



### **Provider Portal Account Management Tools**

*Practice Administrators have permissions to manage Dignity Health HIE user accounts for members of their existing Provider Portal practice.*

**You must be logged in to your Provider Portal account in the Practice Administrator role to access these permissions.**

### **Why do I have these permissions?**

As a Practice Administrator you should assist your staff with their Dignity Health HIE access and ensure that their access stays up to date without interruption.

### **What permissions do I have?**

As an authorized Practice Administrator, you are responsible for following best security practices and ensuring users adhere to terms of use. You will have the ability to do the following for members of your practice:

- Add new Users to your existing Provider Portal Group
- Add new Providers for results routing (approval required)
- Update a User's account information such as: name, email address, phone number
- Unlock or extend a disabled user account for a member of your group
- Create a single-use, temporary password for new users within your group
- Inactivate a user account when a user departs or goes on leave
- Assign a user to another role within your practice

**For additional guidance please see [reference guide](#) in the [following pages](#).**

**You must be logged in to your Provider Portal account in the Practice Administrator role to access these permissions.**

### **Can I still contact Cerner Support?**

We are confident you will find it easy to manage your staff user accounts. In the event assistance is needed, Cerner Support is available via the "Contact Us" link on your Provider Portal login page.

# Maintain User Accounts

## Table of Contents

Navigate to User Management.....	3
Add a New Practice User Account.....	3
Add a New Physician or Mid-Level Provider User Account .....	5
Check the status of your Physician Assignments .....	7
Update User Account Information .....	8
Update user account information .....	9
Create a one-time initial password .....	10
Unlock an account.....	11
Reenable an account disabled due to inactivity or unsuccessful password change attempts. ....	12
Extend an account or Password Expiration .....	13
Temporarily inactivate an account.....	14
Permanently remove an account from your group.....	15
Assign a user to another role .....	16
Frequently asked questions .....	17

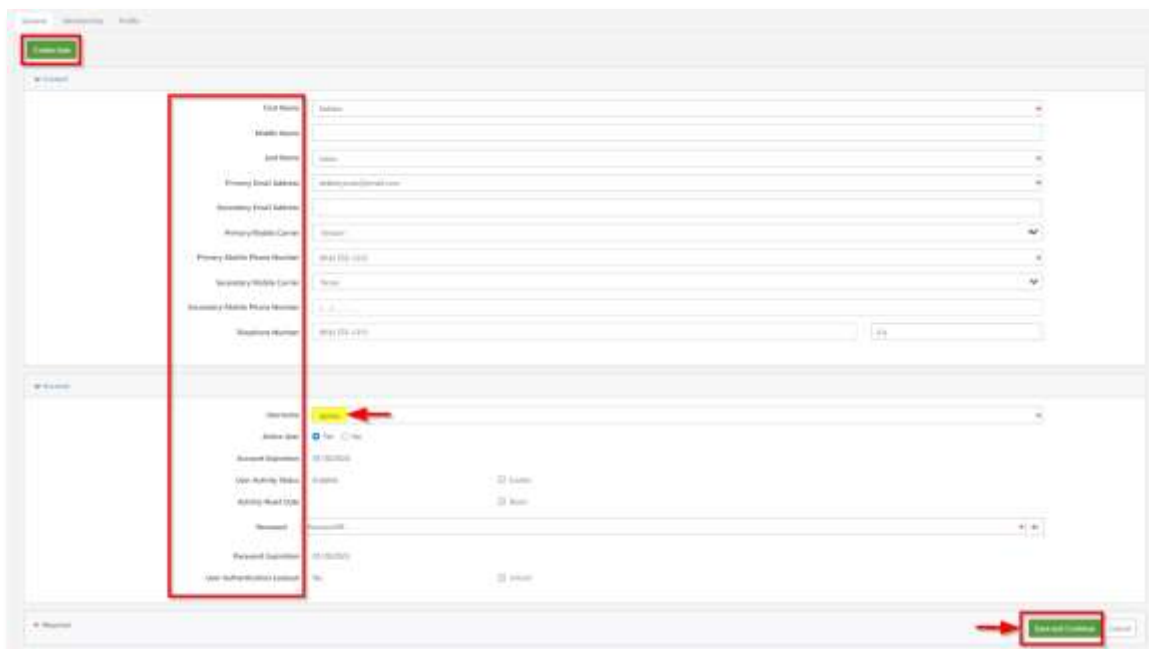
## Navigate to User Management

1. Login to your Dignity Health HIE portal.
2. Select the **System Admin** tab.
3. Select a **Group** from the drop-down list of groups for which you are an administrator. Your default group will already be selected.

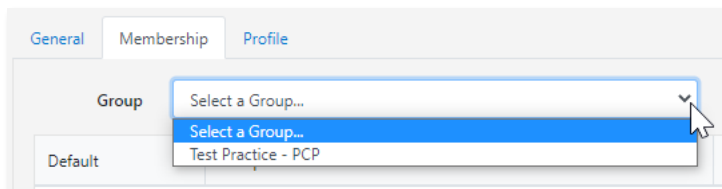
## Add a New Practice User Account

1. Click **Create User** button (\* = Required Fields)
2. Add the user's First Name, Last Name, Primary Email Address, Primary Mobile Carrier, Primary Mobile Phone Number and one-time initial Password, that meets the password requirements.
  - a. Additional fields: Secondary Email Address, Secondary Mobile Carrier, and Secondary Mobile Phone Number.
3. The system will autogenerate the Username.
4. Click **Save and Continue** at the bottom of the General tab.

**Tip:** To avoid password spelling errors, click the eye icon to view the password you have typed.

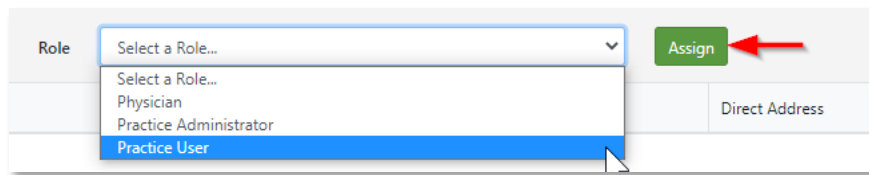


5. In the Membership tab, select a **Group** from the drop-down list of groups for which you are an administrator.



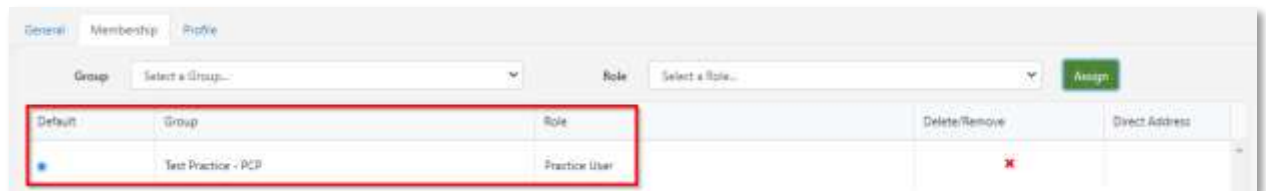
[Top](#)

6. Select a role from the drop-down list of roles and click the **Assign** button.



The screenshot shows a web interface for assigning roles. A dropdown menu labeled 'Role' is open, displaying a list of roles: 'Select a Role...', 'Physician', 'Practice Administrator', and 'Practice User'. The 'Practice User' option is highlighted in blue. To the right of the dropdown is a green 'Assign' button, which is pointed to by a red arrow. Below the dropdown is a 'Direct Address' field.

7. The practice group and users assigned role will be displayed.



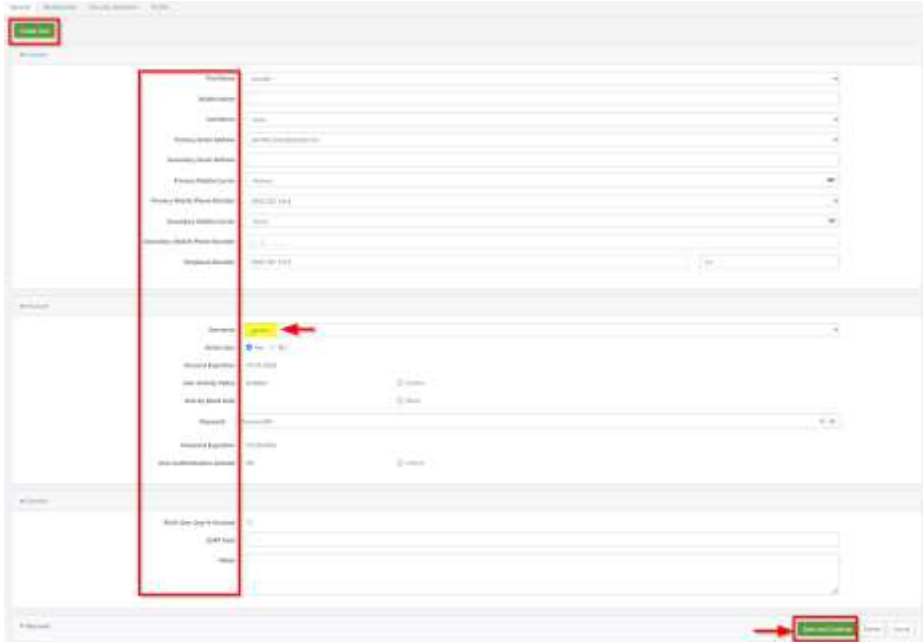
The screenshot shows a web interface with tabs for 'General', 'Membership', and 'Profile'. The 'Membership' tab is active. It features a 'Group' dropdown menu and a 'Role' dropdown menu, both with 'Select a Group...' and 'Select a Role...' respectively. A green 'Assign' button is to the right. Below these is a table with columns: 'Default', 'Group', 'Role', 'Delete/Remove', and 'Direct Address'. The first row of the table is highlighted with a red box and contains the following data: 'Default', 'Test Practice - PCP', 'Practice User', a red 'X' icon, and an empty 'Direct Address' field.

[Top](#)

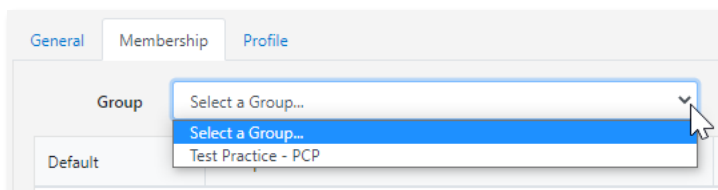
## Add a New Physician or Mid-Level Provider User Account

1. Click **Create User** button (\* = Required Fields)
2. Add the user's First Name, Last Name, Primary Email Address, Primary Mobile Carrier, Primary Mobile Phone Number and one-time initial Password, that meets the password requirements.
  - a. Additional fields: Secondary Email Address, Secondary Mobile Carrier, and Secondary Mobile Phone Number.
3. The system will autogenerate the Username.
4. Click **Save and Continue** at the bottom of the General tab.

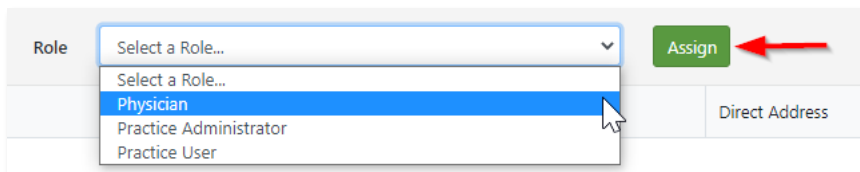
**Tip:** To avoid password spelling errors, click the eye icon to view the password you have typed.



5. In the Membership tab, select a **Group** from the drop-down list of groups for which you are an administrator.



6. Select a role from the drop-down list of roles and click the **Assign** button.



[Top](#)

7. Fill in the Licensed Provider Details screen and click the ‘Save’ button.

Licensed Provider Details

Provider Type	PHYSICIAN
Degree	MD
NPI	4175238865
State License Number	12345
State/Province/Region	California
Hospital Affiliation	Mercy General Hospital
DEA Number	45678
Specialty	Internal Medicine
Practice Type	Practice / Medical Group

Cancel Save

8. The practice group and users assigned role will be displayed.

General Membership Security Questions Profile

Group: Select a Group... Role: Select a Role... Assign

Default	Group	Role	Delete/Remove	Direct Address
<input checked="" type="checkbox"/>	Test Practice - PCP	Physician		

9. The physician has been added to the Approve Physicians queue to be reviewed by the regional hospital HIE approvers. **Approval options: Approve, Deny and In Review**

Approve Physicians

1 Request

1 Physician is assigned to another group

Request Date / By	Status	Practice	Hospital Affiliation	Provider	NPI	License Number / State	Update Date / By	Comments
6/7/2023 Mercy General Hospital	New	Test Practice - PCP	Mercy General Hospital	Internal Medicine	4175238865	12345 CA	06/07/2023	

Approve Deny In Review

[Top](#)

## Check the status of your Physician Assignments

1. Select the **Reports** tab
2. Select the A – Licensed Provider Approval report
3. Enter a **Begin Date** and **End Date**
4. Click the **Search** button

The screenshot shows the Dignity Health Reports interface. On the left, a list of reports is displayed, with 'A – Licensed Provider Approval' highlighted. The main area contains a form with 'Begin Date' and 'End Date' fields, both containing the date '01/11/2023'. A 'Search' button is visible on the right. Below the form, a table of reports is shown, with the first row highlighted. The table has columns: Request Date, Status, Provider, NPI, Type, Requested By, Update Date, Updated By, and Comments. The first row shows a request from '01/11/2023 08:09 PM' with a status of 'New'.

Request Date	Status	Provider	NPI	Type	Requested By	Update Date	Updated By	Comments
01/11/2023 08:09 PM	New	Test Provider - PCP	1075183345	PHYSICIAN	Shirley Callahan	01/11/2023 08:09 PM	System	

[Top](#)

## Update User Account Information

1. Login to your Dignity Health HIE portal.
2. Select the **System Admin** tab.
3. Select a **Group** from the drop-down list of groups for which you are an administrator. Your default group will already be selected.
4. Enter a **Last Name**
5. **Apply Filter** to search for a last name within the selected Group
6. **Select** the user account, on the left side of the screen.

Dignity Health | HIE

Dashboard Manage Documents System Admin Maintenance

Users - TestPhysician, PCP [ptestphysician]

Group

Test Practice - PCP

Last Name

test

Clear Apply Filter

TestPhysician, PCP [ptestphysician]

[Top](#)



## Update user account information

Update a user's first name, last name, email address or phone number. *Please note: a **username** cannot be updated. To change an account **username**, create a new user account and [inactivate the old user account](#).*

1. After selecting a user, navigate to the **General** tab.
2. Drop down the **Contact** section of the General tab.
3. Update the name, email or phone fields on the **General** tab of the screen.
4. Click **Save** at the bottom of the General tab.

The screenshot shows the 'General' tab of a user account update form. The 'Contact' section is expanded, indicated by a red arrow. The 'Contact' section is highlighted with a red box. The fields within this section are: First Name (PCP), Middle Name, Last Name (TestPhysician), Primary Email Address, Secondary Email Address, Primary Mobile Carrier (AT&T), Primary Mobile Phone Number, Secondary Mobile Carrier, Secondary Mobile Phone Number, and Telephone Number. The 'Save' button at the bottom is highlighted with a red box and a red arrow.

The 'Save' button is highlighted with a red box and a red arrow. The 'Delete' and 'Cancel' buttons are also visible.

[Top](#)

## Create a one-time initial password

After a new user account has been created and co-signed, create an initial, temporary password for a user.

1. After selecting a user, navigate to the **General** tab.
2. Drop down the **Account** section on the General tab.
3. Enter a password that meets the password requirements.
4. Click **Save** at the bottom of the General tab.
5. Communicate the username and password to the new user.

**Tip:** To avoid password spelling errors, click the eye icon to view the password you have typed.

The screenshot shows a user management interface with the following elements:

- Tabs:** General (selected), Membership, Security Questions, Profile.
- Account Section:** Expanded, showing fields for Username, Active User (Yes/No), Account Expiration (01/02/2023), User Activity Status (Enabled), and Activity Reset Date.
- Password Field:** A text input field with a red asterisk indicating a required field.
- Eye Icon:** A small icon next to the password field to toggle visibility.
- Buttons:** Save, Delete, and Cancel buttons at the bottom.

Red boxes and arrows highlight the following elements:

- The **Account** section header.
- The **Password** field.
- The **eye icon** next to the password field.
- The **Save** button.

[Top](#)

## Unlock an account

Unlock an account if a user has entered invalid credentials too many times.

1. After selecting a user, navigate to the **General** tab.
2. Drop down the **Account** section on the General tab.
3. Next to **User Authentication Lockout**, check the **Unlock** checkbox. *Please note: the checkbox will only be available if the user account is in a locked status.*
4. Click **Save** at the bottom of the General tab.

The screenshot shows a user management interface with three tabs: **General**, **Membership**, and **Profile**. The **General** tab is selected. Below the tabs is a dropdown menu labeled **Account**. The main content area displays user details for 'ptestphysician'.

Username	ptestphysician	
Active User	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Account Expiration	04/26/2022	<input type="checkbox"/> Extend To 01/02/2023
User Activity Status	Enabled	<input type="checkbox"/> Enable
Activity Reset Date	05/05/2021	<input type="checkbox"/> Reset
Last Log-In Date	05/05/2021	
Password	<input type="password"/>	
Password Expiration	10/23/2021	
User Authentication Lockout	No	<input type="checkbox"/> Unlock

At the bottom of the interface are three buttons: **Save**, **Delete**, and **Cancel**.

[Top](#)

## Reenable an account disabled due to inactivity or unsuccessful password change attempts.

Unlock an account if a user has been inactive more than 90 days or disabled due to excess unsuccessful password change attempts.

1. After selecting a user, navigate to the **General** tab.
2. Drop down the **Account** section on the General tab.
3. Next to **User Activity Status**, check the **Enable** checkbox. *Please note: the checkbox will only be available if the user account is in a disabled status.*
4. Next to **Activity Reset Date**, check the **Reset** checkbox to reset the user's login activity date.
5. Click **Save** at the bottom of the General tab.

The screenshot displays the 'General' tab of a user management interface. The 'Account' section is expanded, showing fields for Username, Active User (radio buttons for Yes/No), Account Expiration (01/02/2023), User Activity Status (Enabled), Activity Reset Date, and Password. Red boxes and arrows highlight the 'Account' dropdown, the 'User Activity Status' field, the 'Enable' checkbox, the 'Activity Reset Date' field, the 'Reset' checkbox, and the 'Save' button at the bottom.

[Top](#)

## Extend an account or Password Expiration

Extend an expired user account.

1. After selecting a user, navigate to the **General** tab.
2. Drop down the **Account** section on the General tab.
3. Next to **Account Expiration**, check the **Extend To** checkbox. *Please note: the date you can extend to is pre-determined by system settings and cannot be changed.*
4. Next to **Password Expiration**, check the **Extend To** checkbox. *Please note: the date you can extend to is pre-determined by system settings and cannot be changed.*
5. Click **Save** at the bottom of the General tab.

The screenshot shows the 'General' tab for a user named 'ptestphysician'. The 'Account' section is expanded, displaying various user settings. The 'Account Expiration' field is set to '04/25/2023' and the 'Extend To' checkbox is checked, with a red arrow pointing to it. The 'Password Expiration' field is set to '10/22/2022' and the 'Extend To' checkbox is checked, with a red arrow pointing to it. At the bottom of the form, the 'Save' button is highlighted with a red box and a red arrow points to it.

Username	ptestphysician	
Active User	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Account Expiration	04/25/2023	<input checked="" type="checkbox"/> Extend To 01/31/2024
User Activity Status	Enabled	<input type="checkbox"/> Enable
Activity Reset Date	04/25/2022	<input type="checkbox"/> Reset
Last Log-In Date	04/25/2022	
Password	<input type="password"/>	
Password Expiration	10/22/2022	<input checked="" type="checkbox"/> Extend To 07/30/2023
User Authentication Lockout	No	<input type="checkbox"/> Unlock

[Save](#) [Delete](#) [Cancel](#)

[Top](#)

## Temporarily inactivate an account

Suspend a user account when a user will go on temporary leave and return at a future date.

1. After selecting a user, navigate to the **General** tab.
2. Drop down the **Account** section on the General tab.
3. Next to **Active User**, click the **No** option.
4. Click **Save** at the bottom of the General tab.
5. Click the **Yes** option when the account should be reactivated.

The screenshot shows a user management interface with three tabs: 'General', 'Membership', and 'Profile'. The 'General' tab is selected and highlighted with a red box. Below the tabs, there is a section titled 'Account' with a dropdown arrow, also highlighted with a red box and a red arrow pointing to it. Inside the 'Account' section, the 'Active User' label is highlighted with a red box. Next to it are two radio buttons: 'Yes' and 'No'. The 'No' radio button is selected and highlighted with a red box and a red arrow pointing to it. Below these are several fields: 'Username' (ptestphysician), 'Account Expiration' (04/26/2022) with an 'Extend To 01/02/2023' checkbox, 'User Activity Status' (Enabled) with an 'Enable' checkbox, 'Activity Reset Date' (05/05/2021) with a 'Reset' checkbox, 'Last Log-In Date' (05/05/2021), 'Password' (empty field with a toggle icon), 'Password Expiration' (10/23/2021), and 'User Authentication Lockout' (No) with an 'Unlock' checkbox.

The screenshot shows the bottom of the interface with three buttons: 'Save', 'Delete', and 'Cancel'. The 'Save' button is highlighted with a red box and a red arrow pointing to it.

[Top](#)

## Permanently remove an account from your group

Terminate a user account when a user leaves your group.

1. After selecting a user, navigate to the **General** tab.
2. Drop down the **Account** section on the General tab.
3. Next to **Active User**, click the **No** option.
4. Click **Save** at the bottom of the General tab.
5. Navigate to the **Membership** tab
6. Click the red **X** to remove the user from their group and role.

**Tip:** Removing the user account for a licensed provider must be followed by opening a [Support Request ticket](#) to stop results routing to your practice for the provider. Please see [Frequently Asked Questions](#) for more information.

General Membership Profile

Account

Username ptestphysician

Active User ☐ Yes ☒ No

Save Delete Cancel

General Membership Profile

Group Select a Group... Role Select a Role...

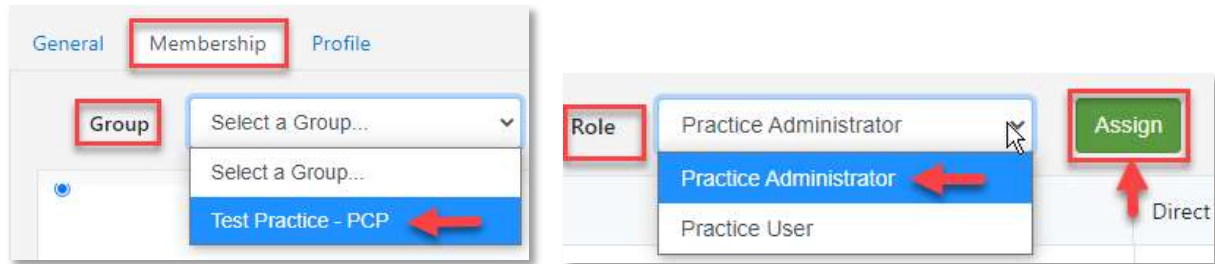
Default	Group	Role	Delete/Remove
<input checked="" type="radio"/>	Test Practice - PCP	Physician	

[Top](#)

## Assign a user to another role

If a practice administrator will be leaving the practice, designate a new practice administrator, or change the role if the assignment is no longer needed.

1. After selecting a user, navigate to the **Membership** tab.
2. Select your **Group** from the Group list.
3. Select the **Role** from the Role list.
4. Click **Assign**.



[Top](#)



## Frequently asked questions

### Who can be a Practice Administrator for Provider Portal?

A Practice Administrator should be a designated group member with staff supervisory responsibilities, or with IT administration responsibilities. As a Practice Administrator with user management responsibilities within the Provider Portal, you are responsible for adhering to policies of appropriate access, timely account termination, and best security practices including a prohibition of staff sharing user accounts or passwords.

### Can I extend the expiration of a password?

When a password expires, a user is prompted to change their own password when they log in. For security purposes, a Practice Administrator may only assign an expired password which a user will be prompted to change immediately. This feature should be reserved for new user accounts which have not set up security question responses. When a user needs to reset their password because they have forgotten it or have mistyped it too many times, they may use the *Forgot Password* link on the login page of the portal to reset the password and unlock their account.

### Can an account be disabled for multiple reasons?

A user account can potentially be expired, locked for invalid credentials and disabled for inactivity all at the same time. When assisting a user, it is always a best practice to review **all** fields on the **Account** section of the user management screen to ensure the user account is unlocked and their activity date is reset before having them try again.

### A staff member states their account is locked, but when I look at their account, nothing is locked or disabled. How do I fix the account?

When a user receives a message that their account is locked and you have confirmed that the account is not locked or disabled, ensure the user is using their correct *username*.

### What is the purpose of the *Profile* tab?

The profile tab displays role definitions. Role definitions may not be changed.

### A licensed provider has left my practice. What other steps do I need to take?

After removing the user's account, please use the *Contact Us* link on your portal login page to open a support request. We will remove the physician or mid-level provider from your practice for patient results routing. Include the provider's name and NPI.



[Top](#)