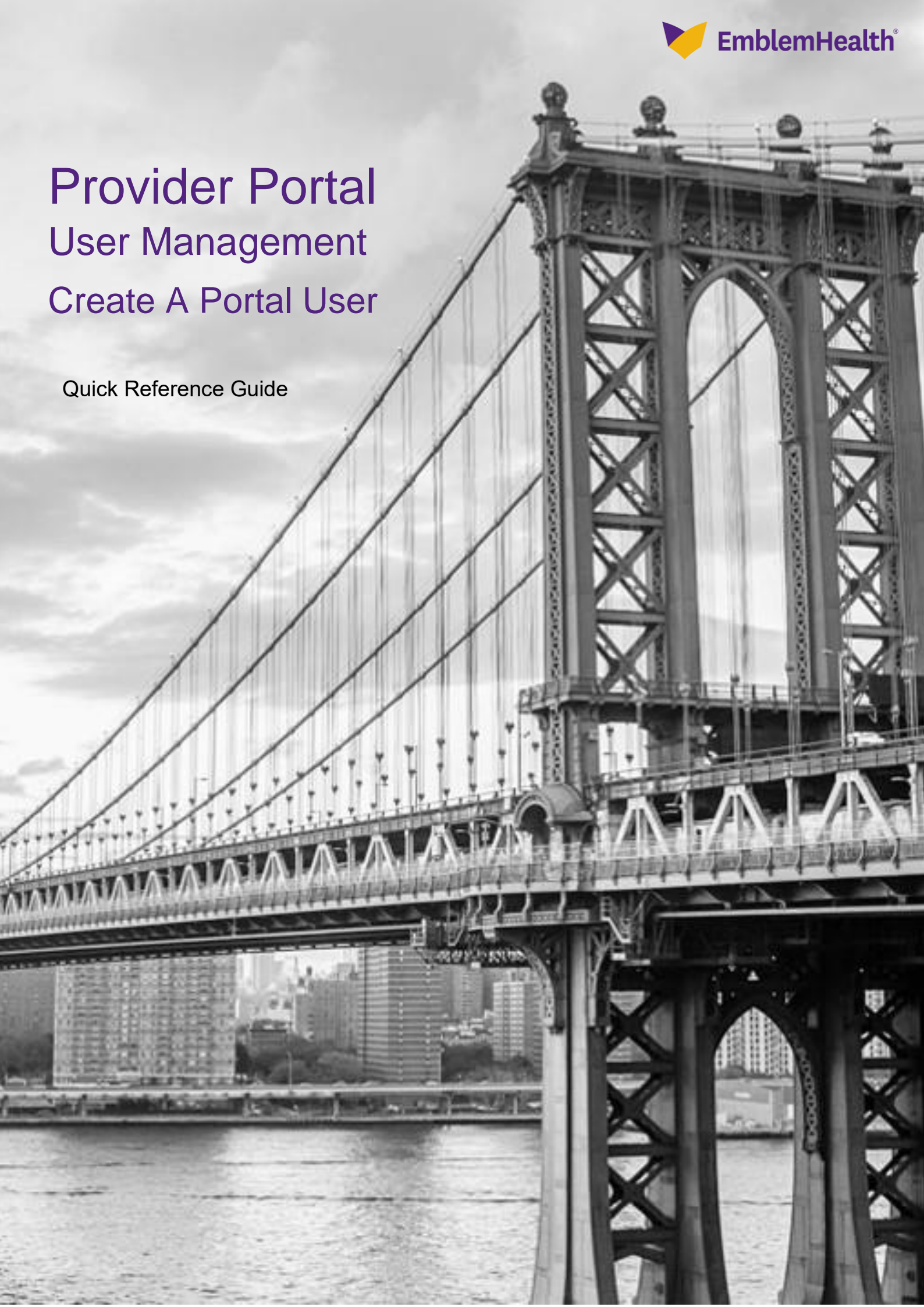


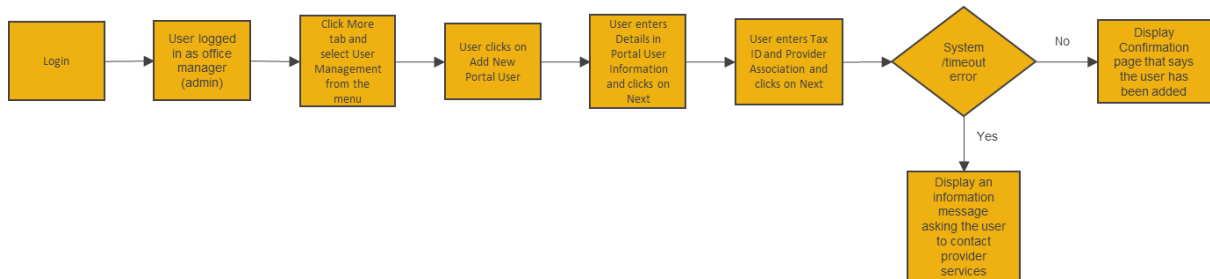
# Provider Portal User Management Create A Portal User

Quick Reference Guide



# Provider Portal – Create A Portal User

This Quick Reference Guide (QRG) will provide an overview of how to create a Portal User.



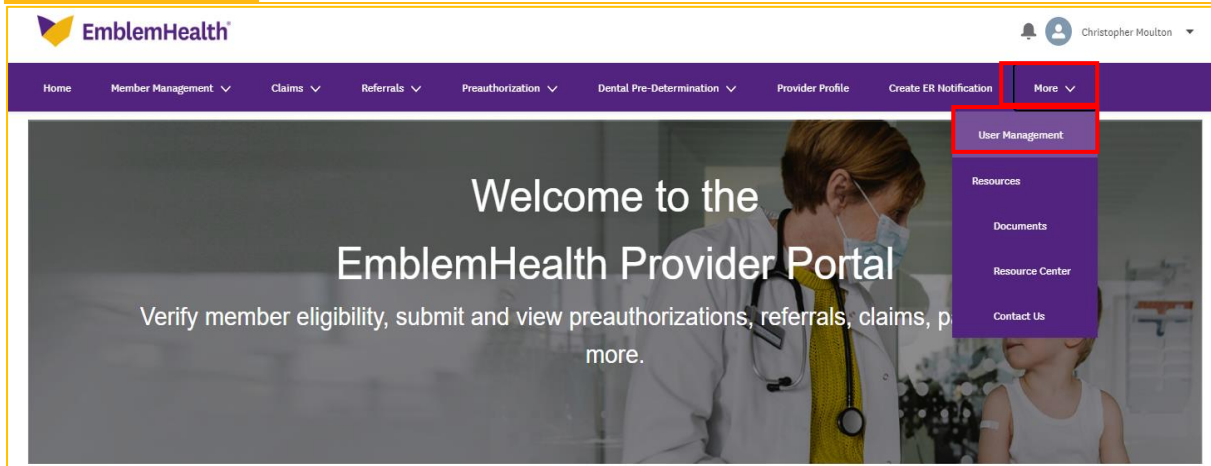
Let us look at the steps in detail for creating a Portal User.

**Purpose: Create a new user.**



**Step 1:**

1. From the EmblemHealth **Homepage**, select the **More** drop-down.
2. From the drop-down list, click **User Management**.



# Provider Portal – Create A Portal User



Step 2:

- The **User Management** page displays.
1. Click **Add New Portal User**.

## User Management

Before adding a new user, please check if the user you want to add already exists.

Add New Portal User

Search By\*  
First Name



First Name\*



Reset Search

Search

# Provider Portal – Create A Portal User



Step 3:

- The **User Information** page displays.
1. Enter required information.
    - **First Name** and **Last Name**
    - **Email** and **Verify Email**
    - **User Name** (this is the email address)
    - **Street**
  2. Click **Next**.

Portal User Information

CREATE PORTAL USER

## User Information

Complete the details below and click Next to continue. All fields with an asterisk \* are required.

<input type="text" value="First Name *"/>	<input type="text" value="Middle Name"/>	<input type="text" value="Last Name *"/>
<input type="text" value="Email *"/>	<input type="text" value="Verify Email *"/>	
<p>Please enter user name in a email format.</p>		
<input type="text" value="User Name *"/>		
<input type="text" value="Mobile"/>	<input type="text" value="Office Phone Number"/>	
<input type="text" value="Fax"/>		
<input type="text" value="Street *"/>		
<input type="text" value="City"/>	<input type="text" value="State/Province"/>	
<input type="text" value="Zip/Postal Code"/>	<input type="text" value="Country"/>	

# Provider Portal – Create A Portal User



Step 4:

The **Tax ID and Provider Association** page displays.

1. Select **Tax ID** from the drop down.
2. Select **User Type** from the drop down.

Tax ID and Provider Association

CREATE PORTAL USER

## Tax ID and Provider Association

Complete the details below and click Next to continue. All fields with an asterisk \* are required.

Select Tax ID \*

Select User Type \*

- Office Manager
- Clinical Staff
- Billing Staff
- Appointment Scheduler
- Eligibility Checker
- Practice Maintenance

Previous

Cancel

# Provider Portal – Create A Portal User



## Step 5:

Access to Tax ID question displays.

1. Select **Yes** or **No**.

\*\* If **Yes** is selected, then click **Submit** to complete.

\*\* If **No** is selected, then continue below.

## Tax ID and Provider Association

Complete the details below and click Next to continue. All fields with an asterisk \* are required.

Select Tax ID \*

190278378 - Sean Clarke



Select User Type \*

Clinical Staff



Do you want to grant this user access to all providers under this Tax ID number?

Yes  No

Selecting "Yes" will automatically allow this user to see all current providers and future providers under this Tax ID number.

This user will have access to all current providers and all future providers with this Tax ID number.

Previous

Submit

Cancel



# Provider Portal – Create A Portal User



Step 6:

1. Click **View Affiliated Providers** or **Choose a Different Tax ID**.

The screenshot shows the EmblemHealth Provider Portal interface. At the top, the logo and user name 'Lucy Livingston' are visible. A navigation bar contains links for Home, Member Management, Claims, Referrals, Preauthorization, Dental Pre-Determination, Provider Profile, and More. The main content area features a progress bar with the current step highlighted as 'Tax ID and Provider Association'. Below the progress bar, the heading 'CREATE PORTAL USER' is followed by 'Tax ID and Provider Association'. A note states: 'Complete the details below and click Next to continue. All fields with an asterisk \* are required.' The form includes two dropdown menus: 'Select Tax ID \*' with the value '190278378 - Sean Clarke' and 'Select User Type \*' with the value 'Clinical Staff'. Below these is a question: 'Do you want to grant this user access to all providers under this Tax ID number?' with radio buttons for 'Yes' and 'No' (selected). A note explains: 'Selecting "Yes" will automatically allow this user to see all current providers and future providers under this Tax ID number.' Below this is the instruction: 'Click the button below to see all affiliated providers and select at least one provider to continue.' Two buttons are present: 'View Affiliated Providers' (highlighted with a red box) and 'Choose a Different Tax ID'. At the bottom, there are 'Previous', 'Submit', and 'Cancel' buttons.

# Provider Portal – Create A Portal User



## Step 7:

1. Under **Select Providers\*** select the **Search by** drop down.
2. Click **Search**.

**CREATE PORTAL USER**

## Tax ID and Provider Association

Complete the details below and click Next to continue. All fields with an asterisk \* are required.

Select Tax ID \*  
190278378 - Sean Clarke

Select User Type \*  
Clinical Staff

Do you want to grant this user access to all providers under this Tax ID number?

Yes  No

Selecting "Yes" will automatically allow this user to see all current providers and future providers under this Tax ID number.

Click the button below to see all affiliated providers and select at least one provider to continue.

[View Affiliated Providers](#)

[Choose a Different Tax ID](#)

### Select Providers \*

Search By

[Reset Search](#) [Search](#)

[Add](#)

	Name	Address	NPI	Provider ID
<input type="checkbox"/>	Rey Shilling	564 Port House Ave., Bronx, NY 10463	176066893	100000392866
<input type="checkbox"/>	Kiana Beringer	981 North Rd., New York, NY 10033	116901688	100000155867
<input type="checkbox"/>	Branda Hippe	9 South Armstrong Court, Ridgewood, NY 11385	182366971	100000908173
<input type="checkbox"/>	Booker Wingate	481 Beechwood Ave., Brooklyn, NY 11215	156066167	100000282731
<input type="checkbox"/>	Pamela Crafton	993 Sunnyslope Dr., Bronx, NY 10473	113066231	100000399031



# Provider Portal – Create A Portal User



## Step 8:

Providers affiliated with the Tax ID display.

1. Select the check box(s) next to the Provider(s) the user may conduct business for.
2. Click **Add**.

Tax ID and Provider Association

**CREATE PORTAL USER**

### Tax ID and Provider Association

Complete the details below and click Next to continue. All fields with an asterisk \* are required.

Select Tax ID \*  
190278378 - Sean Clarke

Select User Type \*  
Clinical Staff

Do you want to grant this user access to all providers under this Tax ID number?

Yes  No

Selecting "Yes" will automatically allow this user to see all current providers and future providers under this Tax ID number.

Click the button below to see all affiliated providers and select at least one provider to continue.

[View Affiliated Providers](#)

[Choose a Different Tax ID](#)

### Select Providers \*

Search By

[Reset Search](#) [Search](#)

[Add](#)

	Name	Address	NPI	Provider ID
<input type="checkbox"/>	Rey Shilling	564 Poor House Ave., Bronx, NY 10463	176066893	100000392866
<input type="checkbox"/>	Kiana Beringer	981 North Rd., New York, NY 10033	116901688	100000155867
<input type="checkbox"/>	Branda Hippe	9 South Armstrong Court, Ridgewood, NY 11285	182366971	100000908173

# Provider Portal – Create A Portal User

Add

Name ↑	Address	NPI	Provider ID
<input type="checkbox"/> Baystate Med Educ Res Fnd	1759 Chestnut St. , Springfield, MA, 01107		100001005625
<input type="checkbox"/> Baystate Med Educ Res Fnd	Md48 Sanderson St. , Greenfield, MA, 01301		100001005626
<input checked="" type="checkbox"/> Baystate Med Educ Res Fnd	Md759 Chestnut St. , Springfield, MA, 01107		100001005627
<input checked="" type="checkbox"/> Baystate Med Educ Res Fnd	Pa759 Chestnut St. , Springfield, MA, 01107		100001005628
<input type="checkbox"/> Baystate Med Educ Res Fnd	100 Wason Ave. , Springfield, MA, 01107-1381	1487655064	100001152420
<input type="checkbox"/> Baystate Med Educ Res Fnd	10 Main St. , Florence, MA, 01062-3160	1487655064	100001152421
<input type="checkbox"/> Baystate Med Educ Res Fnd	24 State Rd. , South Deerfield, MA, 01373-9653	1487655064	100001152422
<input type="checkbox"/> Baystate Med Educ Res Fnd	30 Locust St. , Northampton, MA, 01060-2052	1487655064	100001152423
<input type="checkbox"/> Baystate Med Educ Res Fnd	3111 Do325b King St. , Northampton, MA, 01060	1487655064	100001152424
<input type="checkbox"/> Baystate Med Educ Res Fnd	3258 King St. . Northampton. MA. 01060	1487655064	100001152425

Total Records: 159 < Showing 1 - 159 >

# Provider Portal – Create A Portal User



## Step 9:

**Selected Providers** display in a new list.

1. Click **Submit**.

<input type="checkbox"/>	Cliff Gilden	73 Stonybrook St., Brooklyn, NY 11230	158061297	100000303873
<input type="checkbox"/>	Maria Potter	7890 North Pin Oak St., Ithaca, NY 14850	126766815	100000392866
<input type="checkbox"/>	Tawana Brown	781 Prairie Drive, North Tonawanda, NY 14120	145061703	100000135892
<input type="checkbox"/>	John Anderson	726 Kent Avenue, Brooklyn, NY 11211	191034121	100000672391
<input type="checkbox"/>	Cecil Jacobson	726 Kent Avenue, Brooklyn, NY 11211	196136817	100000452878

Total Records: 150

< Showing 1 - 150 >

### Select Providers \*

Remove

Name	Address	NPI	Provider ID	
<input type="checkbox"/>	Rey Shilling	564 Poor House Ave., Bronx, NY 10463	176066893	100000392866
<input type="checkbox"/>	Kiana Beringer	981 North Rd., New York, NY 10033	116901688	100000155867
<input type="checkbox"/>	Bocker Wingate	481 Beechwood Ave., Brooklyn, NY 11215	156066167	100000282731
<input type="checkbox"/>	Pamela Crafton	993 Sunnyslope Dr., Bronx, NY 10473	113066231	100000399031

Total Records: 4

Previous

Submit

Cancel

# Provider Portal – Create A Portal User



Step 10:

1. **Confirmation** page displays.
2. Click **Done**.



## Confirmation

The Portal User you have just added will be receiving an email with registration information. If the Portal User can't find the email, have them look in their Spam folders as some messages may get filtered there. Please have them click on the Activation Link. Note that this link expires in 7 days.

Done

Thank  
You

