

# Provider Portal

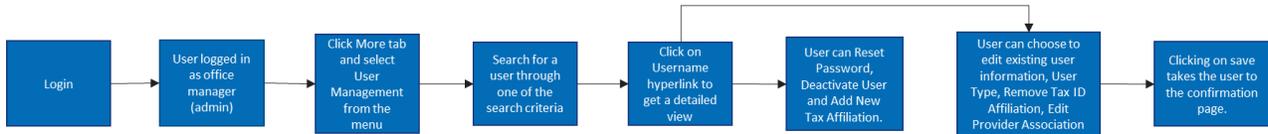
## User Management

### Managing a User's Account

Quick Reference Guide



This Quick Reference Guide (QRG) will provide an overview of how to find and edit a User's information, user type, password, provider affiliation, etc.

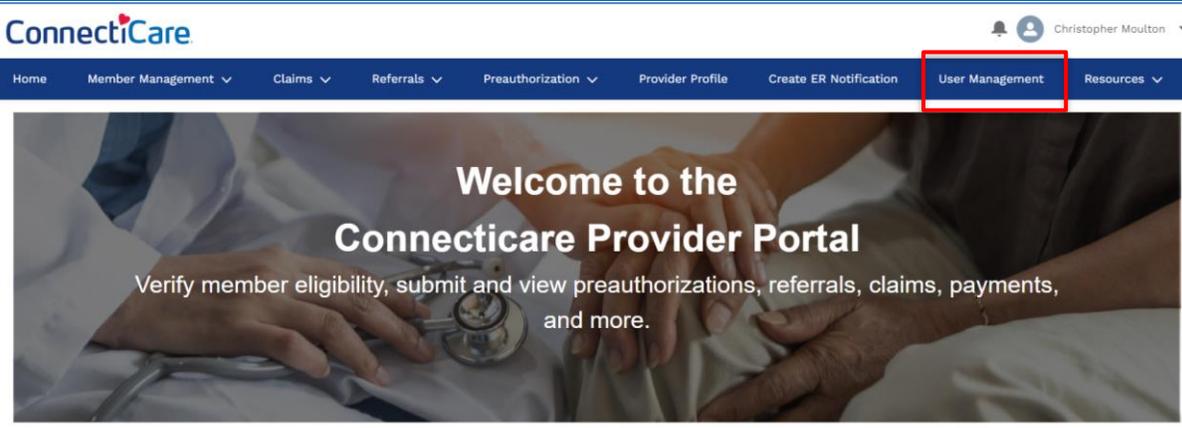


Let us look at the steps in detail for finding and modifying a Portal User's information.

**Purpose: Update an existing User's account.**

 **Step 1:**

1. From the **ConnectiCare Home** page, click the **User Management** tab. The **User Management** page displays.



The screenshot shows the ConnectiCare Home page. The navigation bar includes: Home, Member Management, Claims, Referrals, Preauthorization, Provider Profile, Create ER Notification, **User Management** (highlighted with a red box), and Resources. The main content area features a large banner with the text: "Welcome to the Connecticare Provider Portal. Verify member eligibility, submit and view preauthorizations, referrals, claims, payments, and more." The banner background shows hands of healthcare professionals.

## User Management

Before adding a new user, please check if the user you want to add already exists.

Add New Portal User

Search By \*

Reset Search

Search



Step 2:

1. **Search and select a User.**  
**Note:** Users will appear below without having to search, check to prevent duplication of users.
2. **Portal User Information** page displays.

## User Management

Before adding a new user, please check if the user you want to add already exists.

Add New Portal User

Search By \*

Reset Search

Search

Filter By ⓘ

Name↑	Username	Email	Phone	Status
<a href="#">Adrianna Coombs</a>	acoombs@connecticare.com	acoombs@connecticare.com		Active
<a href="#">Aiden Chattelle</a>	a_chattelle@connecticare.com	a_chattelle@connecticare.com		Active
<a href="#">Alexandra Battaglini</a>	abattaglini@emblemhealth.com	abattaglini@emblemhealth.com		Active
<a href="#">Alinibeth Taveras-Vargas</a>	ataveras-vargas@emblemhealth.com	ataveras-vargas@emblemhealth.com		Active
<a href="#">Alisa Weinberger</a>	aweinberger@emblemhealth.com	aweinberger@emblemhealth.com		Active

### Portal User Information

[Reset Password](#)   [Deactivate User](#)   [Add New Tax ID Affiliation](#)

> User Information

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> 825671892 - Richard Kann

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> 789263718 - Sarah Williams

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Step 3:

1. Click the arrows to Expand or Hide the User's information.
2. Click **Edit**.  
**Note:** Edit Information Page displays.
3. Edit information and click **Save**.

### Portal User Information

Reset Password Deactivate User Add New Tax ID Affiliation

▼ User Information
Edit

First Name John	Middle Name	Last Name Carter	Email jcarter@gmail.com
User Name jcarter@gmail.com	Mobile (212) 723-7868	Office (312) 134-79812	Fax (312) 134-79812
Address 10 Stonybrook Lane, Brooklyn, NY 11235			

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▼ 25671892 - Richard Kim

Remove Tax ID Affiliation Edit User Type Edit Provider Association

Tax ID 25671892	Tax Name Richard Kim	Contact Type Billing Staff
This User has access to all Provider affiliated with this Tax ID.		

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▼ 89263718 - Sarah Williams

Remove Tax ID Affiliation Edit User Type Edit Provider Association

Tax ID 89263718	Tax Name Sarah Williams	Contact Type Appointment Scheduler
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Provider Association

Name	Address	NPI	Phone
Sarah Brooks	73 Belmont St., Staten Island, NY 10314	1989008873	100000267298
Uesugi Suzuki	88 Broad St., Forest Hills, NY 11375	1981208625	100000163812

Total Records: 2 < Showing 1 - 2 >

EDIT USER INFORMATION

## User Information

Complete the details below and click Save to continue. All fields with an asterisk \* are required.

First Name \*

Aiden

Middle Name

Last Name \*

Chattelle

Email \*

a\_chattelle@connecticare.com

Verify Email \*

a\_chattelle@connecticare.com

Please enter user name in a email format.

User Name \*

a\_chattelle@connecticare.com

Mobile

Office Phone Number

Fax

Street

City

State/Province

Zip/Postal Code

Country

Save



**Step 4:**

- From the **Portal User Information** page
1. Click **Edit User Type** to change how the User functions for a **provider**.  
**Note:** Edit User Type popup displays.
  2. From the drop down select user type.
  3. Click **Submit** or **Cancel**.

### Portal User Information

Reset Password Deactivate User Add New Tax ID Affiliation

▼ **User Information** Edit

<b>First Name</b> John	<b>Middle Name</b>	<b>Last Name</b> Carter	<b>Email</b> jcarter@gmail.com
<b>User Name</b> jcarter@gmail.com	<b>Mobile</b> (212) 723-7868	<b>Office</b> (312) 134-79812	<b>Fax</b> (312) 134-79812
<b>Address</b> 40 Stonybrook Lane, Brooklyn, NY 11235			

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▼ **825671892 - Richard Kim** Remove Tax ID Affiliation **Edit User Type** Edit Provider Association

<b>Tax ID</b> 825671892	<b>Tax Name</b> Richard Kim	<b>Contact Type</b> Billing Staff
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This User has access to all Provider affiliated with this Tax ID.

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▼ **789263718 - Sarah Williams** Remove Tax ID Affiliation Edit User Type Edit Provider Association

<b>Tax ID</b> 789263718	<b>Tax Name</b> Sarah Williams	<b>Contact Type</b> Appointment Scheduler
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**Provider Association**

Name	Address	NPI	Phone
Sarah Brooks	73 Belmont St., Staten Island, NY 10314	1989008873	100000267298
Uesugi Suzuki	88 Broad St., Forest Hills, NY 11375	1981208625	100000163812

### Portal User Information

#### Edit User Type

Select the user type you want to change from the drop-down and click save

Select User Type

- Office Manager
- Office Manager**
- Clinical Staff
- Billing Staff
- Appointment Scheduler
- Eligibility Checker
- Practice Maintenance

Deactivate User

### Portal User Information

#### Edit User Type

Select the user type you want to change from the drop-down and click save

Select User Type

Office Manager

Cancel Save

Reset Password Deactivate User



**Step 5:**

From the **Portal User Information** Page.

1. Click **Remove Tax ID Affiliation** if the User is no longer authorized to access information on behalf of the provider shown.  
**Note:** Delete Tax ID popup displays.
2. Click **Cancel** to cancel the request or **Confirm** to remove the Tax ID.

### Portal User Information

Reset Password Deactivate User Add New Tax ID Affiliation

▼ **User Information** Edit

<b>First Name</b> John	<b>Middle Name</b>	<b>Last Name</b> Carter	<b>Email</b> jcarter@gmail.com
<b>User Name</b> jcarter@gmail.com	<b>Mobile</b> (212) 723-7868	<b>Office</b> (312) 134-79812	<b>Fax</b> (312) 134-79812
<b>Address</b> 40 Stonybrook Lane, Brooklyn, NY 11235			

▼ **825671892 - Richard Kim** Remove Tax ID Affiliation Edit User Type Edit Provider Association

<b>Tax ID</b> 825671892	<b>Tax Name</b> Richard Kim	<b>Contact Type</b> Billing Staff
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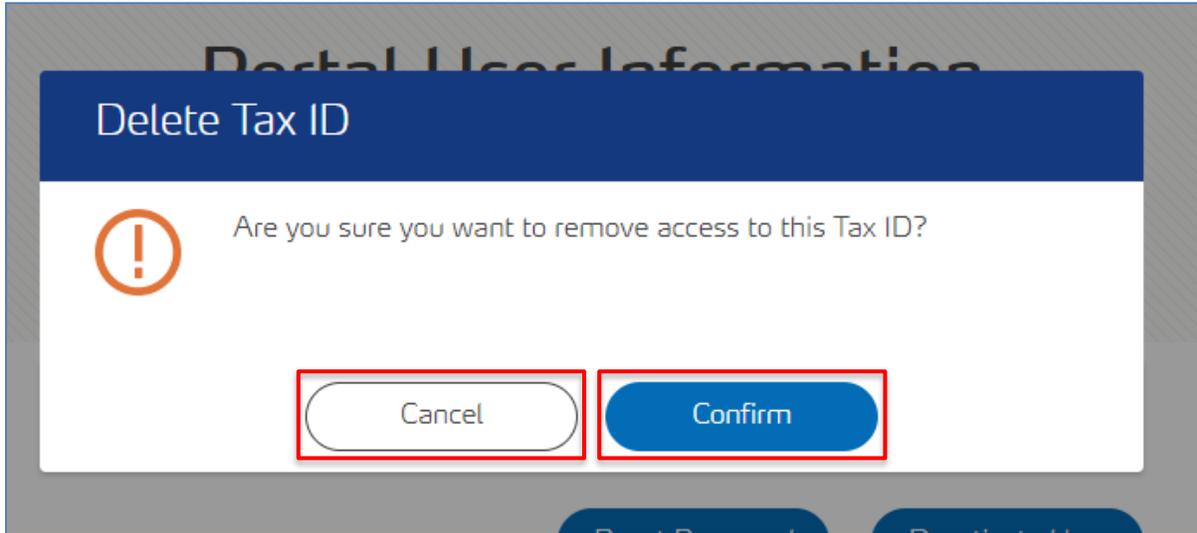
This User has access to all Provider affiliated with this Tax ID.

▼ **789263718 - Sarah Williams** Remove Tax ID Affiliation Edit User Type Edit Provider Association

<b>Tax ID</b> 789263718	<b>Tax Name</b> Sarah Williams	<b>Contact Type</b> Appointment Scheduler
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**Provider Association**

Name	Address	NPI	Phone
Sarah Brooks	73 Belmont St., Staten Island, NY 10314	1989008873	100000267298
Uesugi Suzuki	89 Broad St., Forest Hills, NY 11375	1981209625	100000163812





Step 6:

- From the **Portal User Information Page**
1. Click **Reset Password**.

### Portal User Information

Reset Password
Deactivate User
Add New Tax ID Affiliation

▼ **User Information** Edit

<b>First Name</b> John	<b>Middle Name</b>	<b>Last Name</b> Carter	<b>Email</b> jcarter@gmail.com
<b>User Name</b> jcarter@gmail.com	<b>Mobile</b> (212) 723-7868	<b>Office</b> (312) 134-79812	<b>Fax</b> (312) 134-79812
<b>Address</b> 40 Stonybrook Lane, Brooklyn, NY 11235			

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▼ **825671892 - Richard Kim** Remove Tax ID Affiliation Edit User Type Edit Provider Association

<b>Tax ID</b> 825671892	<b>Tax Name</b> Richard Kim	<b>Contact Type</b> Billing Staff
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This User has access to all Provider affiliated with this Tax ID.

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▼ **789263718 - Sarah Williams** Remove Tax ID Affiliation Edit User Type Edit Provider Association

<b>Tax ID</b> 789263718	<b>Tax Name</b> Sarah Williams	<b>Contact Type</b> Appointment Scheduler
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**Provider Association**

Name	Address	NPI	Phone
Sarah Brooks	73 Belmont St., Staten Island, NY 10314	1989008873	100000267298
Uesugi Suzuki	89 Broad St., Forest Hills, NY 11375	1981208625	100000163812



Step 7:

The **Reset Password** popup displays.

1. Click **Reset Password** or click **Cancel** to return to **User Information**.

**Note:** An email will be sent to users email to fully reset password.

### Reset Password



Are you sure you want to reset the password for this user? They will receive an email with an link and instructions to reset their password?

Cancel

Reset Password



**Step 8:**

From the **Portal User Information** page:

1. Click **Deactivate User** to completely remove the User's access to our portals.  
**Note:** Deactivate popup displays.
2. Click **Deactivate User** or click **Cancel** to return to **User Information**.

### Portal User Information

Reset Password Deactivate User Add New Tax ID Affiliation

**▼ User Information** Edit

<b>First Name</b> John	<b>Middle Name</b>	<b>Last Name</b> Carter	<b>Email</b> jcarter@gmail.com
<b>User Name</b> jcarter@gmail.com	<b>Mobile</b> (212) 723-7868	<b>Office</b> (312) 134-79812	<b>Fax</b> (312) 134-79812
<b>Address</b> 40 Stonybrook Lane, Brooklyn, NY 11235			

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**▼ 825671892 - Richard Kim** Remove Tax ID Affiliation Edit User Type Edit Provider Association

<b>Tax ID</b> 825671892	<b>Tax Name</b> Richard Kim	<b>Contact Type</b> Billing Staff
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This User has access to all Provider affiliated with this Tax ID.

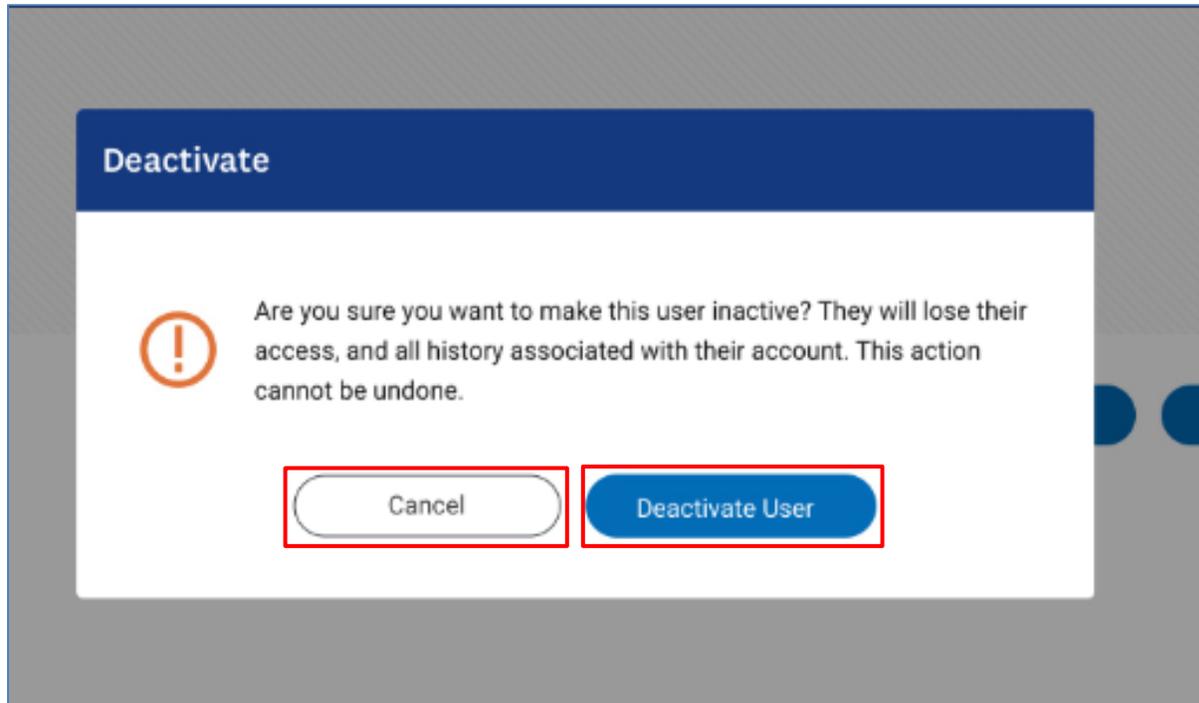
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**▼ 789263718 - Sarah Williams** Remove Tax ID Affiliation Edit User Type Edit Provider Association

<b>Tax ID</b> 789263718	<b>Tax Name</b> Sarah Williams	<b>Contact Type</b> Appointment Scheduler
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**Provider Association**

Name	Address	NPI	Phone
Sarah Brooks	73 Belmont St., Staten Island, NY 10314	1989008873	100000267298
Uesugi Suzuki	88 Broad St., Forest Hills, NY 11375	1981208625	100000163812





Step 9:

- From the **Portal User Information** page:
1. Click **Add New Tax ID Affiliation** to give the User access to providers who use a different Tax ID and to assign the appropriate User Type(s). **Tax ID and Provider Association** screen displays.

### Portal User Information

Reset Password Deactivate User Add New Tax ID Affiliation

▼ User Information Edit

First Name John	Middle Name	Last Name Carter	Email jcarter@gmail.com
User Name jcarter@gmail.com	Mobile (212) 723-7868	Office (312) 134-79812	Fax (312) 134-79812
Address 40 Stonybrook Lane, Brooklyn, NY 11235			

▼ 825671892 - Richard Kim Remove Tax ID Affiliation Edit User Type Edit Provider Association

Tax ID 825671892	Tax Name Richard Kim	Contact Type Billing Staff
This User has access to all Provider affiliated with this Tax ID.		

▼ 789263718 - Sarah Williams Remove Tax ID Affiliation Edit User Type Edit Provider Association

Tax ID 789263718	Tax Name Sarah Williams	Contact Type Appointment Scheduler	
Provider Association			
Name	Address	NPI	Phone
Sarah Brooks	73 Belmont St., Staten Island, NY 10314	1989008873	100000267298
Uesugi Suzuki	88 Broad St., Forest Hills, NY 11375	1981208625	100000163812

Tax ID and Provider Association

**EDIT PORTAL USER**

### Tax ID and Provider Association

Complete the details below and click Save to continue. All fields with an asterisk \* are required.

Select Tax ID \*  Select User Type \*

[Next](#)

[Cancel](#)



Step 10:

1. Select **Tax ID** from drop down.
2. Select **User Type** from drop down.
3. Click **Next**.
4. Click **Done**.

Tax ID and Provider Association

**EDIT PORTAL USER**

### Tax ID and Provider Association

Complete the details below and click Save to continue. All fields with an asterisk \* are required.

Select Tax ID \*

Select User Type \*

- Office Manager
- Clinical Staff
- Billing Staff
- Appointment Scheduler
- Eligibility Checker
- Practice Maintenance

Next

Cancel

Tax ID and Provider Association

**EDIT PORTAL USER**

### Tax ID and Provider Association

Complete the details below and click Save to continue. All fields with an asterisk \* are required.

Select Tax ID \*      Select User Type \*

**Next**

Cancel

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Confirmation

### Confirmation

The user's Tax ID and Provider Associations have been successfully added. This change is effective immediately.

**Done**

Thank  
You