

# ProviderOne Provider System User Manual



## Maintaining ProviderOne User Accounts

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### Disclaimer:

A contract, known as the Core Provider Agreement, governs the relationship between DSHS and Medical Assistance providers. The Core Provider Agreement's terms and conditions incorporate federal laws, rules and regulations, state law, DSHS rules and regulations, and DSHS program policies, numbered memoranda, and billing instructions, including this Guide.

Providers must submit a claim in accordance with the DSHS rules, policies, numbered memoranda, and billing instructions in effect at the time they provided the service. Every effort has been made to ensure this Guide's accuracy. However, in the unlikely event of an actual or apparent conflict between this document and a department rule, the department rule controls."



# ProviderOne Provider System User Manual

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# Maintaining ProviderOne User Accounts

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## Creating, Managing, and Auditing ProviderOne User Accounts

The following ProviderOne tasks are covered in this section:

- [Creating and Modifying ProviderOne User Accounts](#)
- [Assigning and Modifying User Account Profiles](#)



# ProviderOne Provider System User Manual

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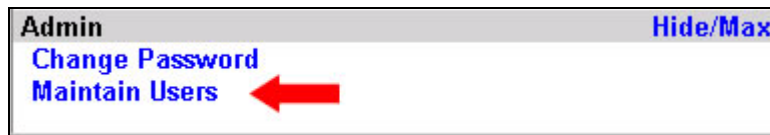
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## Creating and Modifying ProviderOne User Accounts

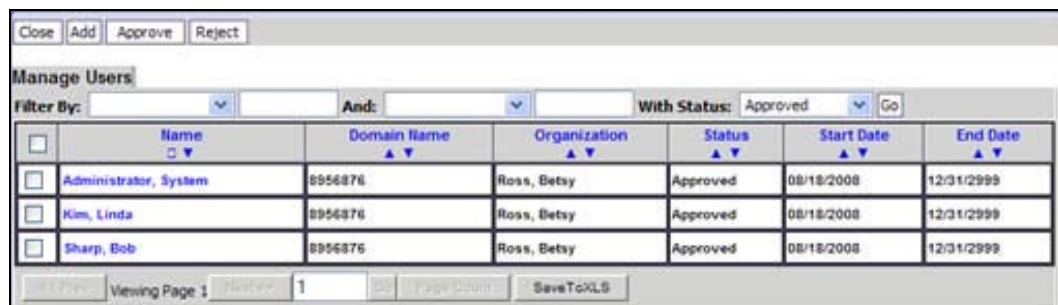
### Accessing the Manage Users List



Using the EXT Provider System Administrator user profile, from the Provider Portal, click the Maintain Users link located in the Admin section. You may need to scroll down to view the Admin section.



ProviderOne displays the Manage Users list.



Close Add Approve Reject

Manage Users

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

<input type="checkbox"/>	Name	Domain Name	Organization	Status	Start Date	End Date
<input type="checkbox"/>	Administrator, System	8956876	Ross, Betsy	Approved	08/18/2008	12/31/2999
<input type="checkbox"/>	Kim, Linda	8956876	Ross, Betsy	Approved	08/18/2008	12/31/2999
<input type="checkbox"/>	Sharp, Bob	8956876	Ross, Betsy	Approved	08/18/2008	12/31/2999

Viewing Page 1 of 1 Page Count Save To XLS

Figure 1 - Manage Users

### About the Manage Users List

- When viewing this list for the first time, the System Administrator is the only account listed.
- By default, the With Status filter is set to Approved.
- Once a user account is added to a Provider Domain the account cannot be removed but can be end dated.



# ProviderOne Provider System User Manual

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## Adding a User Account



To add a new user, click the Add button.

ProviderOne displays the Add User page.

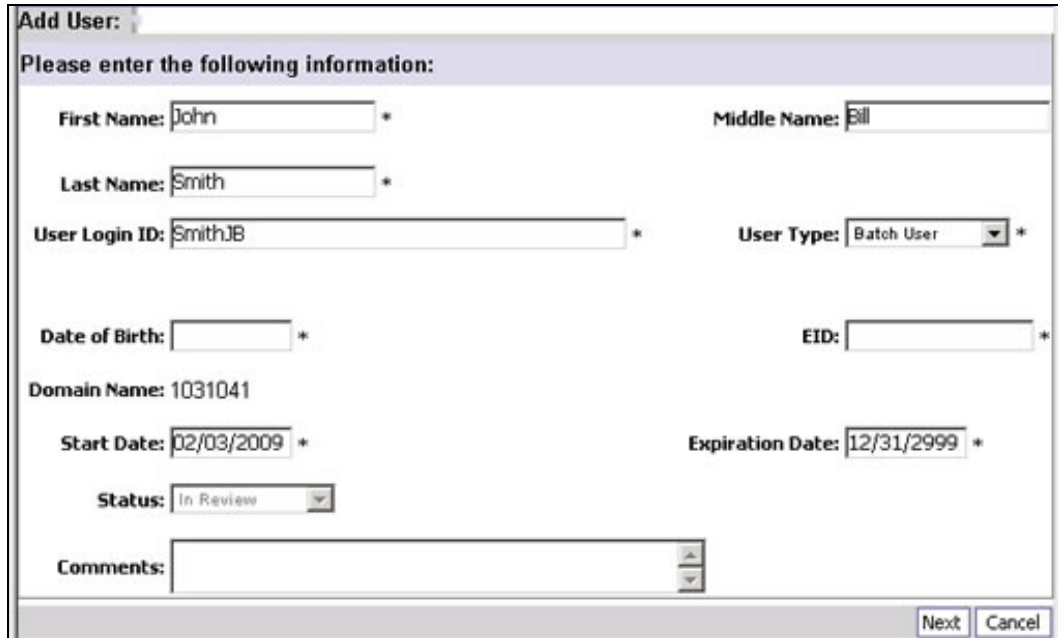


Figure 2 - Add User

### About the Add User Page

- ProviderOne automatically generates a User Login ID by combining the user's first and last name.  
**You can over-ride this value and use your own internal Login ID.**
- The Date of Birth is required for user to reset their password.
- The Employee ID (EID) is numeric. Each user EID must be unique among users in the same domain.

**Important: The EID is not a secure field; do not use Social Security numbers.**

- To set the Expiration Date to never expire enter 12/31/2999.



When all fields have been entered, click the Next button.

ProviderOne verifies that the User Login ID is unique and displays the second Add User form.

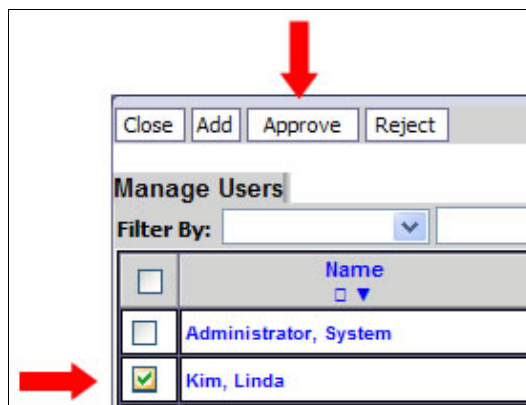


## Approving a New User

- Before a new user account can be used the account must be approved and at least one ProviderOne Profile must be assigned.
- A User Account must have a status of In Review to be approved.



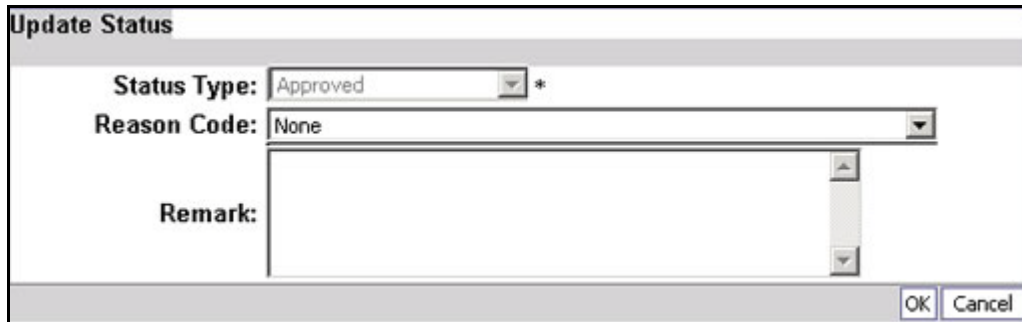
From the Manage Users list, check the box next to the user(s) you want to approve and click the Approve button.



Manage Users	
Filter By: [dropdown]	
<input type="checkbox"/>	Name
<input type="checkbox"/>	Administrator, System
<input checked="" type="checkbox"/>	Kim, Linda



ProviderOne displays the Update Status form.



Update Status	
Status Type:	Approved *
Reason Code:	None
Remark:	[Text Area]
[OK] [Cancel]	

**Figure 4 - Update Status**



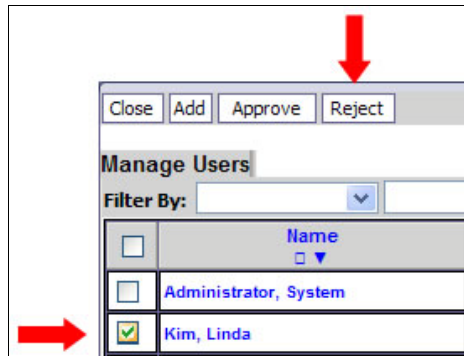
After completing the form, click the OK button to set the Status to Approved and return to the Manage Users list. Click Cancel to leave the Status set to In Review.

## Rejecting a New User

- A User Account must have a status of In Review to be rejected.



From the Manage Users list, check the box next to the user(s) you want to reject and click the Reject button.

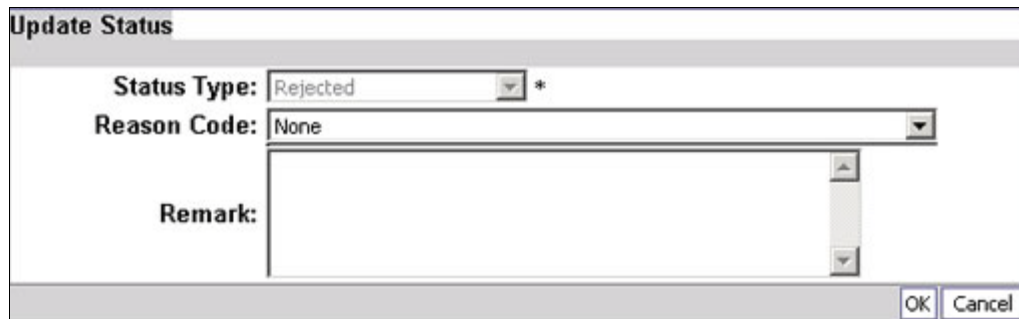


The screenshot shows a 'Manage Users' dialog box with buttons for 'Close', 'Add', 'Approve', and 'Reject'. A red arrow points to the 'Reject' button. Below the buttons is a 'Filter By:' dropdown menu. A table lists users with checkboxes: 'Administrator, System' (unchecked) and 'Kim, Linda' (checked). A red arrow points to the 'Kim, Linda' row.

	Name
<input type="checkbox"/>	Administrator, System
<input checked="" type="checkbox"/>	Kim, Linda



ProviderOne displays the Update Status form.



The screenshot shows the 'Update Status' form with the following fields: 'Status Type' (Rejected), 'Reason Code' (None), and a 'Remark' text area. 'OK' and 'Cancel' buttons are at the bottom right.

### Update Status




After completing the form, click the OK button to set the Status to Approved and return to the Manage Users list. Click Cancel to leave the Status set to In Review.

## Modifying a User Account



From the Manage Users list, click the hyperlink in the Name column.

<input type="checkbox"/>	Name ▼
<input type="checkbox"/>	Administrator, System
<input type="checkbox"/>	Kim, Linda
<input type="checkbox"/>	Sharp, Bob




ProviderOne displays the User Details page.

Close Save
Show: --SELECT-- ▼

---

First Name:

Last Name:

Date of Birth:

EID:

User Name:

Password:

Address Line 1:   
(Enter Street Address or PO Box Only)

Address Line 3:

State/Province:

Country:

Start Date:

Middle Name:

Lock User:

Domain Name: 8956876

UserType:

Confirm Password:

Address Line 2:

City/Town:

County:

Zip Code:  -  Address

Expiration Date:

Figure 5 - User Details

### To lock or unlock a user account:



Place a check in the Lock User checkbox to lock the user account, to unlock remove the check.

**Lock User:**



After making changes, click the Save button to save the changes and return to the Manage Users list, or click the Close button to close without saving.

## Assigning and Modifying User Account Profiles

ProviderOne Profiles are used to control the information can be viewed within ProviderOne and the actions that can be performed.

Profiles are assigned to individual ProviderOne User Accounts.

### Accessing the Manage User Profiles Form



From the Manage Users list, click the hyperlink in the Name column of the user.

Manage Users				
Filter By:	<input type="text"/>	And:	<input type="text"/>	With Status: <input type="text"/>
<input type="checkbox"/>	Name <input type="checkbox"/>	Domain Name <input type="checkbox"/>	Organization <input type="checkbox"/>	Status <input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Administrator, System</a>	8956876	Ross, Betsy	Approved
<input type="checkbox"/>	<a href="#">Kim, Linda</a>	8956876	Ross, Betsy	Approved
<input type="checkbox"/>	<a href="#">Sharp, Bob</a>	8956876	Ross, Betsy	Approved

Figure 6 - Manage Users



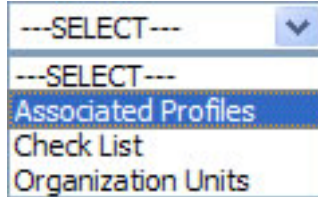
ProviderOne displays the User Details page.

User Details:		Show: --SELECT--
First Name: <input type="text" value="Bob"/>	Middle Name: <input type="text"/>	
Last Name: <input type="text" value="Sharp"/>	Lock User: <input type="checkbox"/>	
Date of Birth: <input type="text" value="06/08/1943"/>	Domain Name: 8956876	
EID: <input type="text" value="03"/>	UserType: <input type="text" value="NON-PHYSICIAN STAFF"/>	
User Name: <input type="text" value="Bob"/>	Confirm Password: <input type="text"/>	
Password: <input type="text"/>	Address Line 1: <input type="text"/>	Address Line 2: <input type="text"/>
Address Line 3: <input type="text"/>	(Enter Street Address or PO Box Only)	
State/Province: <input type="text"/>	City/Town: <input type="text"/>	County: <input type="text"/>
Country: <input type="text"/>	Zip Code: <input type="text"/> - <input type="text"/> <input type="text" value="Address"/>	
Start Date: <input type="text" value="08/18/2008"/>	Expiration Date: <input type="text" value="12/31/2999"/>	

Figure 7 - User Details



Select the Associated Profiles option from the Show drop-down.



ProviderOne displays the Manage User Profiles List.



**Figure 8 - Manage User Profiles**

### About the Manage User Profiles List

- By default the With Status filter is set to Approved.
- If this is the first time viewing this list, it will contain no records.

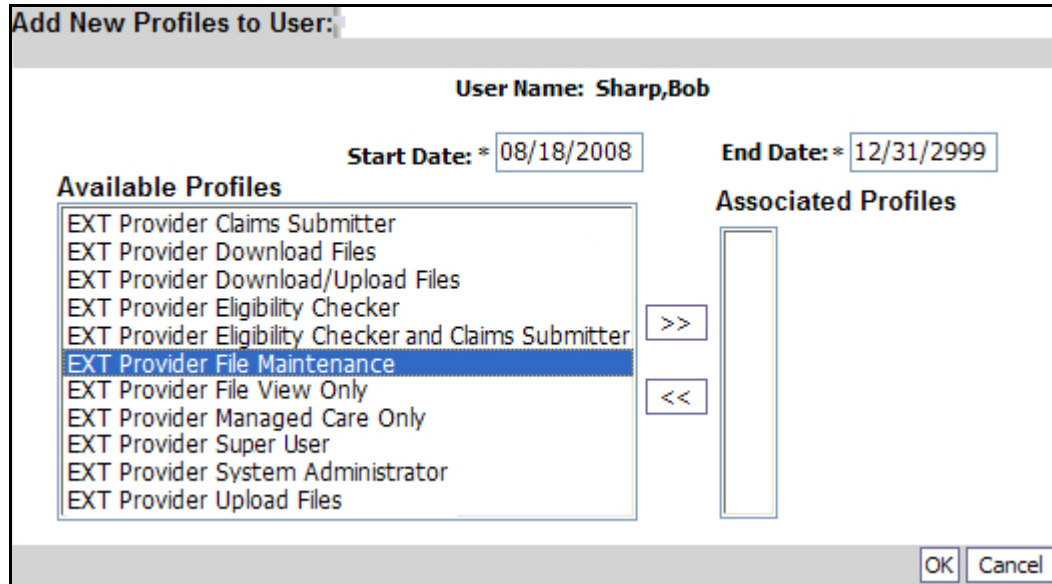


## Adding Profiles to a User Account



To add one or more profiles to a user account, click the Add button.

ProviderOne displays the Add New Profiles to User form.



**Figure 9 - Add New Profiles to User**



Select one or more Profiles from the Available Profiles column and click the >> button.

ProviderOne moves the selected Profiles to the Associated Profiles column.

**Add New Profiles to User:**

**User Name: Sharp,Bob**

**Start Date: \***       **End Date: \***

Available Profiles		Associated Profiles
EXT Provider Claims Submitter EXT Provider Download Files EXT Provider Download/Upload Files EXT Provider Eligibility Checker EXT Provider Eligibility Checker and Claims Submitter EXT Provider File View Only EXT Provider Managed Care Only EXT Provider Super User EXT Provider System Administrator EXT Provider Upload Files	<input type="button" value=" &gt;&gt;"/>  <input type="button" value=" &lt;&lt;"/>	EXT Provider File Maintenance



Click the OK button to return to the Manage User Profiles List.



ProviderOne displays the Manage User Profiles List.



To view the new Profiles, set the With Status filter to either All or In Review and click the Go button.

<b>With Status:</b>	Approved	▼	Go
	All		
	Approved		
	In Review		
	Rejected		

## Approving a New Profile

- All newly added profiles must be approved before they are accessible to the user.
- Only Profiles with a Status of In Review can be approved.



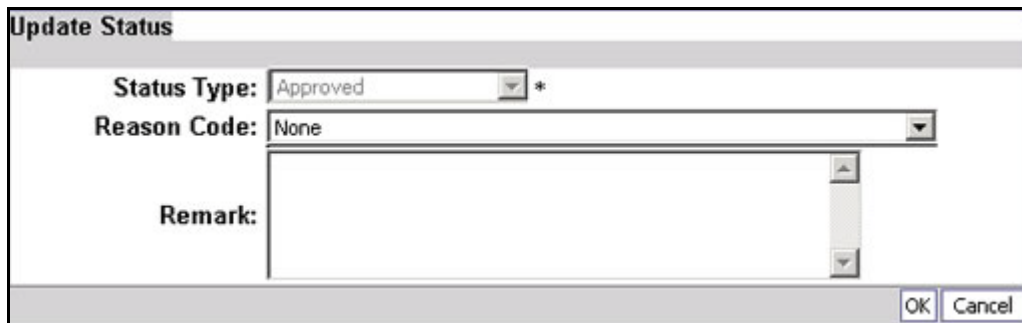
From the Manage User Profiles list, check the box next to the Profile(s) to be approved and click the Approve button.



Manage User Profiles		
Filter By:	<input type="text"/>	With Status: All <input type="button" value="Go"/>
<input type="checkbox"/>	Name	Description
<input checked="" type="checkbox"/>	EXT Provider File Maintenance	EXT Provider File Maintenance



ProviderOne displays the Update Status form.



<b>Update Status</b>	
Status Type:	Approved *
Reason Code:	None
Remark:	<input type="text"/>
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

**Figure 10 - Update Status**



After completing the form, click the OK button to set the Status to Approved and return to the Manage User Profiles list. Click the Cancel button to leave the Status set to In Review.

## Rejecting a New Profile

- Only profiles with a Status of In Review can be rejected.



From the Manage User Profiles list, check the box next to the Profile to be rejected and click the Reject button.



Close Add Approve **Reject**

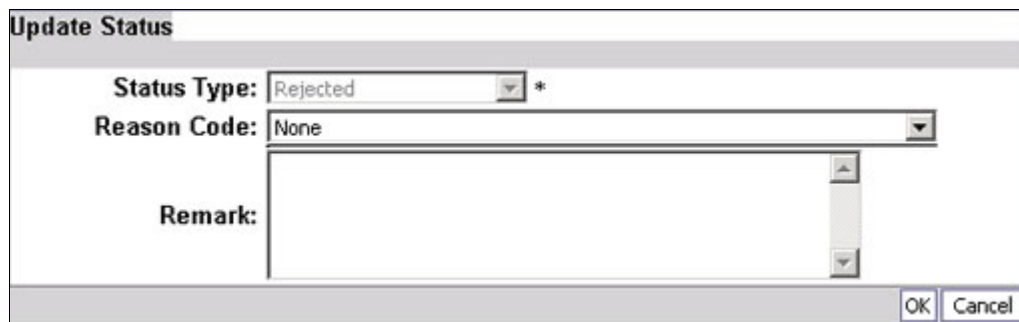
Manage User Profiles

Filter By: [dropdown] With Status: All [dropdown] Go

<input type="checkbox"/>	Name	Description
<input checked="" type="checkbox"/>	EXT Provider File Maintenance	EXT Provider File Maintenance



ProviderOne displays the Update Status form.



Update Status

Status Type: Rejected \*

Reason Code: None

Remark: [text area]

OK Cancel

### Update Status

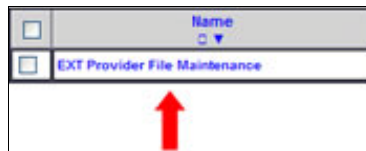


After completing the form, click the OK button to set the Status to Rejected and return to the Manage User Profiles list. Click the Cancel button to leave the Status set to In Review.

## Modifying a User Profile



From the Manage User Profiles list, click the hyperlink in the Name column.



<input type="checkbox"/>	Name
<input type="checkbox"/>	<a href="#">EXT Provider File Maintenance</a>



ProviderOne displays the User Profile Details page.



Close Save

**User Profile Details:**

User Name: Sharp, Bob      Profile Name: EXT Provider File Maintenance

Status:

Start Date:  \*      Expiration Date:  \*

Figure 11 - User Profile Details

### About the User Profile Details Page

- The only field that can be modified is the Expiration Date.



After making changes, click the Save button to save and return to the Manage User Profiles list, or click the Close button to return without saving.

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