRG) will provide an overview of how to create a Portal User.

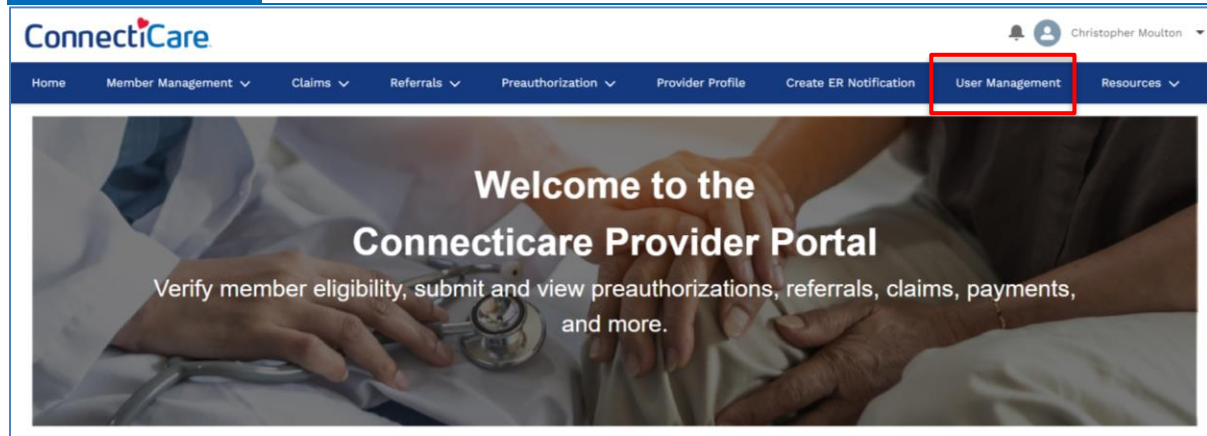


Let us look at the steps in detail for creating a Portal User.

Purpose: Create a new user.

 **Step 1:**

1. From the **ConnectiCare Home** page, click the **User Management** tab.





Step 2:

- The **User Management** page displays.
1. Click **Add New Portal User**.

User Management

Before adding a new user, please check if the user you want to add already exists.

Add New Portal User

Search By *



Reset Search

Search



Step 3:

- The **User Information** page displays.
1. Enter required information.
 - **First Name** and **Last Name**
 - **Email** and **Verify Email**
 - **User Name** (this is the email address)
 - **Street**
 2. Click **Next**.

Portal User Information

CREATE PORTAL USER

User Information

Complete the details below and click Next to continue. All fields with an asterisk * are required.

<input type="text" value="First Name *"/>	Middle Name	<input type="text" value="Last Name *"/>
<input type="text" value="Email *"/>	<input type="text" value="Verify Email *"/>	
Please enter user name in a email format.		
<input type="text" value="User Name *"/>		
<input type="text" value="Mobile"/>	<input type="text" value="Office Phone Number"/>	
<input type="text" value="Fax"/>		
<input type="text" value="Street *"/>		
<input type="text" value="City"/>	<input type="text" value="State/Province"/>	
<input type="text" value="Zip/Postal Code"/>	<input type="text" value="Country"/>	



Step 4:

The **Tax ID and Provider Association** page displays.

1. Select **Tax ID** from drop down.
2. Select **User Type** from drop down.

Tax ID and Provider Association

CREATE PORTAL USER

Tax ID and Provider Association

Complete the details below and click Next to continue. All fields with an asterisk * are required.

Select Tax ID * Select User Type *

Previous Submit

CREATE PORTAL USER

Tax ID and Provider Association

Complete the details below and click Next to continue. All fields with an asterisk * are required.

Select Tax ID *
222537423-AMANDA COOK1

Select User Type *

- Office Manager
- Clinical Staff
- Billing Staff
- Appointment Scheduler
- Eligibility Checker
- Practice Maintenance

Previous Submit



Step 5:

- Access to Tax ID question displays.
1. Select **Yes** or **No**.
** If **Yes** is selected, then click **Submit** to complete.
** If **No** is selected, then continue below.

Tax ID and Provider Association

CREATE PORTAL USER

Tax ID and Provider Association

Complete the details below and click Next to continue. All fields with an asterisk * are required.

Select Tax ID *
190278378 - Sean Clarke

Select User Type *
Clinical Staff

Do you want to grant this user access to all providers under this Tax ID number?

Yes No

Selecting "Yes" will automatically allow this user to see all current providers and future providers under this Tax ID number

This user will have access to all current providers and all future providers with this Tax ID number.

Previous Submit

Cancel



Step 6:

1. Click **View Affiliated Providers** or **Choose a Different Tax ID**.

Tax ID and Provider Association

CREATE PORTAL USER

Tax ID and Provider Association

Complete the details below and click Next to continue. All fields with an asterisk * are required.

Select Tax ID *
190278378 - Sean Clarke

Select User Type *
Clinical Staff

Do you want to grant this user access to all providers under this Tax ID number?

Yes No

Selecting "Yes" will automatically allow this user to see all current providers and future providers under this Tax ID number.

Click the button below to see all affiliated providers and select at least one provider to continue.

View Affiliated Providers

Choose a Different Tax ID

Previous Submit



Step 7:

1. Under **Select Providers*** select the **Search by** drop down.
2. Click **Search**.

CREATE PORTAL USER

Tax ID and Provider Association

Complete the details below and click Next to continue. All fields with an asterisk * are required.

Select Tax ID *
190278378 - Sean Clarke

Select User Type *
Clinical Staff

Do you want to grant this user access to all providers under this Tax ID number?

Yes
 No

Selecting "Yes" will automatically allow this user to see all current providers and future providers under this Tax ID number.

Click the button below to see all affiliated providers and select at least one provider to continue.

View Affiliated Providers

Choose a Different Tax ID

Select Providers *

Search By

Reset Search

Search

Add

	Name	Address	NPI	Provider ID
<input type="checkbox"/>	Ray Shilling	564 Port House Ave., Bronx, NY 10463	176066893	100000392866
<input type="checkbox"/>	Kiana Beringer	981 North Rd., New York, NY 10033	116901688	100000155867
<input type="checkbox"/>	Brandi Hippe	9 South Armstrong Court, Ridgewood, NY 11385	182366971	100000908173
<input type="checkbox"/>	Booker Wingate	481 Beechwood Ave., Brooklyn, NY 11215	156066167	100000282731
<input type="checkbox"/>	Pamela Crafton	993 Sunnyslope Dr., Bronx, NY 10473	113066231	100000399031
<input type="checkbox"/>	Neil Devine	981 North Rd., New York, NY 10033	116901688	100000282731



Step 8:

Providers affiliated with the Tax ID display.

1. Select the check box(s) next to the Provider(s) the user may conduct business for.
2. Click **Add**.

CREATE PORTAL USER

Tax ID and Provider Association

Complete the details below and click Next to continue. All fields with an asterisk * are required.

Select Tax ID *
190278378 - Sean Clarke

Select User Type *
Clinical Staff

Do you want to grant this user access to all providers under this Tax ID number?

Yes
 No

Selecting "Yes" will automatically allow this user to see all current providers and future providers under this Tax ID number.

Click the button below to see all affiliated providers and select at least one provider to continue.

View Affiliated Providers

Choose a Different Tax ID

Select Providers *

Search By

Reset Search
Search

Add

Name ↑	Address	NPI	Provider ID
<input checked="" type="checkbox"/>	Baystate Noble Hospital	115 W Silver St, Westfield, MA, 01085-3678	1700816048 100000158062
<input checked="" type="checkbox"/>	Noble Hospital	115 W Silver Street, , Westfield, MA, 01085-3628	100001047085

Total Records: 2 < Showing 1 - 2 >



Step 9:

Selected Providers display in a new list.

1. Click **Submit**.

Add

Name ↑	Address	NPI	Provider ID
<input type="checkbox"/> Baystate Noble Hospital	115 W Silver St, Westfield, MA, 01085-3678	1700816048	100000158062
<input type="checkbox"/> Noble Hospital	115 W Silver Street, , Westfield, MA, 01085-3628		100001047085

Total Records: 2 < Showing 1 - 2 >

Selected Providers

Remove

Name ↑	Address	NPI	Provider ID
<input type="checkbox"/> Baystate Noble Hospital	115 W Silver St, Westfield, MA, 01085-3678	1700816048	100000158062
<input type="checkbox"/> Noble Hospital	115 W Silver Street, , Westfield, MA, 01085-3628		100001047085

Total Records: 2

Previous

Submit

Cancel



Step 10:

1. **Confirmation** page displays.
2. Click **Done**.



Confirmation

The Portal User you have just added will be receiving an email with registration information. If the Portal User can't find the email, have them look in their Spam folders as some messages may get filtered there. Please have them click on the Activation Link. Note that this link expires in 7 days.



Thank
You