

*Note: Test data/information is displayed in the screenshots listed in this document*

New User Registration Users can navigate to <https://qmportal.azahcccs.gov/> to and click on Create New Account link.

## Table of Contents

1. Create Health Plan/Contractor Master Account .....	1
2. Create Health Plan/Contractor Sub Account.....	7
3. Change User Information for Health Plan/Contractor Sub Account.....	12
4. Manage Sub Health Plan/Contractor Master Account.....	13
5. View Existing Account Information .....	14
6. Change User Email Address.....	16
7. Send Password Recovery Email .....	17
8. Remove Master Account Rights .....	19
9. Remove User .....	21
10. Restore Removed User.....	21

## 1. Create Health Plan/Contractor Master Account

The first account created for the Organization/ Business type is the Master account.

**Step1.** To create a new account, external users need to go to <https://qmportal.azahcccs.gov/> and click on “Create new account? Click Here”.

# QuickStart Guide



Thank you for visiting QM Portal. In order to use the site, you must have an active account. Please login or register a new account. For questions, please contact our Customer Support Center at (602) 417-4451.

FAQ

### External User Log In

User Name

Password

Forgot your Password? [Click Here](#)

**Create new account? [Click Here](#)**

Passwords are case-sensitive. After 3 failed attempts, within 15 minutes, your account will be locked out, and you will either need to contact your Master Account holder to unlock your account or use the Password Recovery feature.

### AHCCCS User Log In

If you are an AHCCCS employee  
AND you are currently logged onto the AHCCCS network  
AND you are accessing this application from a browser on your workstation  
Then click the button below to use this application with your network login credentials

Your web browser must have JavaScript enabled in order to use the QM portal.

**Step2.** To proceed with the registration, users need to accept the agreement shown on the next screen.



FAQ

### User Acceptance Agreement

Please read the following terms of use and indicate that you agree by selecting the "I Agree" option at the bottom of the page

**Warning:** The information provided through the QM Portal Web Application is confidential under state and federal law. Use and disclosure of this information is limited to purposes directly related to the administration of Arizona Health Care Cost Containment System. The use and disclosure of this information is also subject to the privacy and security requirements of the Administrative Simplification provisions of the federal Health Insurance Portability and Accountability Act. The Master Account Holder is responsible for ensuring the confidentiality of any information obtained from this web application by persons using the Master Account Holder user ID or any individual user IDs approved by the Master Account Holder. The Master Account Holder is responsible for informing itself and its employees and agents of the requirements of all applicable privacy laws and ensuring:

Compliance with the license agreement
Individual accounts are limited to employees who need the information to perform their employment-related duties
Inactive individual accounts are deactivated
The Master and individual user IDs and passwords are not shared or disclosed

Violation of the terms and conditions of the licensing agreement and/or violations of the state and federal confidentiality and privacy requirements may result in termination of your license to access the QM Portal Web Application. Violations may also result in the termination the QM Portal Provider Agreement, revocation of QM Portal Provider Registration, and/or the termination of or imposition of sanctions under any other contract or agreement with the AHCCCS Administration.

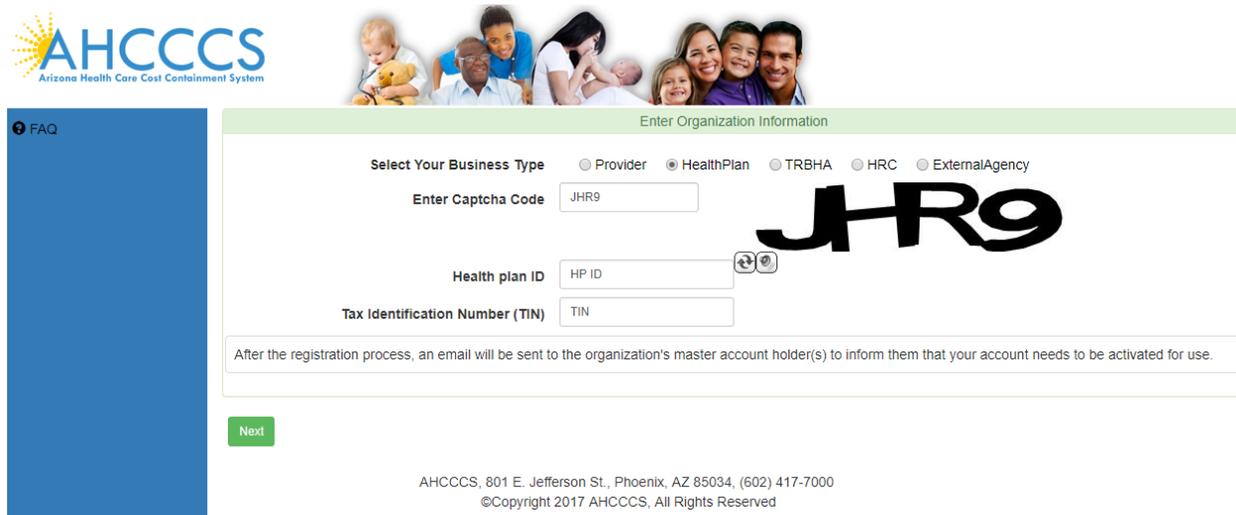
I Disagree  I Agree

# QuickStart Guide

## Registration & Account Management as Health Plan - 3

**Step3.** After selecting the I Agree and clicking on the Next Button, user can select the business type on the following screen.

**Step4.** Select HealthPlan from Select Your Business Type and Enter HealthPlan ID and Tax Identification Number (TIN).



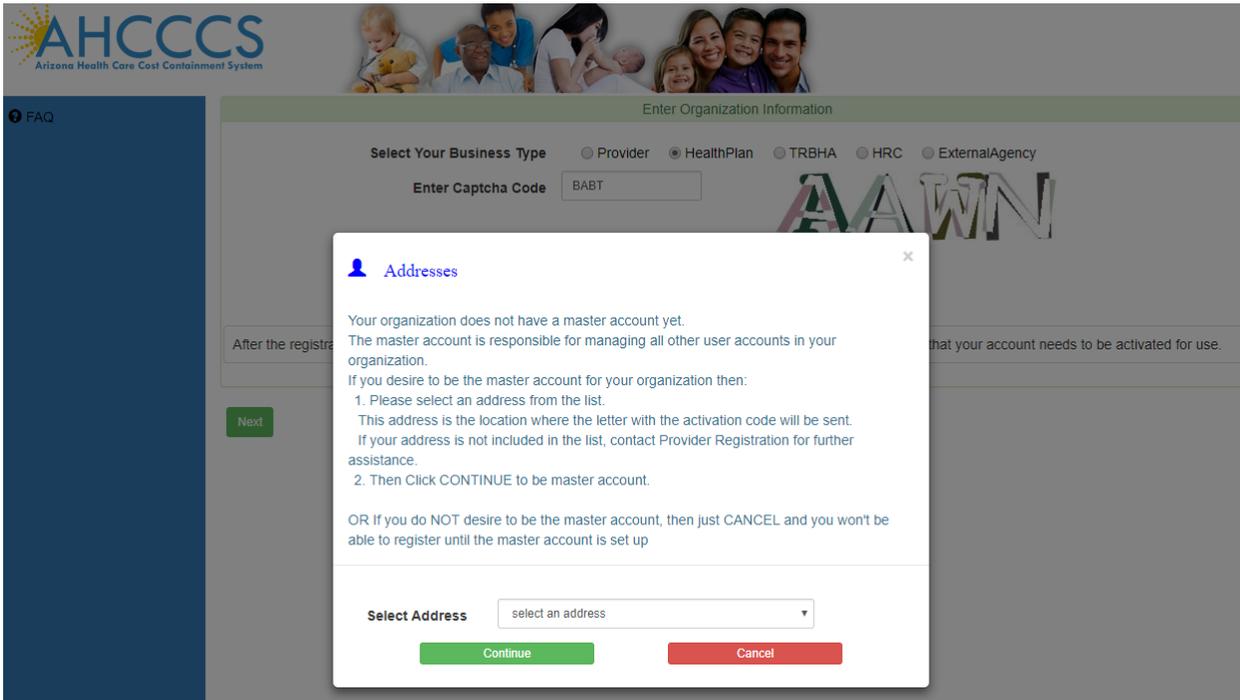
The screenshot shows the AHCCCS registration interface. At the top left is the AHCCCS logo with the text "Arizona Health Care Cost Containment System". To the right is a photograph of a diverse group of people. The main form area is titled "Enter Organization Information" and contains the following fields and options:

- Select Your Business Type:** Radio buttons for Provider, HealthPlan (selected), TRBHA, HRC, and ExternalAgency.
- Enter Captcha Code:** A text input field containing "JHR9" next to a large "JHR9" captcha image.
- Health plan ID:** A text input field containing "HP ID" with a refresh icon.
- Tax Identification Number (TIN):** A text input field containing "TIN".

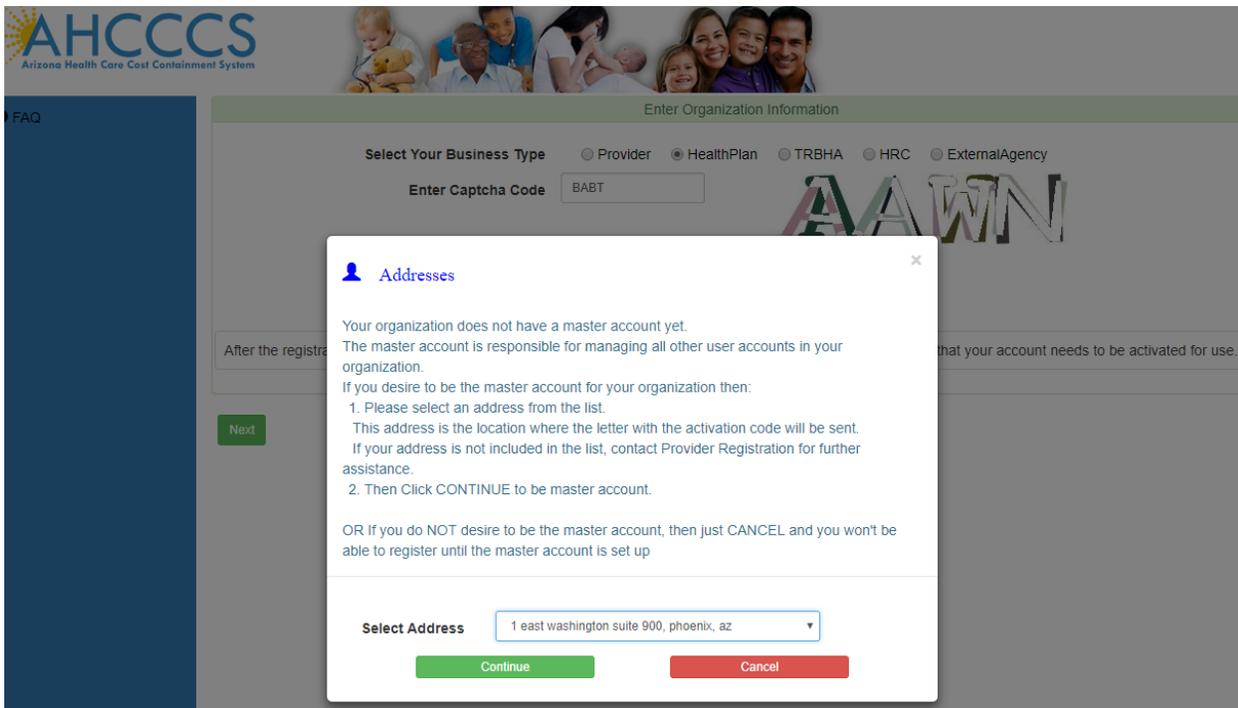
Below the form is a message box: "After the registration process, an email will be sent to the organization's master account holder(s) to inform them that your account needs to be activated for use." A green "Next" button is located at the bottom left of the form area. At the bottom of the page, contact information is provided: "AHCCCS, 801 E. Jefferson St., Phoenix, AZ 85034, (602) 417-7000 ©Copyright 2017 AHCCCS, All Rights Reserved".

A popup Address window appears.

# QuickStart Guide



Step5. Select your facility address from dropdown and click on Continue button.



# QuickStart Guide

**Step6.** Enter user Information in following page to Create New User Account and click on Create User button.

This page has instructions about Username and Password.



FAQ

Passwords are required to be a minimum of 9 characters in length.  
Password require the use of at least one lower case alpha character, one upper case character, at least one numeric character (1,2,etc), at least 1 special character @!#=\$%^&'()\*?\_@  
The password must NOT contain 3 or more of the same consecutive characters (111, aAa, etc.)  
The password must NOT contain 3 consecutive characters in common with the user name.

**Create New Account**

**First Name** HP9\_MA\_FN  
**Last Name** HP9\_MA\_LN  
**Phone** 602-123-4567  
**User Name** HP9\_MA\_USER (must be at least 6 characters)  
**Email** abc@test.com (Duplicate emails are allowed on multiple accounts when the each account has the email address, the first name, and the last name match exactly)

**Security Question #1** What was your favorite childhood TV prog  
**Security Answer #1** Test  
**Security Question #2** What is your favorite city outside the USA  
**Security Answer #2** test  
**Password** \*\*\*\*\*  
**Confirm Password** \*\*\*\*\*

Create User

AHCCCS, 801 E. Jefferson St., Phoenix, AZ 85034, (602) 417-7000  
©Copyright 2017 AHCCCS, All Rights Reserved

**Step7.** Next page you will see the following message.

Your account has been successfully created.

You will receive a letter in the mail, sent to the organization address you selected. The letter will contain activation code. You will enter this code on the QM portal logon page to activate your account.

# QuickStart Guide

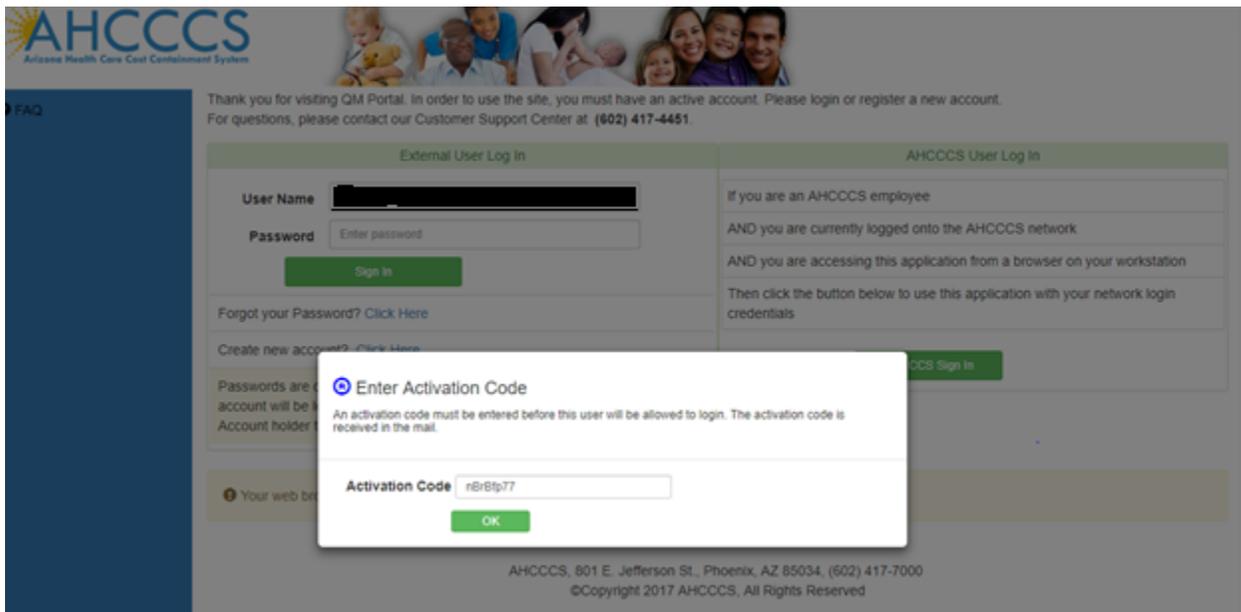


Your account has been successfully created.

You will receive a letter in the mail, sent to the organization address you selected. The letter will contain an activation code. You will enter this code on the QM portal logon page to activate your account.

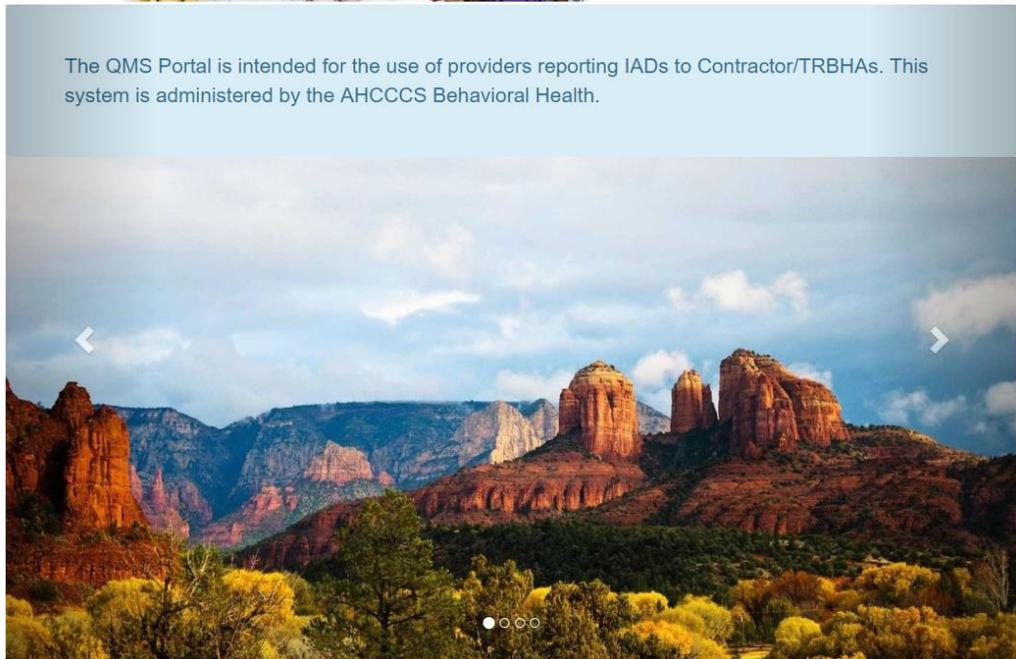
AHCCCS, 801 E. Jefferson St., Phoenix, AZ 85034, (602) 417-7000  
©Copyright 2017 AHCCCS, All Rights Reserved

**Step8.** After receiving the code in Mail enter user credentials and the activation code and click OK to activate Master user account



**Step9.** After logging into the application, the user will see the following page.

# QuickStart Guide



AHCCCS, 801 E. Jefferson St., Phoenix, AZ 85034, (602) 417-7000  
©Copyright 2017 AHCCCS, All Rights Reserved

## 2. Create Health Plan Sub Account

**Step1.** To create a new account, external users need to go to <https://qmportal.azahcccs.gov/> and click on “Create new account? Click Here”.

# QuickStart Guide



FAQ

Thank you for visiting QM Portal. In order to use the site, you must have an active account. Please login or register a new account. For questions, please contact our Customer Support Center at (602) 417-4451.

External User Log In	AHCCCS User Log In
<p><b>User Name</b> <input type="text"/></p> <p><b>Password</b> <input type="password" value="Enter password"/></p> <p><input type="button" value="Sign In"/></p> <p>Forgot your Password? <a href="#">Click Here</a></p> <p><b>Create new account? <a href="#">Click Here</a></b></p> <p>Passwords are case-sensitive. After 3 failed attempts, within 15 minutes, your account will be locked out, and you will either need to contact your Master Account holder to unlock your account or use the Password Recovery feature.</p>	<p>If you are an AHCCCS employee AND you are currently logged onto the AHCCCS network AND you are accessing this application from a browser on your workstation Then click the button below to use this application with your network login credentials</p> <p><input type="button" value="AHCCCS Sign In"/></p>

Your web browser must have JavaScript enabled in order to use the QM portal.

AHCCCS, 801 E. Jefferson St., Phoenix, AZ 85034, (602) 417-7000  
©Copyright 2017 AHCCCS, All Rights Reserved

**Step2.** To proceed with the registration, users need to accept the agreement shown on the next screen.



FAQ

### User Acceptance Agreement

Please read the following terms of use and indicate that you agree by selecting the "I Agree" option at the bottom of the page

**Warning:** The information provided through the QM Portal Web Application is confidential under state and federal law. Use and disclosure of this information is limited to purposes directly related to the administration of Arizona Health Care Cost Containment System. The use and disclosure of this information is also subject to the privacy and security requirements of the Administrative Simplification provisions of the federal Health Insurance Portability and Accountability Act.

The Master Account Holder is responsible for ensuring the confidentiality of any information obtained from this web application by persons using the Master Account Holder user ID or any individual user IDs approved by the Master Account Holder.

The Master Account Holder is responsible for informing itself and its employees and agents of the requirements of all applicable privacy laws and ensuring:

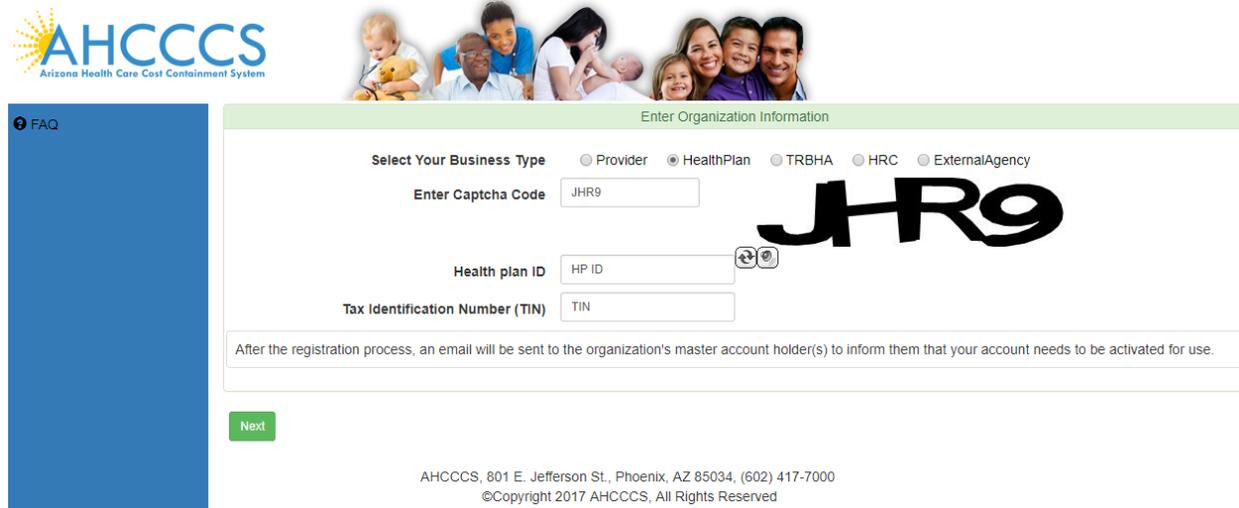
Compliance with the license agreement
Individual accounts are limited to employees who need the information to perform their employment-related duties
Inactive individual accounts are deactivated
The Master and individual user IDs and passwords are not shared or disclosed

Violation of the terms and conditions of the licensing agreement and/or violations of the state and federal confidentiality and privacy requirements may result in termination of your license to access the QM Portal Web Application. Violations may also result in the termination the QM Portal Provider Agreement, revocation of QM Portal Provider Registration, and/or the termination of or imposition of sanctions under any other contract or agreement with the AHCCCS Administration.

I Disagree  I Agree

# QuickStart Guide

**Step3.** Select HealthPlan and Enter HealthPlan ID and Tax Identification Number (TIN)



The screenshot shows the AHCCCS registration interface. On the left is a blue sidebar with an 'FAQ' link. The main content area is titled 'Enter Organization Information' and features a header image of a diverse family. Below the header, there are several input fields: 'Select Your Business Type' with radio buttons for Provider, HealthPlan (selected), TRBHA, HRC, and ExternalAgency; 'Enter Captcha Code' with the value 'JHR9' and a large 'JHR9' captcha image; 'Health plan ID' with a text box containing 'HP ID' and a help icon; and 'Tax Identification Number (TIN)' with a text box containing 'TIN'. A green 'Next' button is located at the bottom left of the form. A note at the bottom of the form states: 'After the registration process, an email will be sent to the organization's master account holder(s) to inform them that your account needs to be activated for use.' At the very bottom of the page, contact information for AHCCCS is provided: 'AHCCCS, 801 E. Jefferson St., Phoenix, AZ 85034, (602) 417-7000 ©Copyright 2017 AHCCCS, All Rights Reserved'.

**Step4.** Enter user Information in following page to Create New User Account and click on Create User Button. This page has instructions about Username and Password.

# QuickStart Guide



FAQ

Passwords are required to be a minimum of 9 characters in length.  
Passwords require the use of at least one lower case alpha character, one upper case character, at least one numeric character (1,2,etc), at least 1 special character @#=#\$%^&(){}?\_~  
The password must NOT contain 3 or more of the same consecutive characters (111, aAa, etc.)  
The password must NOT contain 3 consecutive characters in common with the user name.

### Create New Account

First Name

Last Name

Phone

User Name

Email

Security Question #1

Security Answer #1

Security Question #2

Security Answer #2

Password

Confirm Password

Create User

(must be at least 6 characters)

(Duplicate emails are allowed on multiple accounts when the each account has the email address, the first name, and the last name match exactly)

AHCCCS, 801 E. Jefferson St., Phoenix, AZ 85034, (602) 417-7000  
©Copyright 2017 AHCCCS, All Rights Reserved

**Step5.** Sub Account is created and it's waiting for the Master Account holder approval.



FAQ

Thank you for enrolling with QM portal. Your account has been successfully created and is awaiting activation by the Master account holder. Once activated, you may begin using the site.

Your master account holder(s) are:

Name: HP9\_MA\_FN HP9\_MA\_LN  
Email: abc12@test.com  
Phone: 602-123-4567

AHCCCS, 801 E. Jefferson St., Phoenix, AZ 85034, (602) 417-7000  
©Copyright 2017 AHCCCS, All Rights Reserved

**Master Account receives following Email Notification when a Sub Account is created.**

**Subject: QM portal - User account needs approval**

## QuickStart Guide

\*\*\* PLEASE DO NOT RESPOND TO THIS EMAIL \*\*\*

A new user, HP9\_SA3\_FN HP9\_SA3\_LN, has been successfully created and is awaiting activation. You are designated by the system as being the master account holder.

Please activate the following user account:

Individual Account Name: HP9\_SA3\_USER

Email Address: [TestSA@test.com](mailto:TestSA@test.com)

Phone Number: 602-123-4567

Thank you,

Arizona Health Care Cost Containment System  
801 E. Jefferson  
Phoenix, AZ 85034

**After Master Account Approves the SA, the Sub Account holder receives the following Email:**

**Subject: QM portal - Your account has been activated**

\*\*\* PLEASE DO NOT RESPOND TO THIS EMAIL \*\*\*

Your account has been successfully activated by your master account.

WARNING - Your account may not be fully operational until 5 minutes have passed.

You will be able to logon, but the authorization processing that allows menu items to display may still need additional time to be completed.

Please contact your master account for information concerning your account.

Master account holder: Test HP9\_MA\_LN

Email address: [Test\\_MA@test.com](mailto:Test_MA@test.com)

Phone Number: 602-123-4567

Thank you,

Arizona Health Care Cost Containment System  
801 E. Jefferson  
Phoenix, AZ 85034

## 3. Change User Information for Health Plan Sub Account

Login as Health Plan Master Account, HP9\_MA\_User

**AHCCCS**  
Arizona Health Care Cost Containment System

**Account Selection**

You can only administer accounts that have been created for your provider. Individual accounts can be promoted to master accounts. However, you cannot downgrade your own account from master to individual status.

**Active Users** HP9\_MA\_FN, HP9\_MA\_LN (HP9\_M/ ▾) **Pending Approvals** Select a user to Approve ▾

**User Details**

**User Information**

**User Name** HP9\_MA\_USER  
**First Name** HP9\_MA\_FN  
**Last Name** HP9\_MA\_LN  
**Phone** 602-123-4567  
**Email** abc12@test.com  
(Every user account must have a unique email address. An email address cannot be shared between different accounts. If your organization cannot provide a unique email address for every account, please use a separate personal email address for each account.)

**Account Information**

**Create Date** 05/31/2018  
**Last Login** 06/22/2018 **Last Locked** 05/31/2018  
**Is Approved**  **Is Locked**   
(Check boxes are read only. Approving and locking accounts requires a different process.) [Additional Help](#)

**Organization Information**

**Organization ID** 010158  
**Organization Name** UNITEDHEALTHCARE  
**NPI**  
**Organization Type** HealthPlan

Click to view Master Accounts in your Organization

Select Master Account from Active Users drop down HP9\_MA\_User  
 Select pending user from Pending Approvals drop down HP9\_SA\_User

**AHCCCS**  
Arizona Health Care Cost Containment System

**Account Selection**

You can only administer accounts that have been created for your provider. Individual accounts can be promoted to master accounts. However, you cannot downgrade your own account from master to individual status.

**Active Users** Select a user to administer ▾ **Pending Approvals** HP9\_SA\_FN, HP9\_SA\_LN (HP9\_SA ▾)

**User Details**

**User Information**

**User Name** HP9\_SA\_USER  
**First Name** HP9\_SA\_FN  
**Last Name** HP9\_SA\_LN  
**Phone** 602-123-3456  
**Email** abc12@test.com  
(Every user account must have a unique email address. An email address cannot be shared between different accounts. If your organization cannot provide a unique email address for every account, please use a separate personal email address for each account.)

**Account Information**

**Create Date** 05/31/2018  
**Last Login** 05/31/2018 **Last Locked** 05/31/2018  
**Is Approved**  **Is Locked**   
(Check boxes are read only. Approving and locking accounts requires a different process.) [Additional Help](#)

**Organization Information**

**Organization ID** 010158  
**Organization Name** UNITEDHEALTHCARE  
**NPI**  
**Organization Type** HealthPlan

Send Password Recover for User Set as Master Account

Remove User Approve User

**User Authorization**

# QuickStart Guide

Click on Approve User

The screenshot displays a user management interface with a blue sidebar on the left containing navigation links: Home, User Admin, Search, Create IRF, FAQ, and Log Out. The main content area is divided into several sections:

- User Information:** Fields for User Name (HP9\_SA\_USER), First Name (HP9\_SA\_FN), Last Name (HP9\_SA\_LN), Phone (602-123-3456), and Email (abcsa@test.com). A note states: "(Every user account must have a unique email address. An email address cannot be shared between different accounts. If your organization cannot provide a unique email address for every account, please use a separate personal email address for each account.)" A green button labeled "Change User Information" is at the bottom.
- Account Information:** Fields for Create Date (05/31/2018), Last Login (05/31/2018), Last Locked (05/31/2018), Is Approved (checked), and Is Locked (unchecked). A note says: "(Check boxes are read only. Approving and locking accounts requires a different process.)" with a link to "Additional Help".
- Organization Information:** Fields for Organization ID (010158), Organization Name (UNITEDHEALTHCARE), NPI, and Organization Type (HealthPlan). Buttons for "Send Password Recover for User", "Set as Master Account", and "Remove User" are present.
- User Authorization:** A list of roles with checkboxes: IAD Reviewer, Investigator, Medical Director, OHR, and 3rd Level QOC Review. A green button labeled "Update Authorization" is at the bottom.

Following changes are made to the user admin page.  
Approve user button disappeared.  
Is Approved check box is checked.

## 4. Manage Sub Health Plan Master Account

Assign roles to Health Plan Sub Account

Screen below shows no roles assigned to HP9\_SA\_User.

Master Account can grant any roles to Sub Account from User Authorization.

# QuickStart Guide

## Registration & Account Management as Health Plan - 14

Master Account to Grant Medical Director role to the Sub Account, click on Medical Director check box and click on Update Authorization button. Screen below reflects changes made to the user role with a pop up message Changes were Successful.

## 5. View Existing Account Information

## Health Plan Master Account information

## Health Plan Sub Account information

Health Plan Sub Account user can see the following when logged in

## 6. Change User Email Address

Update SA User email address from [abcsa@test.com](mailto:abcsa@test.com) to [abcsa2@test.com](mailto:abcsa2@test.com)

Changed email address and clicked on change user information.

**Account Selection**

You can only administer accounts that have been created for your provider. Individual accounts can be promoted to master accounts. However, you cannot downgrade your own account from master to individual status.

Active Users: HP9\_SA\_FN, HP9\_SA\_LN (HP9\_SA)

**User Details**

**User Information**

User Name: HP9\_SA\_USER  
First Name: HP9\_SA\_FN  
Last Name: HP9\_SA\_LN  
Phone: 602-123-3456  
Email: abcsa2@test.com  
(Every user account must have a unique email address. An email address cannot be shared between different accounts. If your organization cannot provide a unique email address for every account, please use a separate personal email address for each account.)

Change User Information

**Account Information**

Create Date: 05/31/2018  
Last Login: 05/31/2018  
Last Locked: 05/31/2018  
Is Approved:   
Is Locked:   
(Check boxes are read only. Approving and locking accounts requires a different process.) [Additional Help](#)

**Organization Information**

Organization ID: 010158  
Organization Name: UNITEDHEALTHCARE  
NPI:  
Organization Type: HealthPlan

Send Password Recover for User | Set as Master Account

Remove User

**User Authorization**

Email is updated with message Changes were Successful

## 7. Send Password Recovery Email

Sending password recovery email is accomplished by

**Account Selection**

You can only administer accounts that have been created for your provider. Individual accounts can be promoted to master accounts. However, you cannot downgrade your own account from master to individual status.

Active Users: HP9\_SA\_FN, HP9\_SA\_LN (HP9\_SA)

**User Details**

**User Information**

User Name: HP9\_SA\_USER  
First Name: HP9\_SA\_FN  
Last Name: HP9\_SA\_LN  
Phone: 602-123-3456  
Email: abcsa2@test.com  
(Every user account must have a unique email address. An email address cannot be shared between different accounts. If your organization cannot provide a unique email address for every account, please use a separate personal email address for each account.)

Change User Information

**Account Information**

Create Date: 05/31/2018  
Last Login: 05/31/2018  
Last Locked: 05/31/2018  
Is Approved:   
Is Locked:   
(Check boxes are read only. Approving and locking accounts requires a different process.) [Additional Help](#)

**Organization Information**

Organization ID: 010158  
Organization Name: UNITEDHEALTHCARE  
NPI:  
Organization Type: HealthPlan

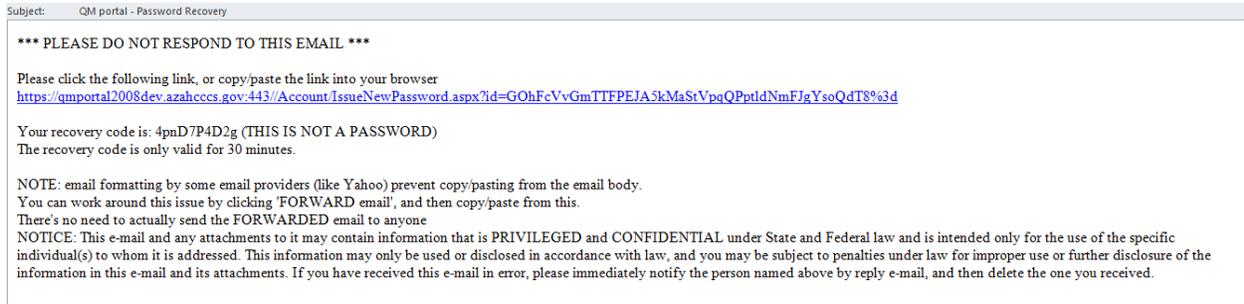
Send Password Recover for User | Set as Master Account

Remove User

**User Authorization**

# QuickStart Guide

Click on Send Password Recover for User



Click on above link will take the user to the next screen



# QuickStart Guide



FAQ

Passwords are required to be a minimum of 9 characters in length.  
Password require the use of at least one lower case alpha character, one upper case character, at least one numeric character (1,2,etc), at least 1 special character @!#=\$%-^&{}|?\_~  
The password must NOT contain 3 or more of the same consecutive characters (111, aAa, etc.)  
The password must NOT contain 3 consecutive characters in common with the user name.

Enter New Password

Password

Confirm Password

AHCCCS, 801 E. Jefferson St., Phoenix, AZ 85034, (602) 417-7000  
©Copyright 2017 AHCCCS, All Rights Reserved

Click on Change Password



Home

User Admin

Search

Create IRF

FAQ

Log Out

The QMS Portal is intended for the use of providers reporting IADs to Contractor/TRBHAs. This system is administered by the AHCCCS Behavioral Health.



## 8. Remove Master Account Rights

Logged in as MA and select SA User account from Active Users drop down.

Click on Set As Master Account

# QuickStart Guide



- Home
- User Admin
- Search
- Create IRF
- FAQ
- Log Out

**Account Selection**

You can only administer accounts that have been created for your provider. Individual accounts can be promoted to master accounts. However, you cannot downgrade your own account from master to individual status.

Active Users Test, HP9\_SA\_LN (HP9\_SA\_USER)

**User Details**

**User Information**

User Name: HP9\_SA\_USER

First Name:

Last Name:

Phone:

Email:

(Every user account must have a unique email address. An email address cannot be shared between different accounts. If your organization cannot provide a unique email address for every account, please use a separate personal email address for each account.)

Change User Information

**Account Information**

Create Date: 05/31/2018

Last Login: 06/25/2018      Last Locked: 06/25/2018

Is Approved:       Is Locked:

(Check boxes are read only. Approving and locking accounts requires a different process.) [Additional Help](#)

**Organization Information**

Organization ID: 010158

Organization Name: UNITEDHEALTHCARE

NPI:

Organization Type: HealthPlan

Send Password Recover for User

Set as Master Account



- Home
- User Admin
- Search
- Create IRF
- FAQ
- Log Out

**Account Selection**

You can only administer accounts that have been created for your provider. Individual accounts can be promoted to master accounts. However, you cannot downgrade your own account from master to individual status.

Active Users Test, HP9\_SA\_LN (HP9\_SA\_USER)

**User Details**

**User Information**

User Name: HP9\_SA\_USER

First Name:

Last Name:

Phone:

Email:

(Every user account must have a unique email address. An email address cannot be shared between different accounts. If your organization cannot provide a unique email address for every account, please use a separate personal email address for each account.)

Change User Information

**Account Information**

Create Date: 05/31/2018

Last Login: 06/25/2018      Last Locked: 06/25/2018

Is Approved:       Is Locked:

(Check boxes are read only. Approving and locking accounts requires a different process.) [Additional Help](#)

**Organization Information**

Organization ID: 010158

Organization Name: UNITEDHEALTHCARE

NPI:

Organization Type: HealthPlan

Send Password Recover for User

Set as Master Account

# QuickStart Guide



Home | User Admin | Search | Create IRF | FAQ | Log Out

**Account Selection**

You can only administer accounts that have been created for your provider. Individual accounts can be promoted to master accounts. However, you cannot downgrade your own account from master to individual status.

Active Users: Test, HP9\_SA\_LN (HP9\_SA\_USER)

**User Details**

User Information	Account Information
<p><b>User Name</b> HP9_SA_USER</p> <p><b>First Name</b> <input type="text" value="Test"/></p> <p><b>Last Name</b> <input type="text" value="HP9_SA_LN"/></p> <p><b>Phone</b> <input type="text" value="602-123-3456"/></p> <p><b>Email</b> <input type="text" value="abcsa2@test.com"/></p> <p style="font-size: x-small; color: #0070c0;">(Every user account must have a unique email address. An email address cannot be shared between different accounts. If your organization cannot provide a unique email address for every account, please use a separate personal email address for each account.)</p> <p style="text-align: center; background-color: #0070c0; color: white; padding: 2px;">Change User Information</p>	<p style="text-align: center; background-color: #0070c0; color: white; padding: 2px; font-weight: bold;">Changes were Successful</p> <p><b>Create Date</b> 05/31/2018</p> <p><b>Last Login</b> 06/25/2018      <b>Last Locked</b> 06/25/2018</p> <p><b>Is Approved</b> <input checked="" type="checkbox"/>      <b>Is Locked</b> <input type="checkbox"/></p> <p style="font-size: x-small; color: #0070c0;">(Check boxes are read only. Approving and locking accounts requires a different process.) <a href="#">Additional Help</a></p> <div style="background-color: #e6f2e6; padding: 5px; margin-top: 10px;"> <p style="text-align: center; font-size: small;">Organization Information</p> <p><b>Organization ID</b> 010158</p> <p><b>Organization Name</b> UNITEDHEALTHCARE</p> <p style="text-align: center;">NPI</p> <p><b>Organization Type</b> HealthPlan</p> </div> <p style="text-align: center;"> <span style="background-color: #0070c0; color: white; padding: 2px 10px; margin: 0 5px;">Send Password Recover for User</span> <span style="background-color: #0070c0; color: white; padding: 2px 10px; margin: 0 5px;">Remove Master Account rights</span> </p>

To Remove Master Account Rights.. Click on Remove Master Account rights button.



Home | User Admin | Search | Create IRF | FAQ | Log Out

**Account Selection**

You can only administer accounts that have been created for your provider. Individual accounts can be promoted to master accounts. However, you cannot downgrade your own account from master to individual status.

Active Users: Test, HP9\_SA\_LN (HP9\_SA\_USER)

**User Details**

User Information	Account Information
<p><b>User Name</b> HP9_SA_USER</p> <p><b>First Name</b> <input type="text" value="Test"/></p> <p><b>Last Name</b> <input type="text" value="HP9_SA_LN"/></p> <p><b>Phone</b> <input type="text" value="602-123-3456"/></p> <p><b>Email</b> <input type="text" value="abcsa2@test.com"/></p> <p style="font-size: x-small; color: #0070c0;">(Every user account must have a unique email address. An email address cannot be shared between different accounts. If your organization cannot provide a unique email address for every account, please use a separate personal email address for each account.)</p> <p style="text-align: center; background-color: #0070c0; color: white; padding: 2px;">Change User Information</p>	<p style="text-align: center; background-color: #0070c0; color: white; padding: 2px; font-weight: bold;">Changes were Successful</p> <p><b>Create Date</b> 05/31/2018</p> <p><b>Last Login</b> 06/25/2018      <b>Last Locked</b> 06/25/2018</p> <p><b>Is Approved</b> <input checked="" type="checkbox"/>      <b>Is Locked</b> <input type="checkbox"/></p> <p style="font-size: x-small; color: #0070c0;">(Check boxes are read only. Approving and locking accounts requires a different process.) <a href="#">Additional Help</a></p> <div style="background-color: #e6f2e6; padding: 5px; margin-top: 10px;"> <p style="text-align: center; font-size: small;">Organization Information</p> <p><b>Organization ID</b> 010158</p> <p><b>Organization Name</b> UNITEDHEALTHCARE</p> <p style="text-align: center;">NPI</p> <p><b>Organization Type</b> HealthPlan</p> </div> <p style="text-align: center;"> <span style="background-color: #0070c0; color: white; padding: 2px 10px; margin: 0 5px;">Send Password Recover for User</span> <span style="background-color: #0070c0; color: white; padding: 2px 10px; margin: 0 5px;">Set as Master Account</span> </p>

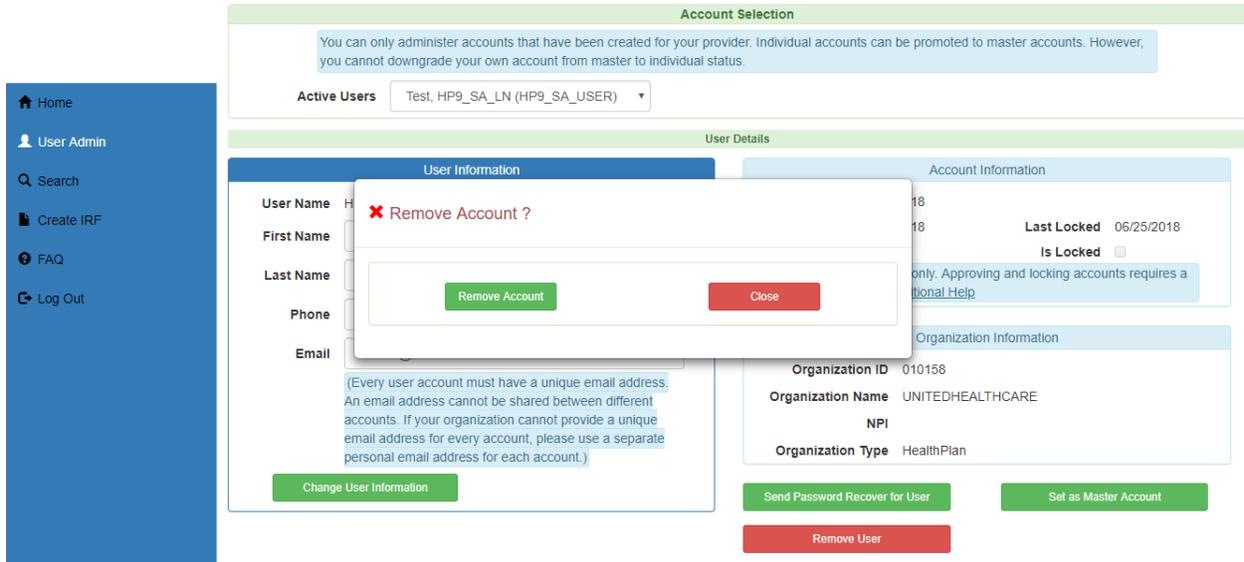
Master Account rights are removed.

## 9. Remove User

To remove User, Select the User from Active User dropdown and click on Remove User button

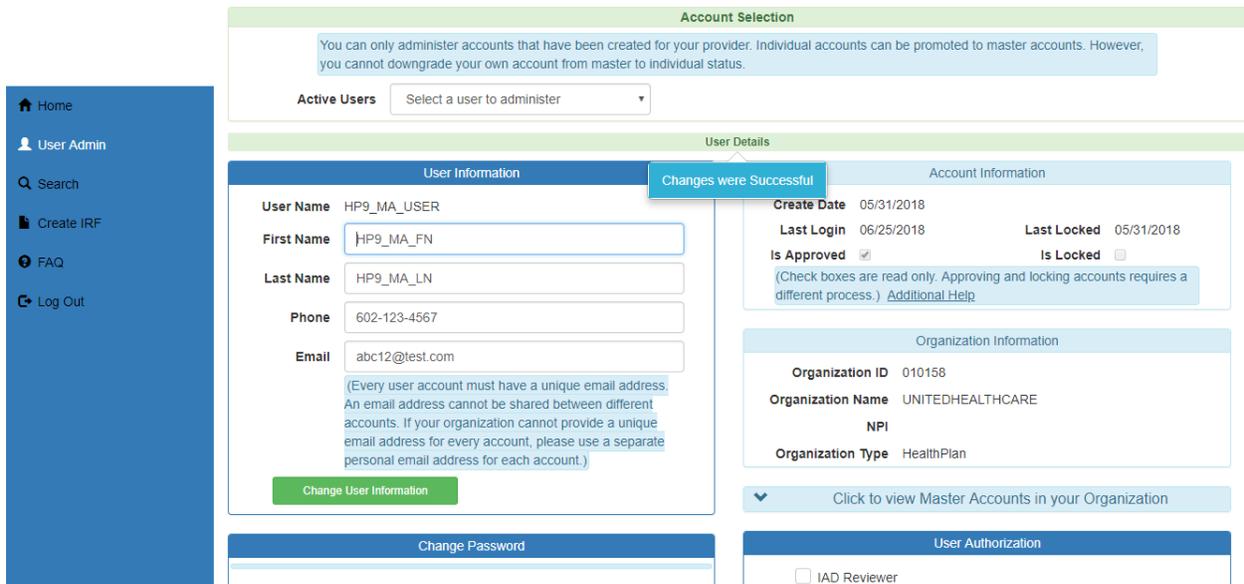
# QuickStart Guide

## Registration & Account Management as Health Plan - 22



Click on Remove Account

Notice the User account Health Plan Sub Account is disappeared from the screen..



# QuickStart Guide



The screenshot shows the 'User Admin' interface. On the left is a blue navigation sidebar with links for Home, User Admin, Search, Create IRF, FAQ, and Log Out. The main content area is titled 'Account Selection' and contains a message: 'You can only administer accounts that have been created for your provider. Individual accounts can be promoted to master accounts. However, you cannot downgrade your own account from master to individual status.' Below this is an 'Active Users' dropdown menu with the selected user 'HP9\_MA\_FN, HP9\_MA\_LN (HP9\_M/...' and a 'Select a user to administer' button. Below the dropdown is another dropdown menu with the selected user 'HP9\_MA\_FN, HP9\_MA\_LN (HP9\_MA\_USER)'. The 'User Details' section is divided into two panels: 'User Information' and 'Account Information'. The 'User Information' panel shows fields for User Name (HP9\_MA\_USER), First Name (HP9\_MA\_FN), Last Name (HP9\_MA\_LN), and Phone (602-123-4567). The 'Account Information' panel shows fields for Create Date (05/31/2018), Last Login (06/25/2018), Last Locked (05/31/2018), Is Approved (checked), and Is Locked (unchecked). A note at the bottom of the 'Account Information' panel states: '(Check boxes are read only. Approving and locking accounts requires a different process.) Additional Help'.

## 10. Restore Removed User Account

To Restore the Sub Account select the user account to restore from Select a removed account dropdown in Manage Removed/Deleted Accounts Tab:

# QuickStart Guide

## Registration & Account Management as Health Plan - 24

The screenshot displays the user management interface for the HP9\_SA\_USER account. The interface is divided into several sections:

- User Information:** Fields for User Name (HP9\_SA\_USER), First Name (Test), Last Name (HP9\_SA\_LN), Phone (602-123-3456), and Email (abcsa2@test.com). A note states: "(Every user account must have a unique email address. An email address cannot be shared between different accounts. If your organization cannot provide a unique email address for every account, please use a separate personal email address for each account.)" A "Change User Information" button is present.
- Organization Information:** Organization ID (010158), Organization Name (UNITEDHEALTHCARE), NPI, and Organization Type (HealthPlan).
- User Authorization:** Checkboxes for IAD Reviewer, Investigator, Medical Director, OHR, and 3rd Level QOC Review.
- Manage Removed/deleted Accounts:** A section for selecting an account to view data and optionally restore it to an active state. The account "Test, HP9\_SA\_LN (HP9\_SA\_USER)" is selected. A "Restore Account" button is highlighted.

Select the HP9\_SA\_User and click on Restore Account Button

# QuickStart Guide

## Registration & Account Management as Health Plan - 25

Navigation: Home, User Admin, Search, Create IRF, FAQ, Log Out

**User Information**

Last Name: HP9\_SA\_LN  
Phone: 602-123-3456  
Email: abcsa2@test.com  
[\(Every user account must have a unique email address. An email address cannot be shared between different accounts. If your organization cannot provide a unique email address for every account, please use a separate personal email address for each account.\)](#)  
**Change User Information**

**Organization Information**

Organization ID: 010158  
Organization Name: UNITEDHEALTHCARE  
NPI:  
Organization Type: HealthPlan  
**Send Password Recover for User** **Set as Master Account**  
**Remove User**

**User Authorization**

IAD Reviewer  
 Investigator  
 Medical Director  
 OHR  
 3rd Level QOC Review  
**Update Authorization**

**Manage Removed/deleted Accounts**

Select an account to view details: **Changes were Successful** [restore account to active state](#)

HP9\_SA\_User account is restored with a pop up message “Changes were successful”



**Account Selection**

You can only administer accounts that have been created for your provider. Individual accounts can be promoted to master accounts. However, you cannot downgrade your own account from master to individual status.

Active Users: Test, HP9\_SA\_LN (HP9\_SA\_USER)  
Select a user to administer:  
HP9\_MA\_FN, HP9\_MA\_LN (HP9\_MA\_USER)  
Test, HP9\_SA\_LN (HP9\_SA\_USER)

**User Details**

**User Information**

User Name: HP9\_SA\_USER  
First Name: Test  
Last Name: HP9\_SA\_LN  
Phone: 602-123-3456

**Account Information**

Create Date: 05/31/2018  
Last Login: 06/25/2018  
Last Locked: 06/25/2018  
Is Approved:    
Is Locked:   
[\(Check boxes are read only. Approving and locking accounts requires a different process.\) Additional Help](#)