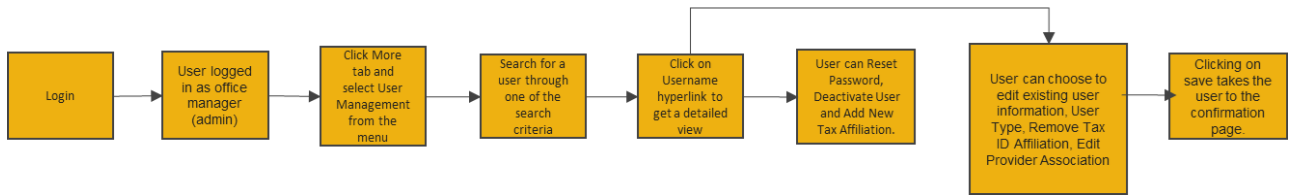


Provider Portal User Management Managing a User's Account

Quick Reference Guide



This Quick Reference Guide (QRG) will provide an overview of how to find and edit a User's information, user type, password, provider affiliation, etc.

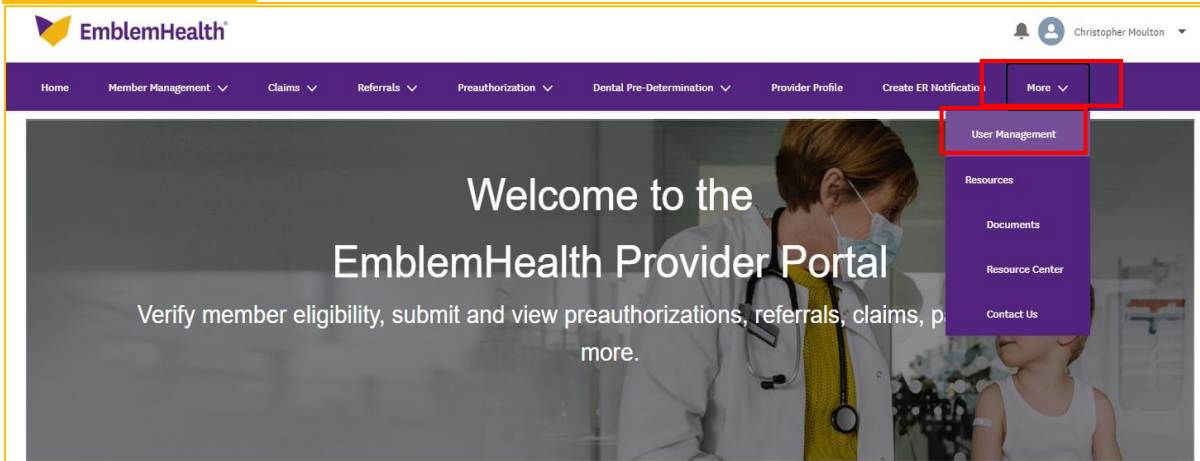


Purpose: Update an existing User's account.



Step 1:

1. From the EmblemHealth **Homepage**, select the **More** dropdown.
2. From the drop-down list, click **User Management**.
The **User Management** page displays.



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

Filter By



Name	User Name	Email	Phone	Status
Sarah Brooks	sbrooks@gmail.com	sbrooks@gmail.com	(578) 901-4883	Active
Uesugi Suzuki	usuzuki@gmail.com	usuzuki@gmail.com	(724) 609-1891	Active
Sung Jin-Shil	sjinshil@gmail.com	sjinshil@gmail.com	(360) 957-9779	Active
Sukhmeet Gorae	sgorae@gmail.com	sgorae@gmail.com	(917) 590-5875	Active
Richard Kann	richardk@gmail.com	richardk@gmail.com	(282) 923-5801	Active
Pin Jung Eun	pinjeum@gmail.com	pinjeum@gmail.com	(646) 996-3143	Active
Pedro Amorim	pedroamrim@gmail.com	pedroamrim@gmail.com	(289) 190-5198	Active
Oscar de la Cavalleria	oscaro@gmail.com	oscaro@gmail.com	(360) 957-9779	Active
Lucas Pacheco	lucasp@gmail.com	lucasp@gmail.com	(210) 112-5091	Active
Leelah Leatherbarrow	leatherbarrow@gmail.com	leatherbarrow@gmail.com	(917) 590-5875	Active
Kondo Ieyasu	kleyasu@gmail.com	kleyasu@gmail.com	(646) 996-3143	Active
Francisco Maia	franciscom@gmail.com	franciscom@gmail.com	(210) 112-5091	Active
Christopher Walker	chriswalker@gmail.com	chriswalker@gmail.com	(636) 344-7507	Active
Wilhelm Dowall	wdowall@gmail.com	wdowall@gmail.com	(317) 671-5901	Active
Uche Ogbonna	uogbonna@gmail.com	uogbonna@gmail.com	(248) 601-745	Active
Tatsui Ichika	tichika@gmail.com	tichika@gmail.com	(917) 590-5875	Active
Thoma Fuloway	tfuloway@gmail.com	tfuloway@gmail.com	(781) 230-9337	Active
Tallah Cotton	tcotton@gmail.com	tcotton@gmail.com	(282) 923-5801	Active
Sudanka Bakalowitz	sbakalowitz@gmail.com	sbakalowitz@gmail.com	(541) 249-3277	Active
Sergio Pilego	sergiop@gmail.com	sergiop@gmail.com	(289) 190-5198	Active
Paramita Haque	paramitah@gmail.com	paramitah@gmail.com	(317) 671-5901	Active
Gnyekachukwu Chibueze	ochibueze@gmail.com	ochibueze@gmail.com	(210) 112-5091	Active
Onyama Limbe	onyamal@gmail.com	onyamal@gmail.com	(210) 112-5091	Active
Ogasawara Katsumi	okatsumi@gmail.com	okatsumi@gmail.com	(360) 957-9779	Active



Step 2:

1. Search and select a **User**.

Note: Users will also appear below without having to search, check for duplication of users. **Portal User Information** page displays.

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

Filter By ⓘ



Name ↑	Username	Email	Phone	Status
Ananth Narayana	ananth.narayana@emblemhealth.com.eh.uat2	ananth.narayana@cognizant.com		Active
Brady Phillips	bphil1.brady.phillips@baystatehealth.org.uat2	tvsn.varma@cognizant.com		Active
Chris Moulton	haha@email.com	haha@email.com		Active
Erik Plaht	erik.plaht1@cognizant.com.uat2	erik.plaht@cognizant.com		Active

Portal User Information

Reset Password

Deactivate User

Add New Tax ID Affiliation

> User Information

> 825671892 - Richard Kann

> 789263718 - Sarah Williams



Step 3:

1. Click the arrows to Expand or Hide the User's information.
 2. Click **Edit**.
 3. Edit information and click **Save**.
- Note:** Edit Information page displays.

Portal User Information

Reset Password

Deactivate User

Add New Tax ID Affiliation

▼ User Information

Edit

First Name John	Middle Name	Last Name Carter	Email jcarter@gmail.com
User Name jcarter@gmail.com	Mobile (212) 723-7868	Office (312) 134-79812	Fax (312) 134-79812
Address 40 Stonybrook Lane, Brooklyn, NY 11235			

▼ 825671892 - Richard Kim

Remove Tax ID Affiliation

Edit User Type

Edit Provider Association

Tax ID 825671892	Tax Name Richard Kim	Contact Type Billing Staff
----------------------------	--------------------------------	--------------------------------------

This User has access to all Provider affiliated with this Tax ID.

▼ 789263718 - Sarah Williams

Remove Tax ID Affiliation

Edit User Type

Edit Provider Association

Tax ID 789263718	Tax Name Sarah Williams	Contact Type Appointment Scheduler
----------------------------	-----------------------------------	--

Provider Association

Name	Address	NPI	Phone
Yogarasa Gandhi	73 Belmont St., Staten Island, NY 10314	1989008873	100000267298
Uesugi Suzuki	88 Broad St., Forest Hills, NY 11375	1981208625	100000163812

Total Records: 2

< Showing 1 - 2 >



Portal User Information

EDIT USER INFORMATION

User Information

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

First Name* Middle Name Last Name*

Email* Verify Email*

Please enter user name in a email format.

User Name*

Mobile Office Phone Number

Fax

Street

City State/Province

Zip/Postal Code Country



Step 4:

From the Portal User Information page.

1. Click **Edit User Type** to change how the User functions for a provider.
Note: Edit User Type popup displays.
2. From the drop down select **User Type**.
3. Click **Submit** or **Cancel**.

Portal User Information

Reset Password

Deactivate User

Add New Tax ID Affiliation

▼ User Information

Edit

First Name John	Middle Name	Last Name Carter	Email jcarter@gmail.com
User Name jcarter@gmail.com	Mobile (212) 723-7868	Office (312) 134-79812	Fax (312) 134-79812
Address 40 Stonybrook Lane, Brooklyn, NY 11235			

▼ 825671892 - Richard Kim

Remove Tax ID Affiliation

Edit User Type

Edit Provider Association

Tax ID 825671892	Tax Name Richard Kim	Contact Type Billing Staff
----------------------------	--------------------------------	--------------------------------------

This User has access to all Provider affiliated with this Tax ID.

▼ 789263718 - Sarah Williams

Remove Tax ID Affiliation

Edit User Type

Edit Provider Association

Tax ID 789263718	Tax Name Sarah Williams	Contact Type Appointment Scheduler
----------------------------	-----------------------------------	--

Provider Association

Name	Address	NPI	Phone
Yogarasa Gandhi	73 Belmont St., Staten Island, NY 10314	1989008873	100000267298
Uesugi Suzuki	88 Broad St., Forest Hills, NY 11375	1981208625	100000163812

Total Records: 2

< Showing 1 - 2 >

Edit User Type

Select the user type you want to change from the drop-down and click save

Select User Type

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

Deactivate User

Edit User Type

Select the user type you want to change from the drop-down and click save

Select User Type

Office Manager

Cancel Save

Reset Password Deactivate User




Step 5:

From the Portal User Information page.

1. Click **Remove Tax ID Affiliation** if the User is no longer authorized to access information on behalf of the provider shown.
Note: Delete Tax ID popup displays.
2. Click **Cancel** to return to the Portal User Information page or **Gold Cancel** to remove the Tax ID.

Jimmie	Test Child	jtc@gmail.com	
User Name jtc@gmail.com	Mobile (222) 222-2222	Office (222) 222-2222	Fax
Address 4202 North 21st Street, NY, NY, United States, 10001			
▼ 042888373-Amanda Cook4			
Remove Tax ID Affiliation		Edit User Type	Edit Provider Association
Tax ID 042888373	Tax Name Amanda Cook4	Contact Type Office Manager	
This user has access to all Providers affiliated with this Tax ID.			

Delete Tax ID

 Are you sure you want to remove access to this Tax ID?

Cancel **Cancel**



Step 6:

- From the **Portal User Information** page:
1. Click **Reset Password**.

Portal User Information

Reset Password
Deactivate User
Add New Tax ID Affiliation

▼ **User Information** Edit

First Name John	Middle Name	Last Name Carter	Email jcarter@gmail.com
User Name jcarter@gmail.com	Mobile (212) 723-7868	Office (312) 134-79812	Fax (312) 134-79812
Address 40 Stonybrook Lane, Brooklyn, NY 11235			

▼ **825671892 - Richard Kim** Remove Tax ID Affiliation Edit User Type Edit Provider Association

Tax ID 825671892	Tax Name Richard Kim	Contact Type Billing Staff
This User has access to all Provider affiliated with this Tax ID.		

▼ **789263718 - Sarah Williams** Remove Tax ID Affiliation Edit User Type Edit Provider Association

Tax ID 789263718	Tax Name Sarah Williams	Contact Type Appointment Scheduler	
Provider Association			
Name	Address	NPI	Phone
Yogarasa Gandhi	73 Belmont St., Staten Island, NY 10314	1989008873	100000267298
Uesugi Suzuki	88 Broad St., Forest Hills, NY 11375	1981208625	100000163812
Total Records: 2			< Showing 1 - 2 >



Step 7:

The **Reset Password** popup displays.

1. Click **Reset Password** or click **Cancel** to return to **User Information**.
Note: An email will be sent to users email to fully reset password.

Reset Password

Are you sure you want to reset the password for this user? They will receive an email with an link and instructions to reset their password?

Cancel Reset Password

Middle Name Last Name
Carter



Step 8:

From the **Portal User Information** Page:

1. Click **Deactivate User** to completely remove the User's access to our portals.
Note: Deactivate popup displays.
2. Click **Deactivate User** or click **Cancel** to return to **User Information**.

Portal User Information

Reset Password

Deactivate User

Add New Tax ID Affiliation

▼ User Information

Edit

First Name
John

Middle Name

Last Name
Carter

Email
jcarter@gmail.com

User Name
jcarter@gmail.com

Mobile
(212) 723-7868

Office
(312) 134-79812

Fax
(312) 134-79812

Address
40 Stonybrook Lane,
Brooklyn, NY 11235

▼ 825671892 - Richard Kim

Remove Tax ID Affiliation

Edit User Type

Edit Provider Association

Tax ID
825671892

Tax Name
Richard Kim

Contact Type
Billing Staff

This User has access to all Provider affiliated with this Tax ID.

▼ 789263718 - Sarah Williams

Remove Tax ID Affiliation

Edit User Type

Edit Provider Association

Tax ID
789263718

Tax Name
Sarah Williams

Contact Type
Appointment Scheduler

Provider Association

Name	Address	NPI	Phone
Yogarasa Gandhi	73 Belmont St., Staten Island, NY 10314	1989008873	100000267298
Uesugi Suzuki	88 Broad St., Forest Hills, NY 11375	1981208625	100000163812

Total Records: 2

< Showing 1 - 2 >

Deactivate



Are you sure you want to make this user inactive? They will lose their access, and all history associated with their account. This action cannot be undone.

Cancel

Deactivate User



Step 9:

From the **Portal User Information** page, click **Add New Tax ID Affiliation** to give the User access to providers who use a different Tax ID and to assign the appropriate User Type(s).

1. The **Tax ID and Provider Association** screen displays.

Portal User Information

Reset Password Deactivate User Add New Tax ID Affiliation

▼ **User Information** Edit

First Name John	Middle Name	Last Name Carter	Email jcarter@gmail.com
User Name jcarter@gmail.com	Mobile (212) 723-7868	Office (312) 134-79812	Fax (312) 134-79812

Address
40 Stonybrook Lane,
Brooklyn, NY 11235

▼ **825671892 - Richard Kim** Remove Tax ID Affiliation Edit User Type Edit Provider Association

Tax ID 825671892	Tax Name Richard Kim	Contact Type Billing Staff
----------------------------	--------------------------------	--------------------------------------

This User has access to all Provider affiliated with this Tax ID.

▼ **789263718 - Sarah Williams** Remove Tax ID Affiliation Edit User Type Edit Provider Association

Tax ID 789263718	Tax Name Sarah Williams	Contact Type Appointment Scheduler
----------------------------	-----------------------------------	--

Provider Association

Name	Address	NPI	Phone
Yogarasa Gandhi	73 Belmont St., Staten Island, NY 10314	1989008873	100000267298
Uesugi Suzuki	88 Broad St., Forest Hills, NY 11375	1981208625	100000163812

Total Records: 2 < Showing 1 - 2 >

Tax ID and Provider Association

EDIT PORTAL USER

Tax ID and Provider Association

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

Select Tax ID*
042888373-Amanda Cook4

Select User Type*

This Tax ID is already affiliated to this user.



Step 10:

1. Select **Tax ID** from drop down.
2. Select **User Type** from drop down.
3. Click **Next**.
4. Click **Done**.

Tax ID and Provider Association

EDIT PORTAL USER

Tax ID and Provider Association

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

Select Tax ID *

Select User Type *

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

Next

Cancel

Tax ID and Provider Association

EDIT PORTAL USER

Tax ID and Provider Association

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

Select Tax ID *



Select User Type *

Next

Cancel

Confirmation

Confirmation

The user's Tax ID and Provider Associations have been successfully added. This change is effective immediately.

Done

Thank
You

