



Provider Portal

Description of Roles

Roles in the New Provider Portal

The new provider portal has roles to accommodate different job functions in provider offices. Each role allows users to access a designated set of tools and features in the portal. Assignment of a role happens after a user registers for the portal (gets a username and password). Once registration is complete, a user requests affiliation to a Contract or Sub-Group Account. Then the Contract or Sub-Group Admin (defined below) approves or denies the affiliation request. If the request is approved, the Admin selects one of the following roles for the user. Only one role per user can be assigned, and roles can be changed at any time by the Admin.

Provider Portal Roles and Descriptions

No Association

This is the default role. After a user registers for the portal (gets a username and password) and signs into the portal, this is their role until they are affiliated with a Contract or Sub-Group Account.

Will be able to: request affiliation at the Contract or Sub-Group Account level, and access the Help feature.

Will not be able to: access any portal features until assigned one of the other roles in this guide.

Intake

This role is designed for staff that initially process patients, obtain insurance information and check member eligibility.

Will be able to: view member eligibility, members' profiles and benefits as well as complete training as necessary.

Will not be able to: access my Practice, manage users or update demographic information within Practice Management

Admin Lite

This role is typically assigned to assist the Contract or Sub-Group Admin with access requests and managing/assigning user roles. This role can be assigned to more than one user.

Will be able to: perform all activities that an Intake role can, as well as approve/reject users to the portal account and assign/change user roles.

Will not be able to: assign the Sub-Group and Contract Admin roles or update demographic information within Practice Management.

Sub-Group Admin

This role manages a Sub-Group Account. If a Sub-Group Admin has not been assigned when a Sub-Group Account is created, then the role defaults to the Contract Admin role.

Will be able to: perform all activities within the Sub-Group Account within the limits of their assigned Sub-Group.

Will not be able to: view or submit anything within the Contract Account or other Sub-Group Account(s).

Contract Admin

This role has full administrative access of the Contract Account. Each contract can only have one Contract Admin.

Will be able to: perform all activities in the portal within the Contract Account.

Will not be able to: n/a.

Provider Portal: **Description of Roles** *continued*

| | Roles: | No Association | Intake | Admin Lite | Sub-Group Admin | Contract Admin |
|----------------|--|----------------|--------|------------|-----------------|----------------|
| Area | Functions | | | | | |
| My Practice | View Practice Management | | | X | X | X |
| | Update Practice Information | | | | X | X |
| | Manage Sub-Group Account Users | | | X | X | X |
| | Manage Contract Users | | | X | | X |
| | Manage Medical Groups | | | X | X | X |
| | Manage Providers | | | X | X | X |
| | Reports | | X | X | X | X |
| My Patients | View Member Eligibility and Benefits | | X | X | X | X |
| | Request Member Transfer | | | X | X | X |
| | View and Submit Visit Checklist | | X | X | X | X |
| Other Features | Request Affiliation to a Contract or Sub-Group Account | X | X | X | X | X |
| | Search and Take Portal Trainings | | X | X | X | X |
| | Secure Messaging and Notifications | | X | X | X | X |
| | Provider Lookup | | X | X | X | X |
| | View Help | X | X | X | X | X |

