User Management – Create a New User

Quick Reference Guide (QRG)
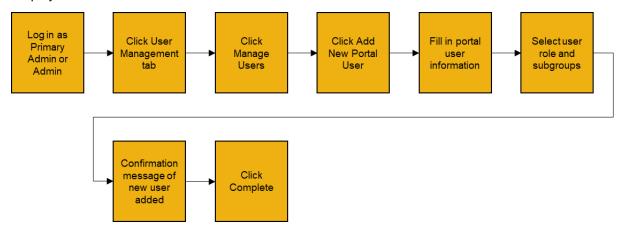
This Quick Reference Guide (QRG) will provide an overview of the Create a New User process in the Employer Portal.
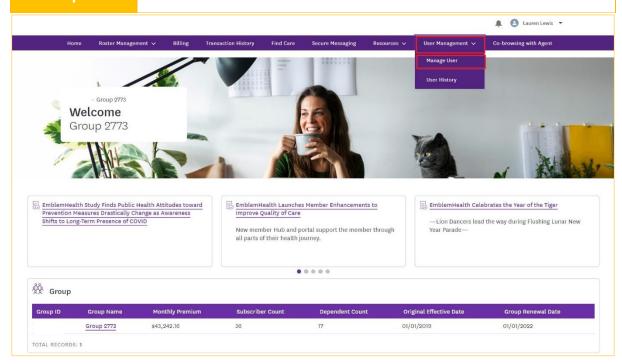
Log in as Primary Admin or Admin	→	Click User Management tab	→	Click Manage Users	→	Click Add New Portal User	→	Fill in portal user information	→	Select user role and subgroups

Confirmation message of new user added	→	Click Complete

Let us look at the steps in detail to New User Registration in the Employer Portal.

Purpose: New User Registration in the Employer Portal.

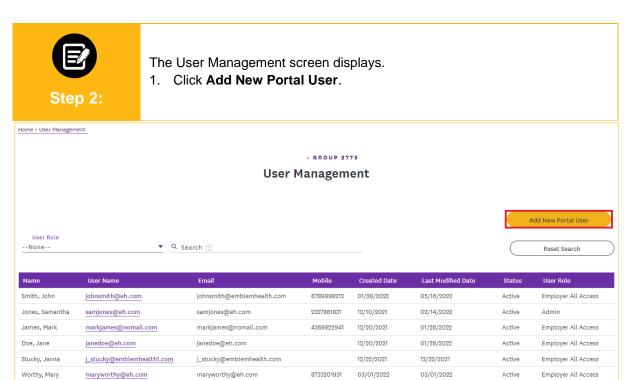**Step 1:**

1. From the **EmblemHealth Home** page, click the **User Management** tab.
   Note: The User Management tab is only visible on the home page for Primary Admin and Admin users.
2. From the drop-down menu, select **Manage User**.

Step 2:

The User Management screen displays.
1. Click **Add New Portal User**.

- GROUP 2773

User Management

Add New Portal User

User Role
--None--

Q Search ⓘ

Reset Search

Name	User Name	Email	Mobile	Created Date	Last Modified Date	Status	User Role
Smith, John	johnsmith@eh.com	johnsmith@emblemhealth.com	6789998212	01/28/2022	05/16/2022	Active	Employer All Access
Jones, Samantha	samjones@eh.com	samjones@eh.com	2327861831	12/10/2021	02/14/2022	Active	Admin
James, Mark	markjames@nomail.com	markjames@nomail.com	4368922941	12/20/2021	01/28/2022	Active	Employer All Access
Doe, Jane	janedoe@eh.com	janedoe@eh.com		12/20/2021	01/28/2022	Active	Employer All Access
Stucky, Janna	j_stucky@emblemhealth1.com	j_stucky@emblemhealth.com		12/22/2021	12/22/2021	Active	Employer All Access
Worthy, Mary	maryworthy@eh.com	maryworthy@eh.com	8733201931	03/01/2022	03/01/2022	Active	Employer All Access

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Step 3:	The User Information screen displays. 1. Enter **First Name** and **Last Name.** 2. Enter **Email Address** and **Verify Email** by re-entering the Email Address. 3. (Optional) Enter **DOB** in MM-DD-YYYY format. **Note:** You can also click the Calendar icon to select your DOB from a calendar view. 4. Enter a **User Name** in email format. 5. (Optional) Entering the user's mobile number will allow them to set up alerts and two-factor authentication on their mobile device. 6. Click **Next**.

Home > Add New Portal User

Portal User Information

User Information

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

Salutation

First Name*
Cameron

Middle Name

Last Name*
Davis

Email ID*
cdavis@emblemhealth.com

Verify Email*
cdavis@emblemhealth.com

DOB
05-21-1985

Please enter user name in a email format

User Name*
cdavis@eh.com

Mobile
(674) 281-9321
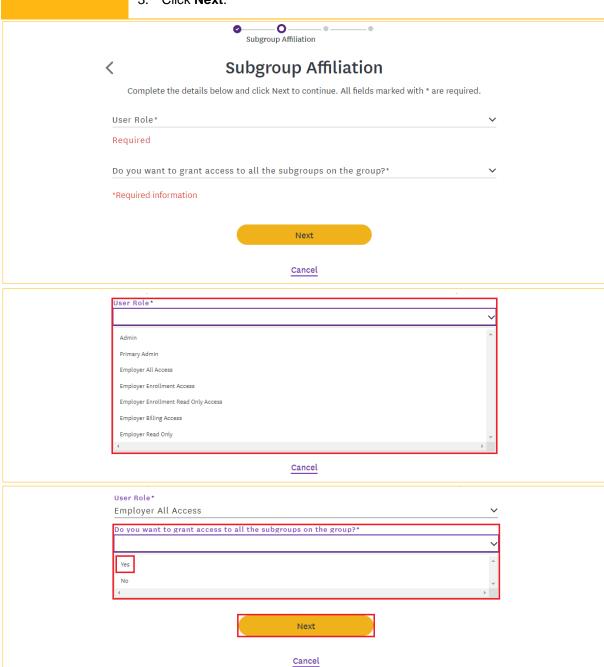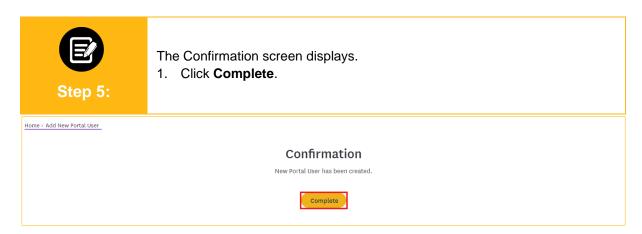
Phone

Extension

*Required information

Next

Cancel

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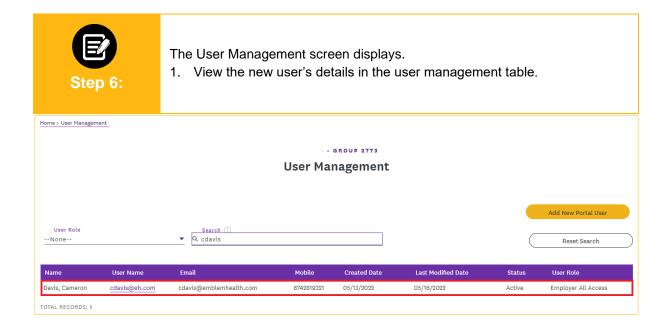| Step 4:	The Subgroup Affiliation screen displays.

1. Select a **User Role** from the drop-down menu.
2. Click **Do you want to grant access to all the subgroups on the group?** and select Yes or No from the drop-down menu.
   Note: In this example, we will select **Yes**. If you select No, a table displays the list of available subgroups from which you will select the desired subgroup.
3. Click **Next**.

○───○───·───·
Subgroup Affiliation

‹

Subgroup Affiliation

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

User Role*   ⌄

Required

Do you want to grant access to all the subgroups on the group?*   ⌄

*Required information

[Next]

Cancel

User Role*

⌄
  Admin
  Primary Admin
  Employer All Access
  Employer Enrollment Access
  Employer Enrollment Read Only Access
  Employer Billing Access
  Employer Read Only

Cancel

User Role*
Employer All Access   ⌄

Do you want to grant access to all the subgroups on the group?*
                                                                              ⌄
  Yes
  No

[Next]

Cancel

Step 5:

The Confirmation screen displays.
1. Click **Complete**.

Confirmation

New Portal User has been created.

[Complete]

Step 6:

The User Management screen displays.
1. View the new user's details in the user management table.

Home > User Management

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User Management

[Add New Portal User]

User Role		Search ⓘ					
--None-- ▾		cdavis					[Reset Search]

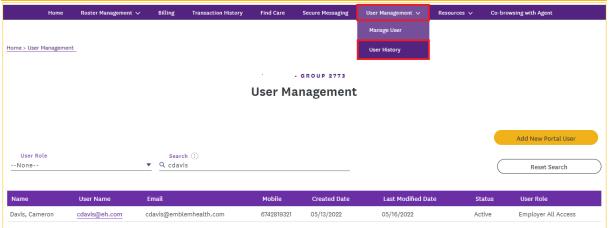| Name	User Name	Email	Mobile	Created Date	Last Modified Date	Status	User Role
Davis, Cameron	cdavis@eh.com	cdavis@emblemhealth.com	6742819321	05/13/2022	05/16/2022	Active	Employer All Access

TOTAL RECORDS: 1

Step 7:

(Optional) View the created user in User History.
1. Click the **User Management** tab and from the drop-down menu select **User History**.

Home	Roster Management ▾	Billing	Transaction History	Find Care	Secure Messaging	User Management ▾	Resources ▾	Co-browsing with Agent

Manage User
User History

Home > User Management

- GROUP 2773
User Management

[Add New Portal User]

User Role		Search ⓘ					
--None-- ▾		cdavis					[Reset Search]

Name	User Name	Email	Mobile	Created Date	Last Modified Date	Status	User Role
Davis, Cameron	cdavis@eh.com	cdavis@emblemhealth.com	6742819321	05/13/2022	05/16/2022	Active	Employer All Access

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Step 8:	The User History screen displays. 1. View the new user in the user history table. **Note:** In the user history table, the created user action will appear in three separate lines with event descriptions listed as Created, Username, and Status.

Home > User History

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User History

Search ⓘ

User Name	Event Description	Old Value	New Value	Date/Time Created	Updated By
Cameron Davis	Status	Inactive	Active	05/13/22 04:52 AM	Lewis, Lauren
Cameron Davis	Username		cdavis@eh.com	05/13/22 04:52 AM	Lewis, Lauren
Cameron Davis	Created			05/13/22 04:51 AM	Lewis, Lauren

Step 9:	An Employer Portal welcome email will be sent to the user's registered email address prompting them to complete web registration. 1. The user will click the **Complete web registration** button in the email to set up their account. **Note:** This will bring the user to the Group Verification screen, where they will follow the steps to register (refer to the Register for the Portal – New User Quick Reference Guide).

[EXTERNAL] Sandbox: Set up your EmblemHealth employer portal account : Complete your registration and check out all the features available to you online.

EmblemHealth

May 13, 2022

Dear Cameron,

Thank you for choosing EmblemHealth.

Your EmblemHealth employer portal account is now ready.

Simply click on the button below to complete your registration. To set up your initial account, you will need this username: cdavis@eh.com. You can always change your username once you've completed your registration.

Complete web registration

If you're having trouble signing in, please contact your primary administrator in your organization or your EmblemHealth account representative.

After you complete your web registration, use this link to sign in to your website account. Or you can simply go to [emblemhealth.com]emblemhealth.com

We're committed to supporting you.

Thank you,
EmblemHealth

*Please do not reply to this message. Replies go to a mailbox that is not checked. If you have questions, please **contact us**.*

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Thank You