Jefferson Health Plans | HPP Health Partners Plans

# Quick Reference Guide: Local Administrator & Users

**Adding Users**

1. Navigate to **Administration > System Admin** from the top menu.

2. In **User Maintenance**, click Add User.

3. **Fill in the user's information:**

   o First/Middle/Last Name, Title

   o Email, Phone, Fax, Extension

   o Username (chosen by admin)

   o Check Local Administrator box if applicable

4. **Click Add** to proceed to the **User Role Selection** screen.

5. **Select a role from the dropdown:**

   o Eligibility Only

   o Eligibility and Claims Only

   o Eligibility, Claims and Authorizations Only

   o Eligibility and Authorizations Only

   o Local Administrator – full access including user administration

   o Office Manager – user administration only

**Note:** Users with multiple roles must ensure they submit authorizations under the correct role. Submitting under an incorrect role may result in errors, especially if the user lacks access to the associated Tax Identification Number (TIN).

6. Choose your **organization from the Entity List** dropdown.

7. Click **Select Role** to return to the User Info screen.

8. Verify **all details and** click **Submit.**

9. **Copy the assigned username and share the temporary password. User creation completes after submission.**

**Creating Additional Local Administrators**

**Step 1: Assign Role During User Creation**

- **Check Local Administrator box**

- **Select Provider** – Local Administrator role when creating the account.

**Step 2: Grant Admin Privileges Post-Creation**

- Go to **Administration > System Admin.**

- Locate the user in **User Maintenance and click their name.**

- On the User Information screen, **check the box for Local Administrator.**

- **Complete the Office Information section:**

  o Organization Name

  o Tax ID

  o Address

- Click **Submit** to finalize administrative privileges.

◆ **Reminders:**

If access to a specific TIN is needed, **contact your local administrator first to request access**. This step is essential for authorization submission accuracy.

For comprehensive guide, please refer to the **Local Admin and User Guide** located on **Provider Portal Resources**.