WellSense HEALTH PLAN

Provider Portal

Office Management User Guide

This guide should be used by the administrators who are responsible for ongoing validation of access levels for all portal users in your organization.

Instructions for adding, deleting, or modifying users are included in this guide. Our expectation is that you review all users under your responsibility every 6 months to confirm that your staff have appropriate access levels. Users that are no longer with your organization should be deleted immediately.

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Expectations for Revalidating Accounts

We request that you regularly review all user accounts to ensure that access is limited to only those functions which are needed to accomplish the user's job.

Role of Main Office Contact (Office Manager)

The main office contact will perform a revalidation **every 6 months** of all user accounts within their Office Manager account. The review must be completed in a 45-day timeframe and you will receive email reminders leading up to your scheduled revalidation deadline. Failure to complete account revalidation by the due date will result in lock-out of provider access to our portal for all users attached to the account.

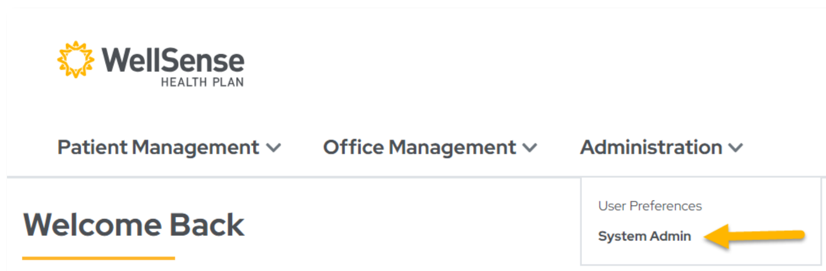
The Office Manager has the ability to:

- o Delete user accounts for those who no longer require access (i.e., any users who have changed positions or who have left the organization)
- o Add new users and send them their login information
- o Validate that any existing user accounts are assigned the correct roles based on job responsibility. (See Appendix for description of user roles)

How to Revalidate Account Users

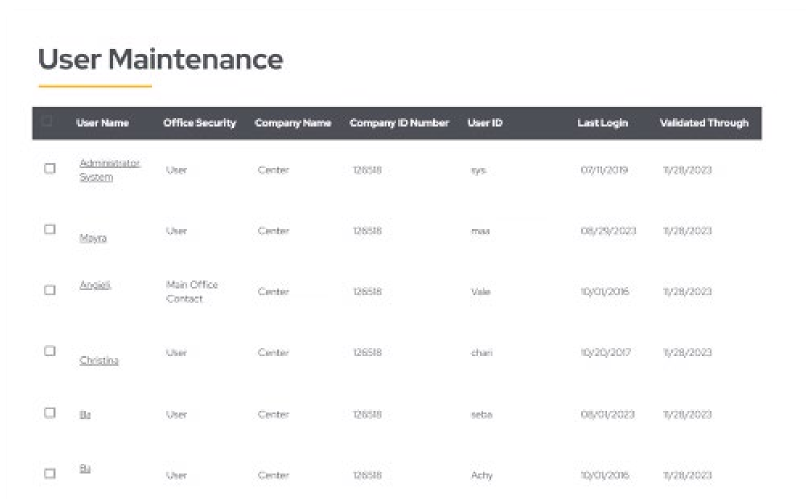
1. **Choose System Administration**

   Log into our provider portal and click **System Administration** under **Administration** tab on the home screen.

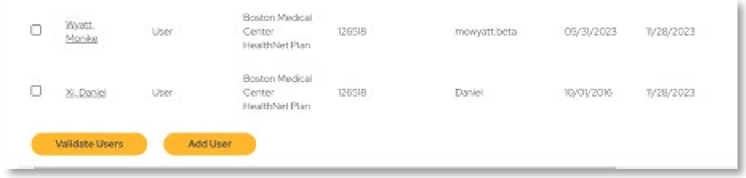


2. **List of Users Displayed**

   User Maintenance allows the main office contact to view a list of users attached to his/her WellSense account.



3. Review the full list of current users

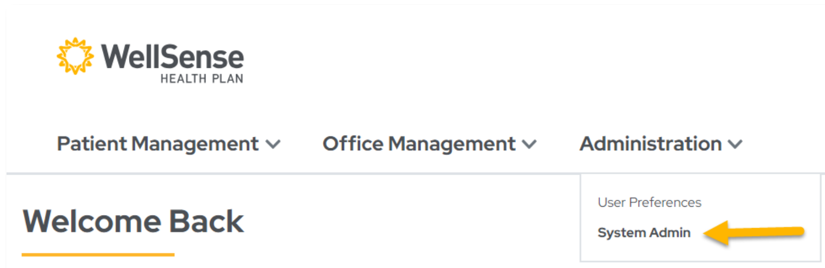


- Delete user accounts for those who no longer require access (i.e., any users who have changed positions or who have left the organization).
- Verify that any remaining user accounts have been attached to the correct roles and make any necessary updates.
- Check the box beside the user's name and click **Validate Users**.
- Verify that the **"Validated Through"** date has been changed to a date next year

How to Add Users

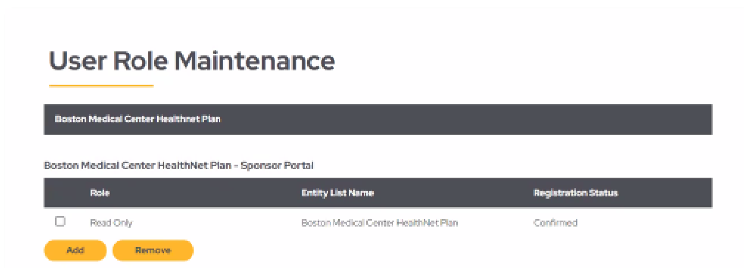
1. Choose System Administration

Log into our provider portal and click System Administration under Administration tab on the home screen.



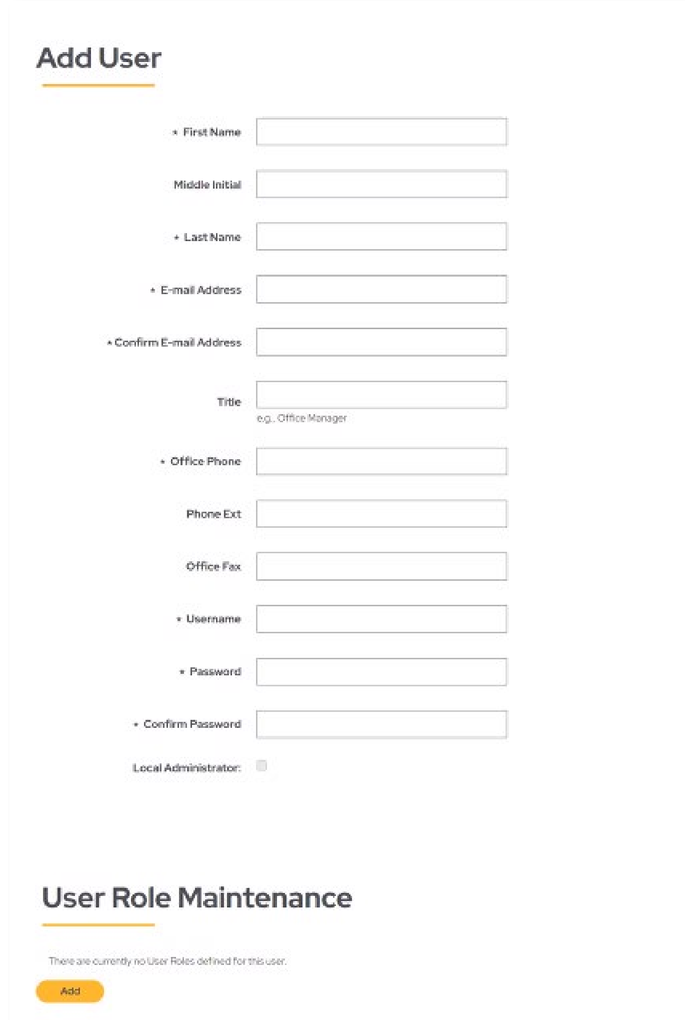
2. Add User

On the User Maintenance screen, click **Add User**.



3. Fill in Required Fields

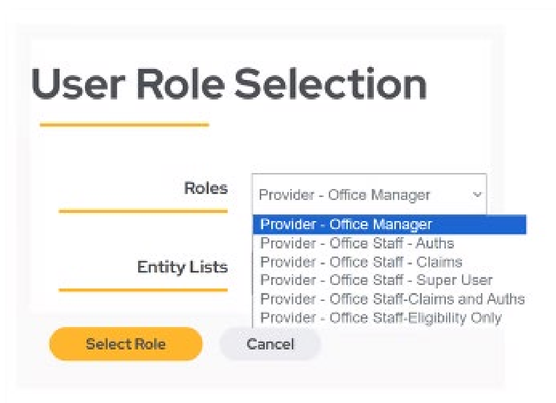
Fill in all required fields on the Add User screen and click Add. (Required fields are designated by a gray dot next to the field name)



4. Select User Role

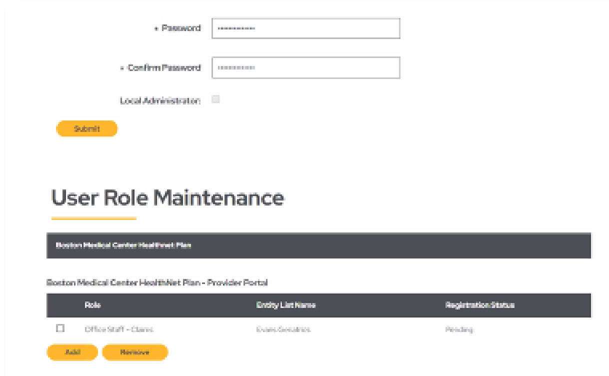
On the User Role Selection screen, select role (access level) and entity and click **Select Role**.

<u>* See Appendix for Descriptions of User Roles</u>



5. **Review and Submit User Information**

   Review the information on the User Information screen redisplays and click **Submit**.

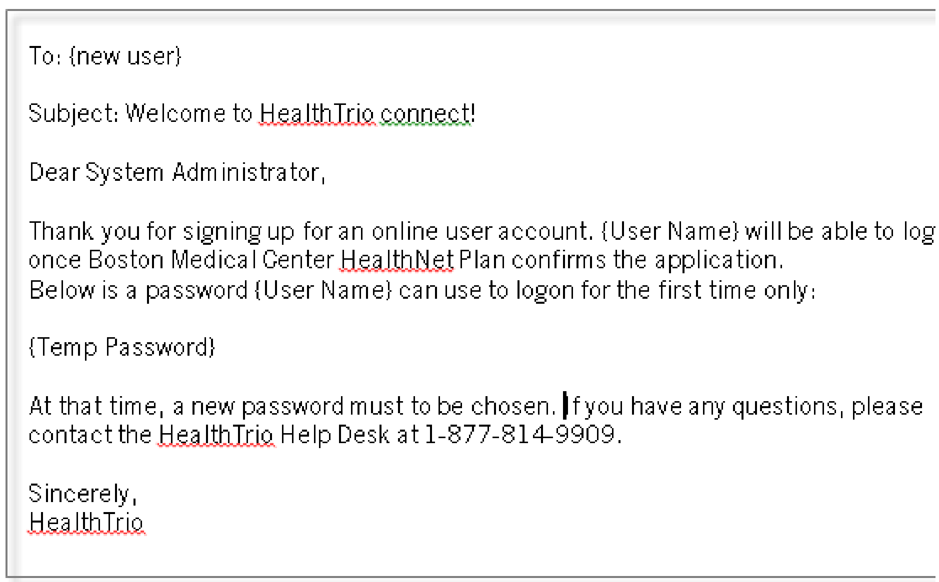


6. **User Added, Review Information**

   Once the user has been added to your account, their name will appear on the list, as shown in the screen to the right.

7. **Provider User Login Credentials**
   The System Administrator will receive an email generated by the portal.

   <u>**The System Administrator will receive an email which they should share with the user.**</u>



To: {new user}

Subject: Welcome to HealthTrio connect!

Dear System Administrator,

Thank you for signing up for an online user account. {User Name} will be able to log once Boston Medical Center HealthNet Plan confirms the application.
Below is a password {User Name} can use to logon for the first time only:

{Temp Password}

At that time, a new password must to be chosen. If you have any questions, please contact the HealthTrio Help Desk at 1-877-814-9909.

Sincerely,
HealthTrio

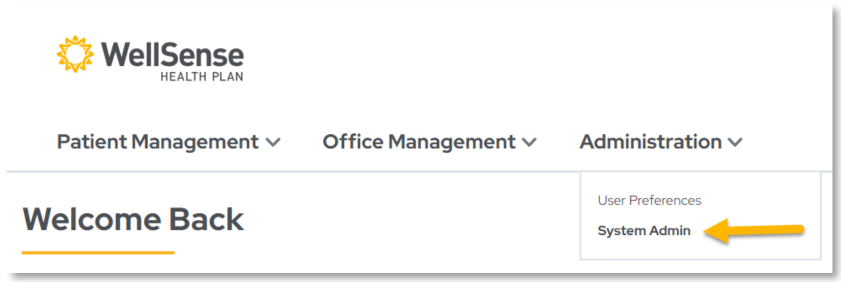
8. **User accepts User Agreement**

Upon their first login to WellSense's provider portal, Users will be required to sign an electronic User Agreement.

How to Delete Users

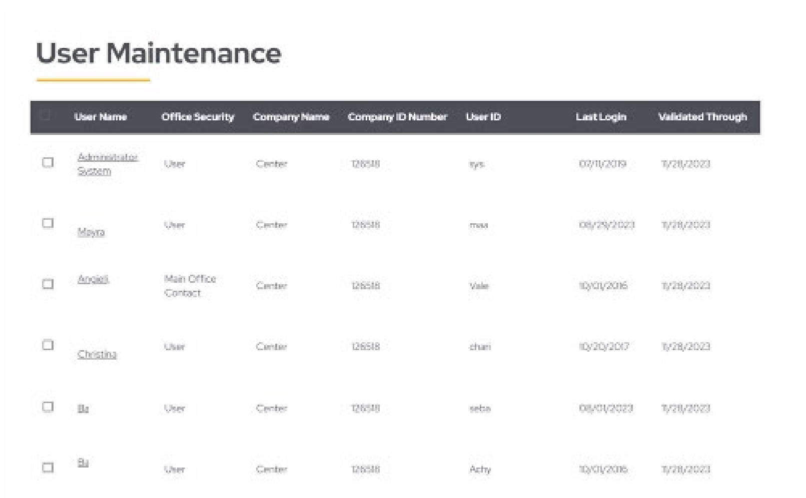
1. **Choose System Administration**

   Log into our provider portal and click **System Administration** under the **Administration** tab on the home screen.



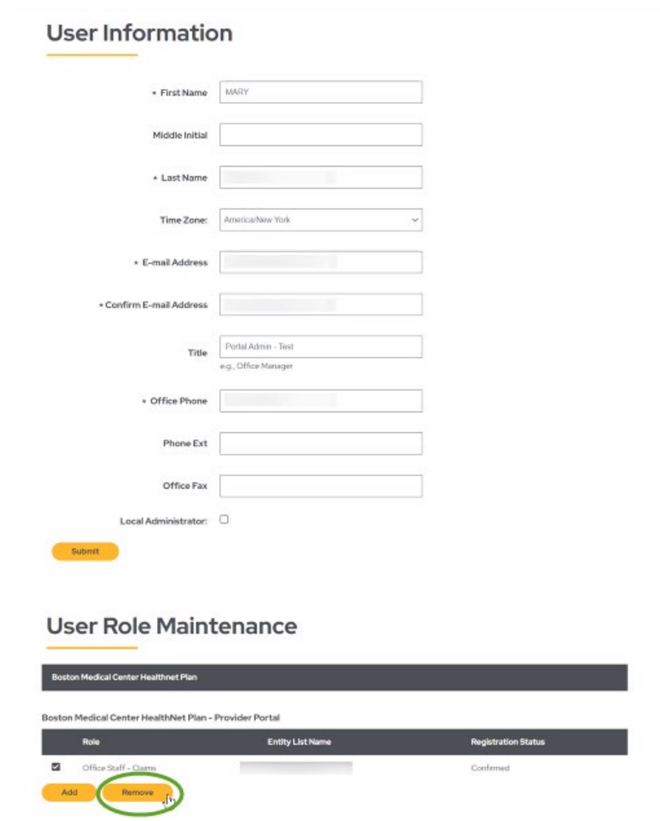
2. **Choose User**

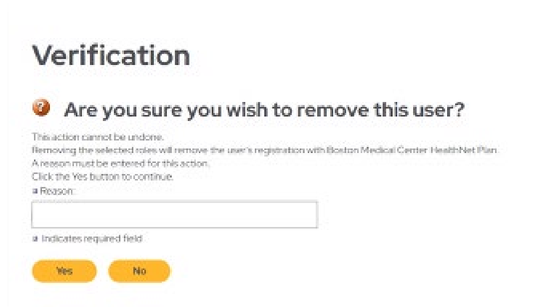
   Click the name of the user who needs to be deleted.



3. **Click Box and Remove**

   Scroll down and click **Remove**. This will open the Verification screen where you can enter the reason for deleting this user (optional) and then click **Yes**.



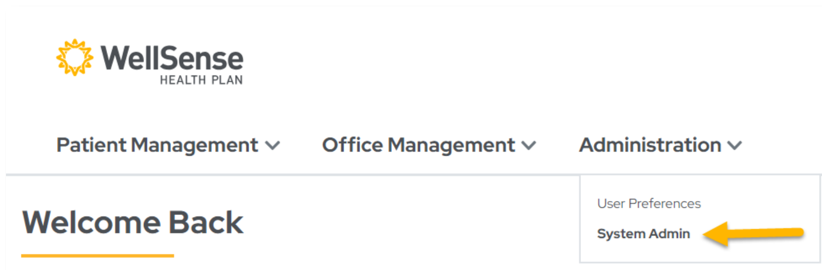


How to Modify Users

Demographic Changes

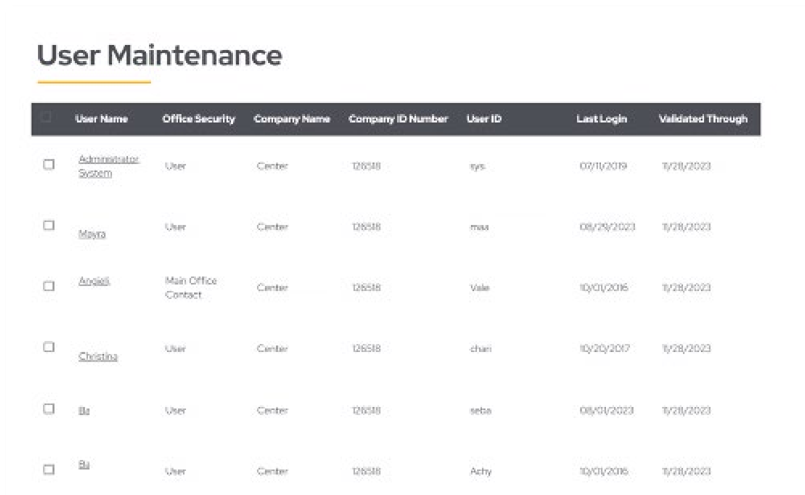
1. **Choose System Administration**

   Log into our provider portal and click **System Administration** under the **Administration** tab on the home screen.



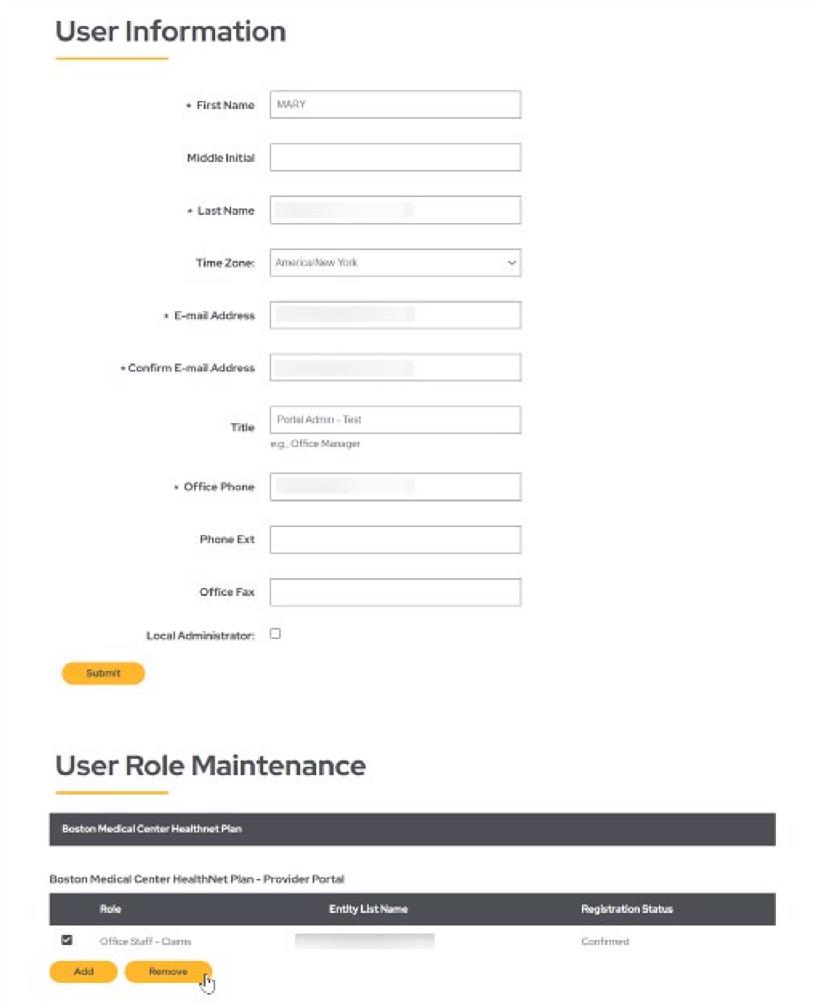
2. **Choose User**

   On the User Maintenance screen, click the name of the user whose demographics or role need to be modified.



3. Changing Demographic Information

On the User Information screen, make changes to any of the demographic fields. Once you have entered the necessary changes, click Submit.



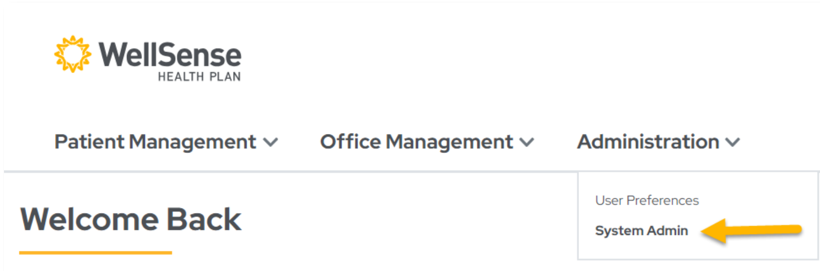
4. Confirmation Screen

You will receive a confirmation page if your change was successfully submitted.

How to Change a User’s Role

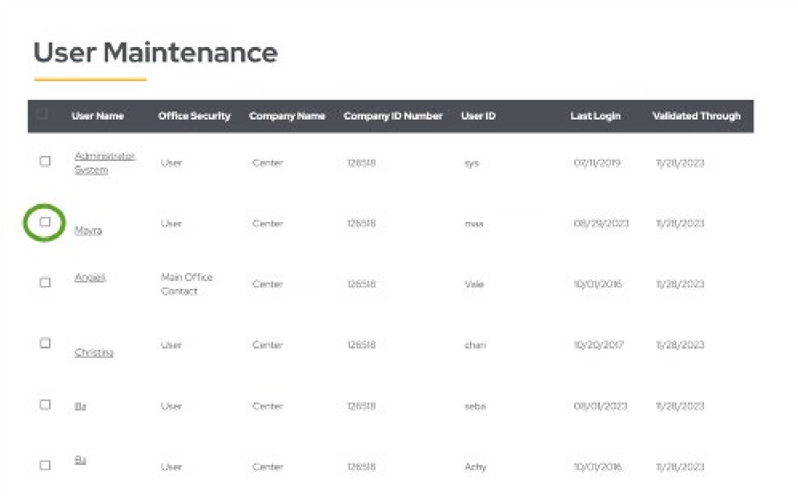
1. **Choose System Administration**

   Log into our provider portal and click **System Administration** under the **Administration** tab on the home screen.



2. **Choose User**

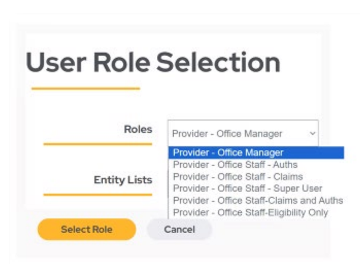
   On the User Maintenance screen, **click the name of the user** whose role needs to be modified



3. **Add Role**

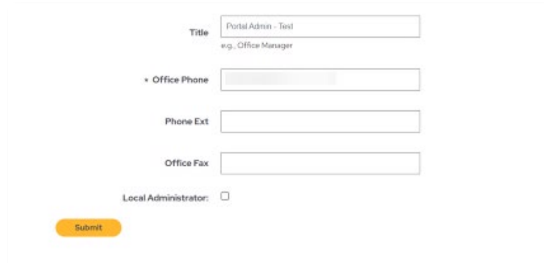
   Under User Role Maintenance, **Add** the user’s new role. You will then add the role the user should have access to

   <u>**NOTE: You must add a role before removing a role**</u>



4. **Review and Submit User Information**

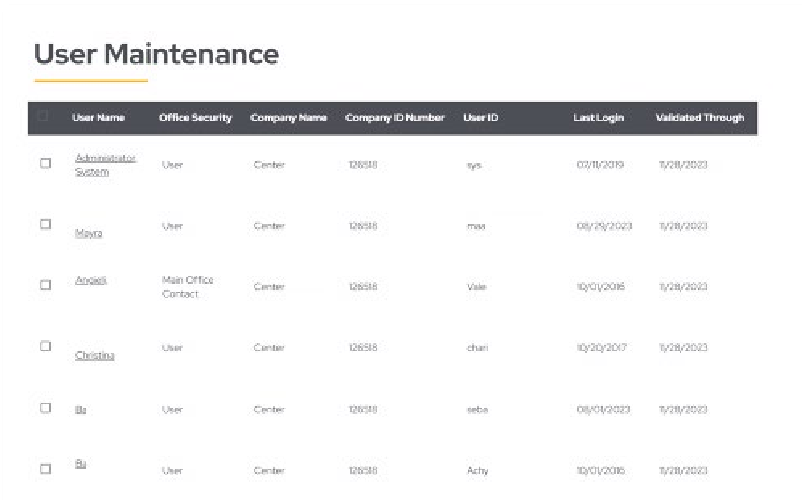
   Review the information when the User Information screen redisplays and click Submit.



5. **Remove Access**

   Follow HOW TO DELETE USER instructions (page 6) to delete the role the user no longer needs

6. **Review the full list of current users**



- Delete user accounts that no longer require access (i.e., users who have changed positions or who have left the organization)
- Remove inactive roles. If you have updated a user to a different role you can now delete the role that should no longer be active.

7. **Validate user accounts**

   - When the review of user accounts has been completed, validate the user accounts that do require access and whose access is appropriate for the user's job:
   - Click the check box beside the user's name
   - Click Validate Users button
   - Verify the "Validated Through" data has been changed to a date next year

How to Change the Office Manager

If the individual with Office Manager/Administration Access is no longer with your organization and you wish to delegate a new individual

- The "new" Office Manager must register on the portal as a user
  - If you already have access then you do not need to re-register and can skip to the next step

- Email Provider-Login@wellsense.org and indicate you are requesting to become the portal administrator
    - Please include User Name and Tax Identification Number in your email
    - You will then receive an email indicating your access has been updated

Appendix

Account Revalidation Reminder Schedule

The following details the revalidation activity that will occur.	
30 days prior to due date	An account revalidation reminder email is sent to the main office contact.
Prior to due date	The main office contact completes account revalidation of users attached to his/her account.
15 days prior to due date	If account revalidation has not been completed, a second reminder email is sent
1 day prior to due date	If account revalidation has not been completed, a third reminder email is sent
Past due date	If account revalidation has not been completed, all user access to WellSense is locked.

Description of User Roles

Roles	**Feature Access**
Office Manager	User setup and maintenance, Eligibility, Claims, Authorizations, Reports
Office Staff – Super User	Same as Office Manager without the user setup capabilities
Office Staff – Claims and Auth	Eligibility, Claims, Authorization
Office Staff – Claims	Eligibility, Claims
Office Staff – Auths	Eligibility, Authorization
Office Staff – Eligibility	Eligibility