



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

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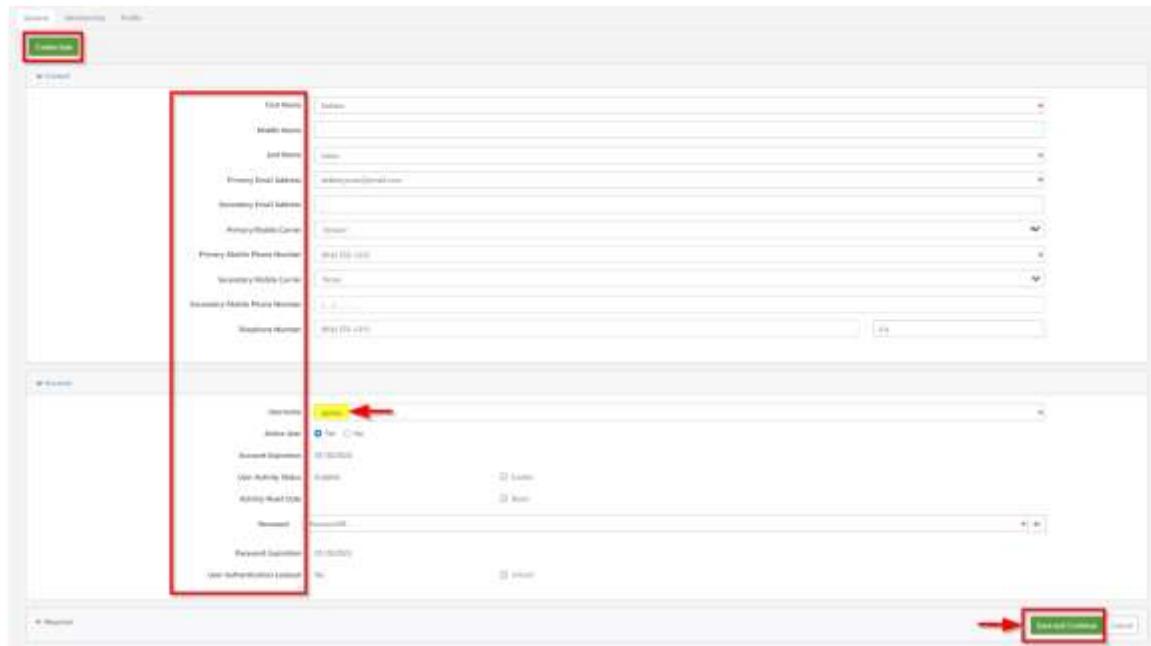
Navigate to User Management

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.

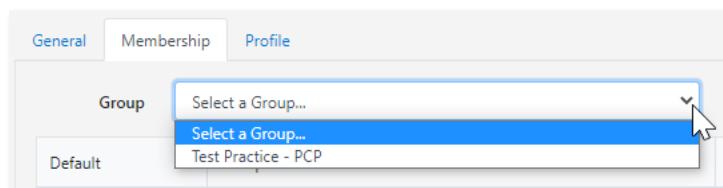
Add a New Practice User Account

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.

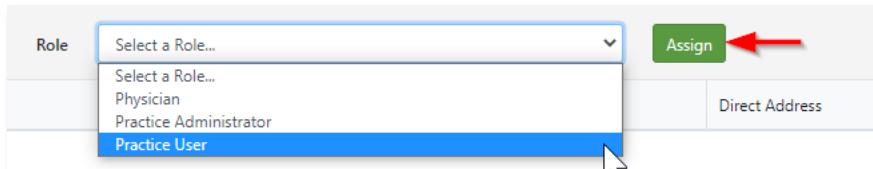


5. In the Membership tab, select a **Group** from the drop-down list of groups for which you are an administrator.



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



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



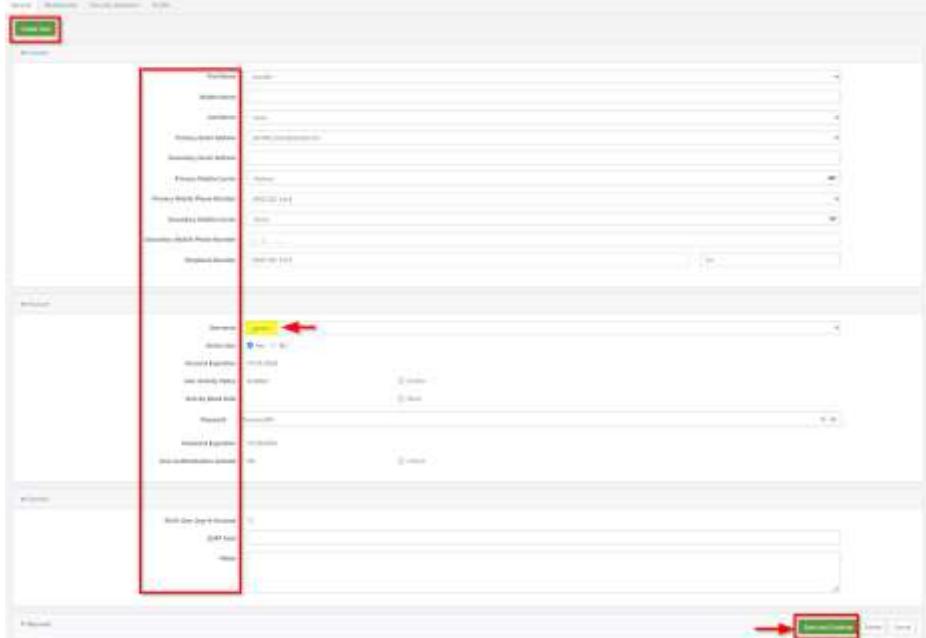
Default	Group	Role	Delete/Remove	Direct Address
*	Test Practice - PCP	Practice User	X	

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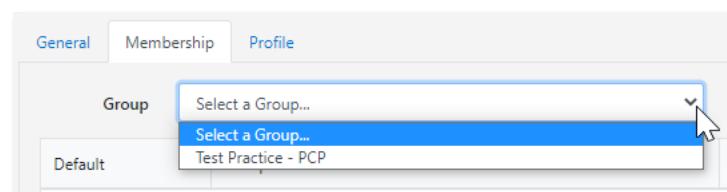
Add a New Physician or Mid-Level Provider User Account

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.

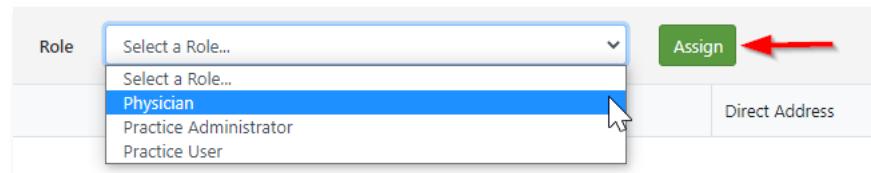
Tip: To avoid password spelling errors, click the eye icon to view the password you have typed.



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

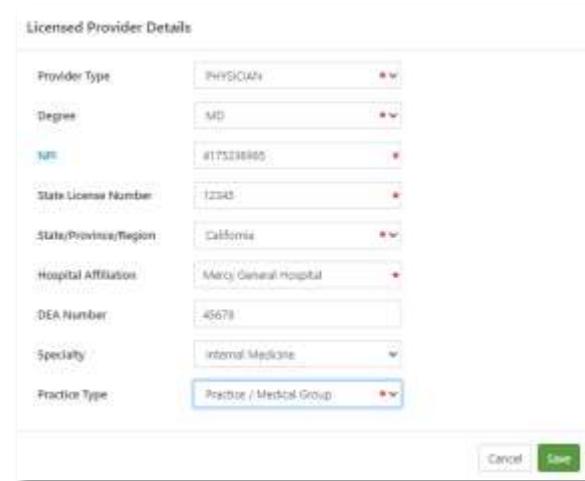


6. Select a role from the drop-down list of roles and click the **Assign** button.



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



Licensed Provider Details

Provider Type	PHYSICIAN
Degree	MD
NPI	8175338865
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
	Test Practice - PCP	Physician	X

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**



Report Date / By	Status	Practice	Hospital Affiliation	Provider	NPI	License Number / State	Update Date / By	Comments
03/01/2023	Test	Test Practice - PCP	Mercy General Hospital	Internal Medicine	456789088	12345 CA	03/01/2023	

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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

Reports

Report List

A - Licensed Provider Approval

Begin Date: 10/1/2021 End Date: 10/11/2021

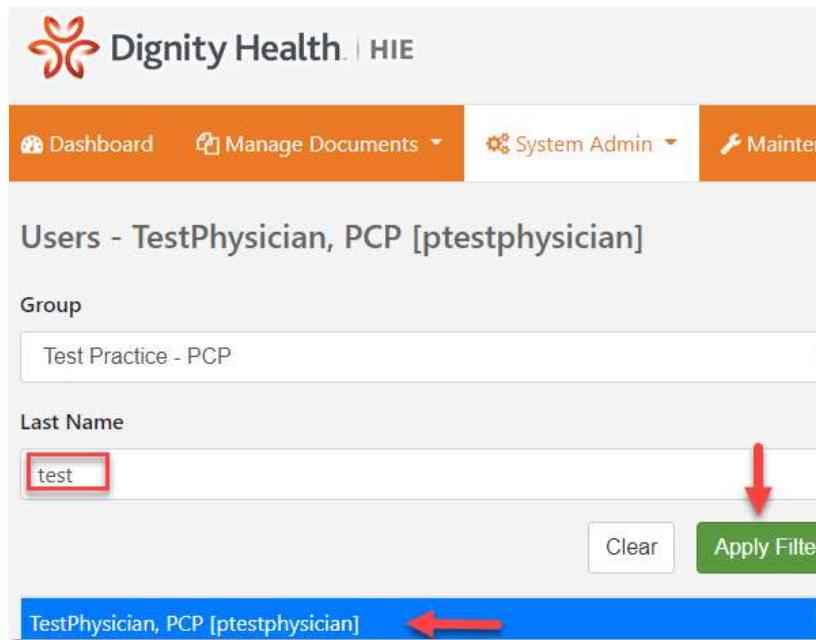
Search

Requested Date	Provider	Provider Name	Type	Requested By	Updated Date	Updated By	Comments
10/11/2021 10:00 PM	1	Test Provider - PGP	Normal	10/11/2021 10:00 PM	10/11/2021 10:00 PM	10/11/2021 10:00 PM	1

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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.



The screenshot shows the Dignity Health HIE System Admin interface. The top navigation bar includes links for Dashboard, Manage Documents, System Admin (selected), and Maintenance. The main content area is titled "Users - TestPhysician, PCP [ptestphysician]". A dropdown menu for "Group" is set to "Test Practice - PCP". A search bar contains the text "test", with a red box and arrow highlighting the search term. Below the search bar are "Clear" and "Apply Filter" buttons, with a red arrow pointing to the "Apply Filter" button. The search results list "TestPhysician, PCP [ptestphysician]" in a blue-highlighted box, with a red arrow pointing to this result.

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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 selected in the top navigation bar. The 'Contact' section is expanded, indicated by a dropdown arrow. The 'First Name' field contains 'PCP' and has a red asterisk indicating it is required. The 'Last Name' field contains 'TestPhysician' and also has a red asterisk. The 'Primary Email Address' field is empty and has a red asterisk. The 'Primary Mobile Carrier' dropdown is set to 'AT&T' and has a red asterisk. The 'Primary Mobile Phone Number' field is empty and has a red asterisk. The 'Telephone Number' field is empty. At the bottom, there are 'Save', 'Delete', and 'Cancel' buttons. The 'Save' button is highlighted with a red box and a red arrow pointing to it.

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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.*

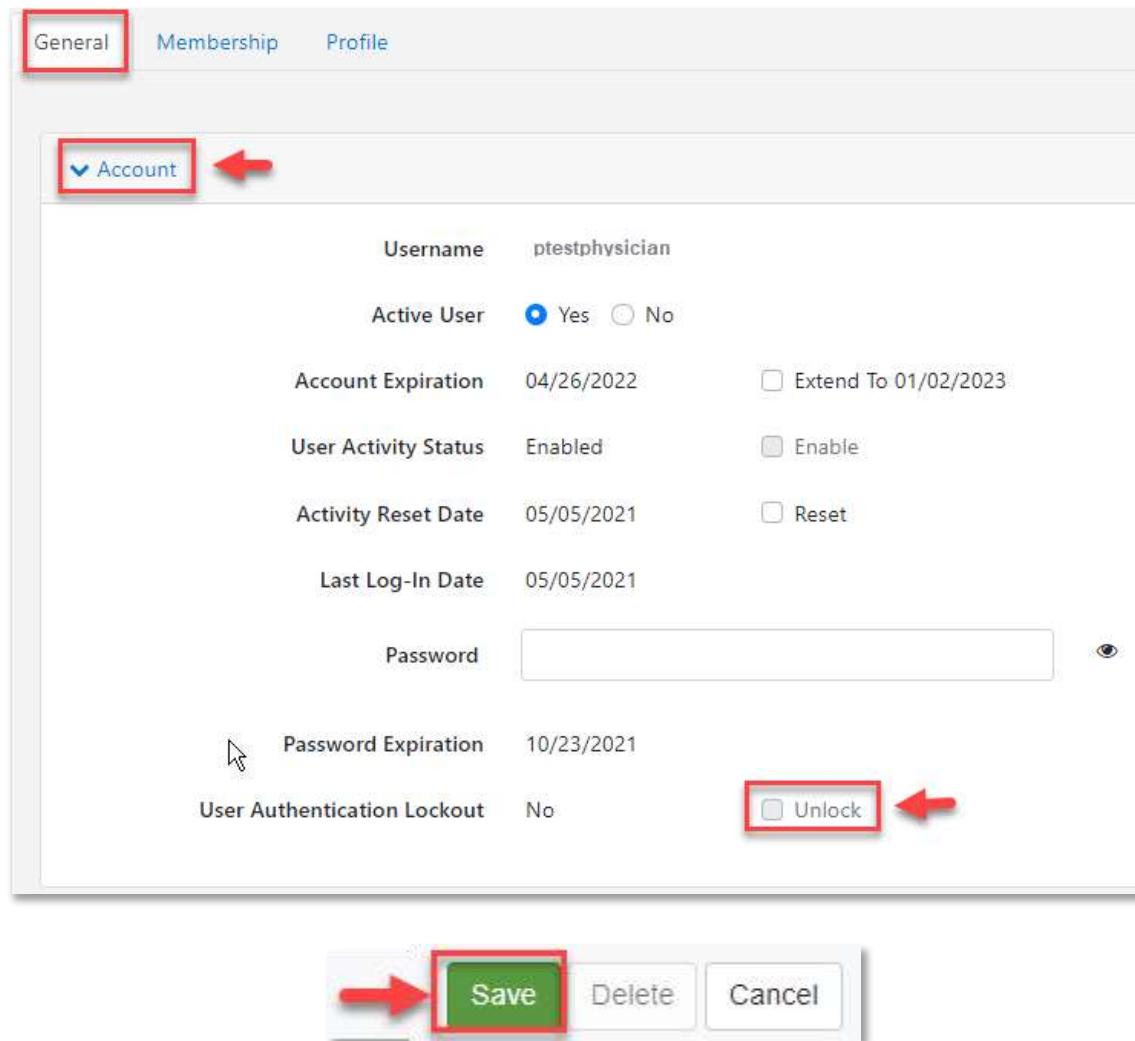
The screenshot shows the 'General' tab selected in the top navigation bar. The 'Account' section is expanded, showing fields for Username, Active User (radio buttons for Yes/No), Account Expiration (set to 01/02/2023), User Activity Status (Enabled), and Activity Reset Date. The 'Password' field is highlighted with a red box and a red arrow pointing to it. To the right of the Password field is an eye icon, also highlighted with a red box and a red arrow pointing to it. At the bottom of the form are 'Save', 'Delete', and 'Cancel' buttons, with the 'Save' button highlighted with a red box and a red arrow pointing to it.

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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.



General Membership Profile

▼ Account

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

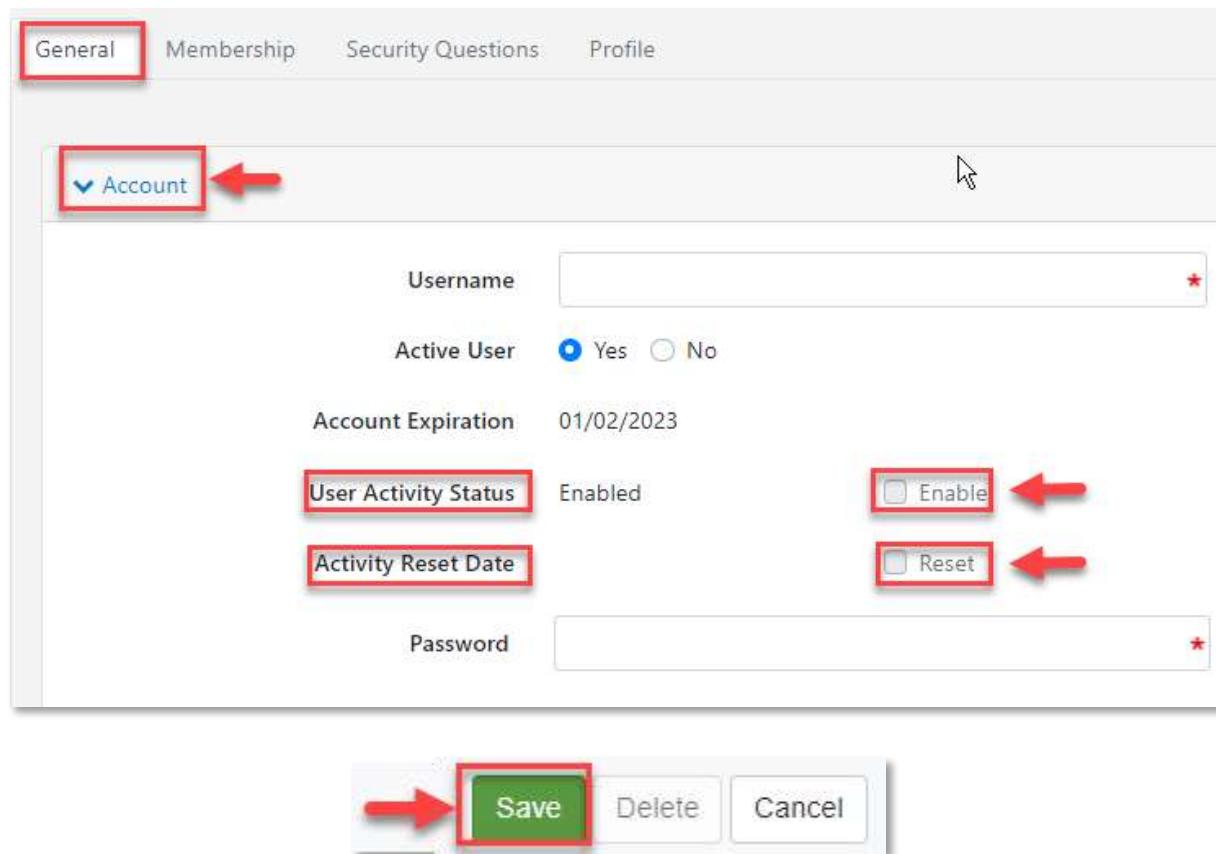
Save Delete Cancel

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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.



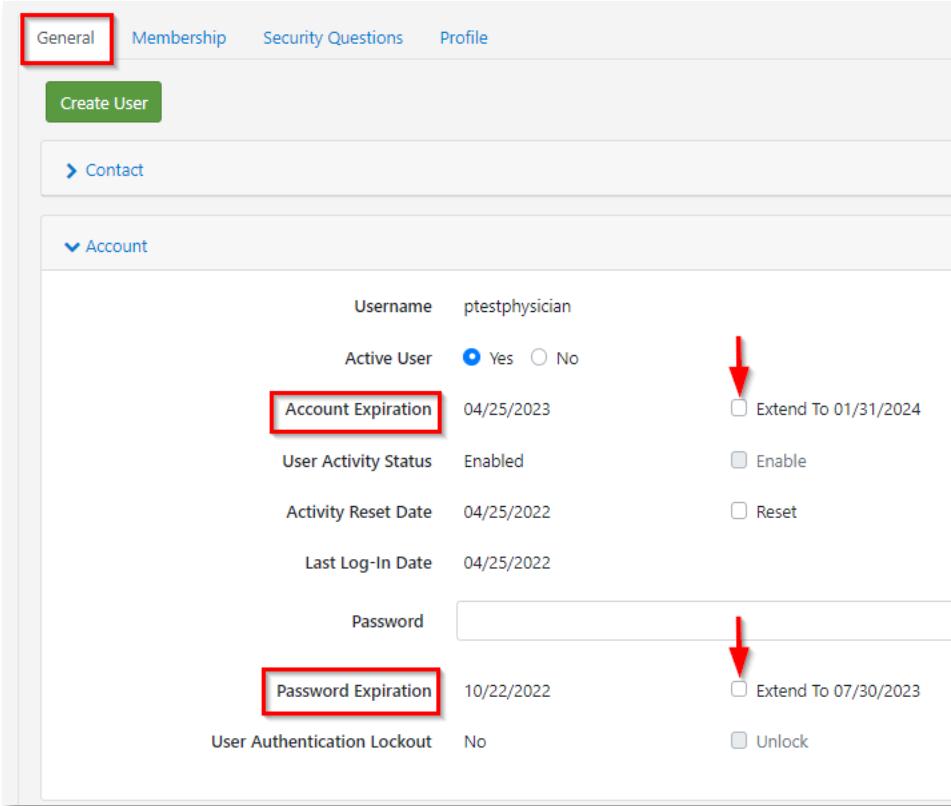
The screenshot shows the 'General' tab selected in the top navigation bar. The 'Account' section is expanded, revealing fields for 'Username', 'Active User' (radio buttons for 'Yes' and 'No'), 'Account Expiration' (set to 01/02/2023), 'User Activity Status' (set to 'Enabled'), and 'Activity Reset Date'. The 'User Activity Status' and 'Activity Reset Date' fields are highlighted with red boxes and arrows pointing to them, indicating they are the focus of the instructions. The 'Save' button at the bottom is also highlighted with a red box and an arrow pointing to it.

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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 selected in the top navigation bar. Below it, the 'Account' section is expanded. The 'Account Expiration' field is set to 04/25/2023, and the 'Extend To 01/31/2024' checkbox is checked. The 'Password' field is empty. The 'Password Expiration' field is set to 10/22/2022, and the 'Extend To 07/30/2023' checkbox is checked. At the bottom, the 'Save' button is highlighted with a red box and an arrow pointing to it, while the 'Delete' and 'Cancel' buttons are shown without a box.

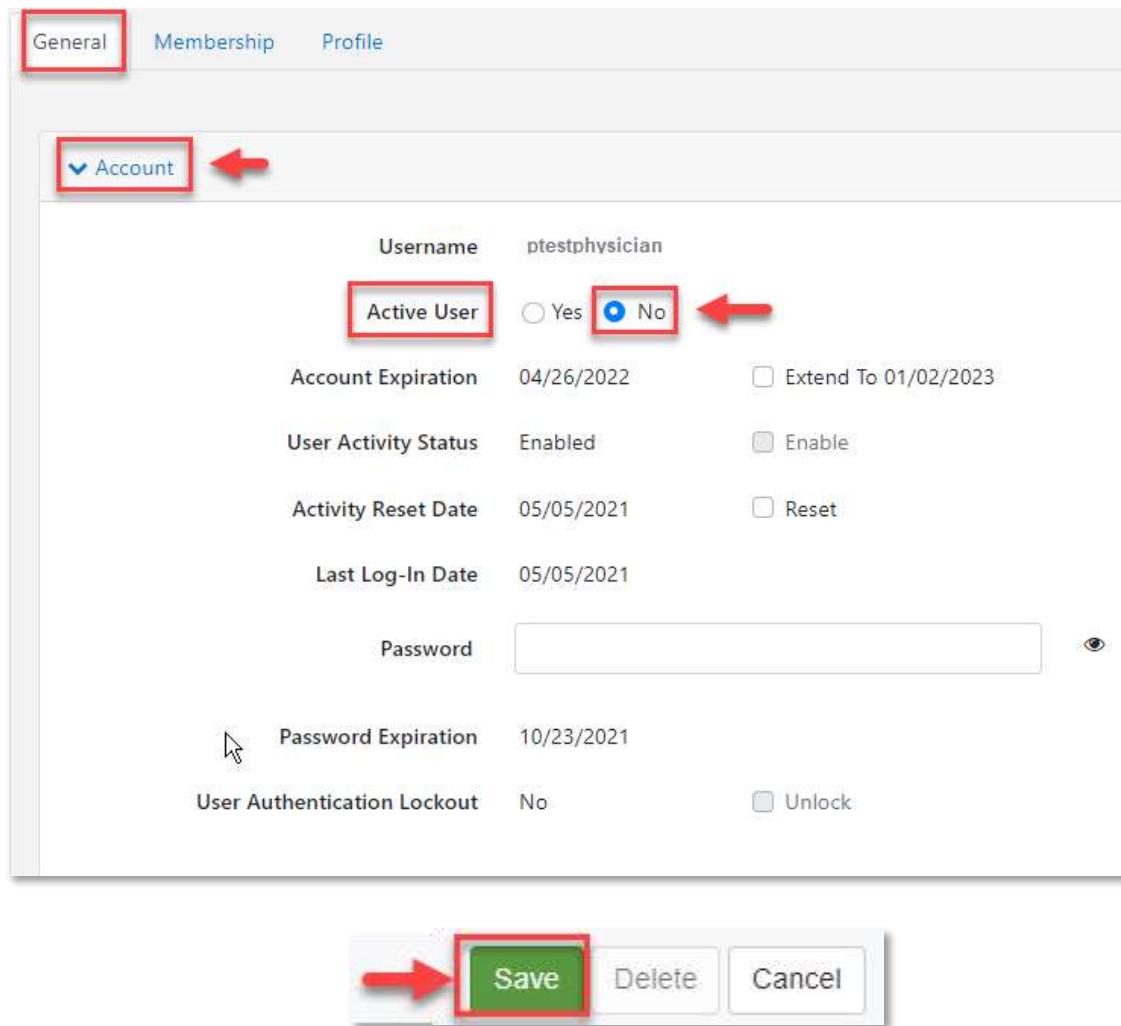
Setting	Current Value	Action
Account Expiration	04/25/2023	<input checked="" type="checkbox"/> Extend To 01/31/2024
User Activity Status	Enabled	<input type="checkbox"/> Enable
Activity Reset Date	04/25/2022	<input type="checkbox"/> Reset
Last Log-In Date	04/25/2022	
Password		
Password Expiration	10/22/2022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

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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.



General Membership Profile

▼ Account

Username	ptestphysician	
Active User	<input type="radio"/> Yes <input checked="" 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="text"/>	
>Password Expiration	10/23/2021	
User Authentication Lockout	No	<input type="checkbox"/> Unlock

Save Delete Cancel

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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.*

The screenshot shows the 'General' tab selected. Under the 'Account' dropdown, the 'Active User' setting is changed from 'Yes' (radio button unselected) to 'No' (radio button selected). A red box highlights the 'Save' button at the bottom, and a red arrow points to the 'No' radio button.

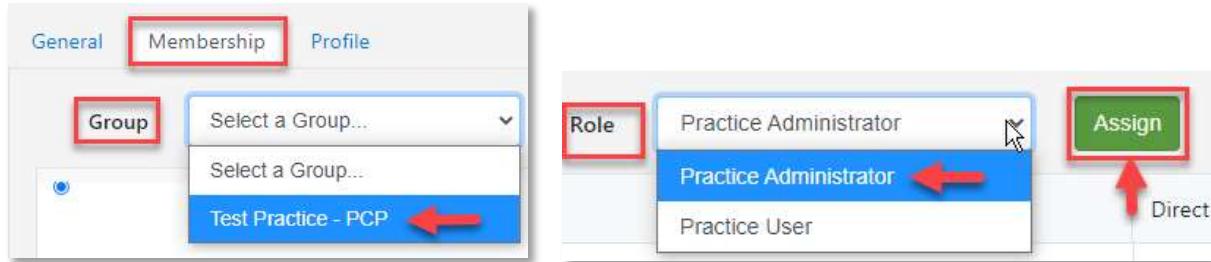
The screenshot shows the 'Membership' tab selected. In the 'Delete/Remove' column of the table, a red box highlights the red 'X' icon, and a red arrow points to it, indicating where to click to remove the user from the group.

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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**.



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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.



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