



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.

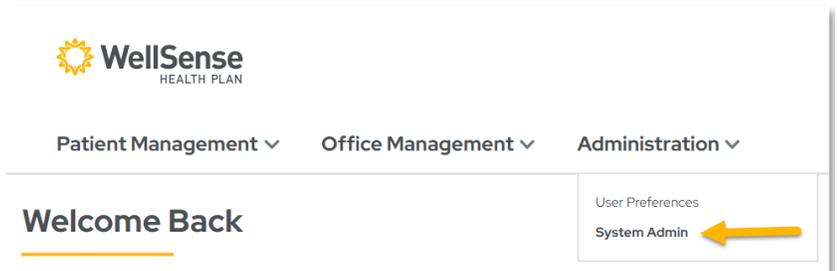
The Office Manager has the ability to:

- Delete user accounts for those who no longer require access (i.e., any users who have changed positions or who have left the organization)
- Add new users and send them their login information
- 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.

The screenshot shows the 'User Maintenance' section with a table of users. The table has columns for User Name, Office Security, Company Name, Company ID Number, User ID, Last Login, and Validated Through. There are seven rows of user data.

User Name	Office Security	Company Name	Company ID Number	User ID	Last Login	Validated Through
<input type="checkbox"/> Administrator System	User	Center	126518	sys	02/11/2019	1/28/2023
<input type="checkbox"/> Maya	User	Center	126518	max	08/29/2023	1/28/2023
<input type="checkbox"/> Arnold	Main Office Contact	Center	126518	Vale	10/01/2016	1/28/2023
<input type="checkbox"/> Christina	User	Center	126518	chari	10/20/2017	1/28/2023
<input type="checkbox"/> Ba	User	Center	126518	seba	08/01/2023	1/28/2023
<input type="checkbox"/> Ba	User	Center	126518	Achy	10/01/2016	1/28/2023

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



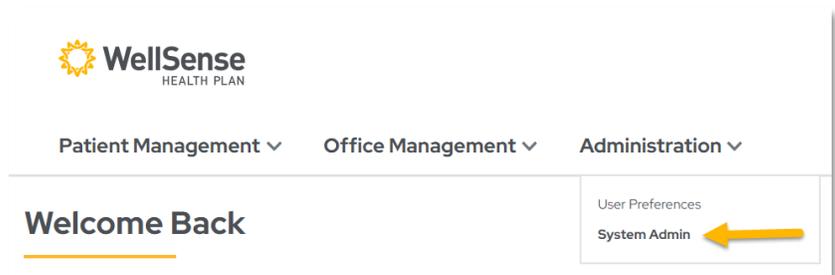
<input type="checkbox"/>	Name	Role	Organization	Employee ID	Username	Validated Through	Expiration Date
<input type="checkbox"/>	Worrt, Monica	User	Boston Medical Center HealthNet Plan	126518	mowjort.beta	05/31/2023	1/28/2023
<input type="checkbox"/>	X, Daniel	User	Boston Medical Center HealthNet Plan	126518	Daniel	10/01/2016	1/28/2023

Buttons: Validate Users, Add User

How to Add Users

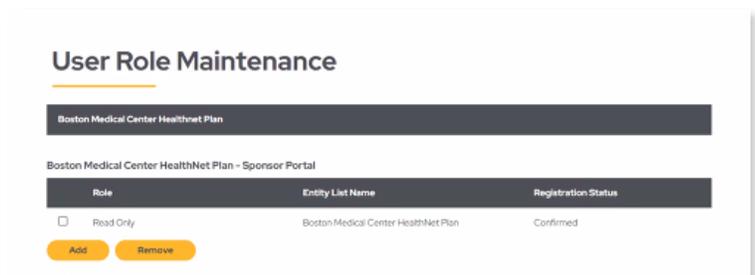
1. Choose System Administration

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)

Add User

• First Name
 Middle Initial
 • Last Name
 • E-mail Address
 • Confirm E-mail Address
 Title
e.g., Office Manager
 • Office Phone
 Phone Ext
 Office Fax
 • Username
 • Password
 • Confirm Password
 Local Administrator:

User Role Maintenance

There are currently no User Roles defined for this user.

[Add](#)

4. Select User Role

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

*** See Appendix for Descriptions of User Roles**

User Role Selection

Roles

Entity Lists

- Provider - Office Manager
- Provider - Office Staff - Auths
- Provider - Office Staff - Claims
- Provider - Office Staff - Super User
- Provider - Office Staff-Claims and Auths
- Provider - Office Staff-Eligibility Only

[Select Role](#) [Cancel](#)

5. Review and Submit User Information

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

• Password [text input]
• Confirm Password [text input]
Local Administrator:
Submit

User Role Maintenance

Boston Medical Center HealthNet Plan

Boston Medical Center HealthNet Plan - Provider Portal

Role	Entry List Name	Registration Status
<input type="checkbox"/> Office Staff - Clinics	Evans Geriatrics	Pending

Add **Remove**

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.

Healthcare Registration for Boston Medical Center HealthNet Plan

HealthTrio connect Office User List

User Name	User ID	Office Security Level
Mary,Test	Test,Mary	provider User

[Return to User Maintenance](#)

7. Provider User Login Credentials

The System Administrator will receive an email generated by the portal.

The System Administrator will receive an email which they should share with the user.

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](#)

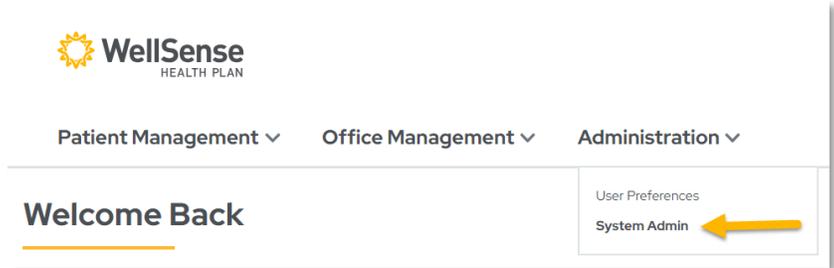
8. User accepts User Agreement

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

How to Delete Users

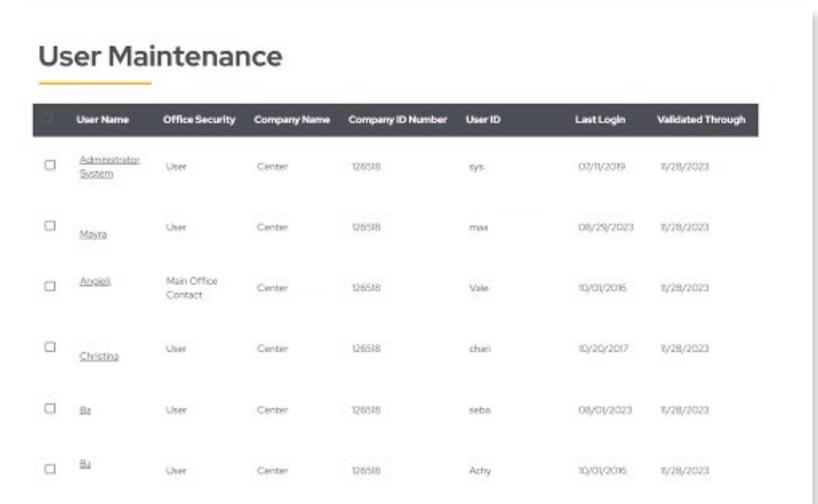
1. Choose System Administration

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



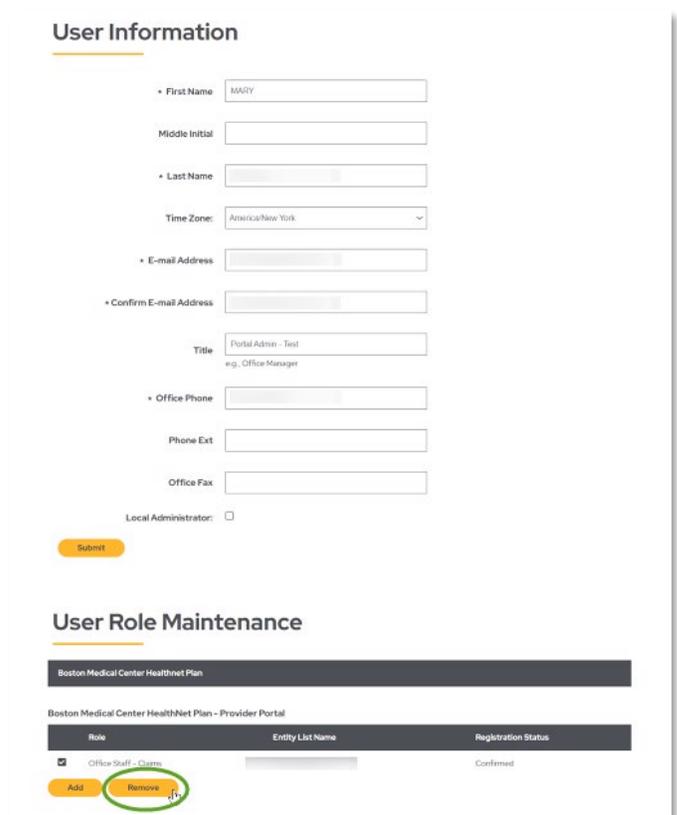
2. Choose User

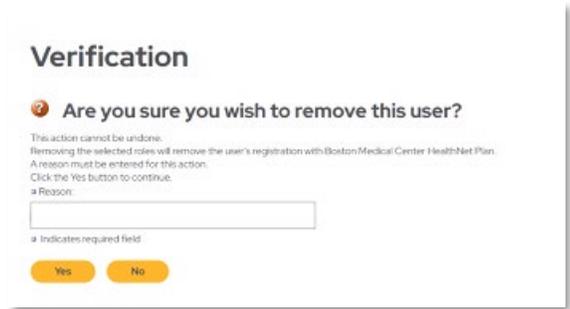
Click the name of the user who needs to be deleted.



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**.



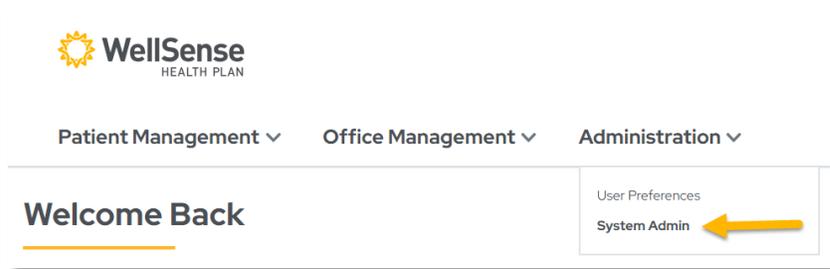


How to Modify Users

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.

User Maintenance

User Name	Office Security	Company Name	Company ID Number	User ID	Last Login	Validated Through
<input type="checkbox"/> Administrator System	User	Center	126518	sys	07/11/2019	1/28/2023
<input type="checkbox"/> Maya	User	Center	126518	max	06/29/2023	1/28/2023
<input type="checkbox"/> Aaron	Main Office Contact	Center	126518	Vale	10/01/2016	1/28/2023
<input type="checkbox"/> Christina	User	Center	126518	chari	10/20/2017	1/28/2023
<input type="checkbox"/> Ba	User	Center	126518	seba	06/01/2023	1/28/2023
<input type="checkbox"/> Ba	User	Center	126518	Achy	10/01/2016	1/28/2023

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.

The image shows two screenshots from a web application. The top screenshot is titled "User Information" and contains several input fields: "First Name" (with "MARY" entered), "Middle Initial", "Last Name", "Time Zone" (a dropdown menu showing "America/New York"), "E-mail Address", "Confirm E-mail Address", "Title" (with "Portal Admin - Test" and "eg, Office Manager" below it), "Office Phone", "Phone Ext", and "Office Fax". There is also a "Local Administrator" checkbox which is unchecked. A yellow "Submit" button is at the bottom.

The bottom screenshot is titled "User Role Maintenance" and shows a table with the following data:

Boston Medical Center HealthNet Plan		
Boston Medical Center HealthNet Plan - Provider Portal		
Role	Entity List Name	Registration Status
<input checked="" type="checkbox"/> Office Staff - Claims		Confirmed

At the bottom of the table are two yellow buttons: "Add" and "Remove". A mouse cursor is pointing at the "Remove" button.

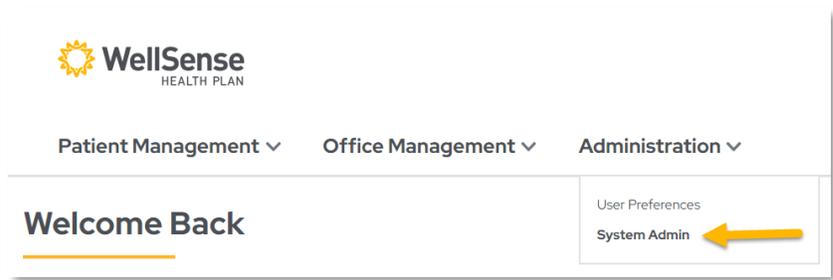
4. Confirmation Screen

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

How to Change a User's Role

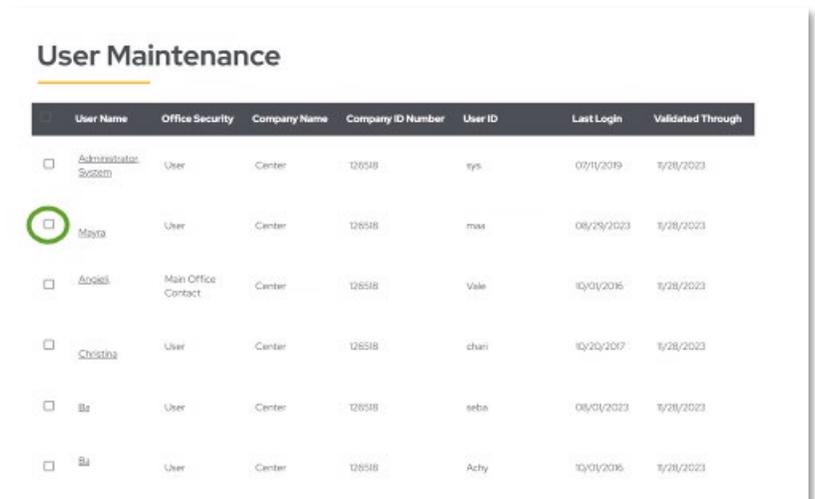
1. Choose System Administration

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



2. Choose User

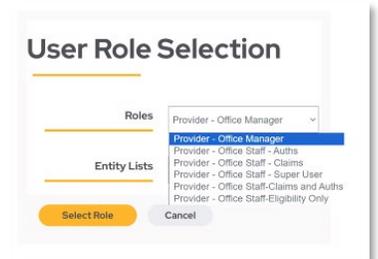
On the User Maintenance screen, **click the name of the user** whose role needs to be modified



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

NOTE: You must add a role before removing a role



4. Review and Submit User Information

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

The screenshot shows a form with the following fields: Title (with a placeholder 'Portal Admin - Test' and 'e.g. Office Manager'), Office Phone, Phone Ext, Office Fax, and a Local Administrator checkbox. A yellow Submit button is at the bottom.

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.

User Name	Office Security	Company Name	Company ID Number	User ID	Last Login	Validated Through
<input type="checkbox"/> Administrator System	User	Center	126518	sys	07/11/2019	1/28/2023
<input type="checkbox"/> Maya	User	Center	126518	msa	08/29/2023	1/28/2023
<input type="checkbox"/> Angelo	Main Office Contact	Center	126518	Vale	10/01/2016	1/28/2023
<input type="checkbox"/> Cristina	User	Center	126518	chari	10/20/2017	1/28/2023
<input type="checkbox"/> Ba	User	Center	126518	seba	08/01/2023	1/28/2023
<input type="checkbox"/> Ba	User	Center	126518	Acty	10/01/2016	1/28/2023

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