CarePartners of Connecticut
MEDICARE ADVANTAGE

Senior Access Administrator (SAA) and Access Administrator (AA) Guide to User Management Tool

This tool is used by Senior Access Administrators (SAAs) and Access Administrators (AAs) to add, remove, and edit user profiles for the NPIs that they are administering.

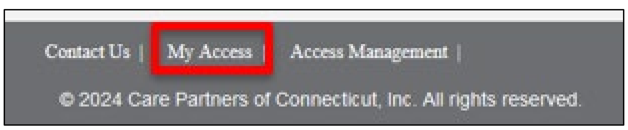
Opening the Access Management Tool

When the SAA or AA needs to maintain, edit, add, or remove a user(s) within their control, they can perform these activities on this page.

Step 1: Log into the Provider Portal – The SAA/AA can reach the Access Management screen by hovering over their name in the right corner of the screen or scrolling to the bottom of the page.

At the top of the page:

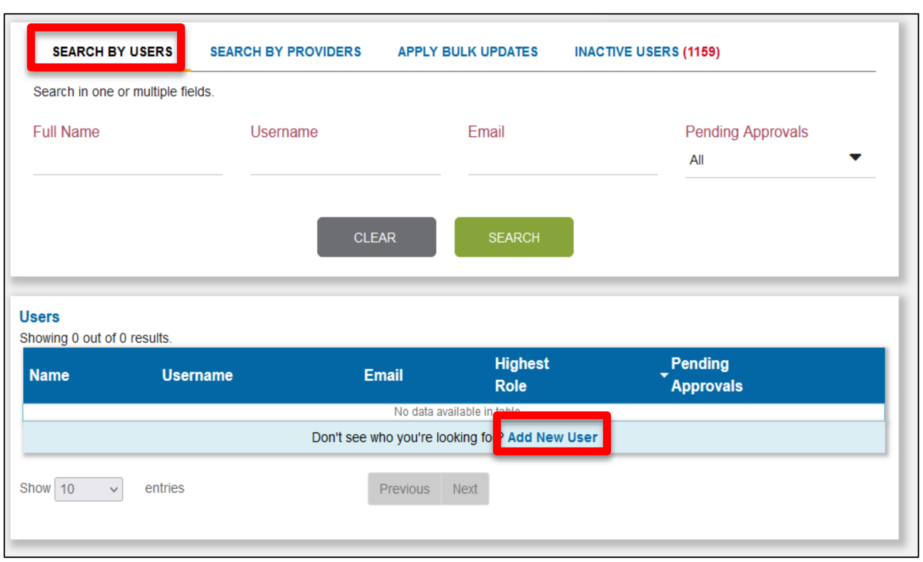
At the bottom of the page:



Adding New Users

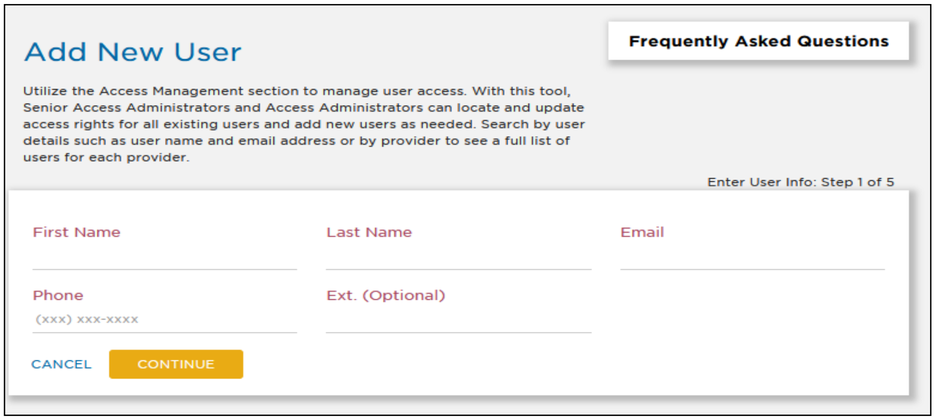
When a user needs access to the Tufts Health Plan Provider Portal, it is the responsibility of the SAA/AA to add access for the user. The SAA and AA have the ability to add the user by creating a new profile on their behalf.

Step 1: Proceed to the Access Management tool after logging into the Provider Portal.

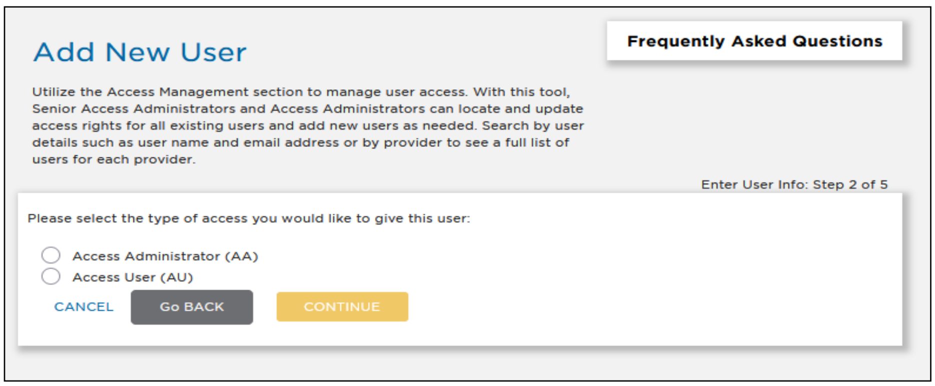


Step 2: Click “Add New User.”

Step 3: Enter New User's Basic Information – The SAA/AA will be prompted to enter the new user's first name, last name, email address, phone number, and extension.



Step 4: Select New User's Role – The SAA/AA will select whether they want the new user to be an Access Administrator or an Access User. Access Administrators can assist the SAA/AA with reviewing other access requests, but Access Users are not able to reach the Access Management page to edit or create other user accounts.



Reviewing Pending Access Requests from Users

When a user needs access to the Tufts Health Plan Provider Portal, it is the responsibility of the SAA or AA to review the access of the user. If an Access User creates their own profile, the request for access will be sent to the SAA/AA for the NPI. If the user is requesting to be an Access Administrator, the request must be reviewed by the Senior Access Administrator.

Step 1: Go to the Access Management page.

Step 2: Once on the page, there are a few ways a user can pull up a pending request:

a.) To pull all pending requests: Click the drop down under "Pending Approvals" and choose "Yes".
b.) To pull a specific request: Search the name of the pending user, search username, or search email.

Step 3: Once the pending request is pulled up, click the user's name to open the profile.

Step 4: To pull up the pending NPI requests:

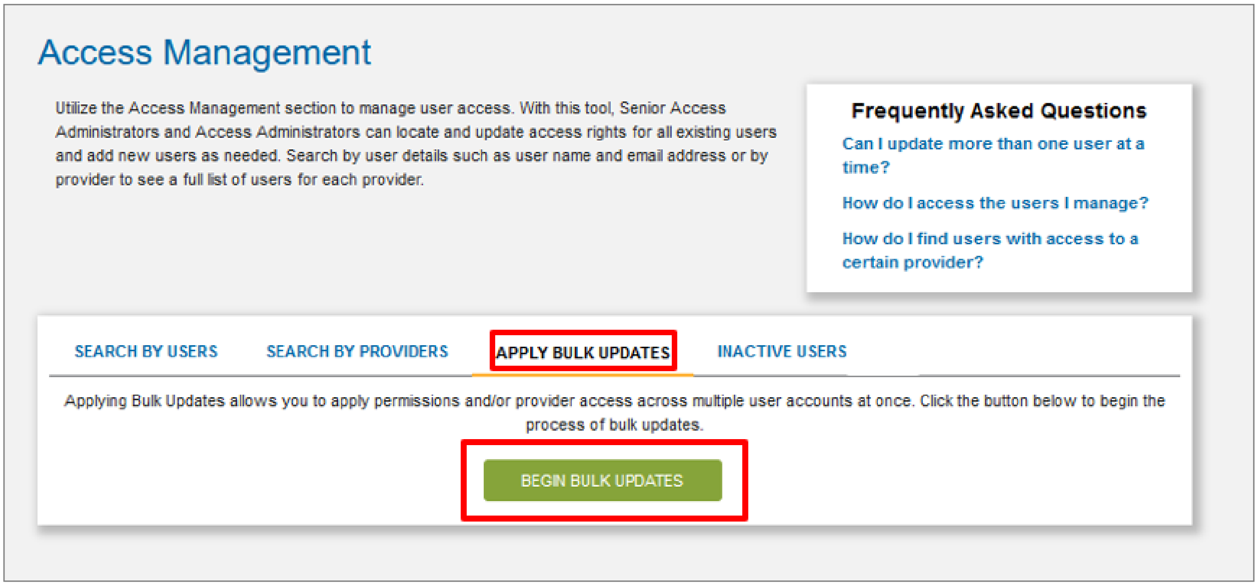
a.) For users who report to multiple SAAs, select the SAA that you are reviewing for, or search by Provider NPI/Name to pull up the pending account.
b.) For users who report to one SAA, you can see the request without selecting anything further.

Step 5: Once the user can see the "Requested Access", the requesting user's NPI request and permissions request will appear. The reviewer will be able to approve the request as is or make alterations to the request by unchecking permissions that are not wanted and then approving or denying the request altogether.

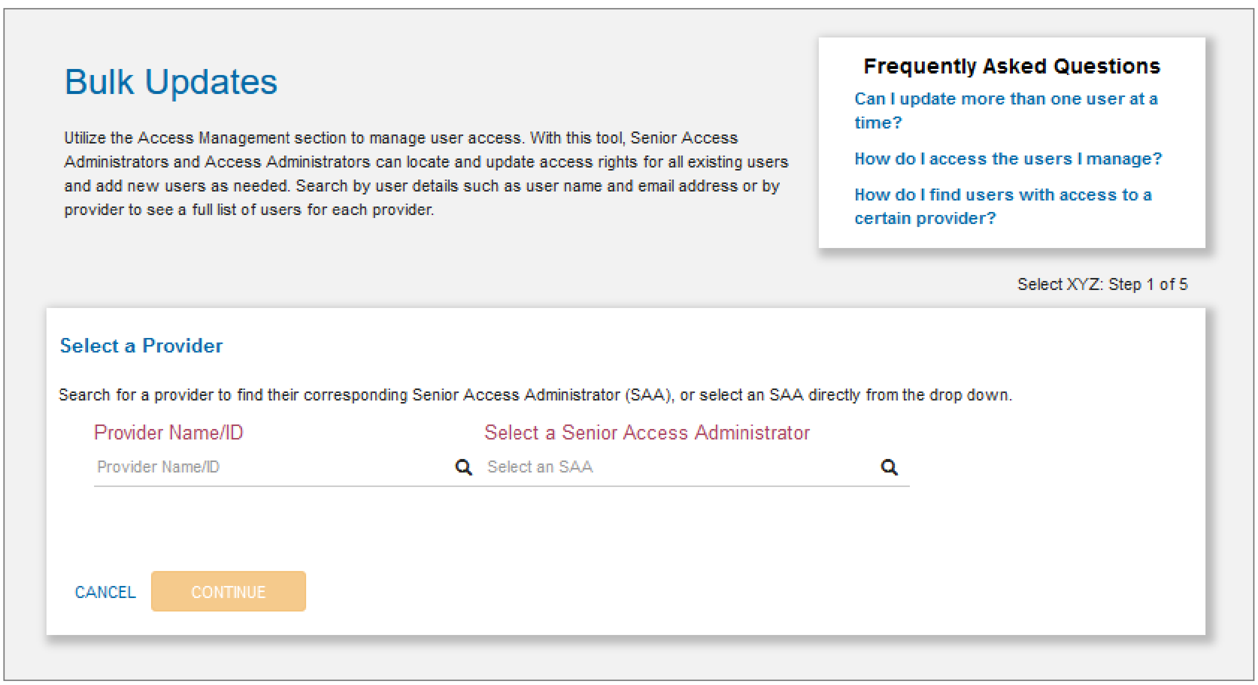
Performing Bulk Updates

This functionality is used when the SAA or AA wants to add multiple NPIs to a user or add one or more NPIs to multiple users at one time.

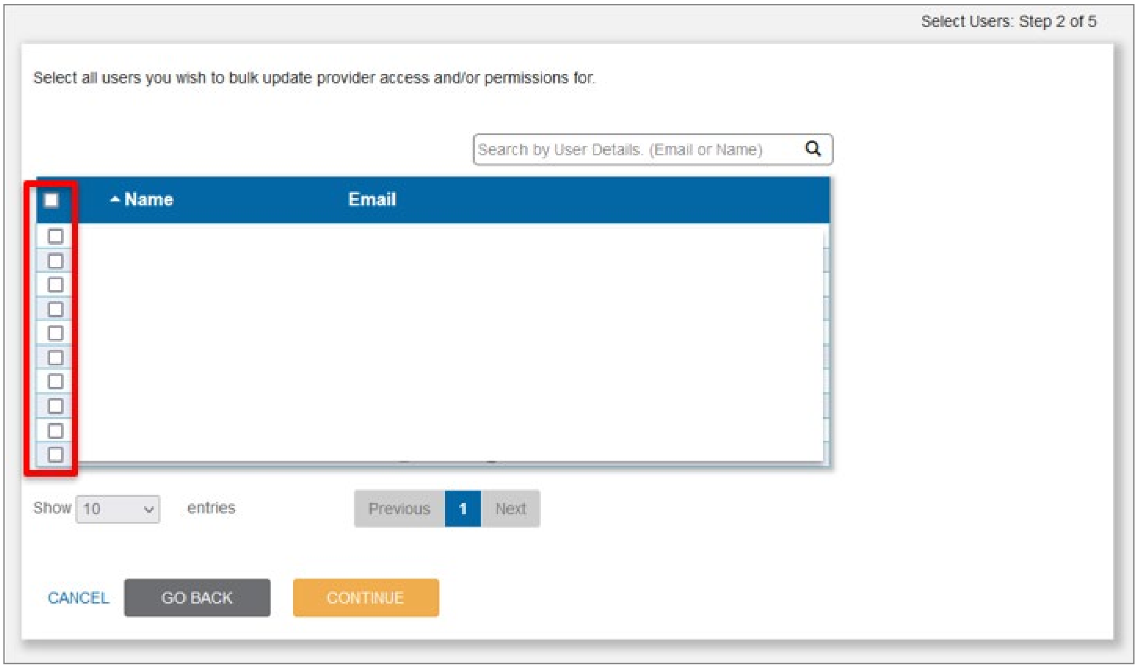
Step 1: Go into Access Management and select the “Apply Bulk Update” tab; then click “Begin Bulk Updates.”



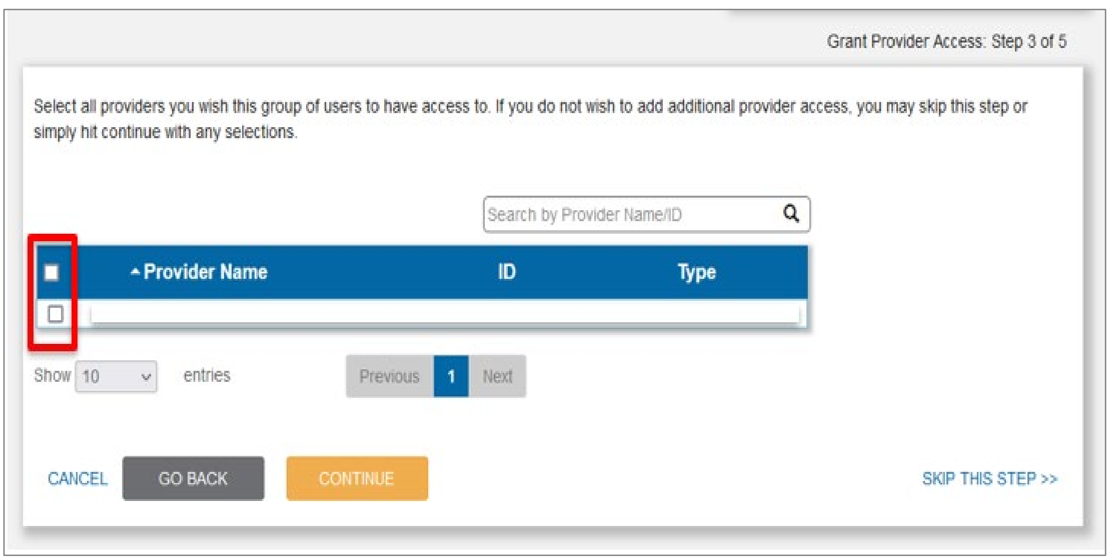
Step 2: Select the provider(s) to add to the user(s). Search by Provider Name/ID or search by SAA. After entering the search criteria, click “Continue”.



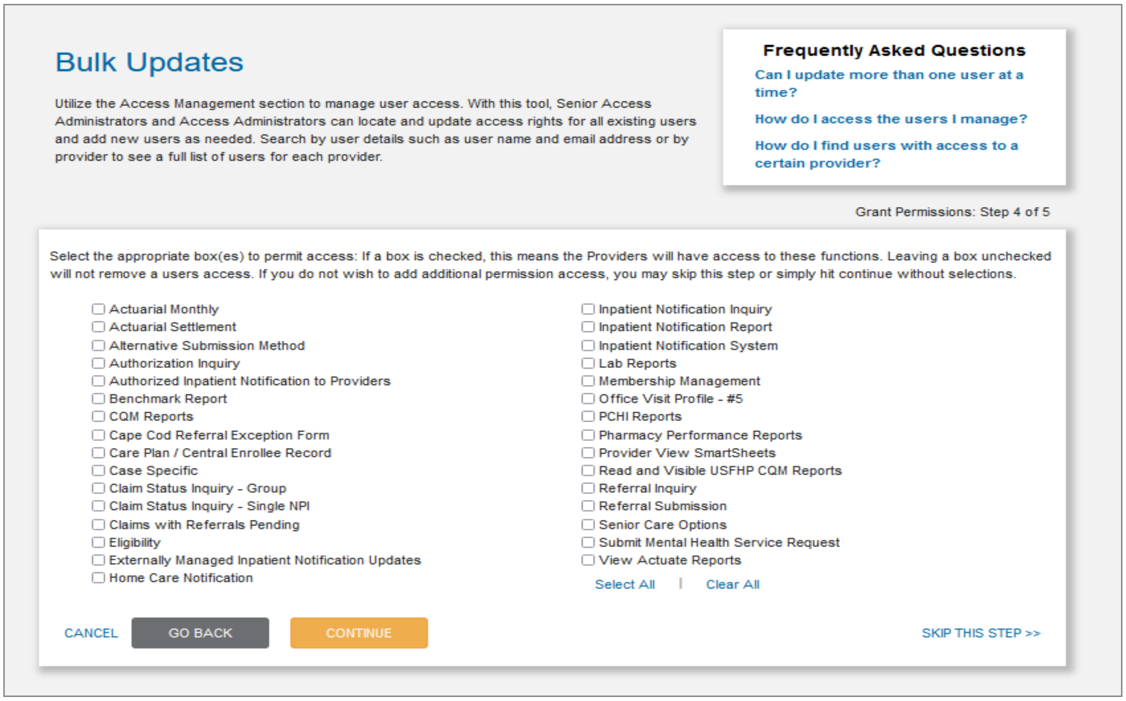
Step 3: Select the users that this Bulk Update needs to be applied to by clicking the check box next to each user, or select all by clicking the box in the blue header to select all.



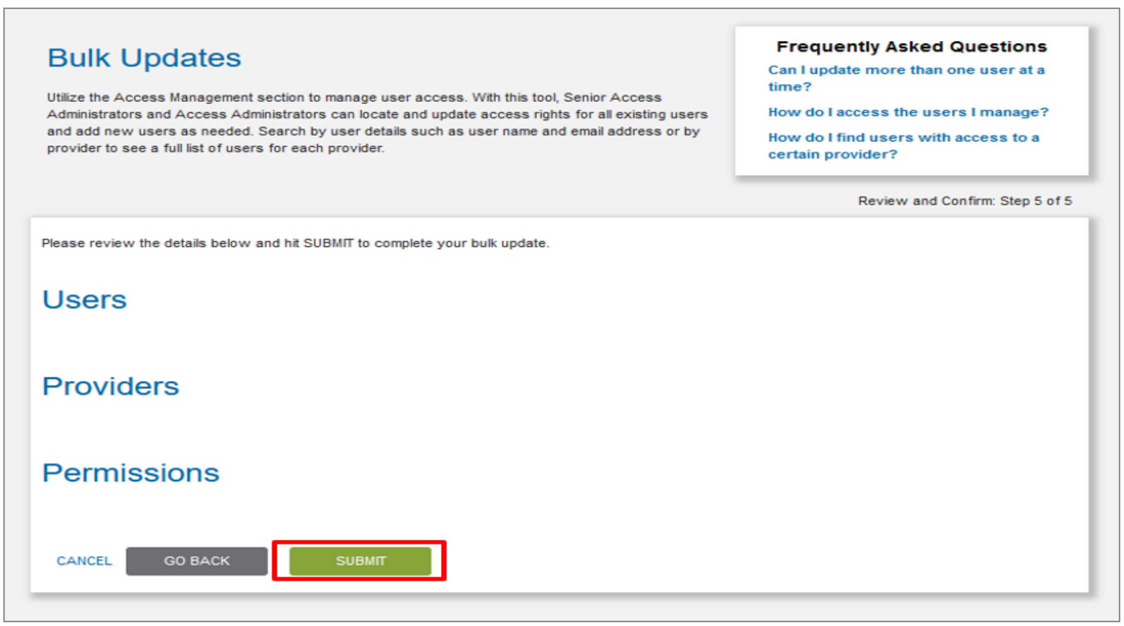
Step 4: Select the providers that this Bulk Update needs to be applied to by clicking the check box next to each provider, or select all by clicking the box in the blue header to select all.



Step 5: Select the permissions that this Bulk Update needs to be applied to, for each user in the Bulk Update.



Step 6: Review all selected options and click “Submit” to finalize the Bulk Update request.



Editing User Permissions

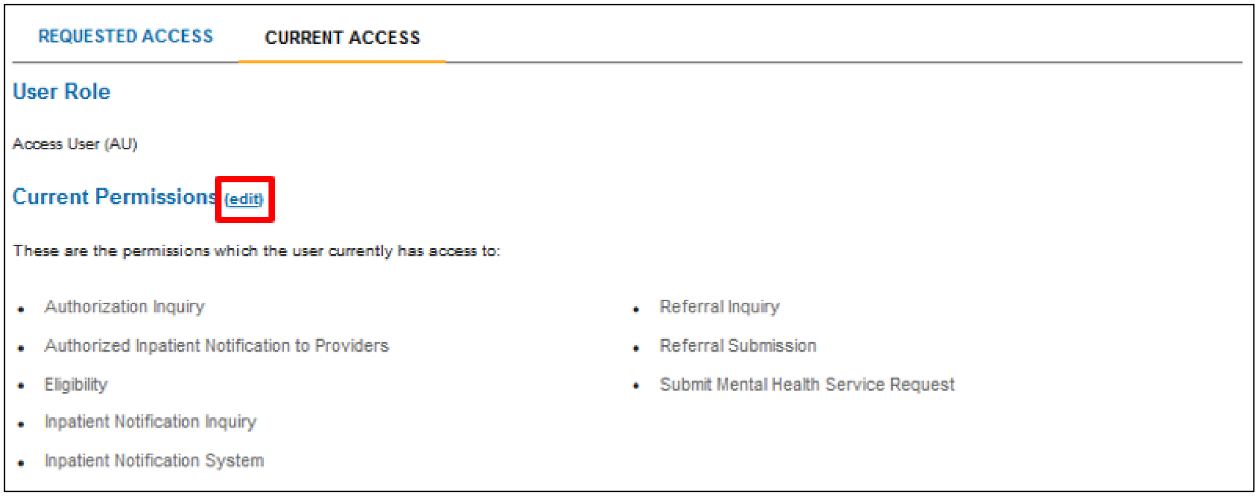
Used to update which permissions users underneath them to the NPIs have access to. For example, if a user has access to referrals, but needs access to authorizations, the SAA/AA can go into Access Management and edit the permissions.

Step 1: Go to the Access Management page.

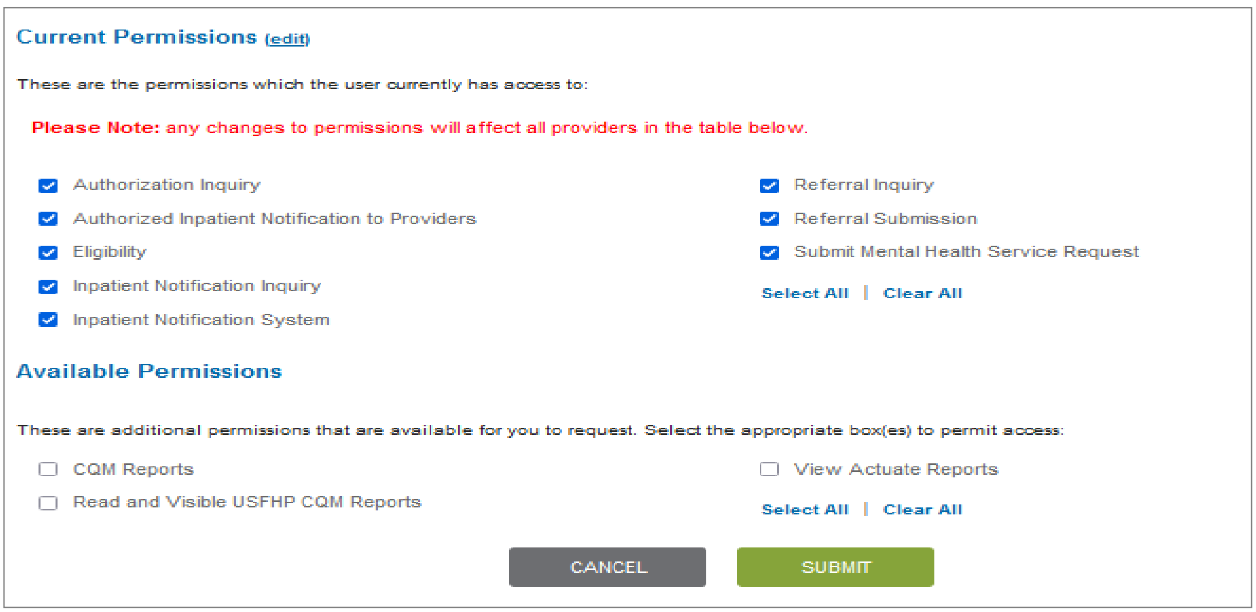
Step 2: Once on the page, there are a few ways that a user can pull up a user:
- a.) Search by name
- b.) Search by username
- c.) Search by email address

Step 3: Once the user is pulled up, click the user’s name to open the profile.

Step 4: Go into the user's "Current Access" and click "Edit" next to the "Current Permissions" section.



Step 5: Once the user clicks the edit button, the check boxes will appear. The SAA/AA can check or uncheck existing boxes to add or remove permissions. Upon completion of checking and unchecking the permissions, the SAA/AA can hit "Submit" to finalize the request.



Editing User Roles

This functionality is used to edit a user from one role to another. For example, moving an Access Administrator down to an Access User or moving an Access User up to an Access Administrator.

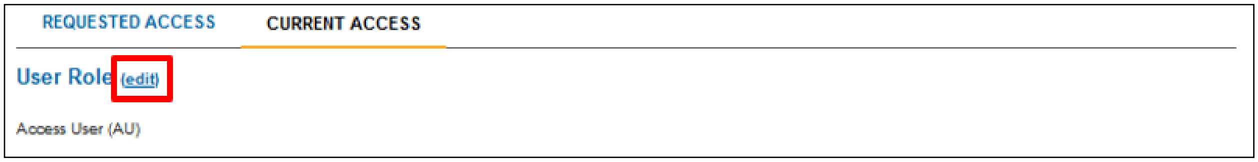
Step 1: Go into Access Management.

Step 2: Once on the Access Management page, there are a few ways that a user can pull up a user:

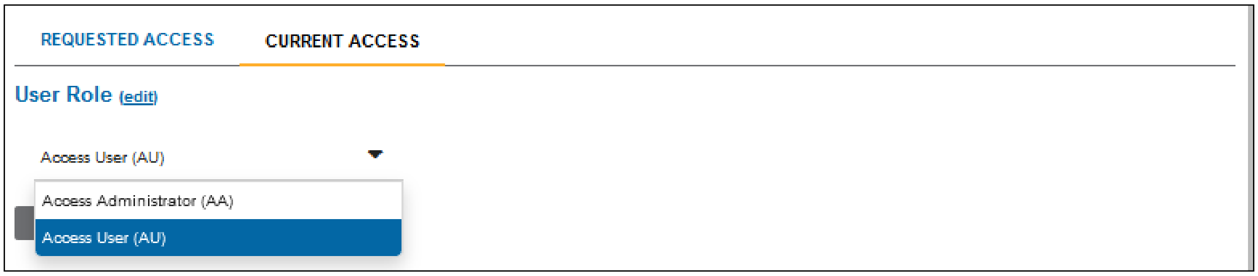
a.) Search by name.
b.) Search by username.
c.) Search by email address.

Step 3: Once the user is pulled up, click the user's name to open the profile.

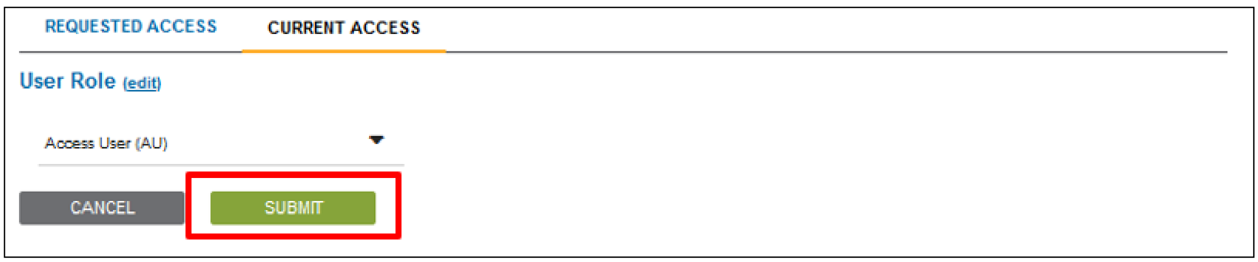
Step 4: Go into the user's "Current Access" and click "Edit" next to the "User Role" section.



Step 5: After clicking edit, a dropdown option will appear. From there, the SAA/AA selects between Access Administrator (AA) or Access User (AU).



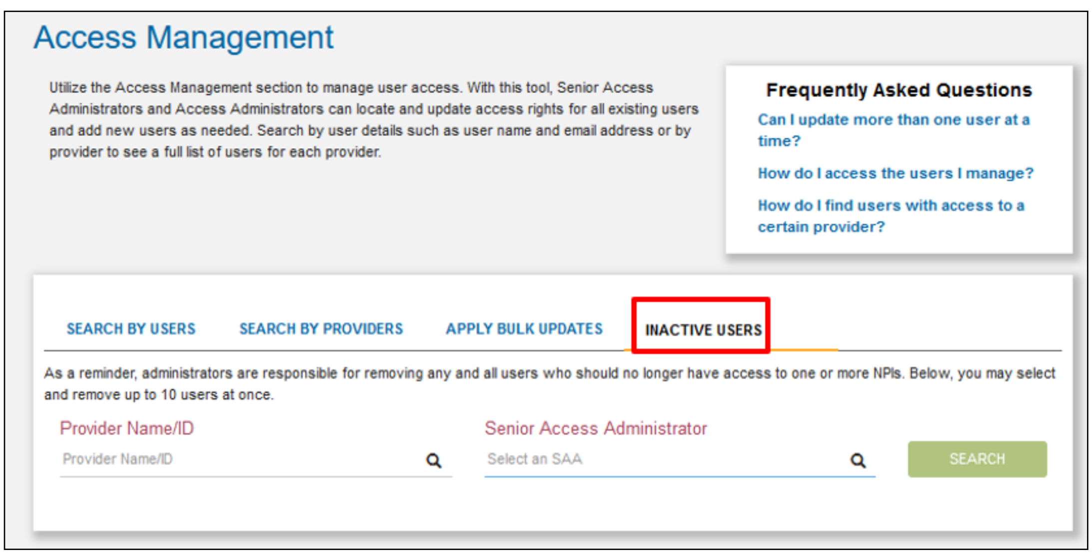
Step 5: After selecting AA or AU access, click the "Submit" button to confirm the selection.



Reviewing Inactive Users

Utilized to update users with access for NPIs who may have become inactive.

Step 1: Pull up the Access Management screen, then click the tab for "Inactive Users".



Step 2: The SAA can search for the inactive users by:

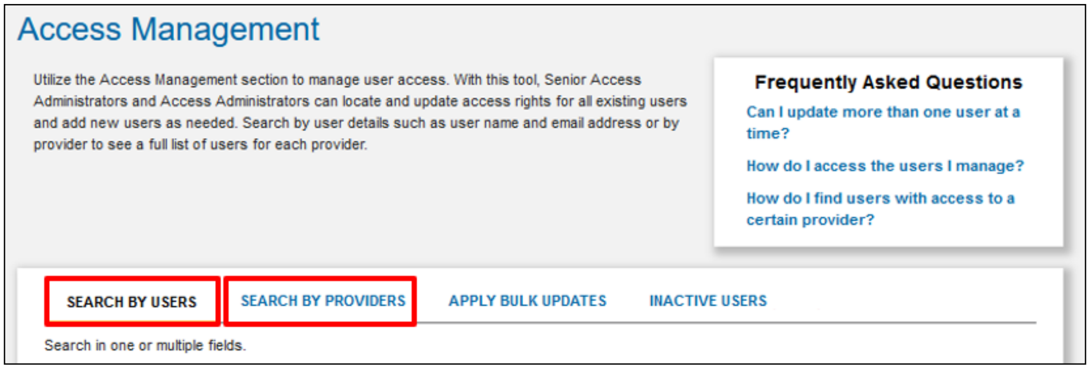
a.) Provider NPI
b.) Provider Name
c.) SAA

Step 3: Once the list is pulled up, the report will give you the information to pull up the user in the "Search By Users" tab to remove permissions and access.

Removing Users

When a user no longer needs access to the Tufts Health Plan Provider Portal, it is the responsibility of the SAA or AA to remove the access of the user.

Step 1: Open Access Management and go into the “Search by User” or “Search by Providers” tab to pull up the user(s) who need to be removed. Click the name of the user to open the profile.



Step 2: To pull up the access of the user being reviewed:

a.) For users who report to multiple SAAs, select the SAA that you are reviewing for or search by Provider NPI/Name to pull up the access in the “Current Access” tab.

b.) For users who report to one SAA, you can view the access without selecting anything further in the “Current Access” tab.

Step 3: Check the boxes next to the NPIs that need access removed. (If you want to select all NPIs, check the box in the blue header section.)

Step 4: Once the appropriate boxes are checked, the “Remove Access” button will appear. Once all the applicable NPIs are selected, click “Remove Access” to submit and finalize the request.

Step 5: Once the NPIs have been removed by clicking the “Remove Access” button, the access will be terminated for the NPIs selected. If the SAA/AA wants to re-add access, they can do so later.