

Provider Registration Overview

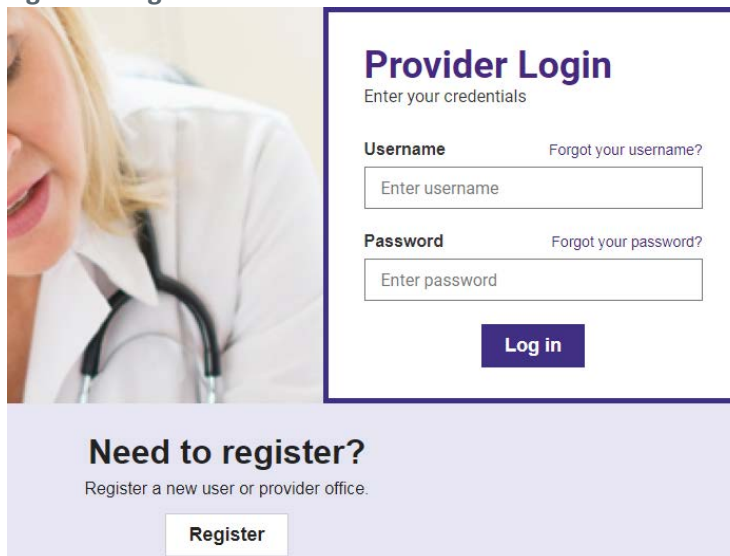
The first individual that registers for a practice of office is assigned the role of Local Administrator. In most cases, the Office Manager should be assigned this role. The Local Administrator has access to all standard features, plus the System Administration feature for setting up and overseeing all other users of the registered office (restricted access for Local Administrator only).

This guide provides step-by-step instructions for completing Local Administrator registration, adding additional users, user sign in and help desk services, and confirming user accounts.

New User Registration for Providers

1. From the *bottom of the Login* screen, click **Register**.

Figure 1: Login Screen



Provider Login
Enter your credentials

Username [Forgot your username?](#)
Enter username

Password [Forgot your password?](#)
Enter password

Log in

Need to register?
Register a new user or provider office.

Register

Note: At any time during the registration process click **Cancel** to cancel registration and return to the *Login* screen.

2. The *User Information* screen gathers information on the person requesting the account. On this screen, please enter the following information: **Note:** Not all fields are required
 - First Name – the office manager’s name
 - Middle Initial – the office manager’s middle initial
 - Last Name – the office manager’s last name
 - Title – the office manager’s title
 - E-Mail – the office manager’s email address
 - Confirm E-Mail – re-enter the office manager’s email address
 - Office Phone – the office phone number
 - Extension # – the office phone’s extension number, if applicable
 - Office Fax – the office fax number
 - Clinician – check box if you are the clinician
 - User Name – choose a username for login
 - Password – choose a password for login
 - Confirm Password – re-enter the password for login
 - Security Question 1 – select a security question from the dropdown menu

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- Security Answer 1 – enter an answer to the security question selected
- Security Question 2 – select a security question from the dropdown menu
- Security Answer 2 – enter an answer to the security question selected
- Security Question 3 – select a security question from the dropdown menu
- Security Answer 3 – enter an answer to the security question selected
- **Local Admin – continue only if you are able to be the administrator for your organization.**

Figure 2: User Information Screen

User Information

If you are an existing user of the Connect system please login. [Click here to start your session.](#)

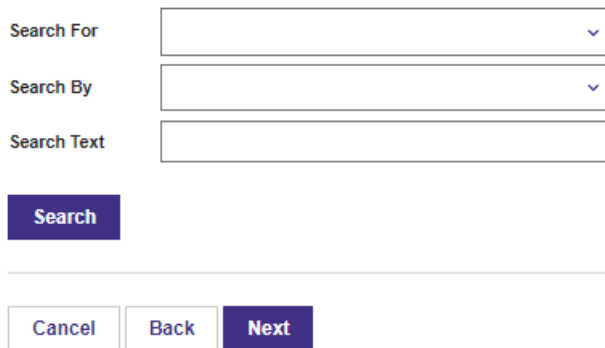
| | |
|---|---|
| First Name * | <input type="text"/> |
| Middle Initial | <input type="text"/> |
| Last Name * | <input type="text"/> |
| Title | <input type="text"/> |
| E-Mail * | <input type="text"/> |
| Confirm E-Mail * | <input type="text"/> |
| Office Phone * | <input type="text"/> |
| | <small>Example: (555) 555-5555</small> |
| Extension # | <input type="text"/> |
| | <small>Example: 123456</small> |
| Office Fax | <input type="text"/> |
| | <small>Example: (555) 555-5555</small> |
| User Name * | <input type="text"/> |
| Password * | <input type="password"/> |
| Confirm Password * | <input type="password"/> |
| Security Question 1 * | <input type="text" value="v"/> |
| Security Answer 1 * | <input type="text"/> |
| | <small>Your answer may not contain your username.</small> |
| Security Question 2 * | <input type="text" value="v"/> |
| Security Answer 2 * | <input type="text"/> |
| | <small>Your answer may not contain your username.</small> |
| Security Question 3 * | <input type="text" value="v"/> |
| Security Answer 3 * | <input type="text"/> |
| | <small>Your answer may not contain your username.</small> |
| Local Admin <input checked="" type="checkbox"/> | |
| <small>As the primary registrant, you are automatically a local admin</small> | |
| <input type="button" value="Cancel"/> | <input type="button" value="Back"/> <input type="button" value="Next"/> |

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3. Click **Next** to proceed to the *Provider Search* screen.
4. On the *Provider Search* screen, select from the following search for options:
 - Practice
 - Hospital
5. Next, select what identifying information to search by from the following options:
 - National Provider ID (NPI) number
 - TaxID
6. Lastly, enter the search text to identify the practice or hospital. Then, click **Search**.
 - National Provider ID (NPI) number – enter the practice or hospital's NPI number
 - TaxID – enter the practice or hospital's taxID number

Figure 3: Provider Search Screen

Search for your provider office



Search For

Search By

Search Text

Search

NOTE: If any of the above information entered does not exist in HPP's system, registration cannot be completed.

7. From the search results, select the radio button of the practice or hospital for which you are registering.
8. Click **Next** to proceed to the *Office Information* screen.

NOTE: If there is already a local administrator registered for the practice or hospital, the following screen will display. **Please contact your local administrator to register you for the portal.**

Figure 4: Existing Registrations Detected Screen

Existing Registrations Detected

Existing registrations have been detected for the following office:

Practice Selected

>

| Existing Registrations | | |
|------------------------|--------------|---------|
| Contact Name | Organization | Address |

9. On the *Office Information* screen, the following information is requested: **Note:** All information below, except those in **bold** will be auto populated.
- Organization Name – enter the organization’s name
 - Tax ID – enter the organization’s tax ID number
 - **Claim Number** – enter a claim number submitted by the organization
 - **Claim Amount** – enter claim billed amount
 - **Multi TIN** – enter yes if you are seeking access to multiple TIN’s, enter no if you are not. If you select yes, you will be contacted for multiple TIN set up.
 - Address – enter the organization’s address
 - City – enter the organization’s city
 - State – enter the organization’s state
 - Zip Code – enter the organization’s zip code

Figure 5: Office Information Screen

Office Information

Enter the name and address of your office.

| | |
|----------------------|--------------------------------|
| Organization Name * | <input type="text"/> |
| Tax ID | <input type="text"/> |
| Claim Number * | <input type="text"/> |
| Claim Amount * | <input type="text"/> |
| Multi Tin (Yes/No) * | <input type="text"/> |
| Address * | <input type="text"/> |
| City * | <input type="text"/> |
| State * | <input type="text" value="v"/> |
| Zip Code * | <input type="text"/> |

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10. Click **Next** to proceed to the *Registration Summary* screen.
11. Before you reach the Registration Summary screen, you will be asked “Would you like to add additional users to your registration?” If your answer is yes, click **Next** and proceed to step 12, *Additional User Information* screen. If your answer is no, click **Next** and proceed to step 14, *Registration Summary* screen. **Note:** If you don’t choose to add additional users at this step, you will be able to add them once you have access to your local administrator account.

Figure 6: Register Additional Users

Register Additional Users

Would you like to add additional users to your registration?

Yes *

No *

Cancel

Back

Next

12. On the *Additional User Information* screen, enter requested information, then select **Next**. if adding multiple additional users, select **Add User** and Repeat.

Figure 7: *Additional User Information* screen

Additional User Information

| | |
|--------------------|--|
| First Name * | <input type="text"/> |
| Middle Initial | <input type="text"/> |
| Last Name * | <input type="text"/> |
| Title | <input type="text"/> |
| E-Mail * | <input type="text"/> |
| Confirm E-Mail * | <input type="text"/> |
| Office Phone * | <input type="text"/> |
| | <small>Example: (555) 555-5555</small> |
| Extension # | <input type="text"/> |
| | <small>Example: 123456</small> |
| Office Fax | <input type="text"/> |
| | <small>Example: (555) 555-5555</small> |
| User Name * | <input type="text"/> |
| Password * | <input type="password"/> |
| Confirm Password * | <input type="password"/> |

Clear

Add User

Cancel

Back

Next

13. Click **Next** to proceed to the *Registration Summary* screen.
14. On the *Registration Summary* screen, verify the office and user information. If the information is correct, click **Finish** to proceed to the *Registration Created* screen. Click **Back** to return to the *Office Information* or *User Information* screens if updates are needed.

Figure 8: Registration Summary Screen
Registration Summary

Office Contact Info:

Practices Represented: [Edit]

User Contact Info: [Edit]

Figure 9: Registration Created Screen
Registration Created

Below are the users that have been created for your registration. Please take note of the User IDs since they will be needed to log into the application.

| Name | User ID | User Type |
|-----------|----------|------------------|
| DOE, JANE | janedoes | Provider Contact |
| DOE, JON | jondoe | Provider User |

The *Registration Created* screen contains the User ID needed to log into the Health Plan. You cannot return to this page.

15. Click **Next** to proceed to the *Registration Complete* screen.

Figure 10: Registration Complete Screen
Registration Complete

Thank you. Your registration with Health Partners Plans is now complete.

You are now registered for HealthTrio® Smart Connect and ready to be confirmed by the Health Partners Plans. You will receive an email once your registration has been confirmed and you can log in with your selected username and password.

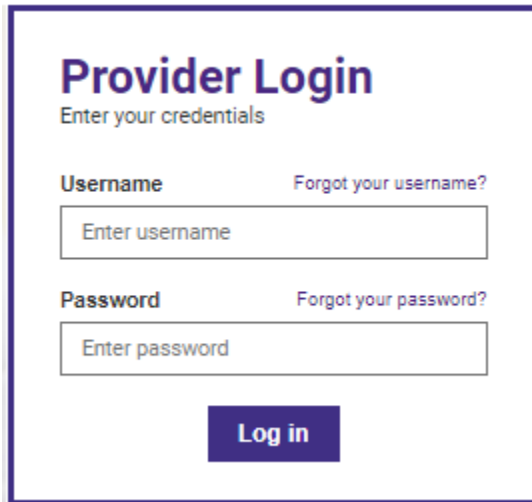
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Sign In

After completing registration and receiving e-mail confirmation, you can return to the Provider Login screen to sign into your account.

1. From the *Provider Login In* screen, enter your **Username** and **Password**.

Figure 10: Provider Login Screen



Provider Login
Enter your credentials

Username [Forgot your username?](#)

Password [Forgot your password?](#)

Log in

2. Click **Log In** to proceed to your *Home* page.

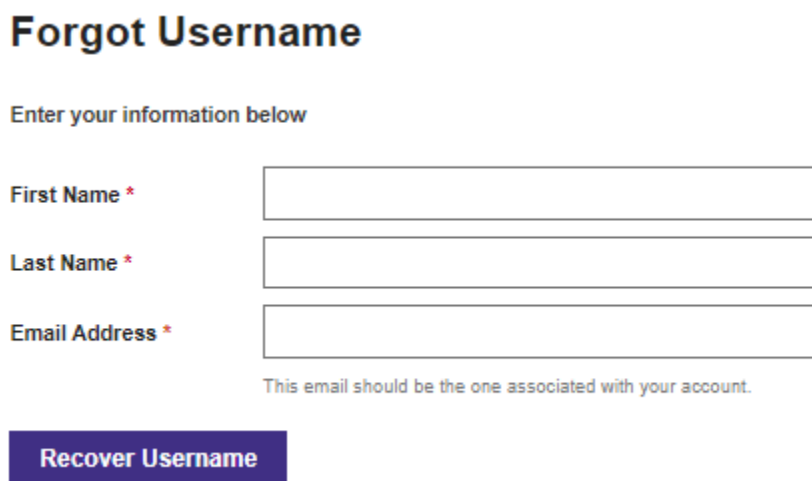
Forgotten Usernames and Passwords

Usernames and passwords can be retrieved and reset from the *Provider Login* screen or by calling the Help Desk toll free at (877) 814-9909.

Forgotten Usernames

1. From the *Provider Login* screen, click **Forgot your username?** to proceed to the *Forgot Username* screen.
2. Enter your **First Name**, **Last Name**, and **E-mail Address** and click **Recover Username**.

Figure 11: Forgot Username Screen



Forgot Username

Enter your information below

First Name *

Last Name *

Email Address *

This email should be the one associated with your account.

Recover Username

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Your username will be sent to your email account.

Figure 12: Forgotten Username Email Notification Forgot Username

Your user name has been sent to your email account

If you do not receive an email within the next 5 minutes please do the following:

- Refresh your email account
- Check your spam folder
- Ensure that your first and last name entered match the information you provided when registering for your account

If you still have not received an email, please contact the help desk at (877)-814-9909 to receive further assistance.

Forgotten Passwords

1. From the *Provider Login* screen, click **Forgot your Password?** to proceed to the *Forgot Password* screen.
2. Enter your **Username** and click **Reset Password**.

Figure 13: Forgot Password Screen

Forgot Password

Enter your username *

Reset Password

Forgot your User ID? Retrieve your User ID [here](#)

Figure 14: Forgotten Password Instructions

Forgot Password

Instructions to change your password have been sent to your email account

If you do not receive an email within the next 5 minutes please do the following:

- Refresh your email account
- Check your spam folder
- Ensure that the user ID you entered is correct

If you still have not received an email, please contact the help desk at (877)-814-9909 to receive further assistance.

Instructions on how to change your password will be sent via email.

Unlocking an Account

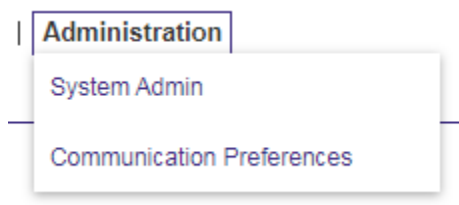
To unlock an account, contact the Help Desk toll free at (877)814-9909.

Adding Users

After registering as the Local Administrator, you can add additional users to the Health Plan. Account confirmation is not required when a user is added by the Local Administrator.

1. From the Home screen, click **Administration > System Admin** from the top navigation menu.

Figure 15: Administration Menu



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

Figure 16: User Maintenance Screen

User Maintenance

| User Name | Office Security | Company Name |
|---------------------------|---------------------|--------------|
| Doe, Jane | Main Office Contact | |
| Doe, Jon | User | |

[Add User](#)

3. In the Add User screen, the following fields are available:

Note: The Local Administrator can decide whether the user can select his/her own username and password, or for the system to generate them. Most often the Local Administrator selects the username and allows the system to generate a temporary password. Not all fields on this page are required.

- First Name – enter the user’s first name
- Middle Initial – enter the user’s middle initial
- Last Name – enter the user’s last name
- E-Mail Address – enter the user’s e-mail address
- Title – enter the user’s title
- Office Phone – enter the office phone number
- Phone Ext – the office phone’s extension number, if applicable
- Office Fax – enter the office’s fax number
- Username – chose a username for login
- Password – choose a password for login

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- Confirm Password – re-enter the password for login
- Local Administrator – select if this user should be a Local Administrator

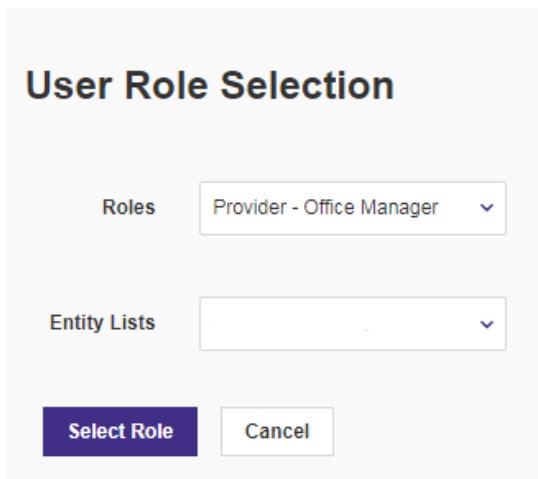
Figure 17: Add User Screen

Add User

| | |
|------------------------|-------------------------------------|
| First Name | <input type="text"/> |
| Middle Initial | <input type="text"/> |
| Last Name | <input type="text"/> |
| E-mail Address | <input type="text"/> |
| Confirm E-mail Address | <input type="text"/> |
| Title | <input type="text"/> |
| | <small>e.g., Office Manager</small> |
| Office Phone | <input type="text"/> |
| Phone Ext | <input type="text"/> |
| Office Fax | <input type="text"/> |
| Username | <input type="text"/> |
| Password | <input type="text"/> |
| Confirm Password | <input type="text"/> |
| Local Administrator: | <input type="checkbox"/> |

4. Click **Add** to proceed to the *User Role Selection* Screen
5. On the *User Role Selection* screen, select a role from the *Roles* dropdown menu and your organization from the *Entity Lists* dropdown menu.

Figure 18: User Role Selection Screen



User Role Selection

Roles: Provider - Office Manager

Entity Lists:

Select Role Cancel

Note: Roles allow Health Partners Plans to assign the appropriate security access to users with varying job responsibilities. You must select a role to add user.

6. Click **Select Role** to return to the *User Information* screen.
7. On the *User Information* screen, confirm all information is correct, then click submit. Once submitted, you will reach the *Healthcare Registration* screen.

Figure 19: Healthcare Registration Screen

Healthcare Registration for Health Partners Plans

HealthTrio connect Office User List

| User Name | User ID | Office Security Level |
|--------------|-----------|-----------------------|
| Smith , Jane | smithjane | provider User |

Note: Copy username from this page and share created password with new user.

Initial User Login

The first time a user logs in to HP Connect they must complete the following steps to update their account.

1. Sign in with your user ID and password.
2. On the next screen, *Terms and Conditions* will appear, click **Accept**.

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3. In the *Account Information Update Required* screen, enter a new password and select three security questions. Security questions are used to access your account for user id and password reset requests.

Figure 20: Account Information Update Required Screen

Account Information Update Required

Please change your password

New password

Password must contain at least 6 character(s).
Password cannot contain your user name.
Password cannot contain your First or Last Name.
You cannot re-use passwords previously used.

Confirm new password

Please select new security questions

Security question 1

Select a security question from the options included in the drop-down menu.

Security answer 1

Your answer may not contain your username.

Security question 2

Select a security question from the options included in the drop-down menu.

Security answer 2

Your answer may not contain your username.

Security question 3

Select a security question from the options included in the drop-down menu.

Security answer 3

Your answer may not contain your username.

Submit

4. Click **Submit**. Users are re-directed to the *Home* screen.

Creating Additional Local Administrators

Creating additional Local Administrators is a two-step process. First, a Local Administrator must give the user the Role that has access to the System Administration features. Second, a Local Administrator must give the user Local Administrator privileges in the System Administration screen.

Selecting a Local Administrator Role

As stated in the section “Adding Users”, a role must be selected when creating users. For Local Administration users, the Role Name is “Provider – Local Administrator”. Proceed with creating the Local Administrator account like you would any other User utilizing the Provider Portal.

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Giving Local Administrator Privileges

A user's account can only be granted Local Administrator privileges after it has been created. To modify the users access, follow these steps:

1. Hover over **Administration**, then click **System Admin** from the top navigation menu (see figure 15).
2. In the *User Maintenance* screen find the user who should be granted Local Administrator privileges and click their **Name** link

Figure 21: User Maintenance Screen

User Maintenance

| User Name | Office Security | Company Name | Company ID Number | User ID | Last Login | Validated Through | User Status |
|-------------|-----------------|--------------|-------------------|---------------|------------|-------------------|-------------|
| Smith, Jane | Provider User | Test Company | 123456 | JaneSmith1234 | 07/27/2022 | 7/26/2023 | Confirme |

3. Once on the *User Information* screen, put a checkmark in the box next to **Local Administrator**.
4. Doing this will expand the screen to include the **Office Information**.
5. Fill out the Office Information section, then click the **Submit** button.

Figure 21: Local Administration section

Local Administrator:

Office Address

City

State Zip

Organization Name

Submit

Indicates required field

User Role Maintenance