Administrator-How to Add, Modify and Remove a User Tutorial
Adding A User
Complete all the required text boxes

The Local Administrator box is used to indicate Administrators and Back Up Administrators. It will usually be greyed out in this function.
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)
Entity Lists will usually include just one option and it defaults to that option.
Click the Submit button
You are now back at the User Entry screen.

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.
Select the Return to User Maintenance link

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

The User Maintenance screen lists all the user names as well.
Administrators are required to confirm their staff are valid every year. The date under Validated Through column tracks the time.

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

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

In this example, we will add a new Role to our user.
If you are switching a user from one Role to another.

WARNING
Always add the new role before removing the old one.

Click the Add button

Registration Status
Confirmed

Office Staff - View All
Primary/Plan

Select the desired Entity.

Note: Most groups will have a single option here.

Click the Select Role button
The User Preferences page re-appears. Scroll down to confirm the additional Role.
Removing a User
Select the user’s name from the list.

The User Preferences page appears. Scroll down to the Roles section.
Confirm that the Role has been removed.

Repeat process for any other roles.
The system will ask you to confirm that you want to delete this user.

Are you sure you wish to remove this user?
- This action cannot be undone.
- Removing the selected user will remove the user's registration with CareOregon, Inc.
- A reason must be entered for this action.
- Click the "OK" button to continue.

Reason:

* Indicators required field

Select the box to enter a reason for the deletion.