

# Local Admin & User Guide

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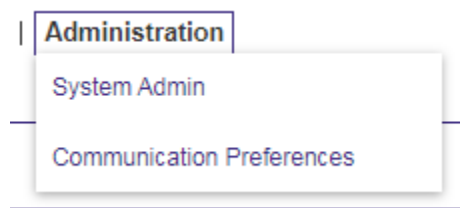
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## Adding Users

After registering as the Local Administrator, you can add additional users to the Health Plan. Account confirmation is not required when a user is added by the Local Administrator.

1. From the Home screen, click **Administration** > **System Admin** from the top navigation menu.

**Figure 13: Administration Menu**



2. In the *User Maintenance* screen, click **Add User**.

**Figure 16: User Maintenance Screen**

### User Maintenance

User Name	Office Security	Company Name
<u>Doe, Jane</u>	Main Office Contact	
<u>Doe, Jon</u>	User	

**Add User**

3. In the Add User screen, the following fields are available:

**Note:** The Local Administrator selects the username and the system will generate a temporary password that is sent to the local administrator. Not all fields on this page are required.

- First Name – enter the user’s first name
- Middle Initial – enter the user’s middle initial
- Last Name – enter the user’s last name
- E-Mail Address – enter the user’s e-mail address
- Title – enter the user’s title
- Office Phone – enter the office phone number
- Phone Ext – the office phone’s extension number, if applicable
- Office Fax – enter the office’s fax number

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- Username – chose a username for login
- Local Administrator – select if this user should be a Local Administrator

**Figure 14: Add User Screen**

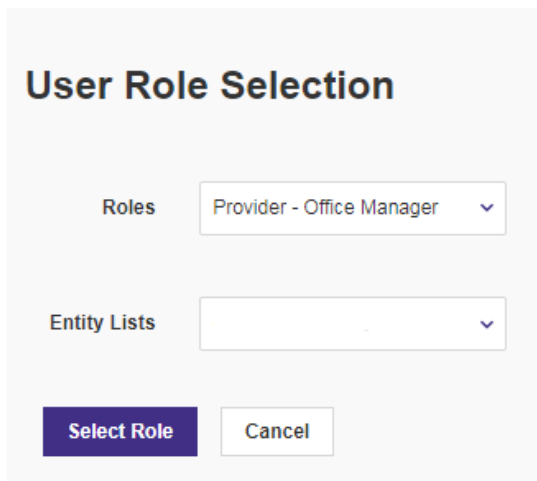
## Add User

First Name	<input type="text"/>
Middle Initial	<input type="text"/>
Last Name	<input type="text"/>
E-mail Address	<input type="text"/>
Confirm E-mail Address	<input type="text"/>
Title	<input type="text"/> e.g., Office Manager
Office Phone	<input type="text"/>
Phone Ext	<input type="text"/>
Office Fax	<input type="text"/>
Username	<input type="text"/>
Local Administrator:	<input type="checkbox"/>

4. Click **Add** to proceed to the *User Role Selection* Screen
5. On the *User Role Selection* screen, select a role from the *Roles* dropdown menu and your organization from the *Entity Lists* dropdown menu.

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Figure 15: User Role Selection Screen



**User Role Selection**

Roles: Provider - Office Manager

Entity Lists:

Select Role Cancel

**Note:** Roles allow Jefferson Health Plans to assign the appropriate security access to users with varying job responsibilities. You must select a role to add user. Roles include:

- a. Eligibility Only
- b. Eligibility and Claims Only
- c. Eligibility, Claims and Authorizations Only
- d. Eligibility and Authorizations Only
- e. Local Administrator – access to all functionality and user administration
- f. Office Manager – user administration only

Note: user administration is the ability to add/edit/delete users.

- 6. Click **Select Role** to return to the *User Information* screen.
- 7. On the *User Information* screen, confirm all information is correct, then click submit. Once submitted, you will reach the *Healthcare Registration* screen.

Figure 16: Healthcare Registration Screen

User Name	User ID	Office Security Level
Smith , Jane	smithjane	provider User

**Note:** Copy username from this page and share created password with new user. **Adding your user is not complete until you hit submit.**

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## Creating Additional Local Administrators

Creating additional Local Administrators is a two-step process. First, a Local Administrator must give the user the Role that has access to the System Administration features. Second, a Local Administrator must give the user Local Administrator privileges in the System Administration screen.

## Selecting a Local Administrator Role

As stated in the section “Adding Users”, a role must be selected when creating users. For Local Administration users, the Role Name is “Provider – Local Administrator”. Proceed with creating the Local Administrator account like you would any other User utilizing the Provider Portal.

## Giving Local Administrator Privileges

A user’s account can only be granted Local Administrator privileges after it has been created. To modify the users access, follow these steps:

1. Hover over **Administration**, then click **System Admin** from the top navigation menu (see figure 15).
2. In the *User Maintenance* screen find the user who should be granted Local Administrator privileges and click their **Name** link

Figure 17: User Maintenance Screen

### User Maintenance

User Name	Office Security	Company Name	Company ID Number	User ID	Last Login	Validated Through	User Status
Smith, Jane	Provider User	Test Company	123456	JaneSmith1234	07/27/2022	7/26/2023	Confirme

3. Once on the *User Information* screen, put a checkmark in the box next to **Local Administrator**.
4. Doing this will expand the screen to include the **Office Information**.
5. Fill out the Office Information section, then click the **Submit** button.

Figure 26: Local Administration Section

Local Administrator:

Office Address:

City:

State Zip:

Organization Name:

Indicates required field