

Provider Registration Overview

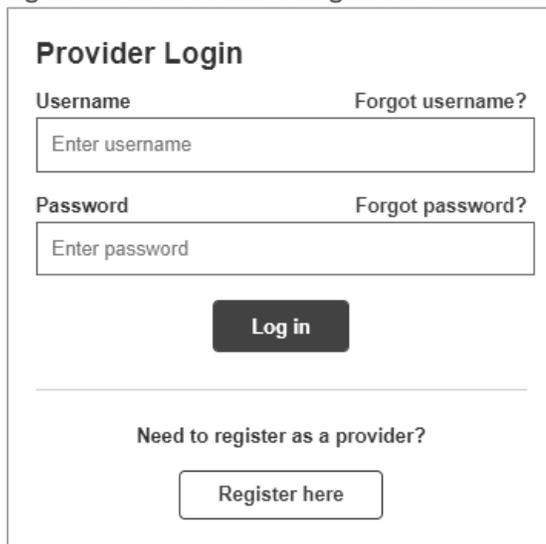
The first individual that registers for a practice of office is assigned the role of Local Administrator. In most cases, the Office Manager should be assigned this role. The Local Administrator has access to all standard features, plus the System Administration feature for setting up and overseeing all other users of the registered office (restricted access for Local Administrator only).

This guide provides step-by-step instructions for completing Local Administrator registration, adding additional users, users, user sign in and help desk services, and confirming user accounts.

New User Registration for Providers

1. From the *Smart Connect Login* screen, click **Provider Registration**.

Figure 1: Smart Connect Login Screen



Provider Login

Username Forgot username?

Password Forgot password?

Log in

Need to register as a provider?

Note: At any time during the registration process click **Cancel** to cancel registration and return to the *Smart Connect Login* screen.

2. The *User Information* screen gathers information on the person requesting the account. On this screen, the user may enter the following information:
 - First Name – the office manager’s name
 - Middle Initial – the office manager’s middle initial
 - Last Name – the office manager’s last name
 - Title – the office manager’s title
 - E-Mail – the office manager’s email address
 - Confirm E-Mail – re-enter the office manager’s email address
 - Office Phone – the office phone number
 - Extension # – the office phone’s extension number, if applicable
 - Office Fax – the office fax number
 - User Name – choose a username for login
 - Password – choose a password for login
 - Confirm Password – re-enter the password for login
 - Security Question 1 – select a security question from the dropdown menu
 - Security Answer 1 – enter an answer to the security question selected

- Security Question 2 – select a security question from the dropdown menu
- Security Answer 2 – enter an answer to the security question selected
- Security Question 3 – select a security question from the dropdown menu
- Security Answer 3 – enter an answer to the security question selected

Note: The Health Plan may decide whether the user can select his/her own username and or password, or for the system to generate them. Most often this user is allowed to choose his/her own username and password.

Figure 2: User Information Screen

User Information

If you are an existing user of the Connect system [click here to login](#).

First Name *

Middle Initial

Last Name *

Title

E-Mail *

Confirm E-Mail *

Office Phone *
Example: (555) 555-5555

Extension #
Example: 123456

Office Fax
Example: (555) 555-5555

User Name *

Password *

Confirm Password *

Security Question 1 *

Security Answer 1 *
Your answer may not contain your username.

Security Question 2 *

Security Answer 2 *
Your answer may not contain your username.

Security Question 3 *

Security Answer 3 *
Your answer may not contain your username.

Local Admin As the primary registrant, you are automatically a local admin

Note: Required fields on the *User Information* screen may vary by Health Plan.

3. Click **Next** to proceed to the *Office Information* screen.
4. On the *Office Information* screen, the user enters the following information:
 - Organization Name – enter the organization’s name
 - Tax ID – enter the organization’s tax ID number
 - Address – enter the organization’s address
 - City – enter the organization’s city
 - State – enter the organization’s state
 - Zip Code – enter the organization’s zip code

Figure 3: Office Information Screen

Office Information

Enter the name and address of your office.

Organization Name *

Tax ID *

Address *

City *

State *

Zip Code *

Note: Required fields on the *Office Information* screen may vary by Health Plan.

Three payer id fields are available to be customized by the Health Plan to capture information required to validate user accounts.

In addition, the system has two functions related to the Tax ID. First, the system can validate upon entry whether the entered Tax ID is a valid Tax ID within the Health Plan’s portal. If the entered Tax ID does not exist, the user will be unable to complete the registration process. Secondly, the system can automatically generate an Access List based on the entered Tax ID. This eliminates the need to add the Tax ID to an Access List manually.

Figure 4: Office Information Screen with Payer ID Fields

Office Information

Enter the name and address of your office.

Organization Name *

Tax ID

Payer Identification Value 1

Payer Identification Value 2

Payer Identification Value 3

Address *

City *

State *

Zip Code *

In this example a PIN, Check Reference Number and Check Payment Amount are used. The check number and payment amount are often used because the Health Plan and provider office are the only ones who have access to this data.

Figure 5: Office Information Screen with Customized Payer ID Fields

Office Information

Enter the name and address of your office.

Organization Name *

Tax ID *

PIN

Check Reference Number *

Check Payment Amount *

Address *

City *

State *

Zip Code *

5. Click **Next** to proceed to the *Registration Summary* screen. Click **Back** to return to the *User Information* screen.
6. On the *Registration Summary* screen, verify the office and user information. If the information is correct, click **Finish** to proceed to the *Registration Created* screen. Click **Back** to return to the *Office Information* screen.

Figure 6: Registration Summary Screen

Registration Summary

▸ [America's Health](#)

User Information: [edit]

▸ [Smith, John Q](#)

The *Registration Created* screen contains the User ID needed to log into the Health Plan. You cannot return to this page.

Figure 7: Registration Created Screen

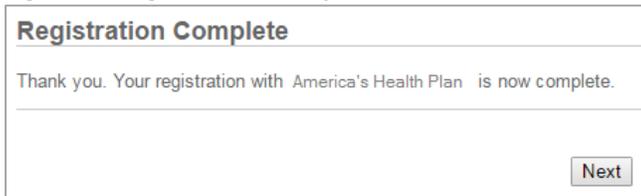
Registration Created

Below are the users that have been created for your registration. Please take note of the User IDs since they will be needed to log into the application.

| Name | User ID | User Type |
|---------------|---------|------------------|
| Smith, John Q | jqsmith | Provider Contact |

7. Click **Next** to proceed to the *Registration Complete* screen.

Figure 8: Registration Complete Screen



The user is now registered for HealthTrio® Smart Connect and ready to be confirmed by the Health Plan.

At this point, the Health Plan can choose to send an email notification to the user, informing them that their registration application has been received. The email contents can be customized by the Health Plan.

Figure 9: Sample Notification Email – After Registering via the Portal



Once the Health Plan confirms the account, the user is also notified via email.

Figure 10: Sample Notification Email – After Confirmed by Health Plan



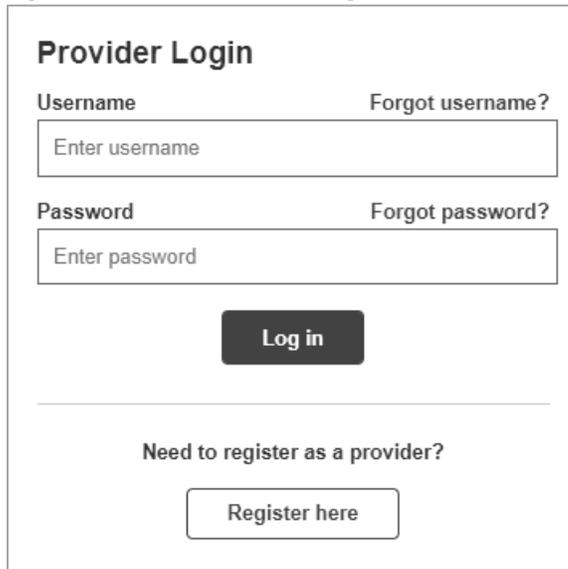
After the user is confirmed by the Health Plan, they can log in with their selected username and password.

Sign In

After completing registration and receiving e-mail confirmation, you can return to the Smart Connect Sign in screen to sign in to your account.

1. From the *Smart Connect Login In* screen, enter your **Username** and **Password**.

Figure 11: Smart Connect Login Screen



Provider Login

Username [Forgot username?](#)

Password [Forgot password?](#)

Log in

Need to register as a provider?

2. Click **Log In** to proceed to your *Home* page.

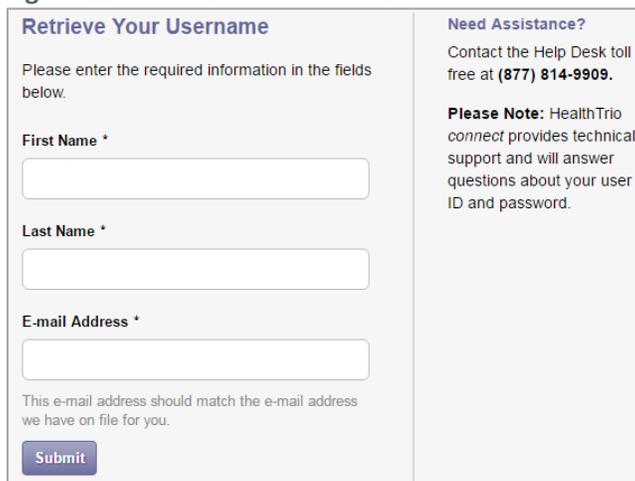
Forgotten Usernames and Passwords

Usernames and passwords can be retrieved and reset from the *Smart Connect Sign In* screen or by calling the Help Desk toll free at (877) 814-9909.

Forgotten Usernames

1. From the *Smart Connect Sign In* screen, click **Forgot your username?** to proceed to the *Retrieve Your Username* screen.
2. Enter your **First Name**, **Last Name**, and **E-mail Address** and click **Submit**.

Figure 12: Retrieve Your Username Screen



Retrieve Your Username

Please enter the required information in the fields below.

First Name *

Last Name *

E-mail Address *

This e-mail address should match the e-mail address we have on file for you.

Submit

Need Assistance?
 Contact the Help Desk toll free at **(877) 814-9909**.

Please Note: HealthTrio *connect* provides technical support and will answer questions about your user ID and password.

Your username will be sent to your email account.

Figure 13: Forgotten Username Email Notification

Your user name has been sent to your email account. If you do not receive an email within the next 5 minutes:

- Refresh your email account
- Check your spam folder
- Ensure that your first and last name entered match the information you provided when registering for your account

If you still have not received an email, please contact the help desk at 877-814-9909 to receive further assistance.

Forgotten Passwords

1. From the *Smart Connect Sign In* screen, click **Forgot your Password?** to proceed to the *Reset Your Password* screen.
2. Enter your **User ID** and click **Reset**.

Figure 14: Reset Your Password Screen

Reset Your Password

Please enter your User ID.

User ID *

Reset

Forgot your User ID? Retrieve your User ID [here](#)

Need Assistance?

Contact the Help Desk toll free at **(877) 814-9909**.

Please Note: HealthTrio *connect* provides technical support and will answer questions about your user ID and password.

Figure 15: Forgotten Password Instructions

Instructions to change your password have been sent to your email account. If you do not receive an email within the next 5 minutes:

- Refresh your email account
- Check your spam folder
- Ensure that the user ID you entered is correct

If you still have not received an email, please contact the help desk at 877-814-9909 to receive further assistance.

Instructions on how to change your password will be sent via email.

Figure 16: Password Reset Email Notification

From: noreply@ahp.com
Sent: Wednesday, July 20, 2016 9:29 AM
To: Jane Doe
Subject: Notice of recent inquiry

Hello Jane Doe,

This email was sent at your request because you forgot your Connect account password.

Click [here](#) within the next 24 hours to reset your password.

If you did not make this request, please notify the help desk at (877)814-9909.

Unlocking an Account

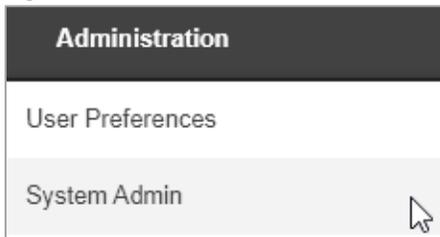
To unlock an account contact the Help Desk toll free at (877)814-9909.

Adding Users

After registering as the Local Administrator, the Office Manager can add additional users to the Health Plan. Account confirmation is not required when a user is added by the Local Administrator.

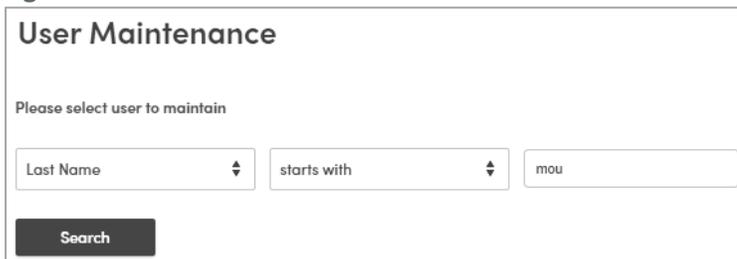
1. From the Home screen, click **Administration** > **System Admin** from the navigation menu.

Figure 17: Administration Menu



2. In the *User Maintenance* screen, click **Add User**.

Figure 18: User Maintenance Screen



The screenshot shows the "User Maintenance" screen. At the top, it says "Please select user to maintain". Below this are three search filters: "Last Name" with a dropdown arrow, "starts with" with a dropdown arrow, and a text input field containing "mou". At the bottom left is a black "Search" button.

3. In the Add User screen, the following fields are available:

Note: The required and available fields are determined by the Health Plan. The Local Administrator can decide whether the user can select his/her own username and password, or for the system to generate them. Most often the Local Administrator selects the user name and allows the system to generate a temporary password.

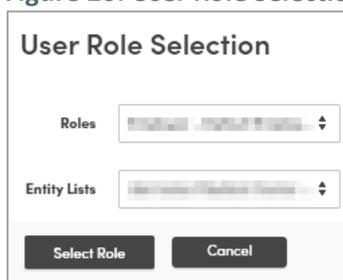
- First Name – enter the user’s first name
- Middle Initial – enter the user’s middle initial
- Last Name – enter the user’s last name
- E-Mail Address – enter the user’s e-mail address
- Title – enter the user’s title
- Office Phone – enter the office phone number
- Phone Ext – the office phone’s extension number, if applicable
- Office Fax – enter the office’s fax number
- Username – chose a username for login
- Password – choose a password for login
- Confirm Password – re-enter the password for login
- Local Administrator – select if this user should be a Local Administrator

Figure 19: Add User Screen



4. Click **Add**.
5. On the *User Role Selection* screen, select a role from the *Roles* dropdown menu and a Health Plan from the *Entity Lists* dropdown menu.

Figure 20: User Role Selection Screen



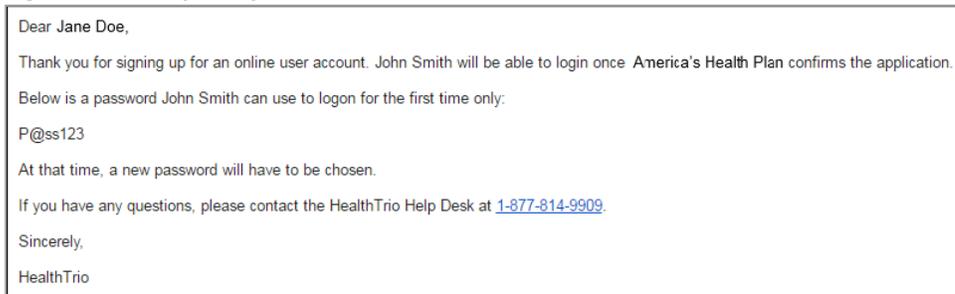
Note: The Health Plan determines what roles the Local Administrator is able to assign to their users.

Note: Roles allow Health Plans to assign the appropriate security access to users with varying job responsibilities. A role is a collection of one or more profiles and is portal-specific. For example, the provider portal may use the Office Manager role to allow office managers to perform system administrator tasks such as adding users.

Note: Access lists are generated by the entity (tax id, provider id, practice id, etc.,) selected when a user registers or is added to the Health Plan. Users confirmed for an access list are granted access to information pertaining to those entities included in the access list.

6. Click **Select Role** to return to the *User Information* screen.
7. Click Submit. Upon submission a temporary password is emailed to the Local Administrator.

Figure 21: Temporary Password Email Notification

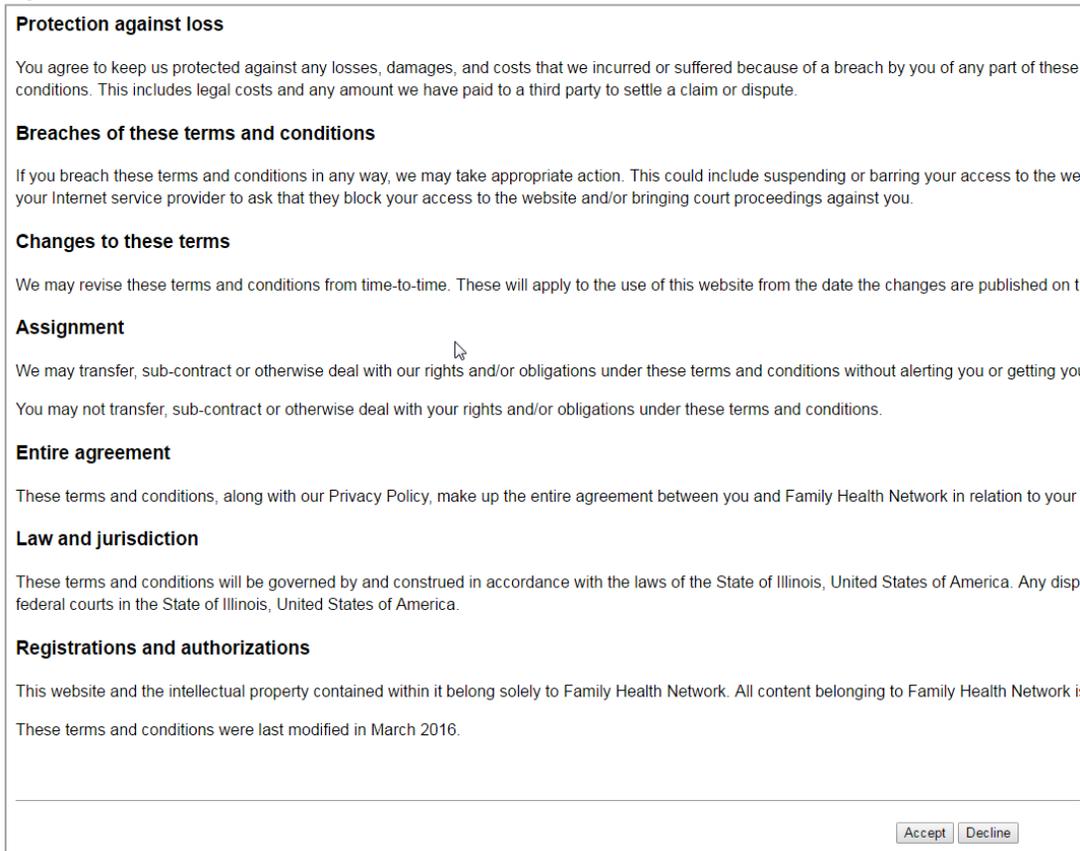


Initial User Login

The first time a user logs in to Smart Connect they must complete the following steps to update their account.

1. Sign in with your user ID and password.
2. In the *Terms and Conditions* screen, click **Accept**.

Figure 22: Terms and Conditions Screen



3. In the *Account Information Update Required* screen, enter a new password and select three security questions. Security questions are used to access your account for user id and password reset requests.

Figure 23: Account Information Update Required Screen

Account Information Update Required

Please change your password

New password *

Password must contain at least 6 character(s).
Password cannot contain your user name.
Password cannot contain your First or Last Name.
You cannot re-use passwords previously used.

Confirm new password *

Please select new security questions

Security question 1 *

Select a security question from the options included in the drop-down menu.

Security answer 1 *

Your answer may not contain your username.

Security question 2 *

Help Desk

Contact the Help Desk toll free at **(877) 814-9909**.

Please Note: HealthTrio *connect* provides technical support and will answer questions about your user ID and password.

4. Click **Submit**. Users are re-directed to the *Home* screen.