What is an Account Manager?

Account Manager is a role within the Secure Portal that is assigned to Managed Health Services' (MHS) primary contact within your practice. The purpose of this role is to help us maintain the safety and integrity of patient data.
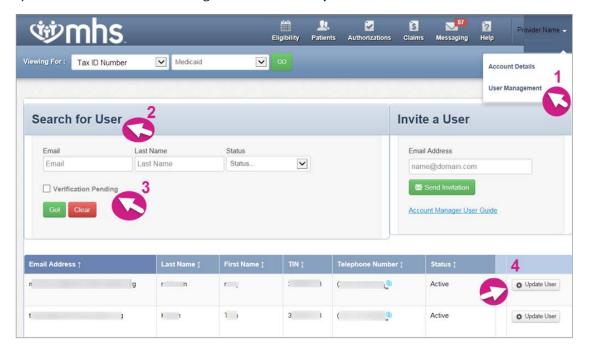
The Account Manager is responsible for day-to-day support of all Secure Portal user accounts that are registered under the same Tax Identification Number (TIN). These responsibilities include:

• Approving access for new Secure Portal users

• Assigning permissions for users based on their job responsibilities

• Regularly adjusting the permissions of users whose roles may have changed

• Terminating users who no longer work at the practice.

Accessing Account Manager Tasks

Account Managers have the ability to verify new users for their TIN, enable or disable access to the portal for existing users and change the permissions of all users under their TIN.

1) Click **User Management** from the dropdown on the homepage

2) **Search for User** by entering their name or email address, or view a list of all users in your practice.

3) For new user accounts that need to be verified, select the **Verification Pending** box, click the Verify Account button, and send message to user to verify their account.

4) To view and edit details of existing accounts, click the **Update User** button and the user will be notified.

Account Manager Tasks

Within the Update User Status and Permissions screen as shown below, the Account Manager has three tasks:

1. Enabling and Disabling Users

Account Managers will receive an email when a user from their practice creates a new user account. The Account Manager will click Enable User to grant access to the user.

User accounts are disabled after 90 days of inactivity. Account Managers can use this button to re-enable these users.

If a user leaves the practice or no longer needs access to the Secure Portal information for that specific TIN, the Account Manager will click Disable User.

2. Send email to verify user accounts and to reset passwords

Once a user is enabled, their status will change to "Unverified." The Account Manager can click Send Registration Email for the user to be notified that they must complete their registration and verify their status.
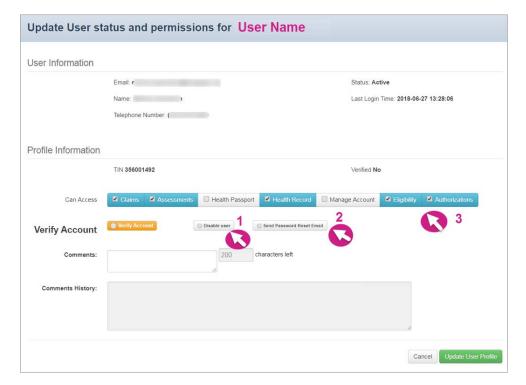
If a user has forgotten their password, the account manager can click Send Password Reset Email.

3. Selecting/modifying access levels for users

Account Managers are responsible for selecting and managing the appropriate access for each user in their practice.

ACCESS LEVELS

- *Claims:* View and submit claims.
- *Assessments:* Complete or view a Health Risk Assessment (HRA)
- *Health Passport:* Not used by MHS
- *Health Record:* View a patient's health records for number and type of visits, medications, Immunizations and labs, care gaps, etc.
- *Manage Account:* Enable, disable, modify permissions for a specific TIN, and invite users to set up an account.
- *Eligibility:* View and check eligibility for a specific patient.
- *Authorizations:* View and submit autho

Update User status and permissions for **User Name**

User Information

Email: r
Name:
Telephone Number: (

Status: **Active**
Last Login Time: **2018-06-27 13:28:06**

Profile Information

TIN 356001492   Verified **No**

Can Access   ☑ Claims ☑ Assessments ☐ Health Passport ☑ Health Record ☐ Manage Account ☑ Eligibility ☑ Authorizations

Verify Account   ⬤ Verify Account   ○ Disable user   **1**   ○ Send Password Reset Email   **2**   **3**

Comments: [   ] 200   characters left

Comments History: [   ]

Cancel   Update User Profile

MHS is responsible for verifying and setting up the original user/registrant for your TIN. Please contact your Provider Relations Rep or Provier Services at 1-888-912-0327 to get set up.