



Affinity Provider Portal Training Manual

Affinity Provider Portal

Security Access

The provider has the ability to add users from their office to gain access to their information. The role assigned to the user will determine the level of permission for the user.

Permissions	USER ROLES SET					
	Manager / Administrator	Clinical	Office Staff	Billing Specialist	Quality Quality Manager, Care Coordinator	Share Savings Financial Perspective
Provider Profile						
View Provider Profile	X	X	X	X	X	X
Edit Provider Profile	X	-	-	-	-	-
View Staff User Profile (Self)	X	X	X	X	X	X
Edit Staff User Profile(Self)	X	X	X	X	X	X
Member Verification						
Eligibility Inquiry	X	X	X	X	X	-
Claims						
Claims Inquiry	X	X	X	X	-	-
Medical Authorization						
Authorization Inquiry	X	X	X	X	-	-
Authorization Submission	X	X	X	-	-	-
Find a Doctor						
Provider Search	X	X	X	X	-	-
Resources						
View Resources	X	X	X	X	-	X
Announcements						
View Announcements	X	X	X	X	-	X
Add Announcements	-	-	-	-	-	-
Edit Announcements	-	-	-	-	-	-
Reports						
Panel Reports	X	X	X	X	X	X
View Operational Reports (Shared Savings)	X	X	-	-	X	X
Add Operational Reports (Shared Savings)	-	-	-	-	-	-
Edit Operational Reports (Shared Savings)	-	-	-	-	-	-
Alerts	X	X	-	-	X	-
View Population Health Analytic Dashboard (3M Treo)	X	X	X	-	X	X
Quality Incentive / GAP in Care Report Card	X	X	-	-	X	X
Security Application (Security Access)						
View Users	X	-	-	-	-	-
Add Users	X	-	-	-	-	-
Delete Users	X	-	-	-	-	-

Note: The Quality (Quality Manager, Care Coordinator) and Share Savings Financial Perspective roles can only be assigned to Strategic Alliance Partners providers.

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Search User Function

The provider and/or office manager have the capability to create and search for users associated with provider login.



Search User

The user must enter the following information:

1. First Name
2. Last Name
3. Email Address
4. User Name
5. Phone Number
6. Click "Search" and user is taken to search user results

Search Users

Please enter any one of the fields below and click "Search"

User Name <input type="text"/>	User Role <All> <input type="text"/> 
First Name <input type="text"/>	Last Name <input type="text"/>
Phone Number <input type="text" value="#####"/>	Date of Birth MM/DD/YYYY 

Search

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Search User Results Page

The user provider and/or office manager have the capability to search for users associated with the provider login.

The user is then presented with the following information:

1. First Name
2. Last Name
3. User Name
4. Tel Number
5. User Active – “Active” or “Inactive”
6. Account Locked – “Yes” or “No”

Control Buttons allow the user to do the following functions:

1. Reset Password – option allows the account to be unlocked and permit the end user to reset their password via forgot pin option.
2. Edit User – allows the user to edit the registration profile of the office staff (i.e changing roles from billing specialist to Clinical)
3. Delete User – allows the user to delete the record selected
4. Back to User Search – allows the user to return to “Search Users” page

Note: Control buttons are only presented to providers and office manager/administrator

[Search Users](#) [Create Staff User](#)

Security Access

Search User Results

	First Name	Last Name	User Name	User Role	Tel Number	User Active	Account Locked		
<input type="checkbox"/>	test	test	CLINICAL1	CLINICAL	111-111-1111	Active	No	Reset Password	Edit User
<input type="checkbox"/>	test	test	STAFF1	CLINICAL, OFFICESTAFF, BILLINGSPECIALIST	111-222-1111	Active	No	Reset Password	Edit User

[Delete User](#) [Back to User Search](#)

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Create User

This page is utilized to create access for staff user to the professional/group/ancillary provider's information via the website.

The user must enter the following information:

1. First Name
2. Last Name
3. Email Address
4. User Name
5. "Check Availability" allows user to confirm if user name entered is available
6. Phone Number
7. Select a User Role (applicable to the office staff user)
8. Click on "Create User" to complete registration

Note: The user can click on "Cancel" to return back to the previous screen.

**The office registration role set of Quality and Share Savings is only available for Strategic Alliance Providers (SAP).

The screenshot shows a web form titled "Security Access" with a sub-header "Create Staff User". The form contains several input fields and a list of user roles. The fields are: "Provider Name*", "User Name*" (with a "Check Availability" link), "First Name*", "Last Name*", "Email Address*", and "Phone Number*" (with a masked input field). Below these is a "User Roles*" section with checkboxes for "Manager", "Clinincal", "Office Staff", "Billing Specialist", "Quality", and "Share Savings". At the bottom are "Create User" and "Cancel" buttons.

Security Access

Create Staff User

Fields marked with an * are required

Provider Name* User Name* Check Availability

First Name* Last Name*

Email Address* Phone Number*

User Roles*

- Manager
- Clinincal
- Office Staff
- Billing Specialist
- Quality
- Share Savings

Create User Cancel

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Edit Users

This page is utilized to edit the user role. The user must utilize the “Search User” function to find the user profile which requires editing.

The user must enter the following information:

1. Username
2. Status – allows the user to disable or enable an account
3. First Name
4. Last Name
5. Phone Number
6. Date of Birth
7. Select User Role
8. Click on “Submit” to complete editing of the user profile

Note: The user can click on “Cancel” to return back to the previous screen.

Note: Screen mockup of Provider


Edit User Profile

User Name <input type="text" value="Jsmith99"/>	User Role * <input type="text" value="Select"/>
First Name * <input type="text" value="John"/>	Last Name * <input type="text" value="Smith"/>
Phone Number <input type="text" value="718-555-9876"/>	Date of Birth <input type="text" value="12/14/1975"/>
Current Email <input type="text" value="pgarg@affinityplan.org"/>	
New Email * <input type="text"/>	Confirm Email * <input type="text"/>
Security Question 1 <input type="text" value="Name of town you were born"/>	ANSWER 1 <input type="text"/>
Security Question 2 <input type="text" value="Name of Elementary School"/>	ANSWER 2 <input type="text"/>

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Note : Screen mockup is for SAP Providers-Office Staff

Edit User Profile

User Name* <input type="text"/>	Status <input checked="" type="radio"/> Enabled <input type="radio"/> Disabled
First Name* <input type="text"/>	Last Name* <input type="text"/>
Phone Number* <input type="text" value="#####"/>	Date of Birth* <input type="text" value="MM/DD/YYYY"/> 
Selected Role(s)* <input type="checkbox"/> Manager <input type="checkbox"/> Clinical <input type="checkbox"/> Office Staff <input type="checkbox"/> Billing Specialist <input type="checkbox"/> Quality <input type="checkbox"/> Share Savings	Email Address <input type="text"/>