User Access and Permissions

User Guide

Release: r1 V2

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Proprietary Notice

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Chapter 1

Managing users

The *User access and permissions* window allows organizations to create and manage their own user base. User administrators can add and update user profile information, set role permissions, and assign a user to a work location.

Provider portal users can be given roles or privileges that allow them, for example, to submit claims, configure payment information, or manage other users.

User roles

A user role defines permissions for users to perform a group of tasks. Predefined roles with a predefined set of permissions are identified according to the needs of the organization.

The user role list that is displayed when creating and updating a user profile reflects the permissions and/or services for which you have registered with TELUS.

The table below lists all possible user role values; however, it is normal to see only the values that apply to you.

Table 1.1

Role	This role allows users to...
eClaims Submission	Access the eClaims application.
eClaims Mobile App	Access the eClaims mobile application. Users must also have the eClaims Submission role.
EFT Payment Administrator	Configure the banking information for eClaims and EFT registrations.
User Administrator	Create, search for, and modify users.
WSIB HC Bill Submission	Access the WSIB Health Bill Submission application.

Table 1.1 (cont)

Role	This role allows users to...
WSIB NHC Bill Submission	Access the WSIB Non-Healthcare Bill Submission application.
Hierarchy Administrator	Manage associations between organizations and a head office.
Provider Administrator	Add new service providers to a clinic.
Merge Administrator	Merge their account with another account.
Physician Referral	Access the Physician Referral application.
WSIB EPS Administrator	Access the RTW Administration application.
WSIB EAS Administrator	Access the RTW Administration application.
WSIB Payment Administrator	Configure the banking information for WSIB registrations.

Chapter 2

Accessing the user access and permissions module

Access to the **User access and permissions** window is managed by the organization's user administrator.

1. From the Provider Portal, click the Menu button, then select **User access and permissions**.

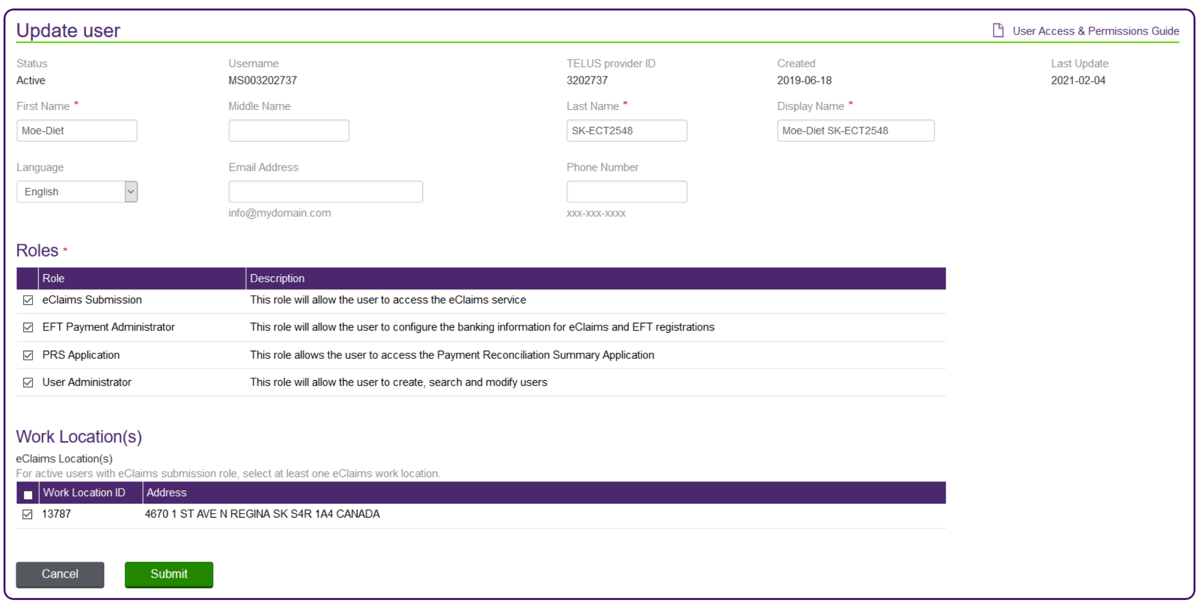
Chapter 3

Viewing a user profile

1. From the **User access and permissions** window, click within the row that corresponds to the user profile you want to view.

   You can use the filter to help you locate a specific user profile.

   The **Update User** window is displayed.



2. Review the user’s profile, then click **Cancel** to leave the user’s profile unchanged.

   The **User access and permissions** window is displayed.

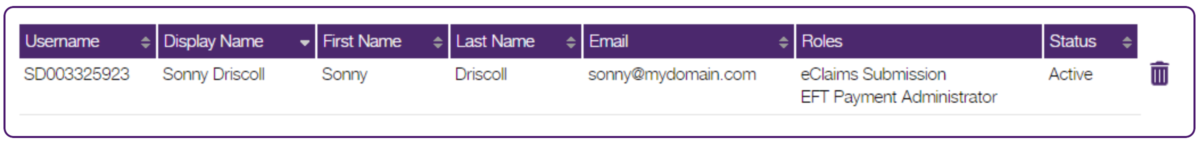
Filtering the list of users

You can use the filter to display only those users with specific attributes.

1. From the **User access and permissions** window, enter or select one or more values in the filter fields.

2. Click **Filter**.

   The user list is redisplayed to show only the names that match the filter criteria.



Username	Display Name	First Name	Last Name	Email	Roles	Status
SD003325923	Sonny Driscoll	Sonny	Driscoll	sonny@mydomain.com	eClaims Submission EFT Payment Administrator	Active

When more than 10 users are retrieved, use the navigation bar to view additional pages of results.

Sort the user list by clicking on a column header. Click once to sort in ascending order, then click again to sort in descending order.

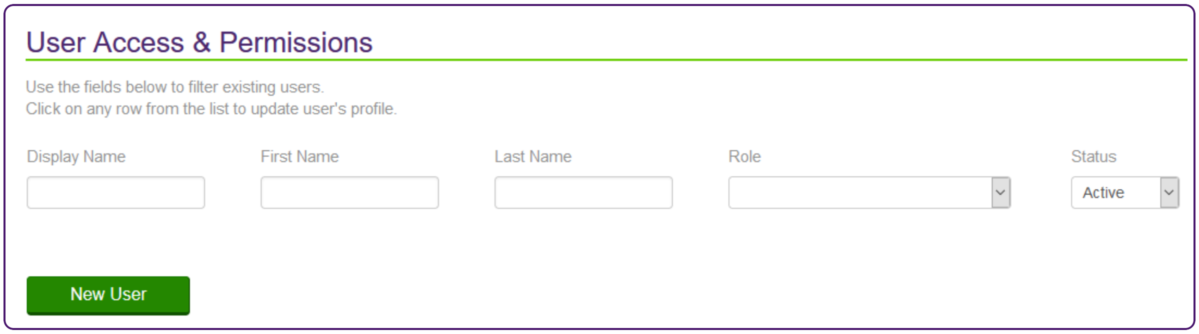
Chapter 4

Adding a user profile

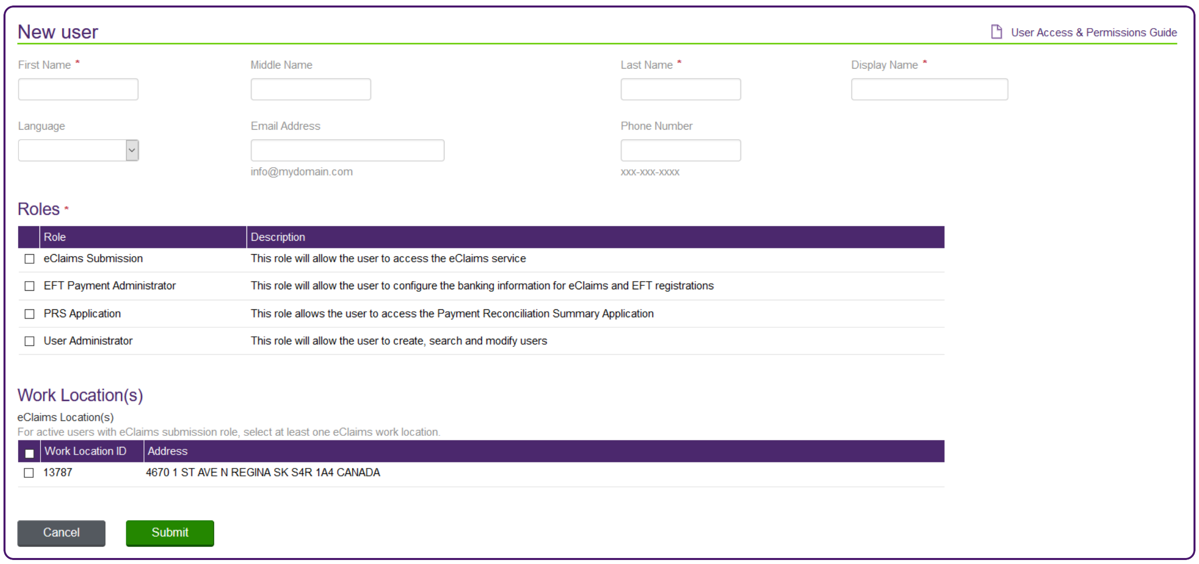
Providers are set up from the **User access and permissions** window. Access to this window is managed by the organization’s user administrator.

From the **New User** window, you can enter the information needed to create a new user account. You can give each new user a role, which allows the user to have certain permissions and perform certain actions in the system. You can also assign the user to one or more work locations.

1. From the **User access and permissions** window, click **New user**.



The **New User** window is displayed.



2. Enter the user's **First Name**, optional **Middle Name**, and **Last Name**.
3. Enter a **Display Name**.

   This is the username, which is displayed in various areas of the Provider Portal.
4. Select the user's preferred **Language**.
5. Optionally enter the user's email address *info@mydomain.com*.

   The user's login credentials are emailed to this address. The user’s email address must be different from the one indicated at the time of registration. If no email address is entered, then the login credentials are sent to the email associated with the billing number.

   The email address you enter when setting up the account cannot be the same one that is used to identify the provider. By default, the email address you used to set up the account is displayed, but it must be overwritten. For further information, see "Removing a user's email address" (page 12)
6. Optionally enter the user's **Phone Number**.

7. In the **Roles** section, select the roles that the user should have.

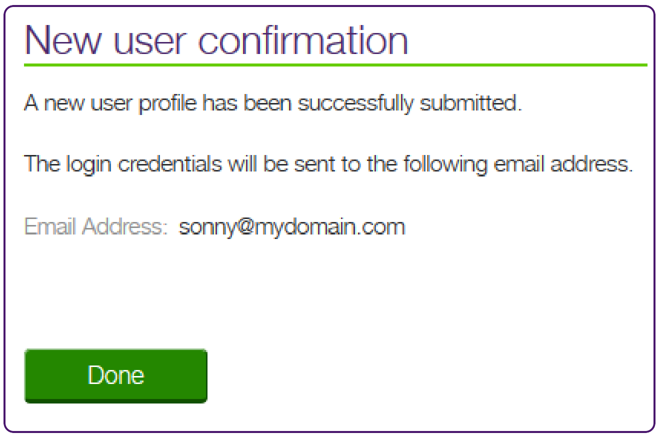
   The roles determine the user's permissions within the system. Your roles (as the logged-in administrator) determine which roles are displayed. As a user administrator, you can create a user administrator account for another person by selecting the User Administrator role.

8. In the **Work Location(s)** section, select the locations for which the user will submit claims.

   Your work locations (as the logged-in administrator) determine which locations are displayed.

9. Click **Submit**.

   The **New User Confirmation** window is displayed, indicating the email address to which the user's login credentials will be sent.



10. Click **Done**.

    The **User access and permissions** window is displayed.

> When the user profile is created, the system automatically generates a unique user name and associates the user to the organization's TELUS Provider ID.

> If the user's email address has been entered, an email is sent to the new user providing his or her user name and temporary password, along with a link to the portal.

Chapter 5

Removing a user's email address

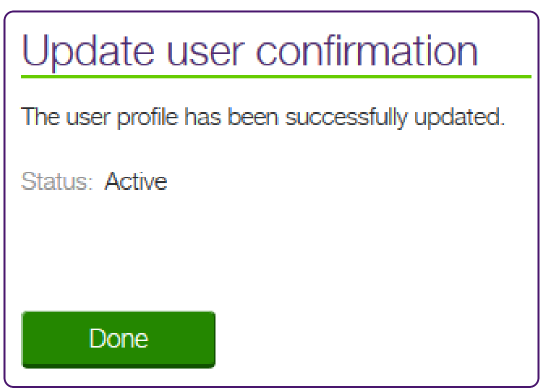
The email address associated with the user during account creation must be different from the one used to register the provider in the system. For this reason, if the same email address is to be used to create more than one user account, you will need to remove the address after the login emails have been sent.

1. From the **User access and permissions** screen, click within the row that corresponds to the **Username** of the user profile from which you want to remove the email address.

   You can use "Filtering the list of users" (page 8)) or the navigation bar to find the user whose email address you want to remove.

   The **Update User** window is displayed.
2. Delete the email address within the **Email Address** field.
3. Click **Submit**.

   The **Update user confirmation** dialog is displayed.

4. Click **Done**.

   The **User access and permissions** window is displayed.

Chapter 6

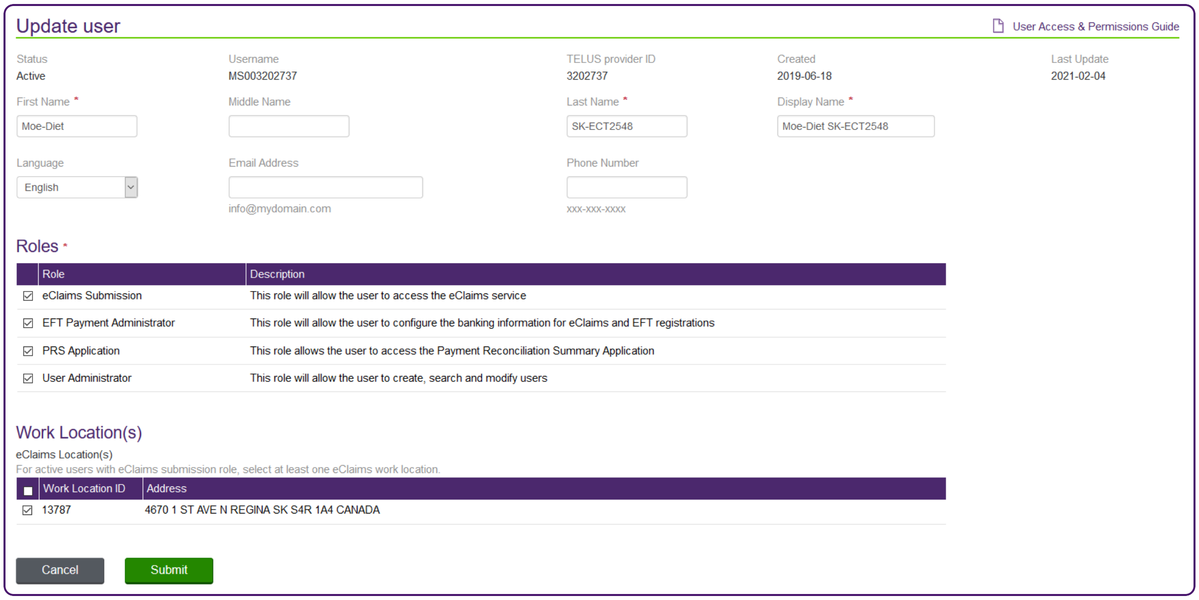
Updating a user profile

You can use the **Update user** window to view and update a user’s profile information (including their email address) and permissions.

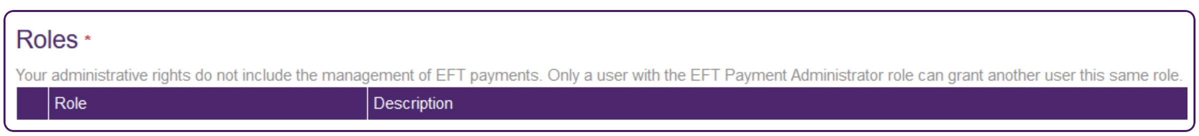
1. From the **User access and permissions** window, click within the row that corresponds to the **Username** of the user profile you want to update.

   You can use the filter to help you locate a specific user profile.

   The **Update user** window is displayed.

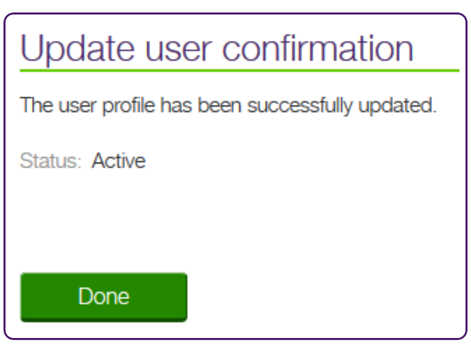
   

   If you have not been assigned the role of EDT Payment Administrator, you cannot assign this role to others. This role is hidden from the list of available roles, and the following message is displayed:

2. Update the user, roles, and locations as needed.
3. Click **Submit**.

   The **Update user confirmation** dialog is displayed.

4. Click **Done**.

   The **User access and permissions** window is displayed.

Chapter 7

Deleting a user profile

As an administrator, you can delete both active and inactive user accounts. There is no Delete user button next to your name, as you cannot delete your own account.

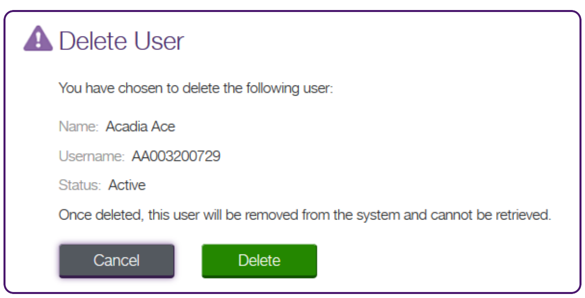
1. From the **User access and permissions** window, click within the row that corresponds to the **Username** of the user profile you want to delete.

   You can use the filter to help you locate a specific user profile.

Username	Display Name	First Name	Last Name	Email	Roles	Status	
SD003325923	Sonny Driscoll	Sonny	Driscoll	sonny@mydomain.com	eClaims Submission EFT Payment Administrator	Active	

2. Click the Delete button next to the user row.

   The **Delete User** confirmation window is displayed.



The **Delete** action is permanent; once the deletion has been confirmed, the user profile cannot be reinstated. If you delete a user profile in error, you will need to create a new replacement profile.

3. Click **Delete**.

   The user profile is deleted from the system.

Chapter 8

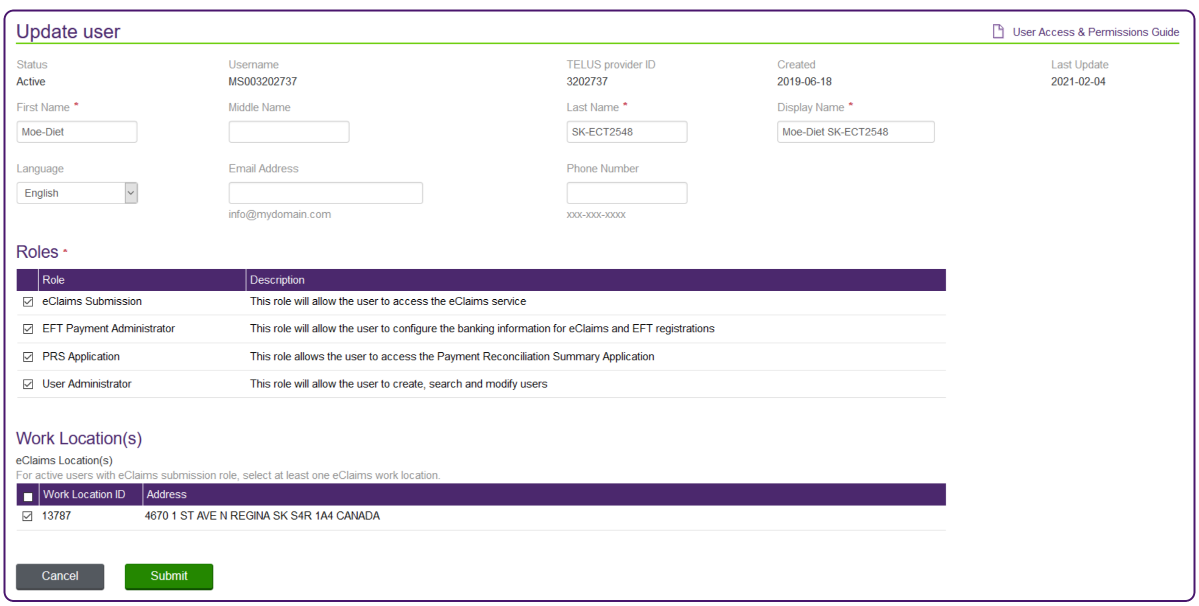
Disabling and reactivating a user profile

In some cases, it may be necessary to disable a user profile temporarily; for example, during a leave of absence. The user account can be reactivated when the employee returns.

1. From the **User access and permissions** window, click within the row that corresponds to the **Username** of the user profile you want to temporarily disable.

   You can use the filter to help you locate a specific user profile.

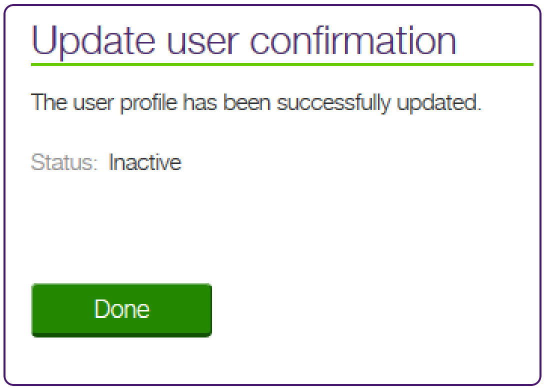
   The **Update User** window is displayed.



2. In the **Status** field, select Inactive.

3. Click **Submit**.

   The **Update user confirmation** dialog is displayed, showing the status as Inactive.



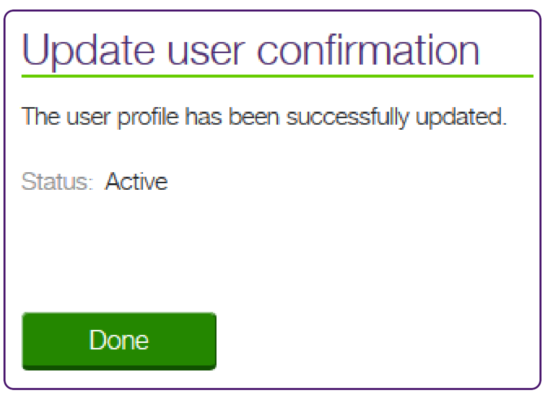
4. **Click Done.**

   The **User access and permissions** window is displayed.

Reactivating a user profile

1. Locate the user and navigate to the **Update User** window as described in step 1 above.
2. In the **Status** field, select **Active**.
3. Click **Submit**.

   The **Update user confirmation** dialog is displayed, showing the status as **Active**.



4. Click **Done**.

   The **User access and permissions** window is displayed.

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