SECURE PORTAL ACCOUNT MANAGER

WHAT YOU NEED TO KNOW

What is an Account Manager?

Account Manager is a role within the Secure Portal that is assigned to your health plan's primary contact within your practice. The purpose of this role is to help us maintain the safety and integrity of patient data.

The Account Manager is responsible for day-to-day support of all Secure Portal user accounts that are registered under the same Tax Identification Number (TIN). These responsibilities include:

- Approving access for new Secure Portal users
- Assigning permissions for users based on their job responsibilities
- Regularly adjusting the permissions of users whose roles may have changed
- Terminating users who no longer work at the practice.

Accessing Account Manager Tasks

1) Click the **User Management** dropdown in order to complete Account Manager actions.
2) Search for a specific user by entering their name and email address, or view a list of all users in your practice.
3) For new user accounts that need to be verified, select the **Verification Pending** box, click the Verify Account button, and follow instructions on the back page.
4) To view and edit details of existing accounts, click the **Update User** button and follow instructions on the back page.
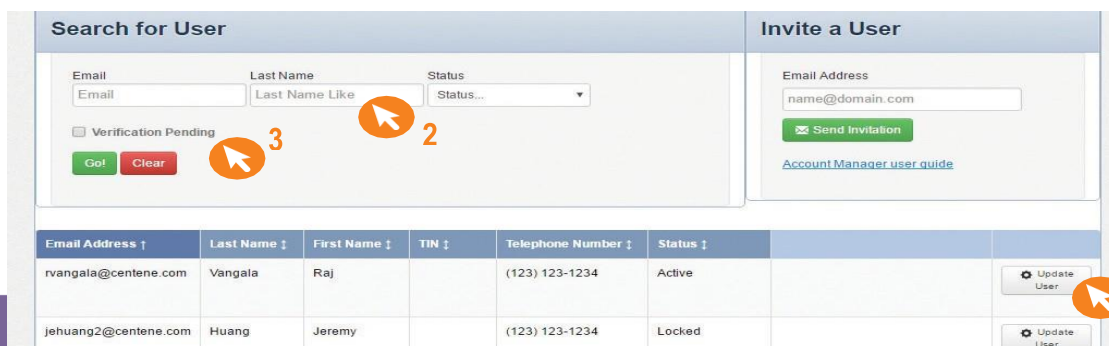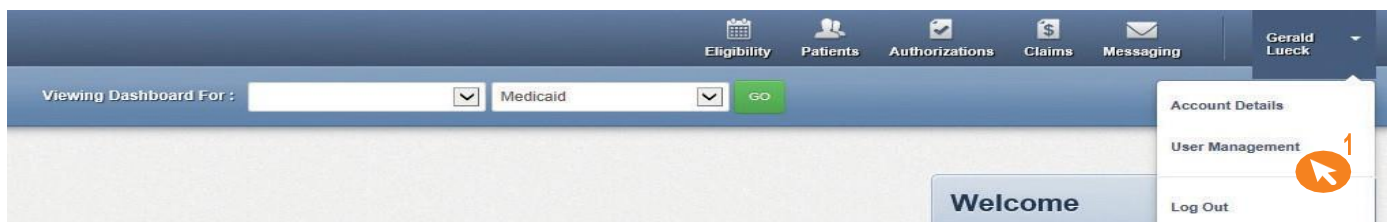
Account Manager Tasks

Within the Update User Status and Permissions screen as shown below, the Account Manager has three tasks:

1) Enabling and Disabling Users

- Account Managers will receive an email when a user from their practice creates a new user account. The Account Manager will click **Enable User** to grant access to the user.
- User accounts are disabled after 90 days of inactivity. Account Managers can use this button to re-enable these users.
- If a user leaves the practice or no longer needs access to the Secure Portal information for that specific TIN, the Account Manager will click **Disable User.**

2) Send email to verify user accounts and to reset passwords

- Once a user is enabled, their status will change to "Unverified." The Account Manager can click **Send Registration Email** for the user to be notified that they must complete their registration.
- If a user has forgotten their password, the account manager can click **Send Password Reset Email.**

3) Selecting/modifying access levels for users

- Account Managers are responsible for selecting and managing the appropriate access for each user in their practice.
- Access levels include:

Health Records: View a patient's health records for number and type of visits, medications, Immunizations and labs, care gaps, etc.

Claims: View and submit claims.

Manage Account: Enable, disable, modify permissions for a specific TIN, and invite users to set up an account.

Eligibility: View and check eligibility for a specific patient.

Assessments: Complete or view a Health Risk Assessment (HRA) or Notification of Pregnancy (NOP) for a patient.

Authorizations: View and submit authorizations.

Please reach out to Provider Relations Rep for Secure Portal Assistance 1-844-366-2880