

# CareOregon Connect



1

## Administrator- How to Add, Modify and Remove a User Tutorial

# Adding A User

CareOregon Connect

Home | Log Out  
Logged in: Parr Primary  
Role: Office Admin - Security Access

Office Management

- Eligibility
- Code Lookup
- Reports
- File Transfer Agent
- Authorizations
- Member Roster
- Claims/Remittance

Administration

- User Preferences
- System Admin**
- A-Z Healthwise
- CareOregon Benefits

References

- Find a Provider
- MMIS
- CMS

Welcome to CareOregon Connect!

CareOregon is excited to bring you our new provider portal CareOregon Connect.

CareOregon Connect will allow you to:

- Confirm member eligibility for all CareOregon Plan members
- Check PCP assignment for members and print clinic rosters
- Verify benefits, copayments and review plan summary's
- Review authorizations submitted and check status
- Contact Customer Service

2011 CareOregon Closure Dates

- Monday, January 17 Birthday of Martin Luther King, Jr.
- Monday, May 30 Memorial Day
- Monday, July 4 Independence Day
- Monday, September 5 Labor Day
- Thursday, November 24 Thanksgiving Day
- Friday, November 25 Day after Thanksgiving
- Monday, December 26 Christmas (observed)

Contact Us

Select the System Admin link

CareOregon Connect

Home | Log Out  
Logged in: Parr Primary  
Role: Office Admin - Security Access

Office Management

- Eligibility
- Code Lookup
- Reports
- File Transfer Agent
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- Member Roster
- Claims/Remittance

Administration

- User Preferences
- System Admin**
- A-Z Healthwise
- CareOregon Benefits

References

- Find a Provider
- MMIS
- CMS

User Maintenance

Return to Previous Page

<input type="checkbox"/>	User Name	Office Security	Company Name	Company ID Number	Company Status	TIN/User ID	Last Login	Validated Through	User Status	User Index
<input type="checkbox"/>	FrontDesk, PrimaryParr	User	Primary Parr	11937	Validated	PrFro1		03/27/2012	Confirmed	16334
<input type="checkbox"/>	OfficeStaff, PrimaryParr	User	Primary Parr	11937	Validated	PrOff1		03/27/2012	Confirmed	16329
<input type="checkbox"/>	Primary, Parr	Main Office Contact	Primary Parr	11937	Validated	primaryparr	04/04/2011	03/27/2012	Confirmed	16191

Validate Users Add User

Click the Add User button

CareOregon better together

Home | Log Out

CareOregon Connect

Logged in: Parr Primary

Role: Office Admin - Security Access

User Maintenance Provider Department

Return to Previous Page View Audit

Add User

First Name

Middle Initial

Last Name

E-mail Address

Office Phone

Office Fax

Local Administrator:

Complete all the required text boxes

Return to Previous Page View Audit

Add User

First Name

Middle Initial

Last Name

E-mail Address

Confirm E-mail Address

Title   
e.g. Office Manager

Office Phone

Office Fax

Local Administrator:

The Local Administrator box is used to indicate Administrators and Back Up Administrators. It will usually be greyed out in this function.

This screenshot shows the 'Add User' form in a web application. The form includes fields for First Name (Right), Middle Initial, Last Name (Hand), E-mail Address (righthand@pri), Confirm E-mail Address (righthand@pri), Title (Office Admin), Office Phone (503 555 1212), and Office Fax (503 555 1212). A 'Local Administrator' checkbox is checked. A 'Submit' button is visible. An orange callout box with white text reads: 'To add a Back Up Administrator, the user must already be active. Please see the Modify section for more information.' The left sidebar contains navigation links for Reports, Administration, System Admin, and References. A 'Return to Previous Page' link and a 'View Audit' icon are at the top right.

This screenshot shows the 'Add User' form after the 'Submit' button has been clicked. The 'Local Administrator' checkbox is now unchecked. An orange callout box with white text reads: 'Bypass the Submit button for now and click the first Add button.' A blue arrow points from the callout box to the 'Add' button. Below the form, the text 'User Role Maintenance' is followed by 'There are currently no User Roles defined for this user.' The left sidebar and top navigation elements are the same as in the previous screenshot.

The screenshot shows the CareOregon 'User Role Selection' form. The 'Roles' dropdown menu is currently set to 'Provider - Office Admin - Security Access'. An orange callout box on the right side of the form provides instructions and lists possible role options:

Use the drop down menu to select the new users Role assignment.  
Role options could include:

- Security Access (Administrators)
- Office Staff- View All (no limitations on search options)
- Office Staff- View Elig. Only (member eligibility information only)

The form also includes an 'Entity Lists' dropdown set to 'Primary Parr - CORE', 'Submit' and 'Cancel' buttons, and a 'Return to Previous Page' link.

This screenshot shows the 'User Role Selection' form in the CareOregon Connect environment. The 'Roles' dropdown menu is open, displaying three options:

- Provider - Office Admin - Security Access
- Provider - Office Staff - View All
- Provider - Office Staff - View Elig Only

The 'Entity Lists' dropdown remains set to 'Primary Parr - CORE'. The top right of the page shows the user is logged in as 'Parr Primary' with the role 'Office Admin - Security Access'. The page header includes 'Home' and 'Log Out' links.

The screenshot shows the CareOregon Connect interface. The top left features the CareOregon logo with the tagline "better together". The top right shows navigation links for "Home" and "Log Out", and user information: "Logged in: Parr Primary" and "Role: Office Admin - Security Access". A left-hand navigation menu is organized into three sections: "Office Management" (Eligibility, Code Lookup, Reports, File Transfer Agent, Authorizations, Member Roster, Claims/Remittance), "Administration" (User Preferences, System Admin, A-Z Healthwise, CareOregon Benefits), and "References" (Find a Provider, MMIS, CMS). The main content area is titled "User Role Selection" and contains a "Roles" dropdown menu set to "Provider - Office Staff - View All". Below it is an "Entity Lists" section with a list containing "Primary Parr - CORE". A mouse cursor is pointing at the "Primary Parr - CORE" entry. There are "Submit" and "Cancel" buttons below the list, and a "Return to Previous Page" link at the bottom left. An orange callout box with white text is overlaid on the right side of the page, stating: "Entity Lists will usually include just one option and it defaults to that option."

This screenshot is identical to the one above, showing the "User Role Selection" page. However, the "Entity Lists" section now contains two entries, both labeled "Primary Parr - CORE". A mouse cursor is pointing at the top entry. The rest of the page, including the navigation menu and user information, remains the same.

The screenshot shows the CareOregon Connect interface. At the top left is the CareOregon logo with the tagline "better together". The main header displays "CareOregon Connect". On the top right, there are links for "Home" and "Log Out", and the text "Logged in: Parr Primary" and "Role: Office Admin - Security Access". A left-hand navigation menu is visible, with sections for "Office Management", "Administration", "System Admin", and "References". The main content area is titled "User Role Selection" and contains two dropdown menus: "Roles" (set to "Provider - Office Staff - View All") and "Entity Lists" (set to "Primary Parr - CORE"). Below these are "Submit" and "Cancel" buttons. A blue callout box with the text "Click the Submit button" is overlaid on the "Submit" button, with a blue arrow pointing to it. A "Return to Previous Page" link is located below the buttons.

This screenshot is identical to the one above, showing the "User Role Selection" page. However, instead of a callout box, a mouse cursor is positioned over the "Submit" button, indicating the next step in the process.

Office Management

Eligibility

Code Lookup

Reports

File Transfer Agent

Authorizations

Member Roster

Claims/Remittance

Administration

User Preferences

System Admin

A-Z Healthwise

CareOregon Benefits

References

Find a Provider

MMIS

CMS

Home | Log Out

CareOregon Connect

Logged in: Parr Primary

Role: Office Admin - Security Access

User Maintenance Provider Department

Return to Previous Page View Audit

User Information

Last Name Hand

E-mail Address righthand@primaryparr.com

Confirm E-mail Address righthand@primaryparr.com

Title Office Admin  
e.g. Office Manager

Office Phone (503) 555-1212

Office Fax (503) 555-1212

You are now back at the User Entry screen.

User Preferences

System Admin

A-Z Healthwise

CareOregon Benefits

References

Find a Provider

MMIS

CMS

CMS Fee Schedule Search

Claim Adjustment Reason

Remittance Advice Remittance

CO - ICD-10

Provider Manual

Add Remove

User Role Maintenance

Careoregon, Inc.

PROVIDER PORTAL

Role	Entity List Name	Registration Status
<input type="checkbox"/> Office Staff - View All	Primary Parr	Pending

If the user needs another location (TIN/NPI) added to their record, click on the Add button again and follow the same Role/Entity List process.

This screenshot shows a registration form with the following fields: Confirm E-mail Address (righthand@primaryparr.com), Title (Office Admin), Office Phone ((503) 555-1212), and Office Fax ((503) 555-1212). A 'Local Administrator' checkbox is present. A red box highlights the 'Submit' button, and a blue arrow points from it to an orange instruction box that says 'Click the Submit button'. Below the form is a 'User Role Maintenance' section for 'Careoregon, Inc.' with a table:

Role	Entity List Name	Registration Status
<input type="checkbox"/> Office Staff - View All	Primary Parr	Pending

This screenshot shows the CareOregon Connect user management interface. The top navigation includes 'Home | Log Out' and 'Logged in: Parr Primary' with the role 'Office Admin - Security Access'. The left sidebar lists 'Office Management' and 'Administration' options. The main content area shows a table of users:

USER NAME	USER ID	OFFICE SECURITY LEVEL
Hand, Right	Rihani1	provider User

An orange callout box with a blue arrow pointing to the 'USER ID' column contains the text: 'Note that the User ID now lists the new users assigned log in name. The Administrator will need to note the User ID and forward it to their staff'.

Home | Log Out  
 Logged in: Parr Primary  
 Role: Office Admin - Security Access

CareOregon Connect

Office Management

- Eligibility
- Code Lookup
- Reports
- File Transfer Agent
- Authorizations
- Member Roster
- Claims/Remittance

Administration

- User Preferences

System Admin

- A-Z Healthwise
- CareOregon Benefits

References

- Find a Provider
- MMIS
- CMS

Return to User Maintenance

Healthcare Registration for CareOregon, Inc.

USER NAME	USER ID	OFFICE SECURITY LEVEL
Hand , Right	RHAn1	provider User

Return to User Maintenance

Select the Return to User Maintenance link

Home | Log Out  
 Logged in: Parr Primary  
 Role: Office Admin - Security Access

CareOregon Connect

Office Management

- Eligibility
- Code Lookup
- Reports
- File Transfer Agent
- Authorizations
- Member Roster
- Claims/Remittance

Administration

- User Preferences

System Admin

- A-Z Healthwise
- CareOregon Benefits

References

- Find a Provider
- MMIS
- CMS

User Maintenance

Return to Previous Page

<input type="checkbox"/>	User Name	Office Security	Company Name	Company ID Number	Company Status	TIN/User ID	Last Login	Validated Through	User Status	User Index
<input type="checkbox"/>	FrontDesk , PrimaryParr	User	Primary Parr	11937	Validated	PrFro1		03/27/2012	Confirmed	16334
<input type="checkbox"/>	Hand , Right	User	Primary Parr	11937	Validated	RHAn1		03/27/2012	Confirmed	16359
<input type="checkbox"/>	OfficeStaff , PrimaryParr	User	Primary Parr	11937	Validated	PrOff1		03/27/2012	Confirmed	16309
<input type="checkbox"/>	Primary, P									

Validate User

Return to Previous Page

User Status shows Confirmed. All non-Administrator users are confirmed automatically.

The User Maintenance screen lists all the user names as well.

CareOregon  
better together

Home | Log Out  
Logged in: Parr Primary  
Role: Office Admin - Security Access

CareOregon Connect

Administrators are required to confirm their staff are valid every year. The date under Validated Through column tracks the time.

<input type="checkbox"/>	User Name	Office	Company	Company ID	Company TIN	User ID	Last Login	Validated Through	User Status	User Role
<input type="checkbox"/>										
<input type="checkbox"/>										
<input type="checkbox"/>										

To validate a user, the Administrator clicks on the box by their name and then the Validate User button.

Validate Users Add User

[Return to Previous Page](#)

Administrators will receive an email with a temporary password for each new user.

They will then forward the User ID and temporary password onto their staff.

# Modifying a User

CareOregon better together  
CareOregon Connect  
Home | Log Out  
Logged In: Parr Primary  
Role: Office Admin - Security Access

AAA

**Office Management**  
Eligibility  
Claims/Remittance  
Authorizations  
Code Lookup  
Member Roster  
Reports  
File Transfer Agent

**Administration**  
User Preferences  
System Admin

Return to [User Maintenance](#)

Select the user name from the list.  
Larger offices may need to search for the correct name.

<input type="checkbox"/>	User	Primary	11937	Validated	Rihan1	03/27/2012	Confirmed	16359
<input type="checkbox"/>	OfficeStaff, Primary Parr	Primary Parr	11937	Validated	PrOff1	03/27/2012	Confirmed	16329
<input type="checkbox"/>	Primary Parr	Main Office Contact	Primary Parr	11937	Validated	primaryparr 07/06/2011	03/27/2012	Confirmed 16191

CareOregon better together  
CareOregon Connect  
Home | Log Out  
Logged In: Parr Primary  
Role: Office Admin - Security Access

AAA

**Office Management**  
Eligibility  
Claims/Remittance  
Authorizations  
Code Lookup  
Member Roster  
Reports  
File Transfer Agent

**Administration**  
User Preferences  
System Admin

[User Maintenance](#)

Return to [Previous Page](#)

The User Preferences screen appears.  
Changes to the user's name, e-mail address or phone number can be made here.

**User Information**

First Name: PrimaryParr

Middle Initial:

Last Name: OfficeStaff

E-mail Address:

Confirm E-mail Address:

A-Z Healthwise  
CareOregon Benefits

**References**  
Find a Provider  
MMIS  
CMS  
CMS Fee Schedule  
Search  
Claim Adjustment  
Reason & Remittance  
Advice Remark  
CO - ICD-10  
Provider Manual

Title: Office Staff  
e.g. Office Manager

Office Phone: (503) 555-1212

Office Fax: (503) 555-1212

Local Administrator:

Submit

Indicates required field

[Return to Previous Page](#)

Add Remove

**User Role Maintenance**

Careoregon, Inc.

PROVIDER PORTAL

Role	Entity List Name	Registration Status	User Security Agreement
<input type="checkbox"/> Office Staff - View All	Primary Parr	Confirmed	<a href="#">Print</a>

Add Remove

[Return to Previous Page](#)

If we wanted to make the person a Back Up Administrator, we would select the Local Administrator box.

A-Z Healthwise  
CareOregon Benefits

**References**  
Find a Provider  
MMIS  
CMS  
CMS Fee Schedule  
Search  
Claim Adjustment  
Reason & Remittance  
Advice Remark  
CO - ICD-10  
Provider Manual

Title: Office Staff  
e.g. Office Manager

Office Phone: (503) 555-1212

Office Fax: (503) 555-1212

Local Administrator:

Submit

Indicates required field

[Return to Previous Page](#)

Add Remove

**User Role Maintenance**

Careoregon, Inc.

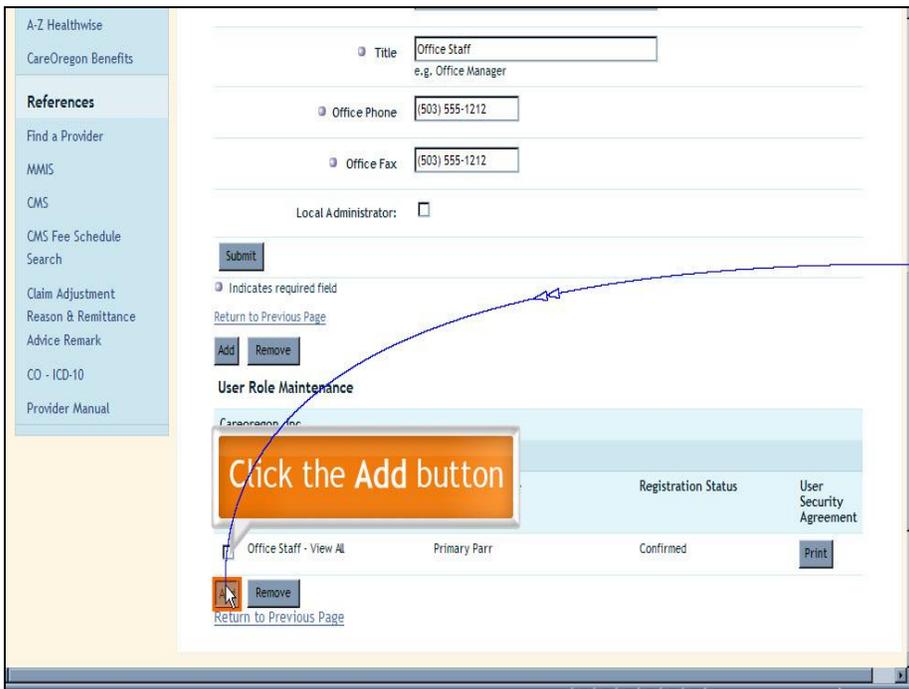
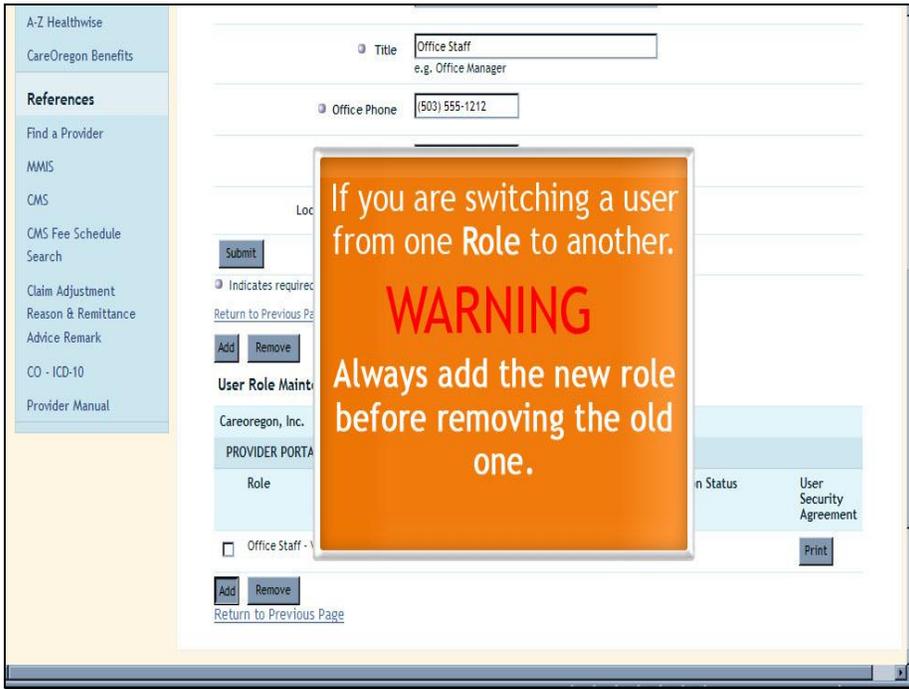
PROVIDER PORTAL

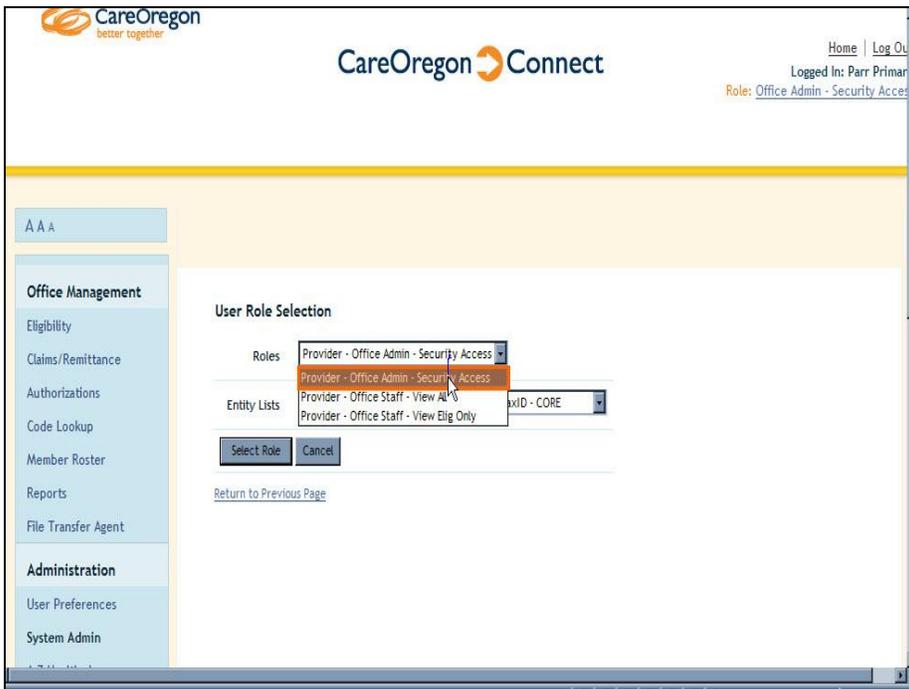
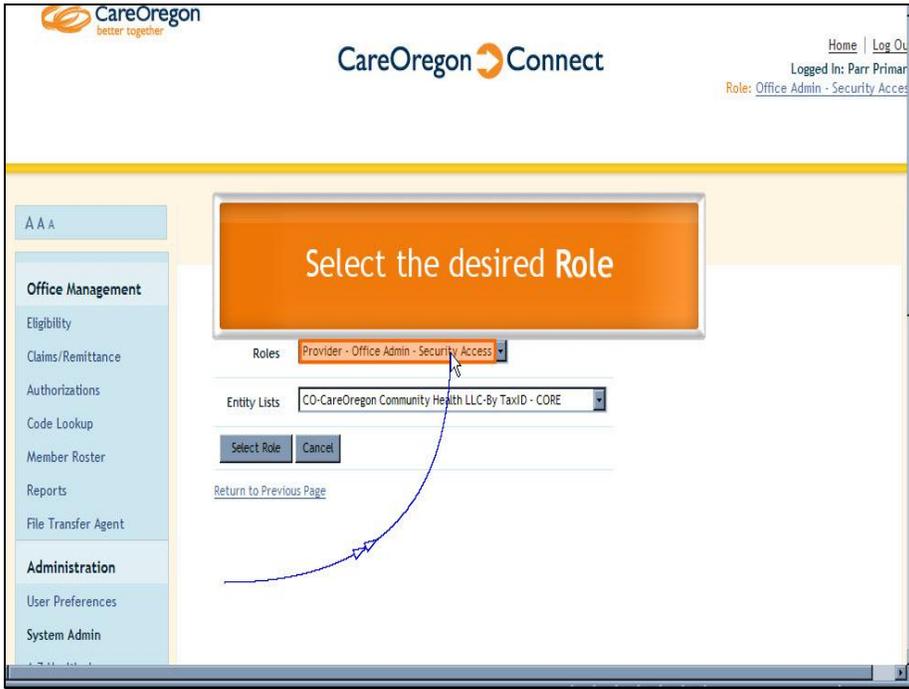
Role	Entity List Name	Registration Status	User Security Agreement
<input type="checkbox"/> Office Staff - View All	Primary Parr	Confirmed	<a href="#">Print</a>

Add Remove

[Return to Previous Page](#)

In this example, we will add a new Role to our user.





CareOregon better together  
CareOregon Connect  
Home | Log Out  
Logged In: Parr Primar  
Role: Office Admin - Security Access

Office Management  
Eligibility  
Claims/Remittance  
Authorizations  
Code Lookup  
Member Roster  
Reports  
File Transfer Agent  
Administration  
User Preferences  
System Admin

**User Role Selection**

Roles: Provider - Office Admin - Security Access

Entity Lists: CO-CareOregon Community Health LLC-By TaxID - CORE

Select Role Cancel

[Return to Previous Page](#)

Select the desired Entity.

Note: Most groups will have a single option here.

CareOregon better together  
CareOregon Connect  
Home | Log Out  
Logged In: Parr Primar  
Role: Office Admin - Security Access

Office Management  
Eligibility  
Claims/Remittance  
Authorizations  
Code Lookup  
Member Roster  
Reports  
File Transfer Agent  
Administration  
User Preferences  
System Admin

**User Role Selection**

Roles: Provider - Office Admin - Security Access

Entity Lists: Primary-CORE

Select Role Cancel

[Return to Previous Page](#)

Click the Select Role button

CareOregon better together  
CareOregon Connect  
Home | Log Out  
Logged In: Parr Primary  
Role: Office Admin - Security Access

Office Management  
Eligibility  
Claims/Remittance  
Authorizations  
Code Lookup  
Member Roster  
Reports  
File Transfer Agent  
Administration  
User Preferences  
System Admin

User Maintenance Provider Department  
Return to Previous Page New Audit

User Information  
First Name Primary Parr

The User Preferences page re-appears.  
Scroll down to confirm the additional Role.

References  
Find a Provider  
MMIS  
CMS  
CMS Fee Schedule  
Search  
Claim Adjustment  
Reason & Remittance  
Advice Remark  
CO - ICD-10  
Provider Manual

Office Phone (503) 555-1212  
Office Fax (503) 555-1212  
Local Administrator:

Submit  
Indicates required field  
Return to Previous Page  
Add Remove

User Role Maintenance  
Careoregon, Inc.  
PROVIDER PORTAL

Role	Entity List Name	Registration Status	User Security Agreement
<input type="checkbox"/> Office Admin - Security Access	Primary Parr	Confirmed	Print
<input type="checkbox"/> Office Staff - View All	Primary Parr	Confirmed	Print

Add Remove  
Return to Previous Page  
powered by

CareOregon better together

CareOregon Connect

Home | Log Out  
Logged In: Parr Primary  
Role: Office Admin - Security Access

Office Management

- Eligibility
- Claims/Remittance
- Authorizations
- Code Lookup
- Member Roster
- Reports
- File Transfer Agent

Administration

- User Preferences
- System Admin**

User Maintenance | Provider Department

[Return to Previous Page](#) [View Audit](#)

**User Information**

First Name: PrimaryParr

Confirm

Select System Admin to return to the list of users.

# Removing a User

CareOregon better together  
CareOregon Connect  
Home | Log Out  
Logged In: Parr Primary  
Role: Office Admin - Security Access

Office Management  
Eligibility  
Claims/Remittance  
Authorizations  
Code Lookup  
Member Roster  
Reports  
File Transfer Agent  
Administration  
User Preferences  
System Admin

User Maintenance  
Provider Department

Return to Previous Page

Select the user's name from the list

<input type="checkbox"/>	User Name	Role	Primary	Validated	PrOff1	03/27/2012	Confirmed	16334		
<input type="checkbox"/>	FrontD Primary							16334		
<input type="checkbox"/>	Hand, reg...	Primary	11937	Validated	PrOff1	03/27/2012	Confirmed	16359		
<input type="checkbox"/>	OfficeStaff, PrimaryParr	User	Primary Parr	11937	Validated	PrOff1	03/27/2012	Confirmed	16329	
<input type="checkbox"/>	Primary, Parr	Main Office Contact	Primary Parr	11937	Validated	primaryparr	07/06/2011	03/27/2012	Confirmed	16191

CareOregon better together  
CareOregon Connect  
Home | Log Out  
Logged In: Parr Primary  
Role: Office Admin - Security Access

Office Management  
Eligibility  
Claims/Remittance  
Authorizations  
Code Lookup  
Member Roster  
Reports  
File Transfer Agent  
Administration  
User Preferences  
System Admin

The User Preferences page appears. Scroll down to the Roles section

View Audit

Middle Initial

Last Name

E-mail Address

Confirm E-mail Address

Find a Provider  
MMIS  
CMS  
CMS Fee Schedule  
Search  
Claim Adjustment  
Reason & Remittance  
Advice Remark  
CO - ICD-10  
Provider Manual

Office Phone: \_\_\_\_\_  
Office Fax: (503) 555-1212  
Local Administrator:

Submit

Indicates required field  
Return to Previous Page

Add Remove

### User Role Maintenance

Careregion, Inc.

PROVIDER PORTAL

Role	Entity List Name	Registration Status	User Security Agreement
<input type="checkbox"/> Office Admin - Security Access	Primary Parr	Confirmed	Print
<input checked="" type="checkbox"/> Office Staff - View All	Primary Parr	Confirmed	Print

Select the check box

HealthTrio LLC

Find a Provider  
MMIS  
CMS  
CMS Fee Schedule  
Search  
Claim Adjustment  
Reason & Remittance  
Advice Remark  
CO - ICD-10  
Provider Manual

Office Phone: \_\_\_\_\_  
Office Fax: (503) 555-1212  
Local Administrator:

Submit

Indicates required field  
Return to Previous Page

Add Remove

### User Role Maintenance

Careregion, Inc.

PROVIDER PORTAL

Role	Entity List Name	Registration Status	User Security Agreement
<input type="checkbox"/> Office Admin - Security Access	Primary Parr	Confirmed	Print
<input checked="" type="checkbox"/> Office Staff - View All	Primary Parr	Confirmed	Print

Add Remove

Return to Previous Page

Click the Remove button

e.g. Office Manager

Office Phone: (503) 555-1212

Office Fax: (503) 555-1212

Local Administrator:

Submit

Indicates required field

[Return to Previous Page](#)

Add Remove

**User Role Maintenance**

Careregion, Inc.

PROVIDER PORTAL

Role	Entity List Name	Registration Status	User Security Agreement
Office Admin - Security Access	Primary Parr	Confirmed	<a href="#">Print</a>

Add Remove

[Return to Previous Page](#)

powered by HealthTrio<sup>LLC</sup>



e.g. Office Manager

Office Phone: (503) 555-1212

Office Fax: (503) 555-1212

Local Administrator:

Submit

Indicates required field

[Return to Previous Page](#)

Add Remove

**User Role Maintenance**

Careregion, Inc.

PROVIDER PORTAL

Role	Entity List Name	Registration Status	User Security Agreement
Office Admin - Security Access	Primary Parr	Confirmed	<a href="#">Print</a>

Add Remove

[Return to Previous Page](#)

powered by HealthTrio<sup>LLC</sup>



e.g. Office Manager

Office Phone: (503) 555-1212

Office Fax: (503) 555-1212

Local Administrator:

Submit

Indicates required field

[Return to Previous Page](#)

Add Remove

### User Role Maintenance

Careregion, Inc.

PROVIDER PORTAL

Role	Entity List Name	Registration Status	User Security Agreement
<input type="checkbox"/> Office Admin - Security Access	Primary Parr	Confirmed	<a href="#">Print</a>

Select the check box

Powered by HealthTrio<sup>SM</sup> LLC

e.g. Office Manager

Office Phone: (503) 555-1212

Office Fax: (503) 555-1212

Local Administrator:

Submit

Indicates required field

[Return to Previous Page](#)

Add Remove

### User Role Maintenance

Careregion, Inc.

PROVIDER PORTAL

Role	Entity List Name	Registration Status	User Security Agreement
<input checked="" type="checkbox"/> Office Admin - Security Access	Primary Parr	Confirmed	<a href="#">Print</a>

Click the Remove button

