Employer eServices® Manage Access eLearning

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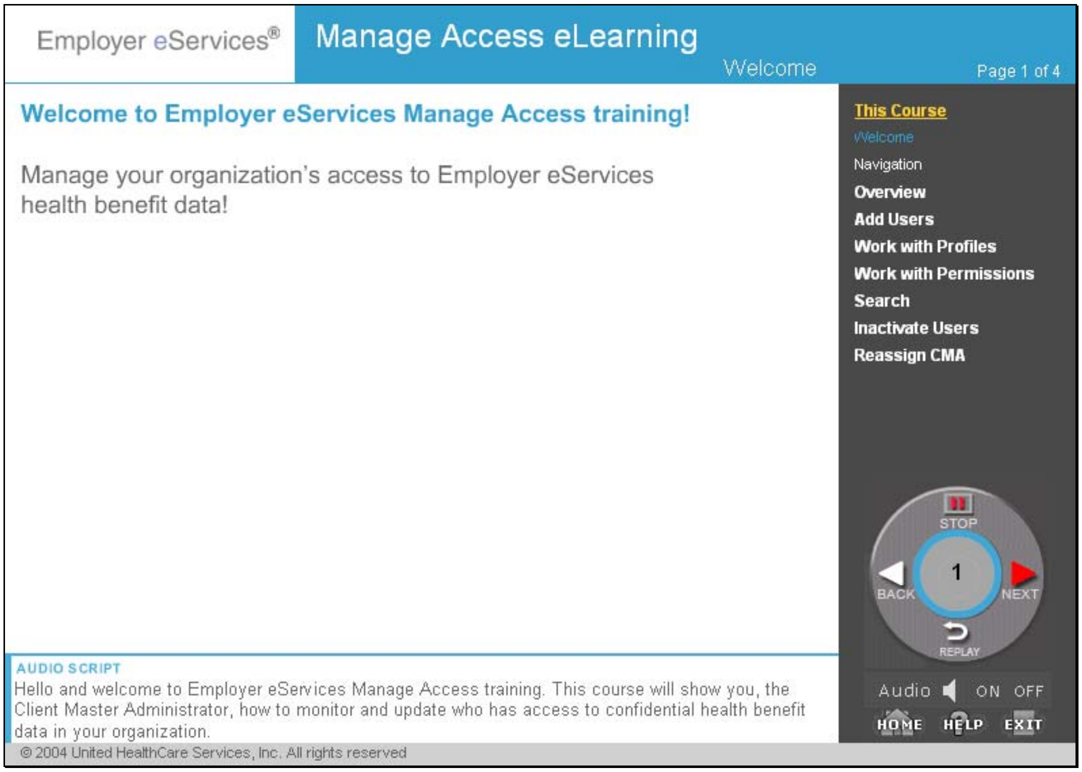
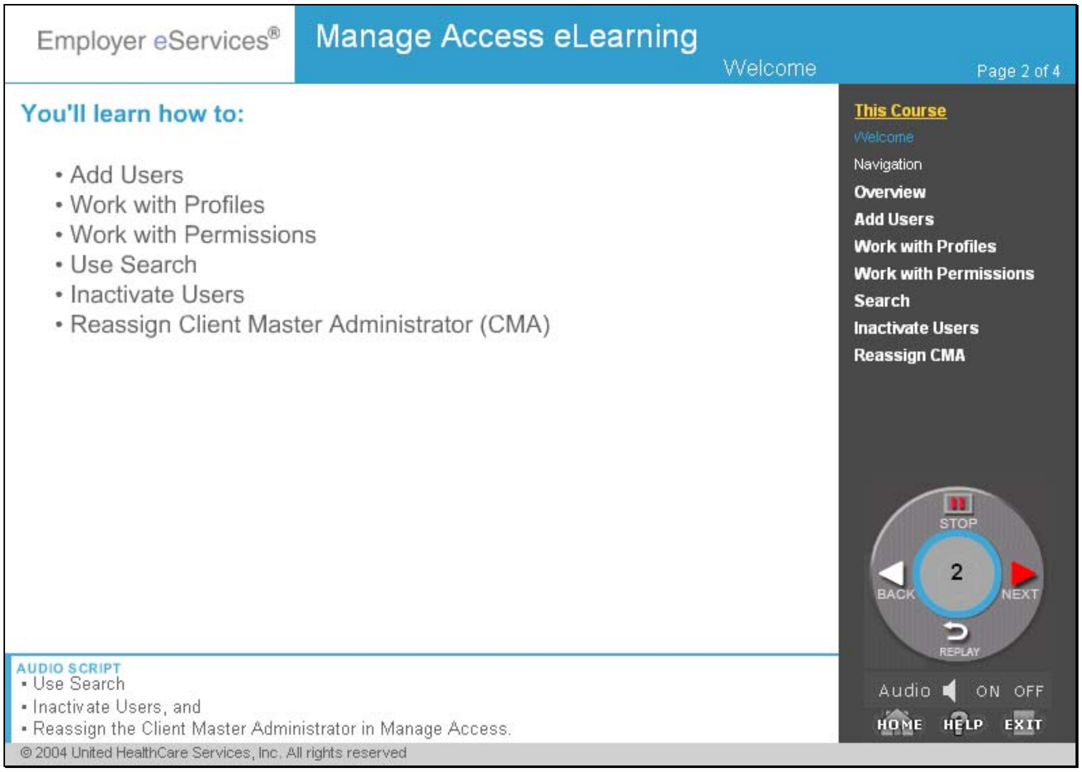


Hello and welcome to Employer eServices Manage Access training. This course will show you, the Client Master Administer, how to monitor and update who has access to confidential health benefit data in your organization.

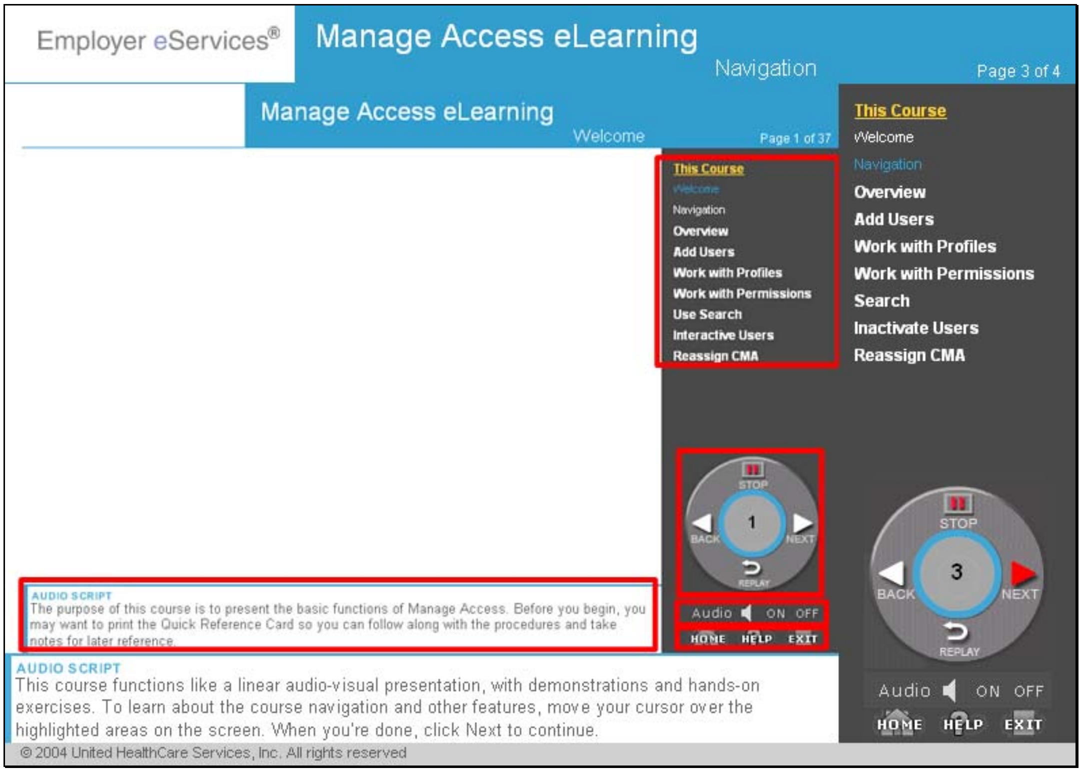
The purpose of this course is to present the basic functions of Manage Access. Before you begin, you may want to print the Quick Reference Card, located in the course Help, so you can follow along with the procedures and take notes for later reference.

For more detailed information, refer to Online Help; we'll show you how to access this tool later. Or you can find out more about other training tools on the Employer eServices Training Information Home Page.

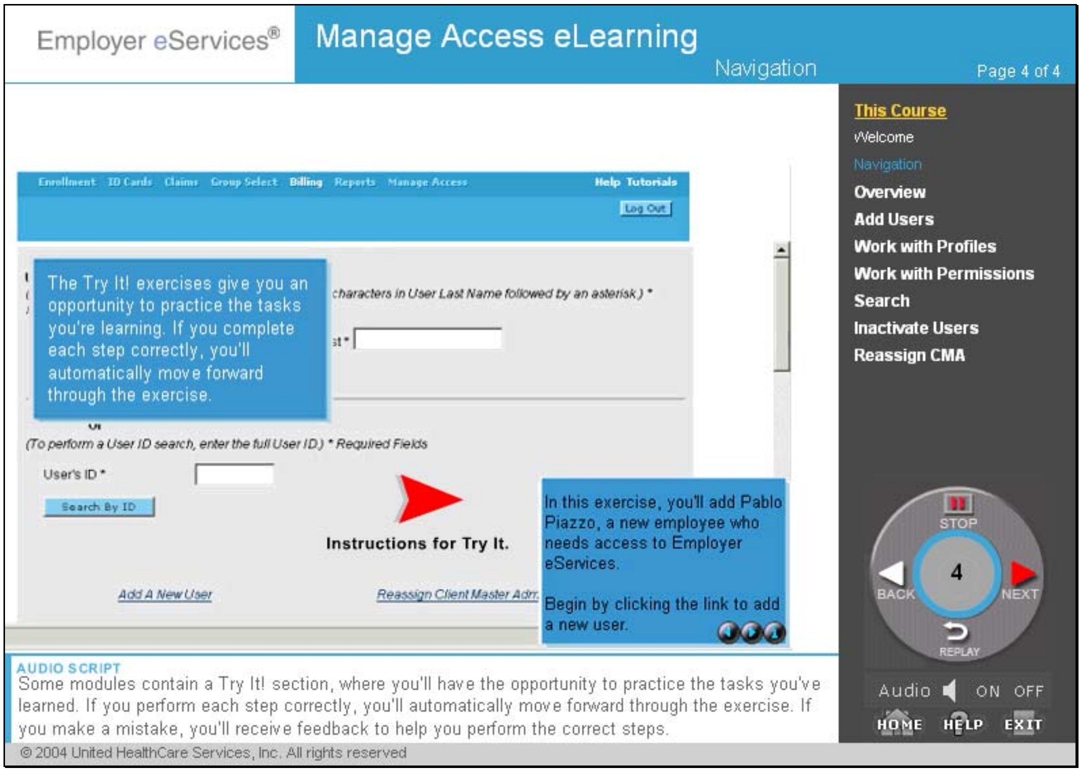


By the time you finish the course, you'll know how to:

- Add Users,
- Work with Profiles and Permissions,
- Use Search,
- Inactivate Users, and
- Reassign the Client Master Administrator in Manage Access



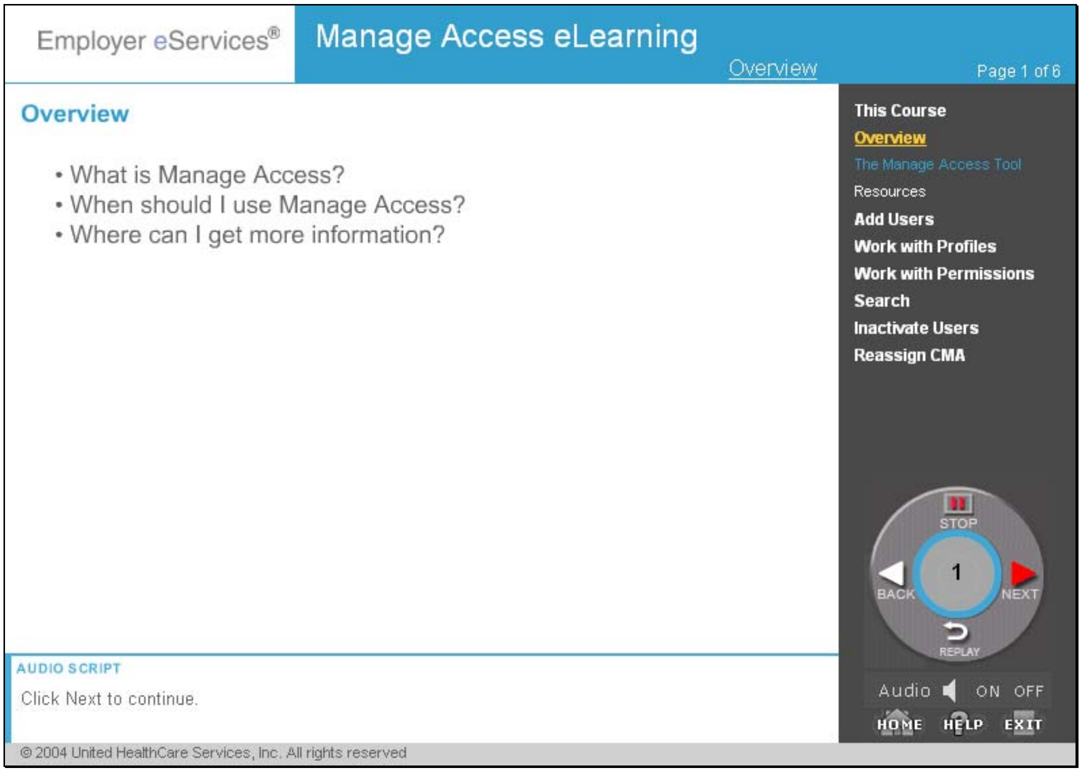
This course functions like a linear audio-visual presentation, with demonstration and hands-on exercises. To learn about the course navigation and other features, move your cursor over the highlighted areas on the screen. When you're done, click Next to continue.



Some modules contain a Try It! section, where you'll have the opportunity to practice the tasks you've learned. If you perform each step correctly, you'll automatically move forward through the exercise. If you make a mistake, you'll receive feedback to help you perform the correct steps.

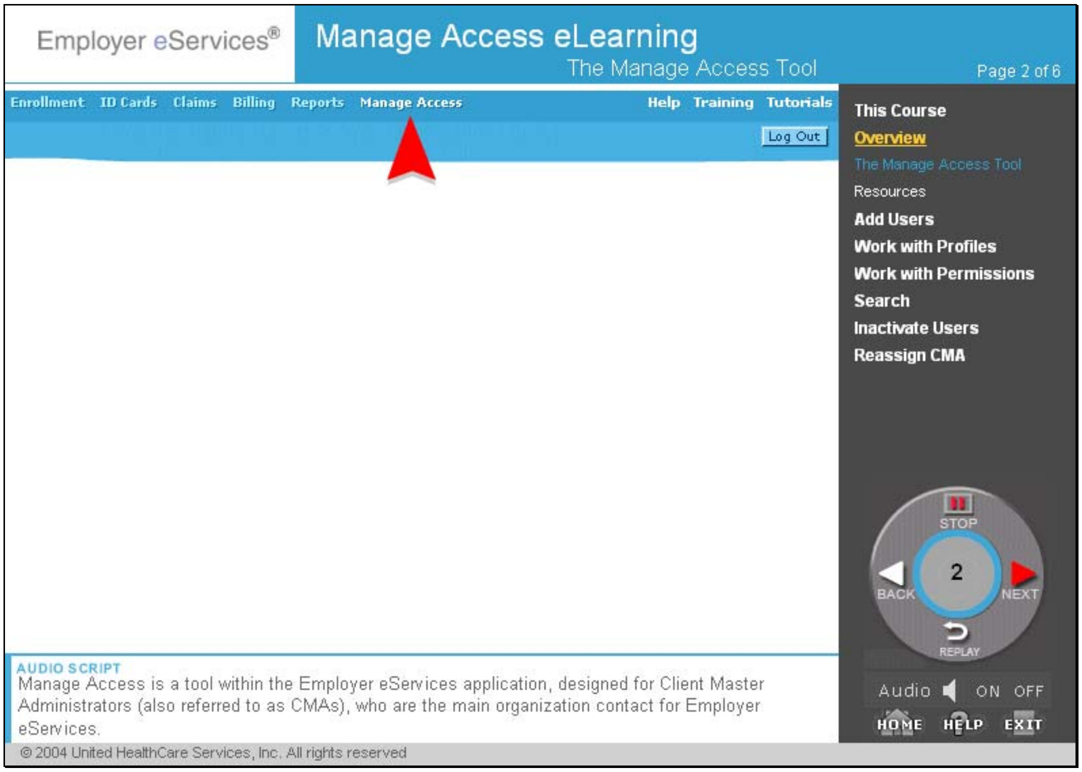
It only takes a couple minutes to complete the Try It!s and by doing so, you'll be able to work more efficiently when using Employer eServices Manage Access.

Overview

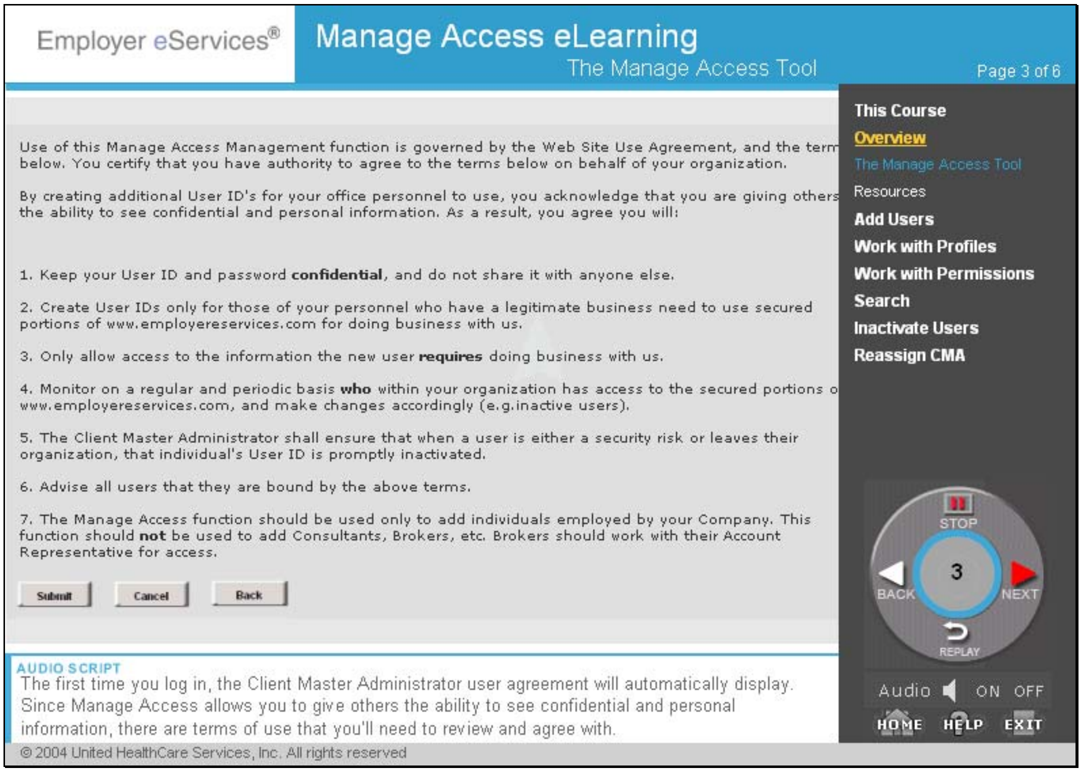


In this module, you'll find out

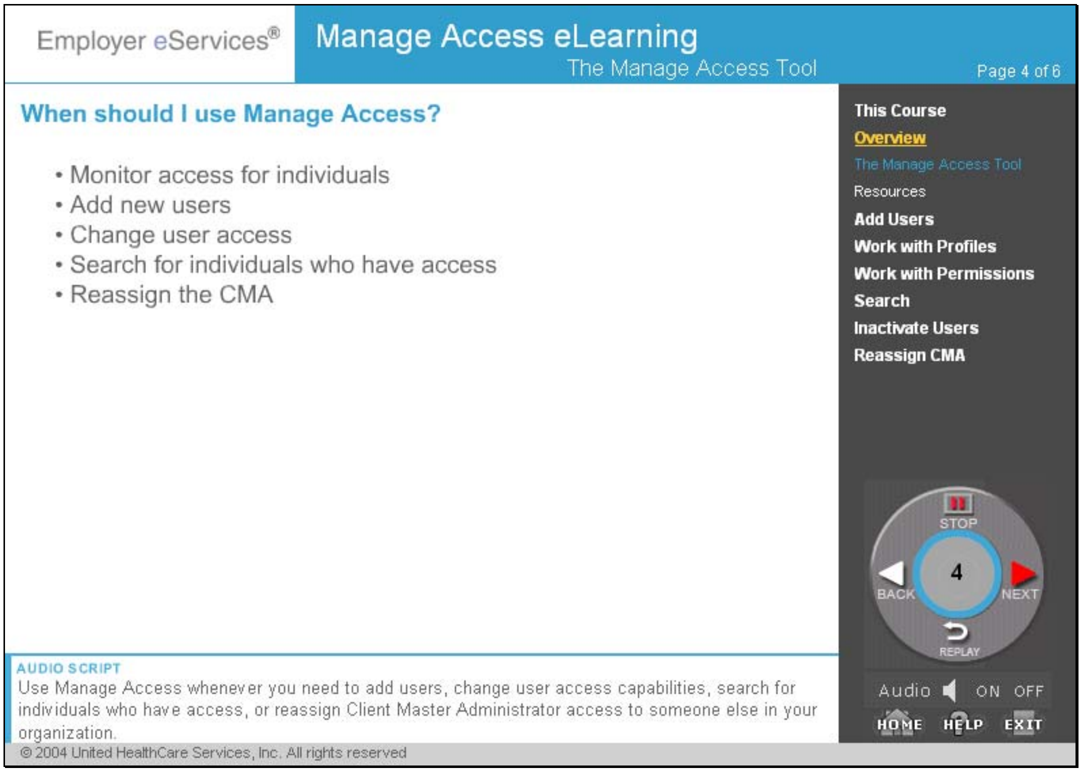
- What Employer eServices Manage Access is,
- When you should use it, and
- Where you can get more information after finishing this course.



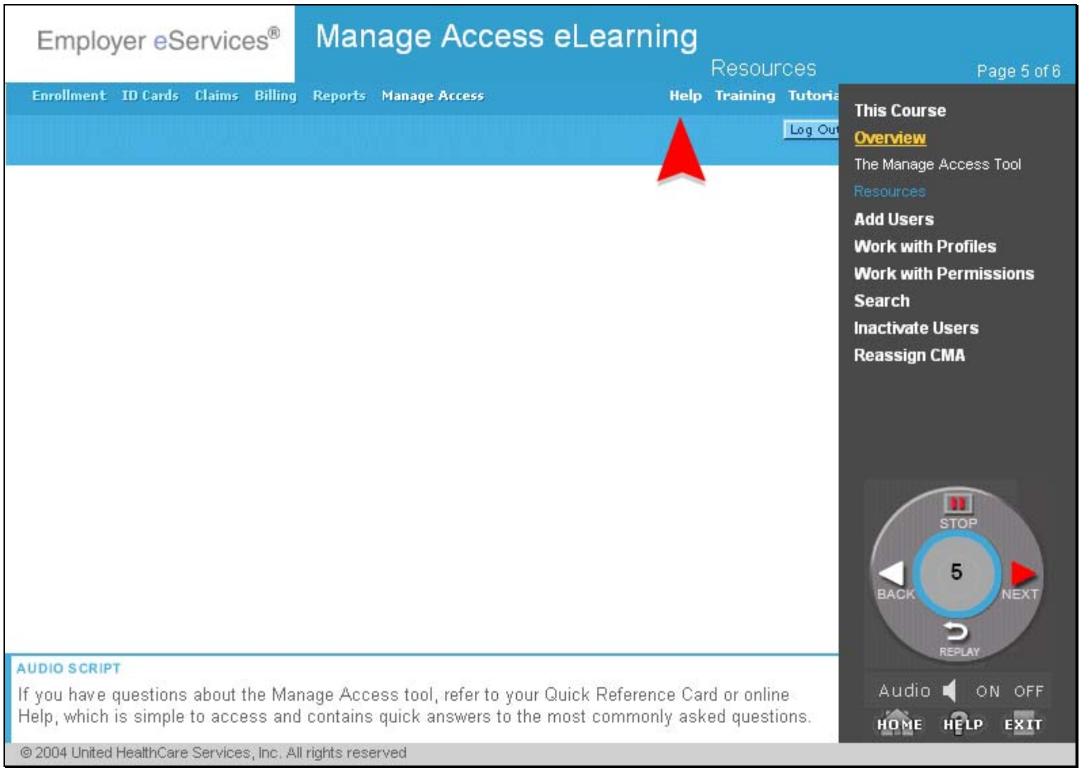
Manage Access is a tool within the Employer eServices application, designed for Client Master Administrators (also referred to as CMAs), who are the main organization contact for Employer eServices. Manage Access allows you, the CMA, to manage your Employer eServices users by adding or inactivating them and assigning functional permissions, such as eligibility, billing, and reporting access.



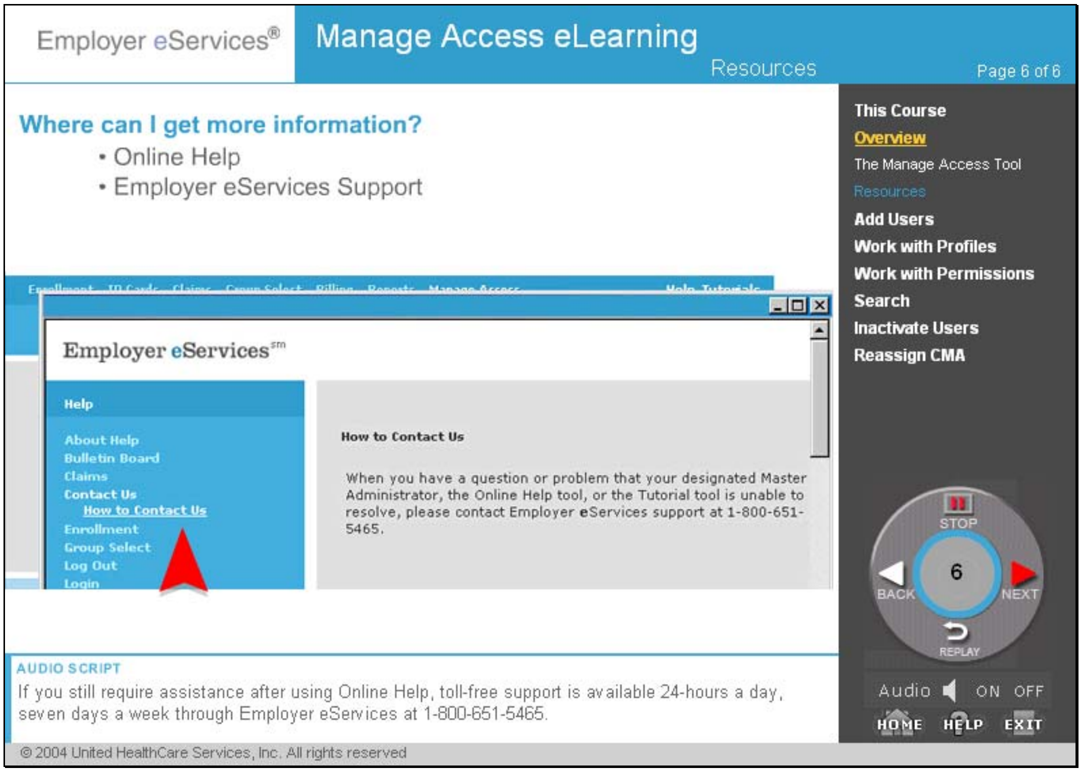
The first time you log in, the Client Master Administrator user agreement will automatically display. Since Manage Access allows you to give others the ability to see confidential and personal information, there are terms of use that you'll need to review and agree with. Once you click Submit, this screen will not display again unless you click the View User Agreement link within Manage Access.



As a Client Master Administrator, you should regularly monitor who in your organization has access to the confidential data available in Employer eServices. Use Manage Access whenever you need to add users, change user access capabilities, search for individuals who have access, or reassign Client Master Administrator access to someone else in your organization.

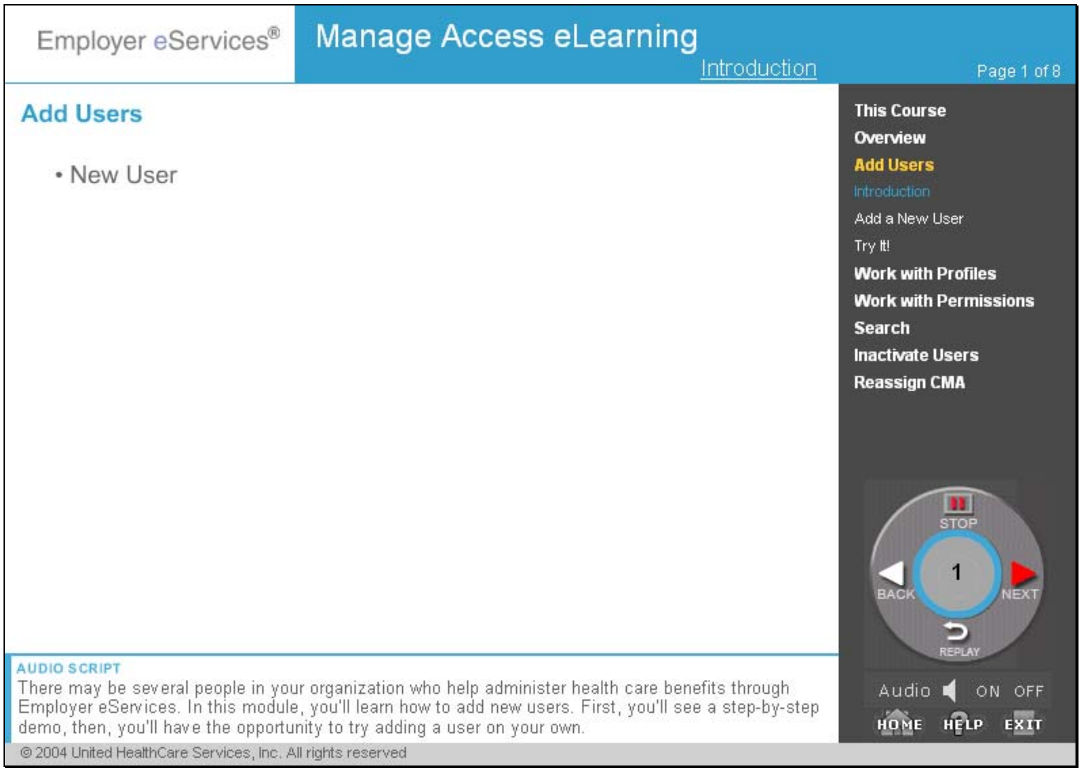


If you have questions about the Manage Access tool, refer to your Quick Reference Card or online Help, which is simple to access and contains quick answers to the most commonly asked questions.

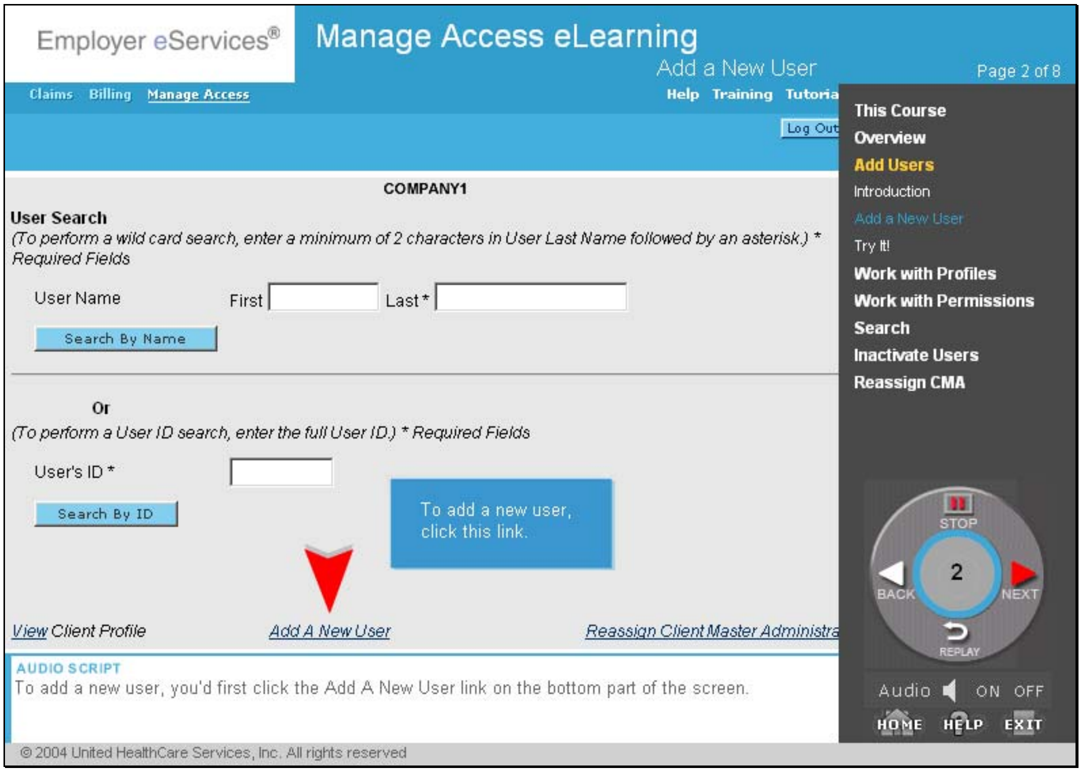


If you still require assistance after using Online Help, toll-free support is available 24-hours a day, seven days a week through Employer eServices at 1-800-651-5465.

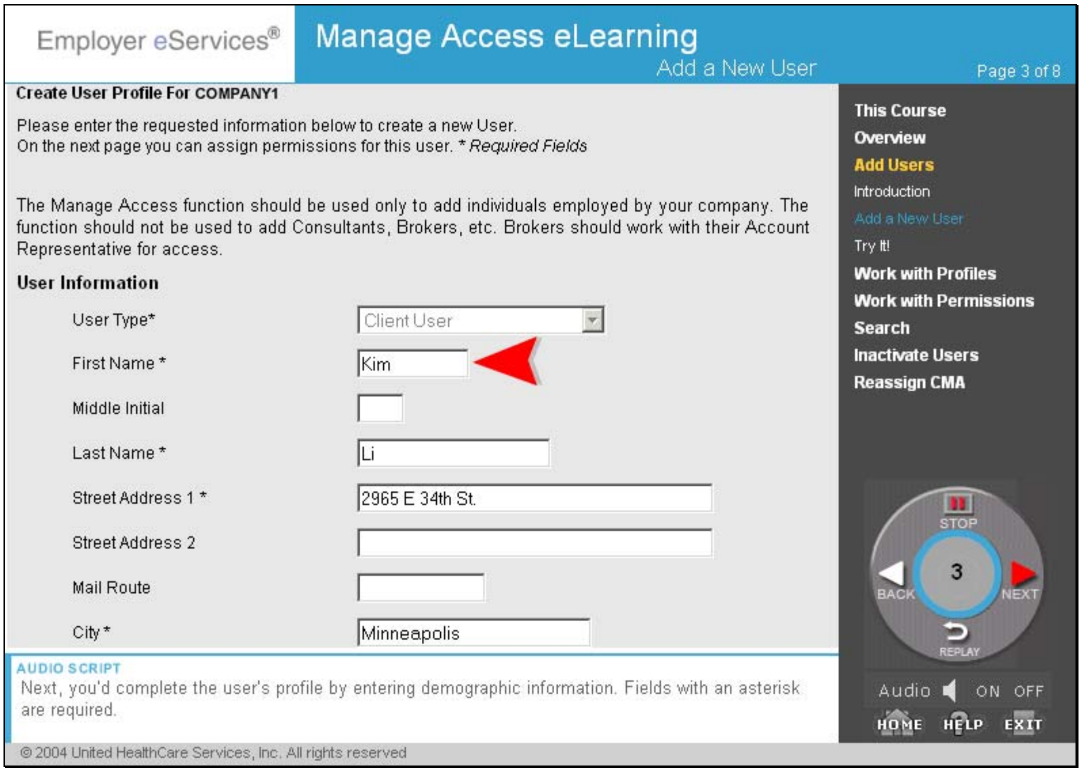
Add Users



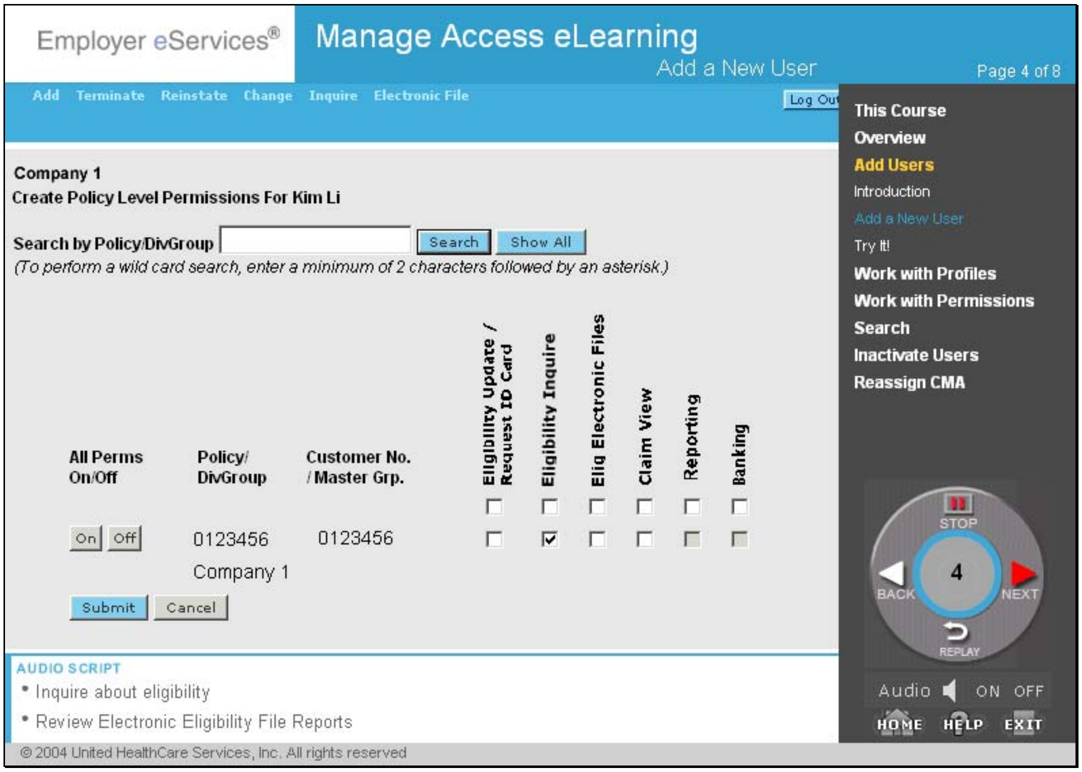
There may be several people in your organization who help administer health care benefits through Employer eServices. In this module, you'll learn how to add new users. First, you'll see a step-by-step demo, then, you'll have the opportunity to try adding a user on your own.



To add a new user, you'd first click the Add A New User link on the bottom part of the screen.



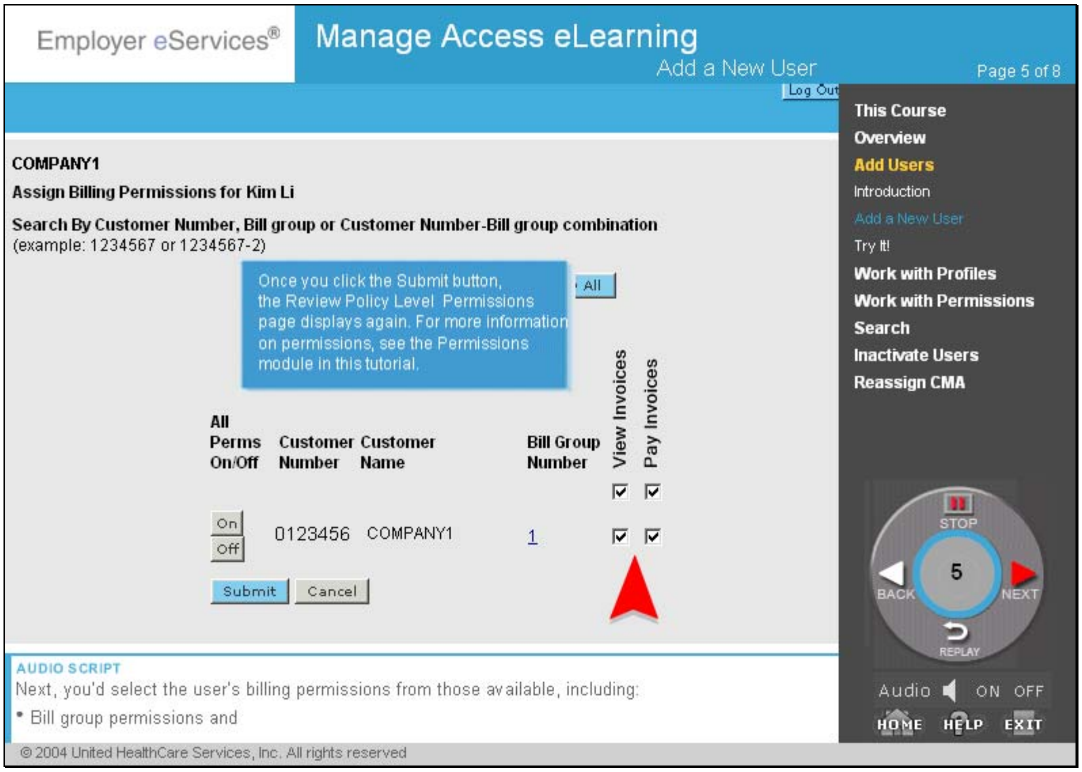
Next, you'd complete the user's profile by entering demographic information. Fields with an asterisk are required.



Next, you'd select the user's permissions from those available, including:

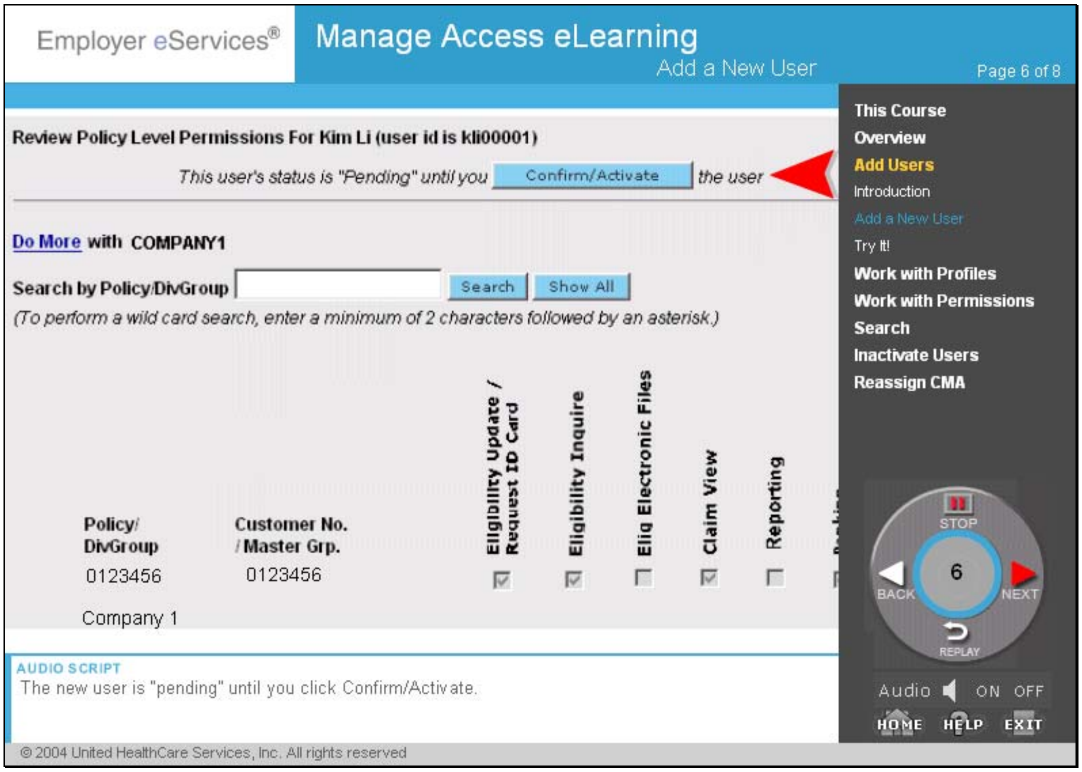
- Update eligibility and request ID cards,
- Inquire about eligibility,
- Review Electronic Eligibility File Reports
- View claims,
- Run reports and
- View banking reports

Then, you would click submit to assign billing permissions.

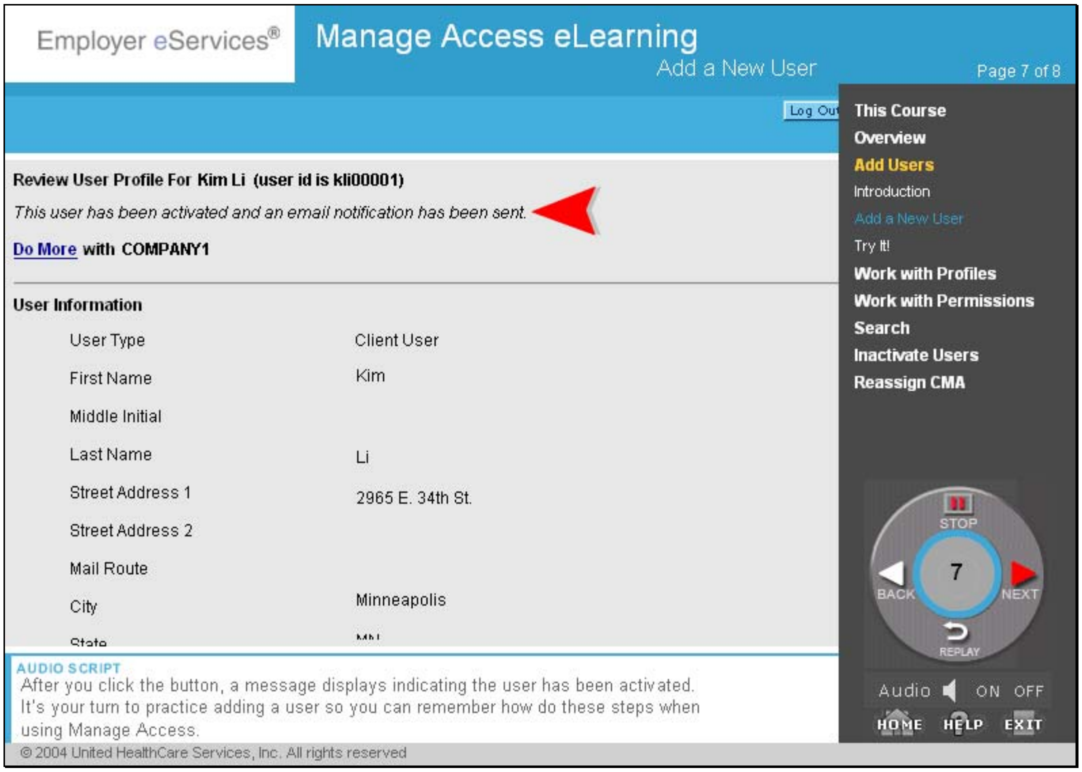


Next, you'd select the user's billing permissions from those available, including:

- Bill group permissions and
- Invoice permissions

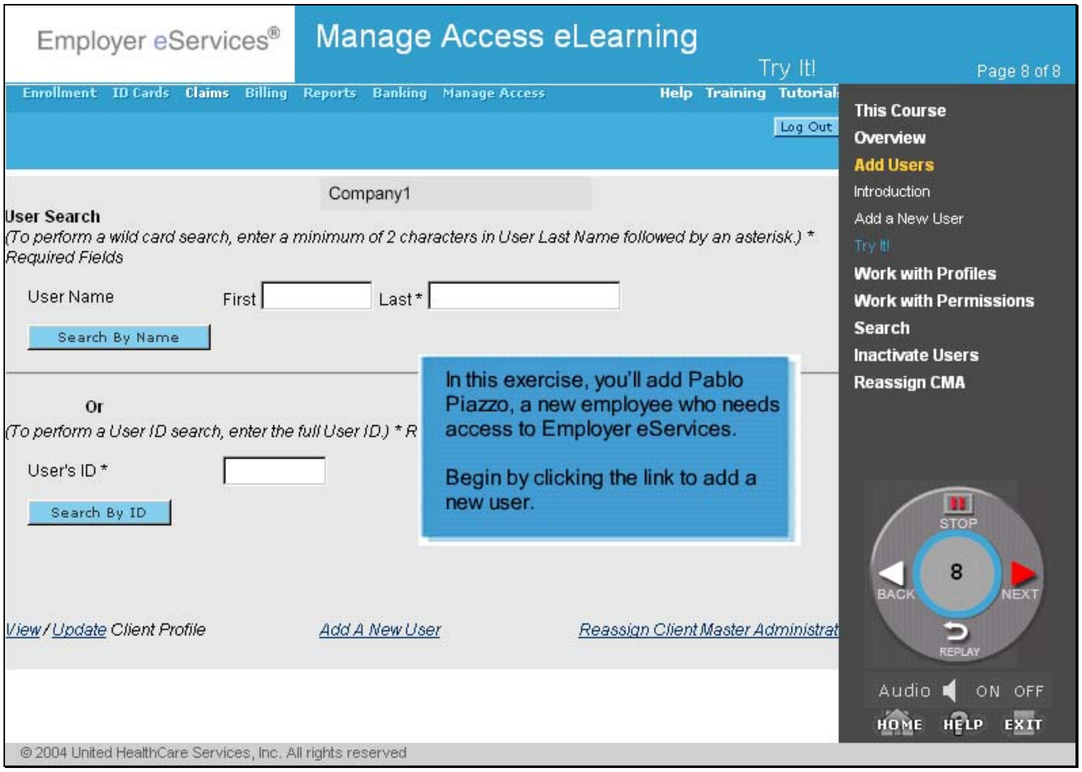


The new user is “pending” until you click Confirm/Activate.



After you click the button, a message displays indicating the user has been activated.

It's your turn to practice adding a user so you can remember how do these steps when using Manage Access.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Try It!
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Enrollment ID Cards Claims Billing Reports Banking Manage Access Help Training Tutorials
Log Out
Company1
User Search
(To perform a wild card search, enter a minimum of 2 characters in User Last Name followed by an asterisk.) * Required Fields
User Name First Last *
Search By Name
Or
(To perform a User ID search, enter the full User ID.) * R
User's ID *
Search By ID
In this exercise, you'll add Pablo Piazzo, a new employee who needs access to Employer eServices.
Begin by clicking the link to add a new user.
View / Update Client Profile
Add A New User
Reassign Client Master Administrat
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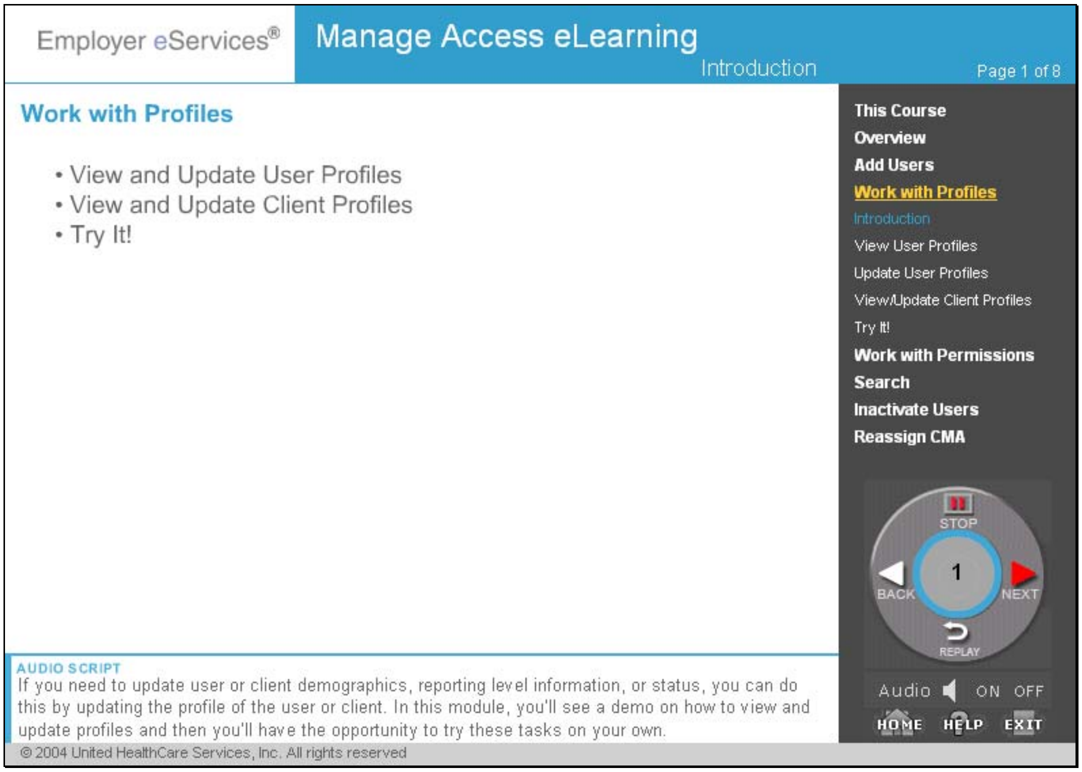
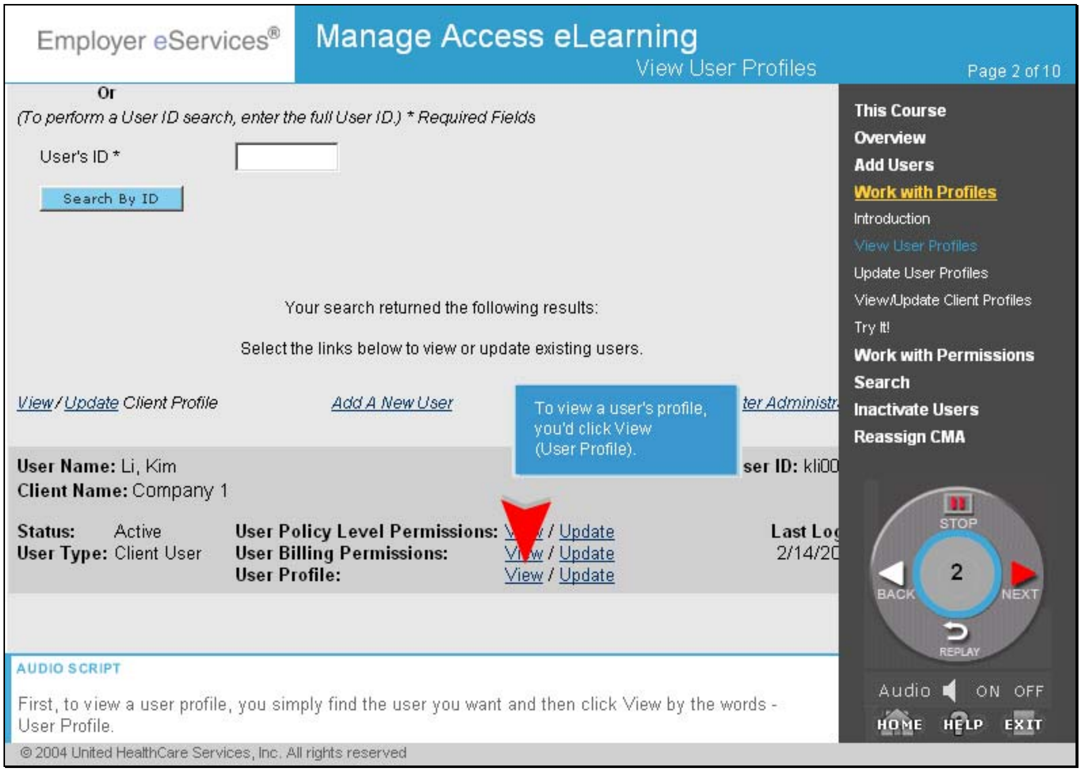
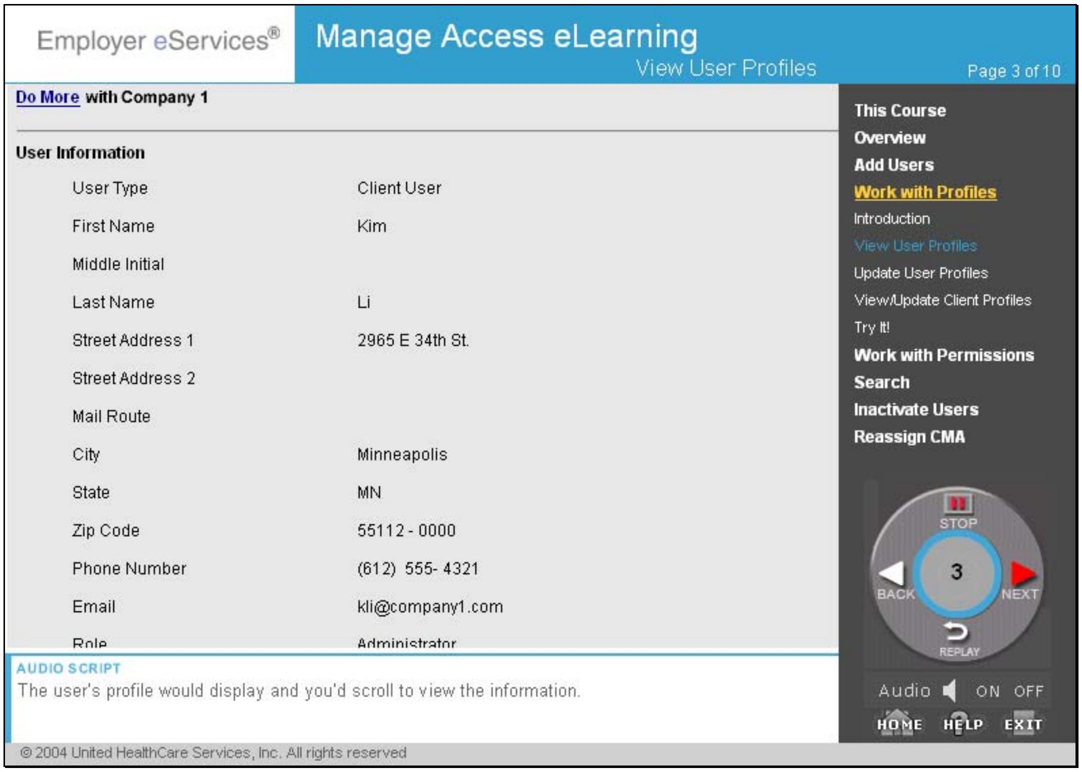
Work with Profiles



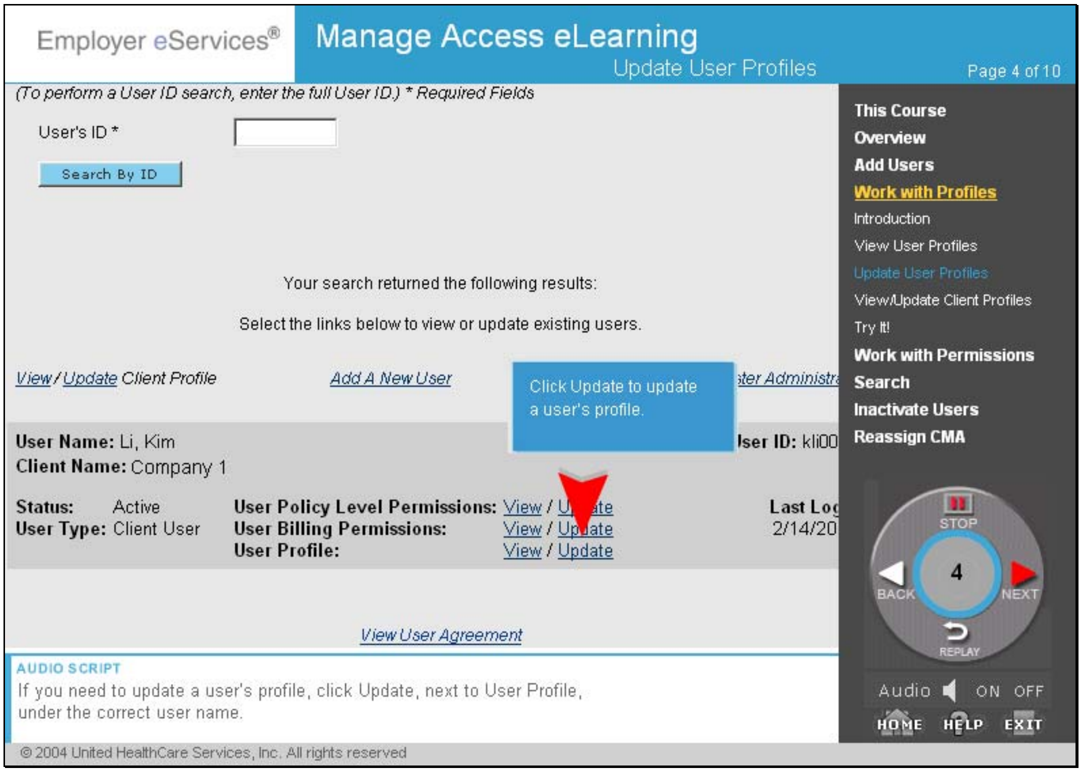
If you need to update user or client demographics, reporting level information, or status, you can do this by updating the profile of the user or client. In this module, you'll see a demo on how to view and update profiles and then you'll have the opportunity to try these tasks on your own.



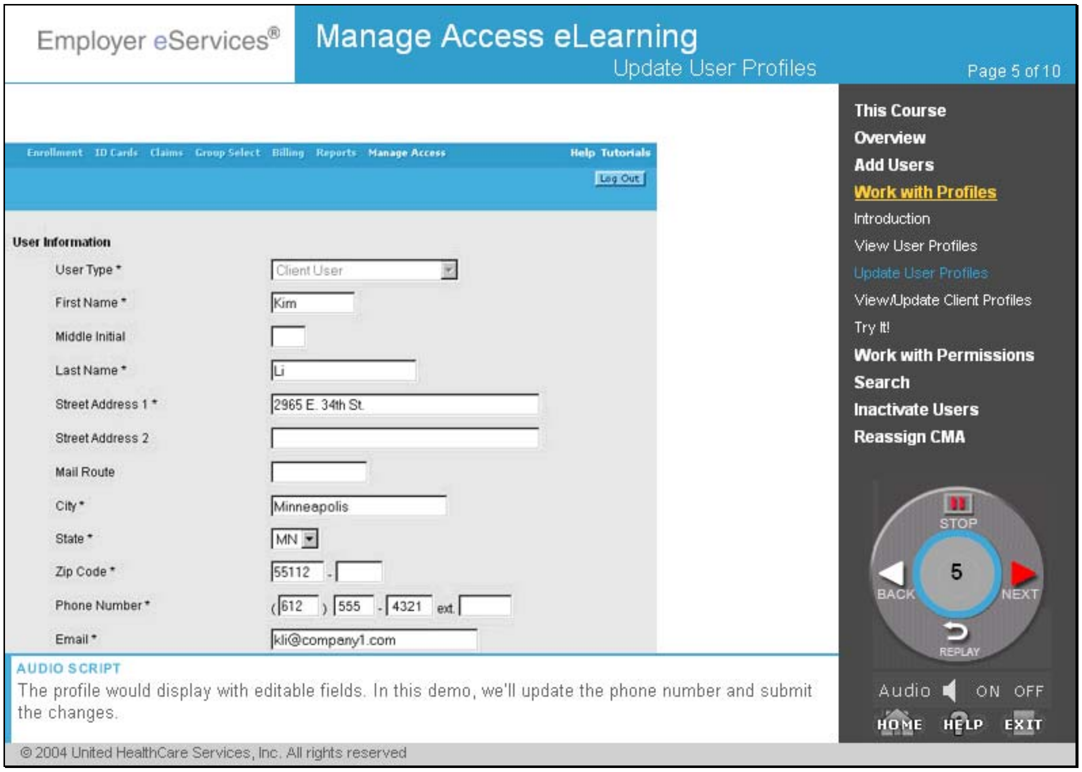
First, to view a user profile, you simply find the user you want and then click View by the words User Profile.



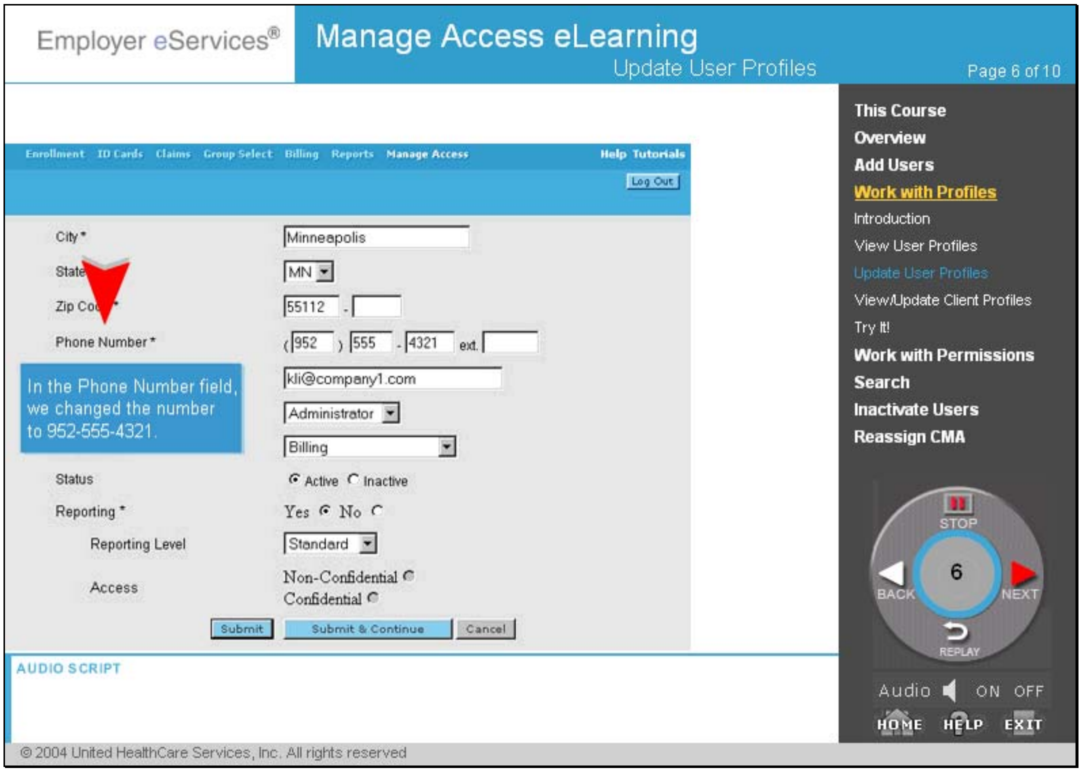
The user’s profile would display and you’d scroll to view the information.



If you need to update a user's profile, click Update, next to User Profile, under the correct user name.



The profile would display with editable fields. In this demo, we'll update the phone number and submit the changes.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Update User Profiles
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Enrollment ID Cards Claims Group Select Billing Reports Manage Access
Help Tutorials
Log Out
City *
Minneapolis
State
MN
Zip Code *
55112
Phone Number *
952 555 4321 ext.
In the Phone Number field, we changed the number to 952-555-4321.
kli@company1.com
Administrator
Billing
Status
Active Inactive
Reporting *
Yes No
Reporting Level
Standard
Access
Non-Confidential
Confidential
Submit
Submit & Continue
Cancel
AUDIO SCRIPT
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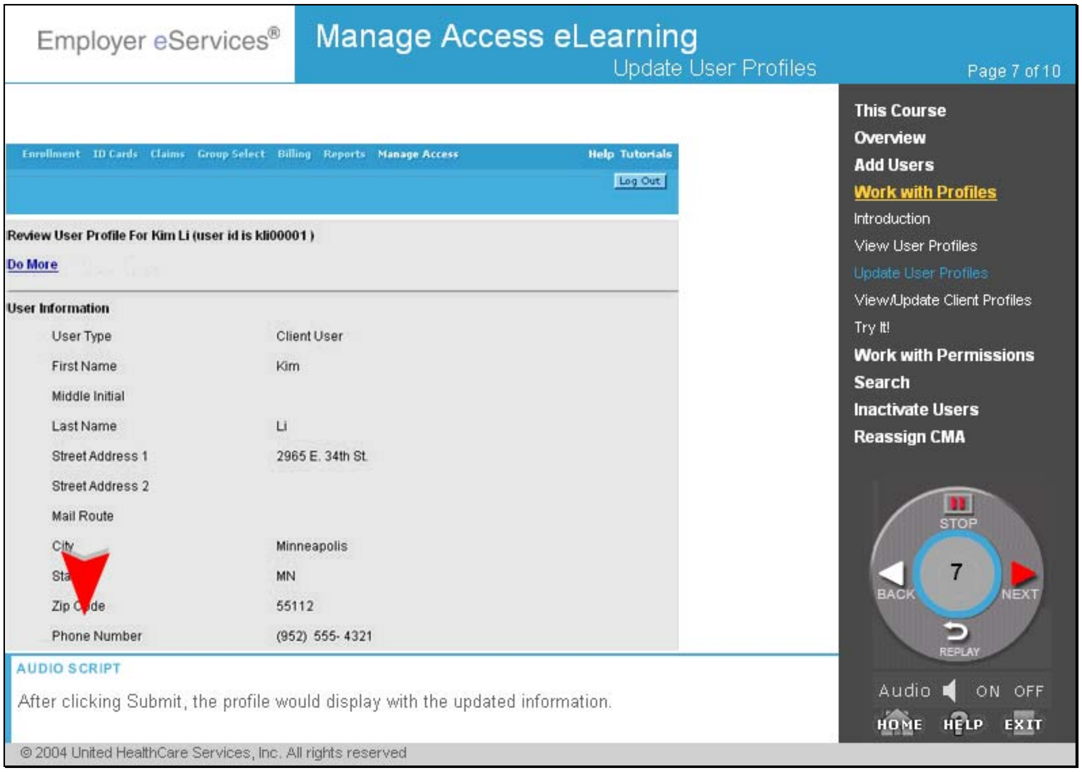
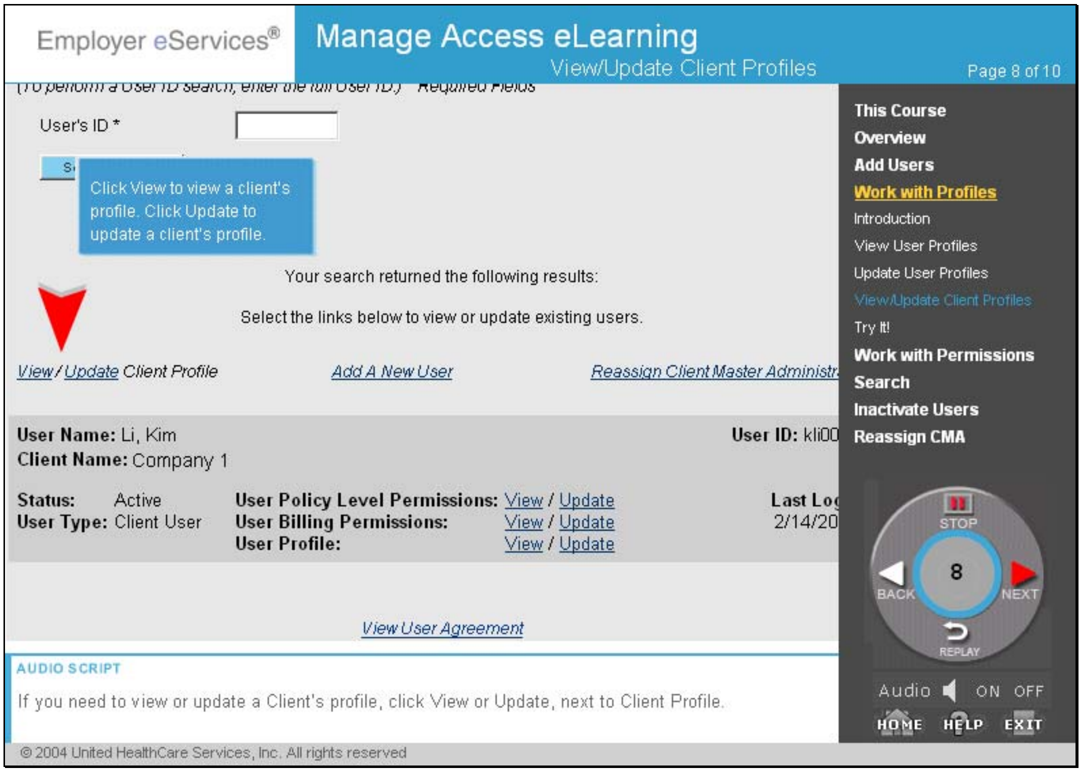
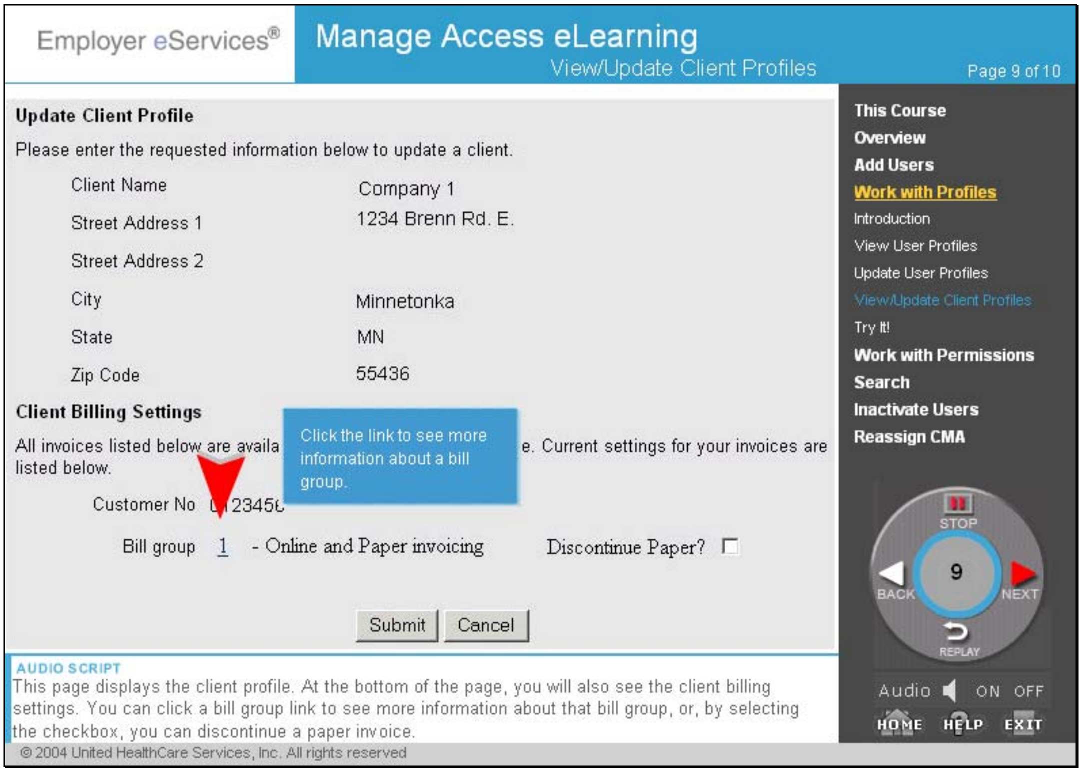
HOME HELP EXIT



After clicking Submit, the profile would display with the updated information.



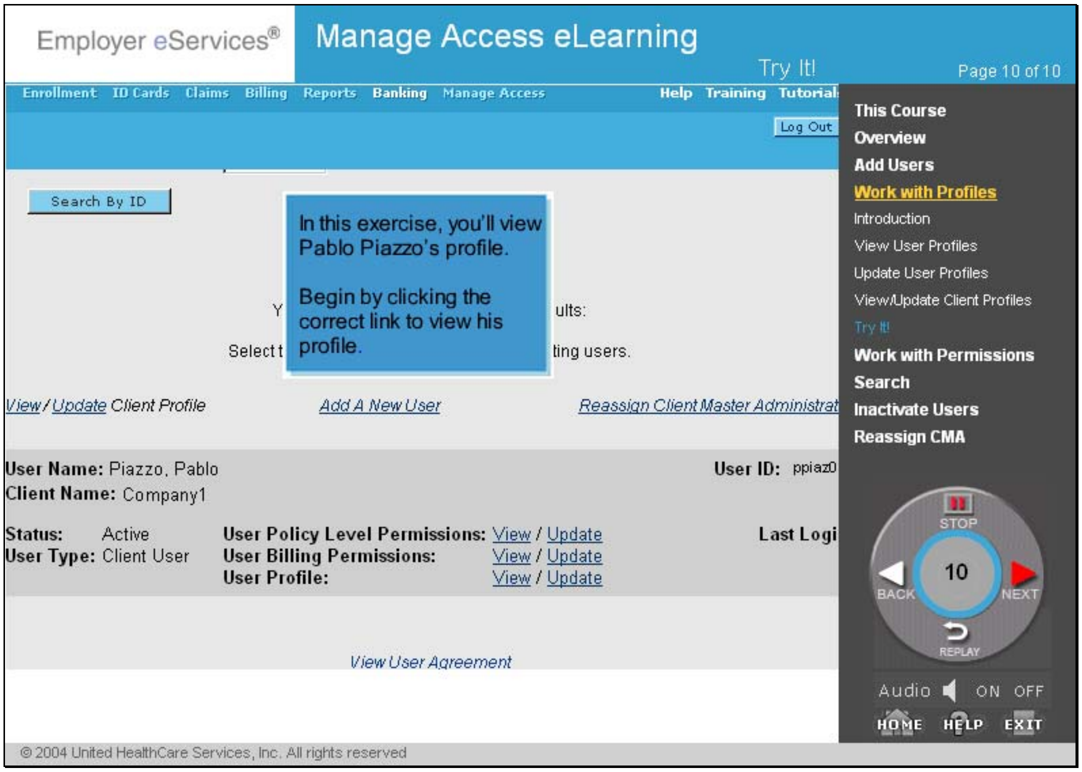
If you need to view or update a Client's profile, click View or Update, next to Client Profile.



This page displays the client profile.

At the bottom of page, you will also see the client billing settings. You can click a bill group link to see more information about that bill group, or, by selecting the checkbox, you can discontinue a paper invoice.

It's your turn to practice viewing and updating profiles so you can remember how to do these steps when using Manage Access.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Enrollment ID Cards Claims Billing Reports Banking Manage Access
Help Training Tutorial
Log Out
Search By ID
In this exercise, you'll view Pablo Piazzo's profile.
Begin by clicking the correct link to view his profile.
View / Update Client Profile
Add A New User
Reassign Client Master Administrat
User Name: Piazzo, Pablo
Client Name: Company1
User ID: ppiaz0
Status: Active
User Type: Client User
User Policy Level Permissions: View / Update
User Billing Permissions: View / Update
User Profile: View / Update
Last Logi
View User Agreement
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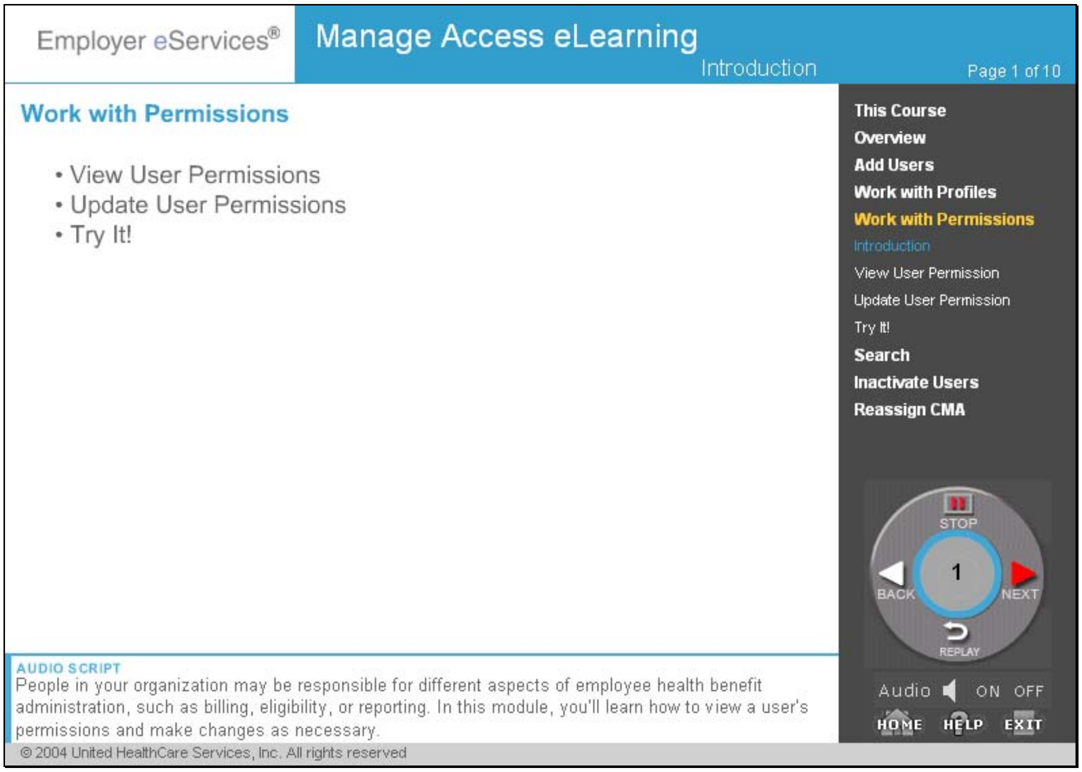
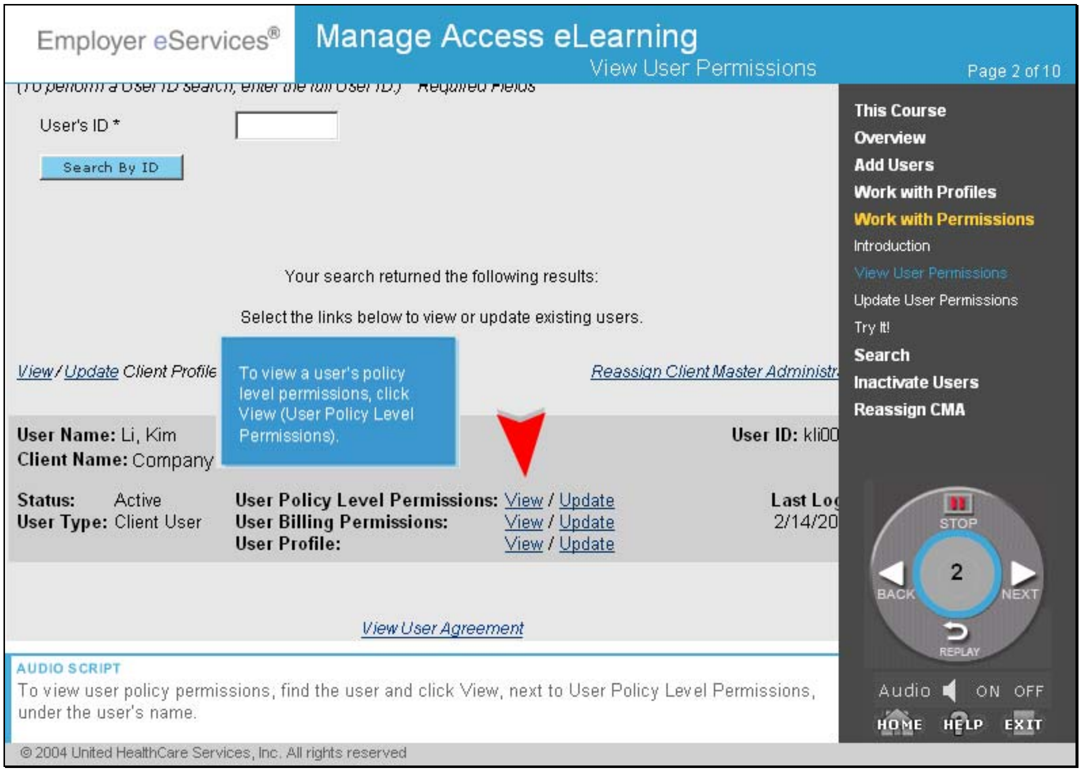
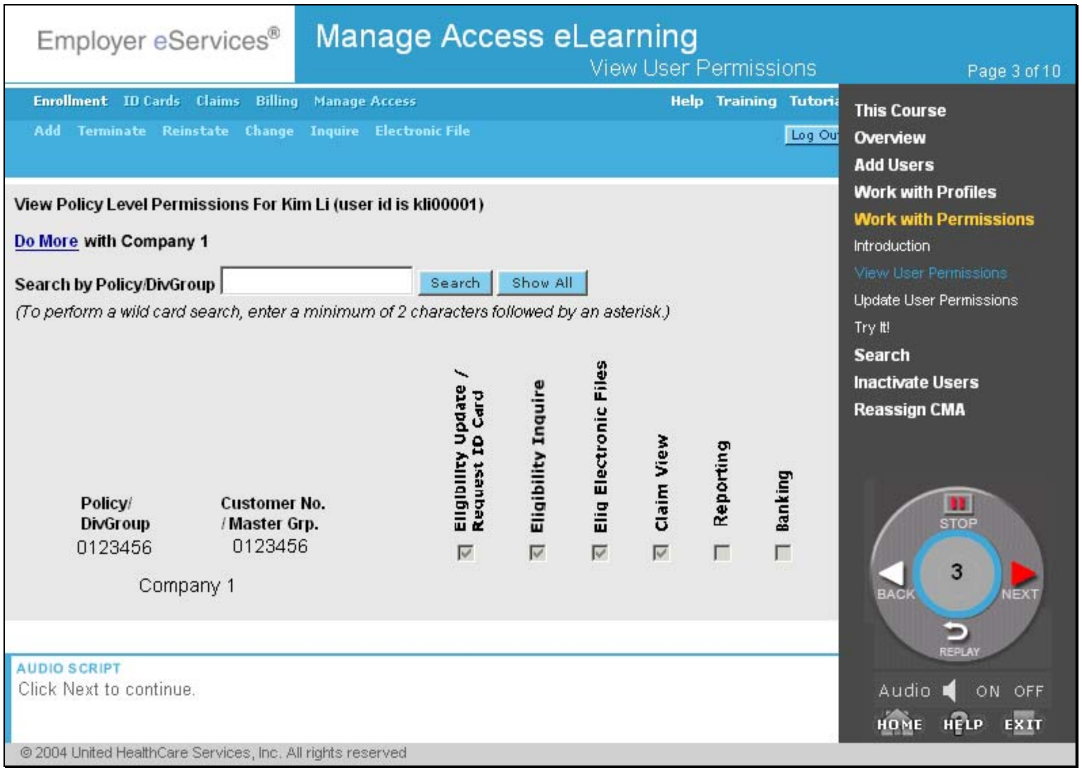
Work with Permissions



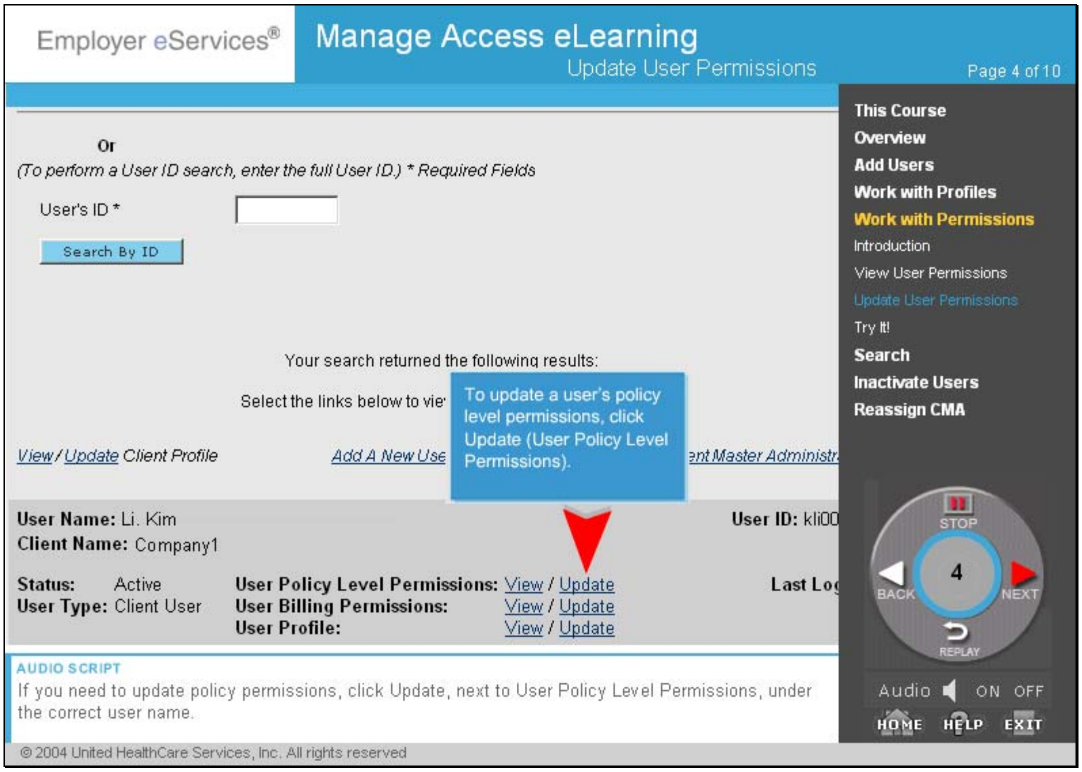
People in your organization may be responsible for different aspects of employee health benefit administration, such as billing, eligibility, or reporting. In this module, you'll learn how to view a user's permissions and make changes as necessary.



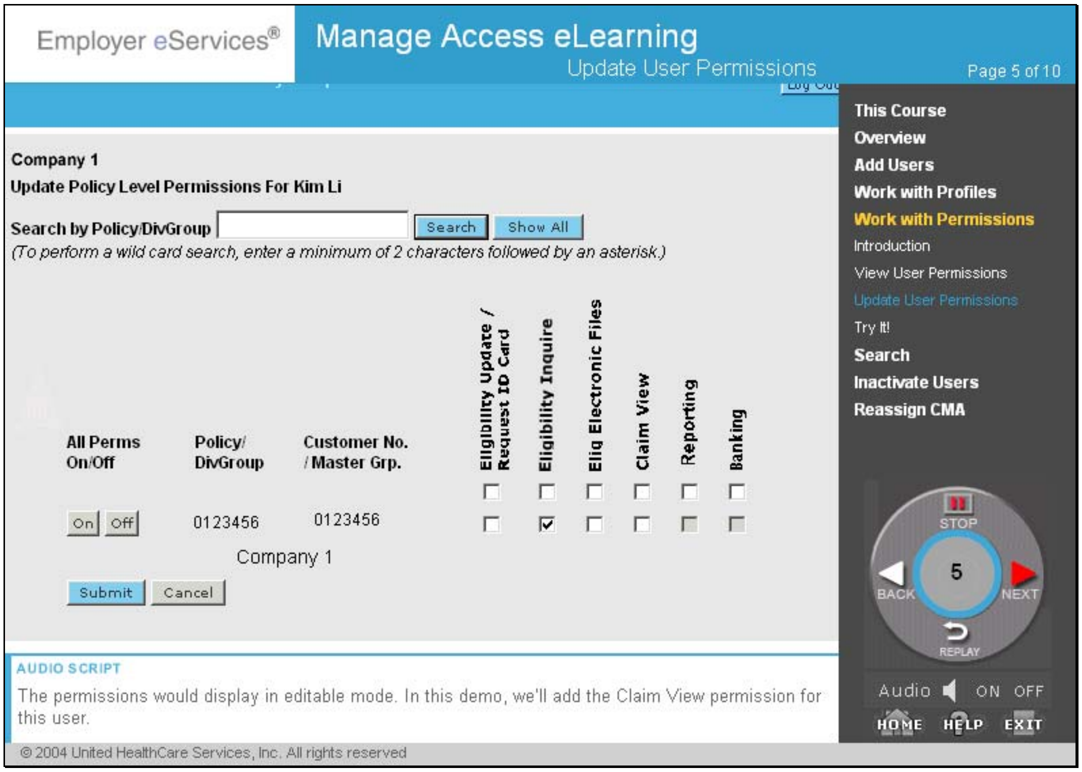
To view user policy permissions, find the user and click View, next to User Policy Level Permissions, under the user's name.



The user’s permissions would display in view only mode.

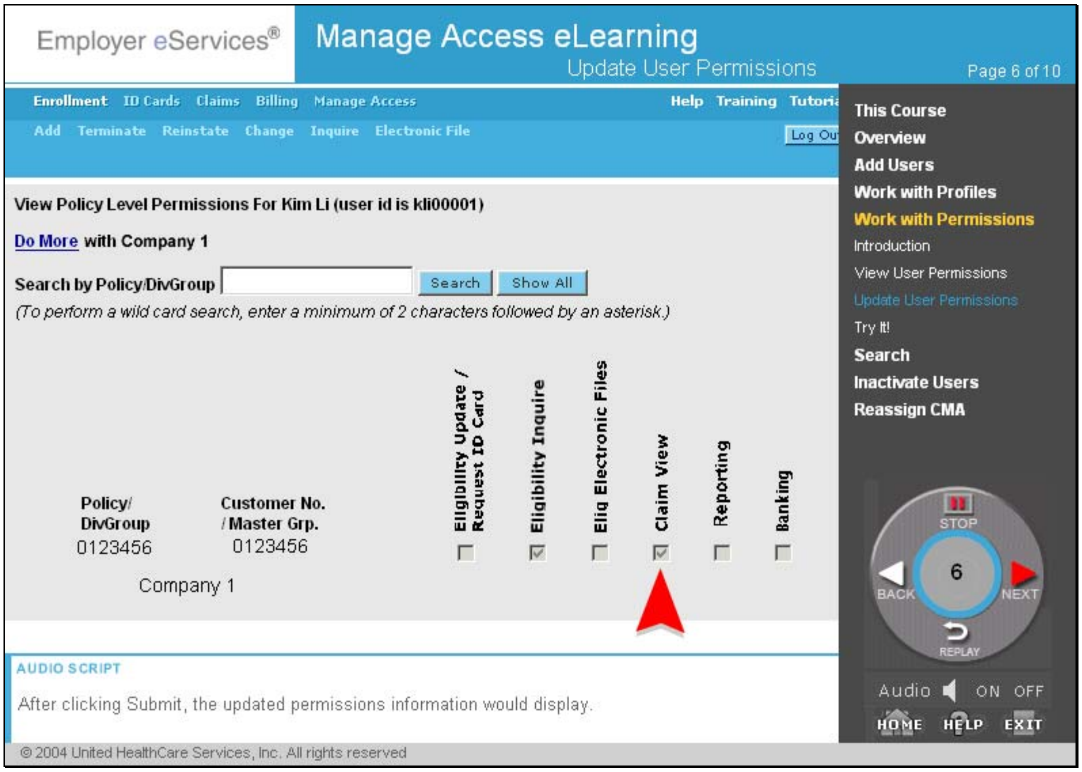


If you need to update policy level permissions, click Update, next to User Policy Level Permissions, under the correct user name.

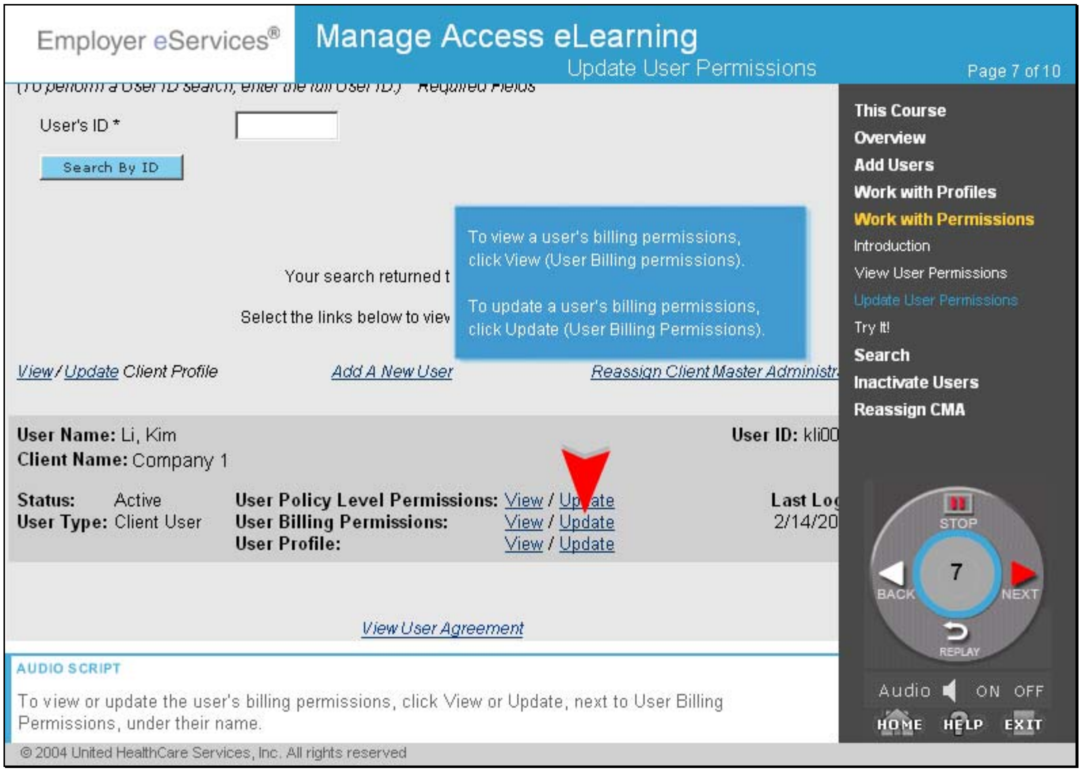


The permissions would display in editable mode. In this demo, we'll add the Claim View permission for this user.

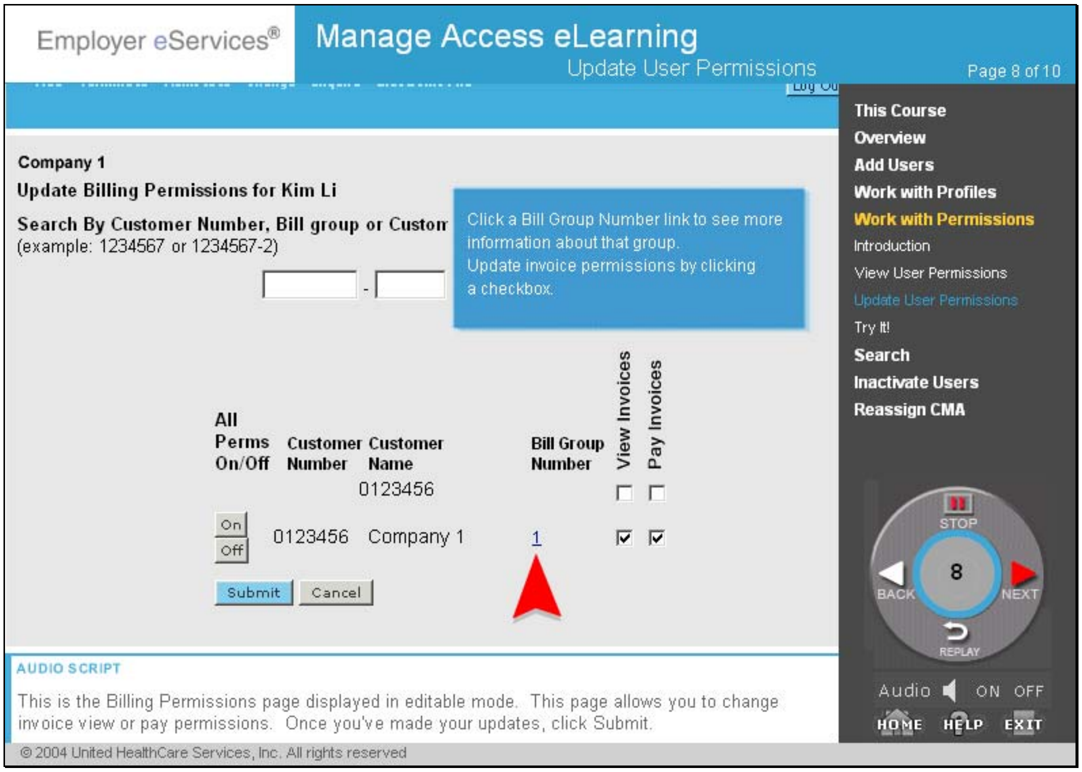
Remember, the Electronic Files, Billing, and Reporting permissions require 24-48 hours to take effect; the other permissions will take effect immediately.



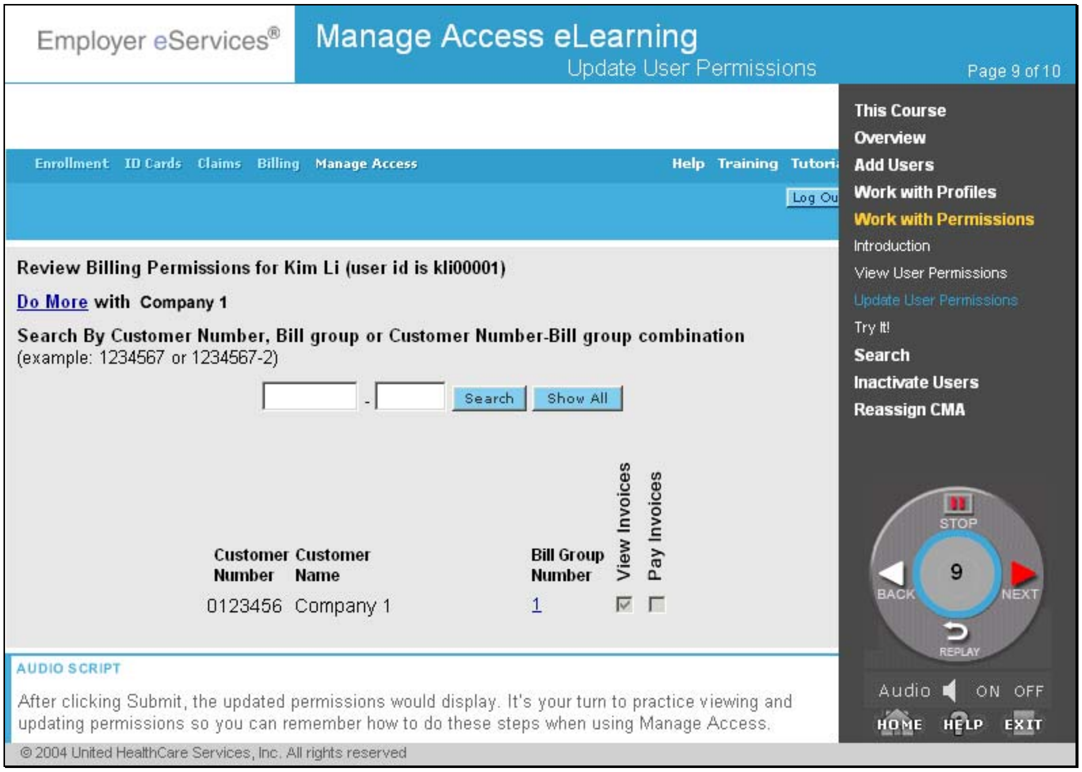
After clicking Submit, the updated permissions information would display.



To view or update the user's billing permissions, click View or Update, next to User Billing Permissions, under their name.

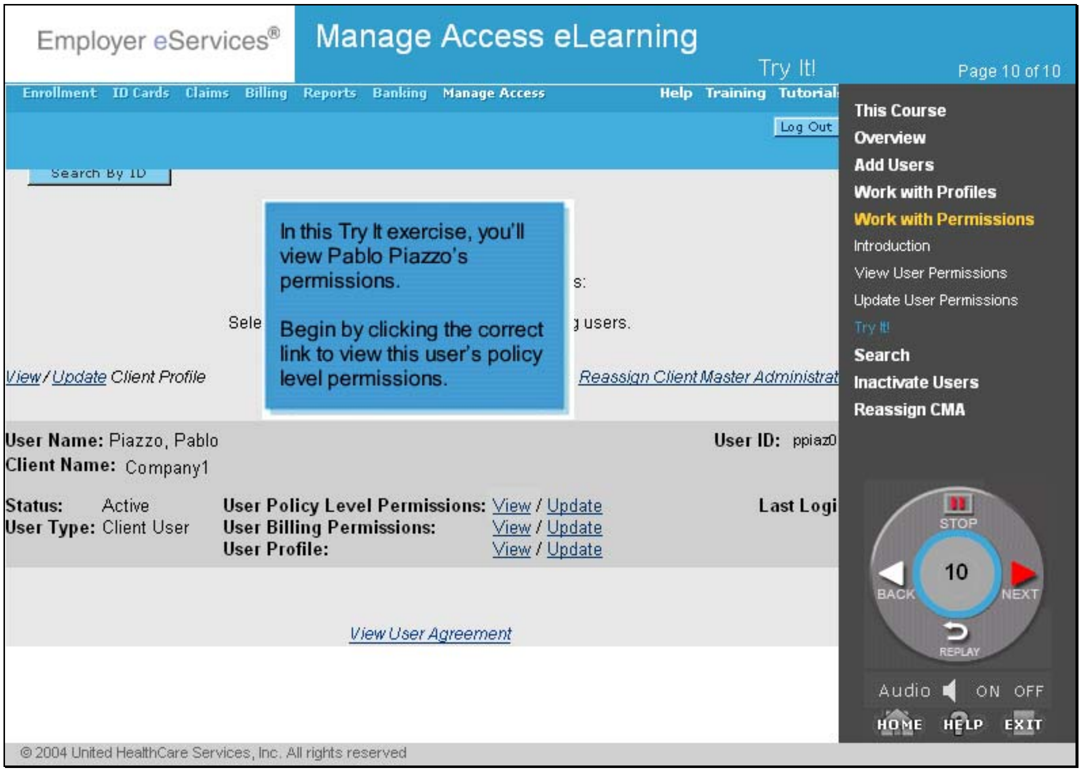


This is the Billing Permissions page displayed in editable mode. This page allows you to change invoice view or pay permissions. Once you've made your updates, click Submit.



After clicking Submit, the updated permissions would display.

It's your turn to practice viewing and updating permissions so you can remember how to do these steps when using Manage Access.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Enrollment ID Cards Claims Billing Reports Banking Manage Access
Help Training Tutorial
Log Out
Search By ID
In this Try It exercise, you'll view Pablo Piazzo's permissions.
Begin by clicking the correct link to view this user's policy level permissions.
View / Update Client Profile
Reassign Client Master Administrat
User Name: Piazzo, Pablo
User ID: ppiaz0
Client Name: Company1
Status: Active
User Type: Client User
User Policy Level Permissions: View / Update
User Billing Permissions: View / Update
User Profile: View / Update
Last Logi
View User Agreement
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Work with Permissions
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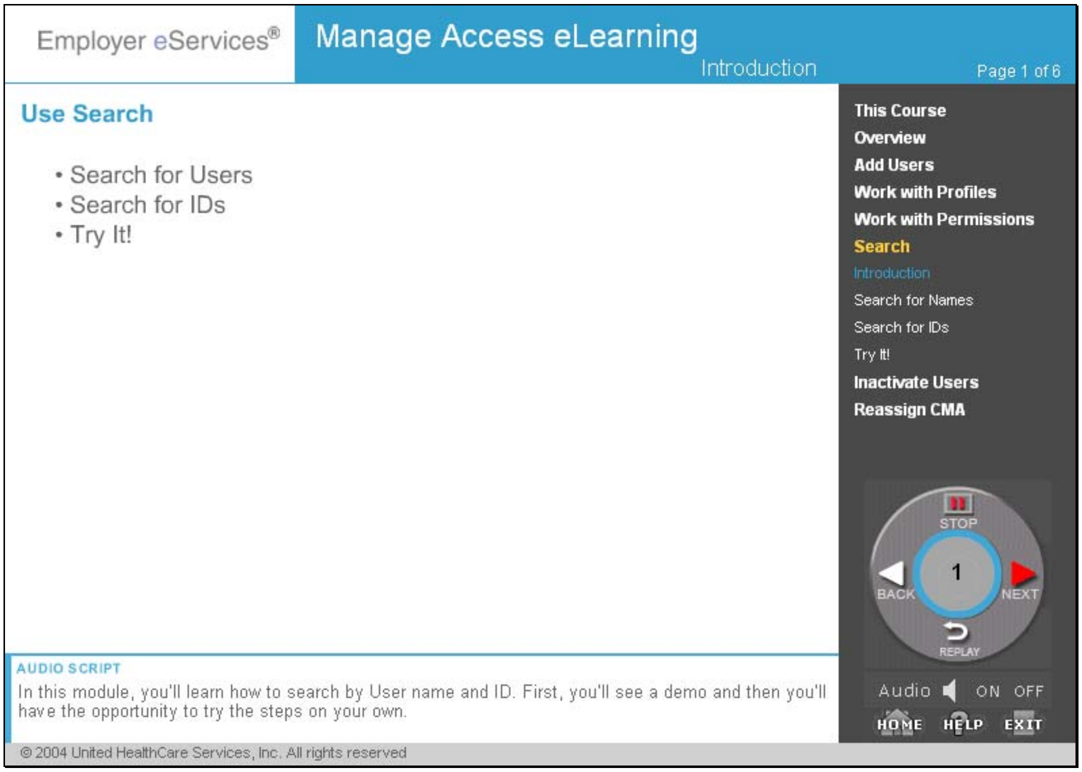
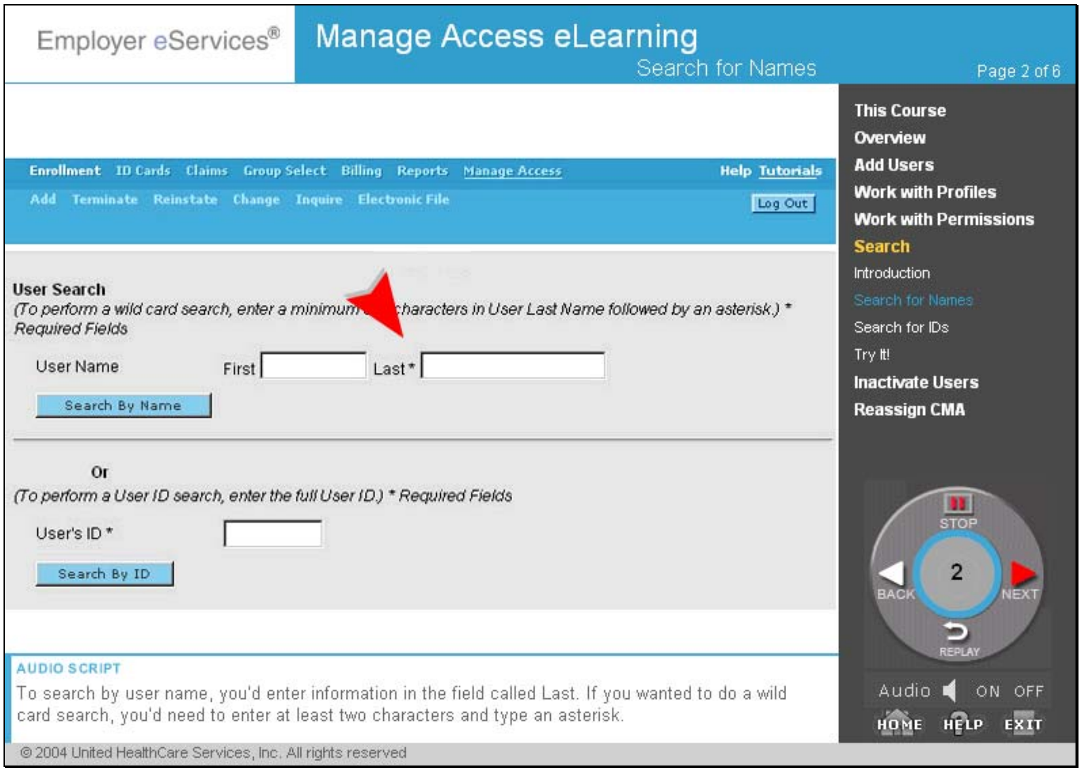
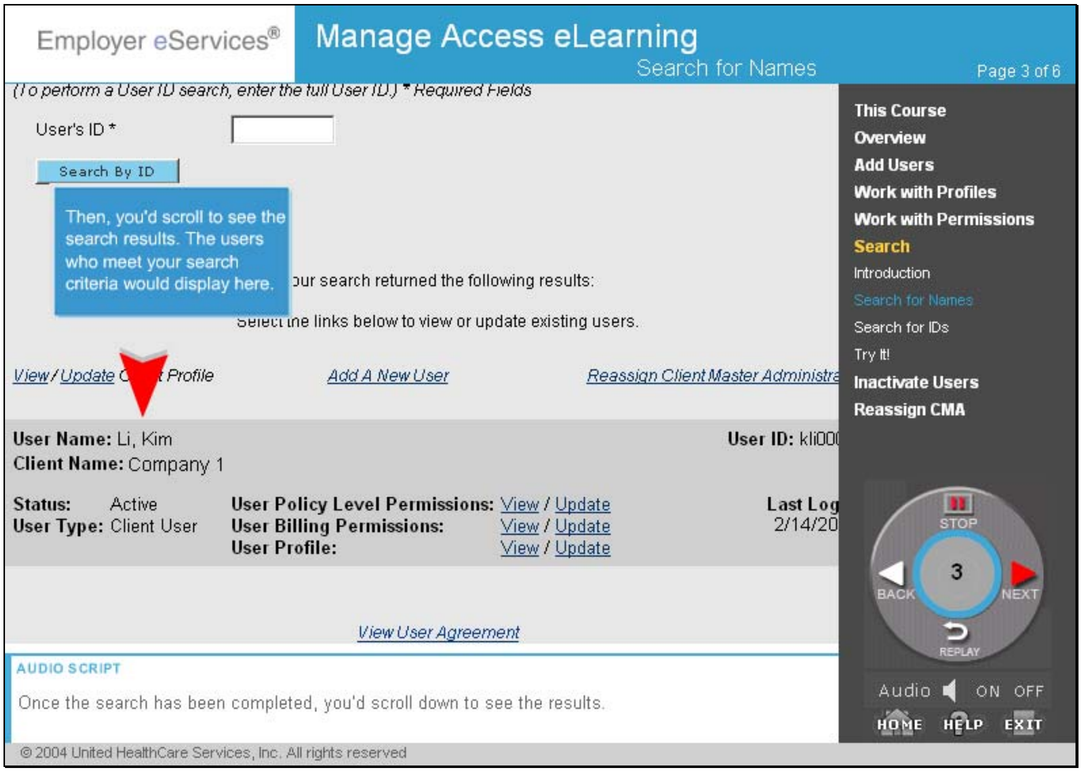
Search



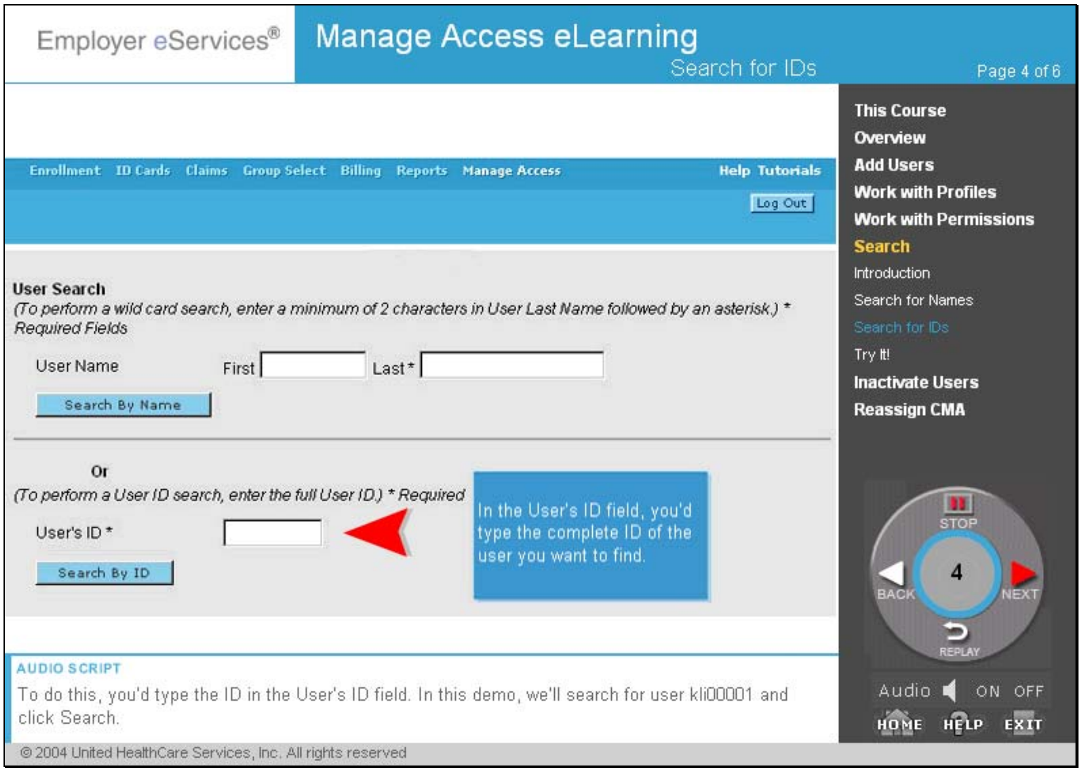
If your organization has many registered Employer eServices users, perhaps within various businesses or locations, you may find the Manage Access search feature useful to quickly find a user's record. In this module, you'll learn how to search by User name and ID. First, you'll see a demo and then you'll have the opportunity to try the steps on your own.



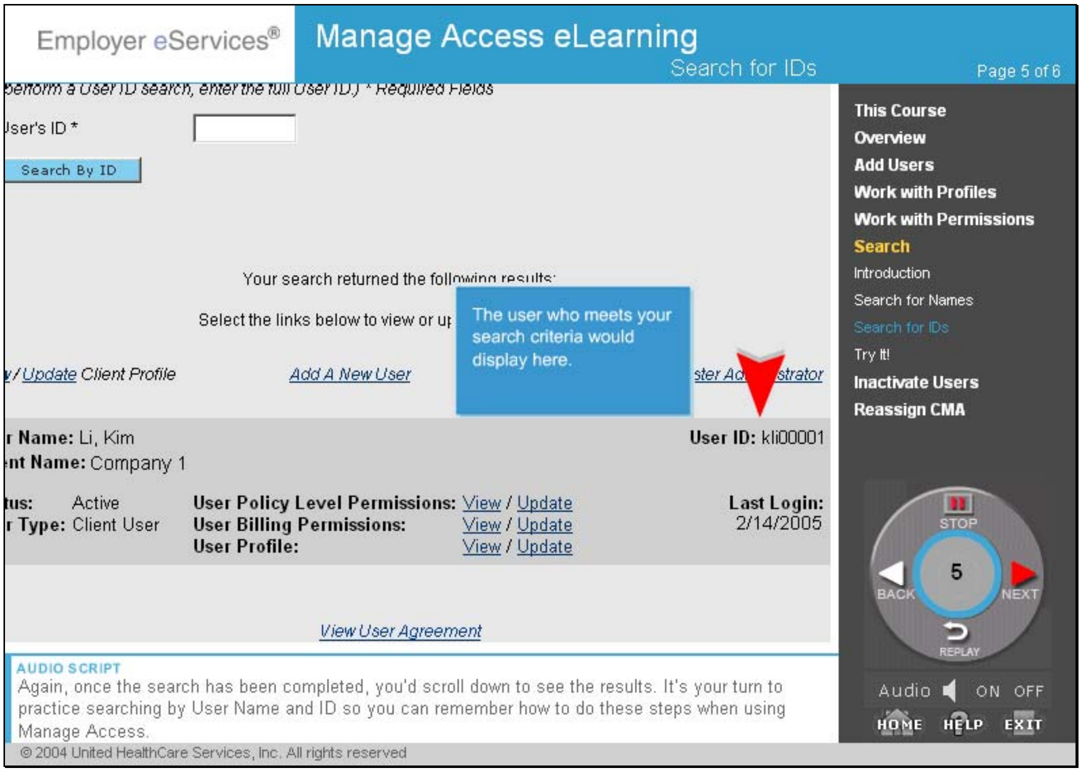
To search by user name, you'd enter information in the field called Last. If you wanted to do a wild card search, you'd need to enter at least two characters and type an asterisk. If you were entering a complete last name, you could narrow your search, by entering a name in the field called First. In this demo, we'll search for users with the last name, Li.



Once the search has been completed, you'd scroll down to see the results.

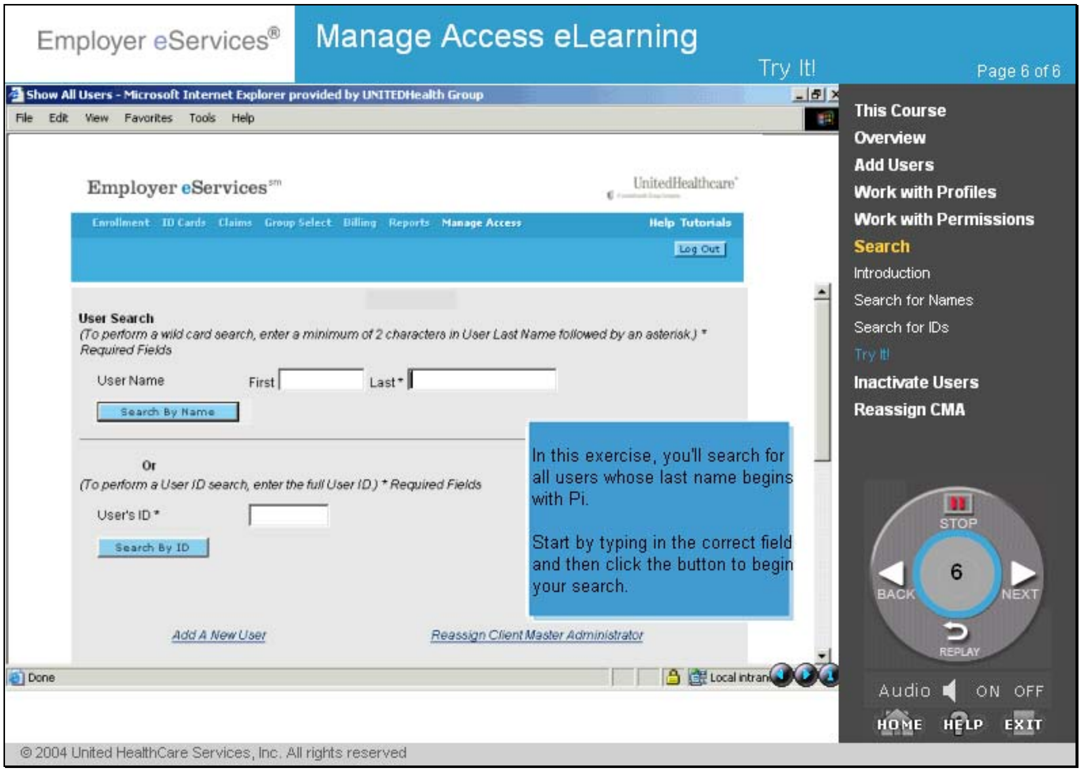


You can also search by User ID if you know the complete ID. To do this, you'd type the ID in the User's ID field. In this demo, we'll search for user kli00001 and click Search.



Again, once the search has been completed, you'd scroll down to see the results.

It's your turn to practice searching by User Name and ID so you can remember how to do these steps when using Manage Access.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Show All Users - Microsoft Internet Explorer provided by UNITEDHealth Group
File Edit View Favorites Tools Help
Employer eServices℠
UnitedHealthcare
Enrollment ID Cards Claims Group Select Billing Reports Manage Access Help Tutorials
Log Out
User Search
(To perform a wild card search, enter a minimum of 2 characters in User Last Name followed by an asterisk.) * Required Fields
User Name First Last *
Search By Name
Or
(To perform a User ID search, enter the full User ID.) * Required Fields
User's ID *
Search By ID
In this exercise, you'll search for all users whose last name begins with Pi.
Start by typing in the correct field and then click the button to begin your search.
Add A New User
Reassign Client Master Administrator
Done
Local intranet
This Course
Overview
Add Users
Work with Profiles
Work with Permissions
Search
Introduction
Search for Names
Search for IDs
Try It!
Inactivate Users
Reassign CMA
STOP
6
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NEXT
REPLAY
Audio ON OFF
HOME HELP EXIT
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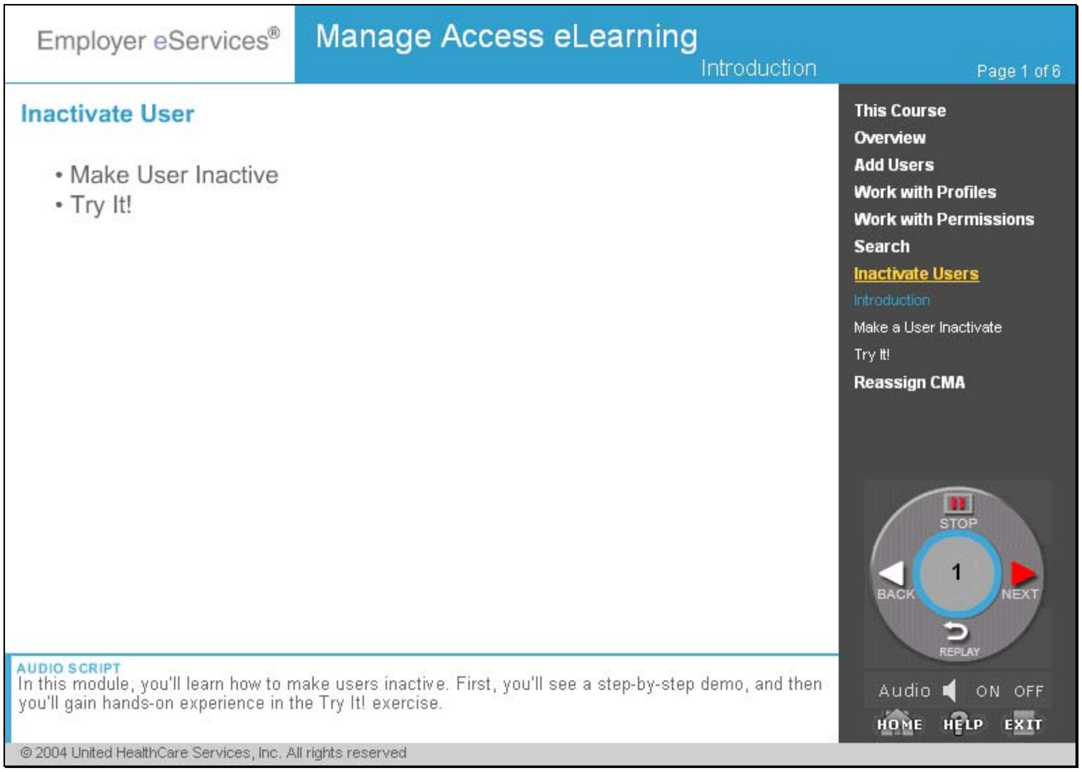
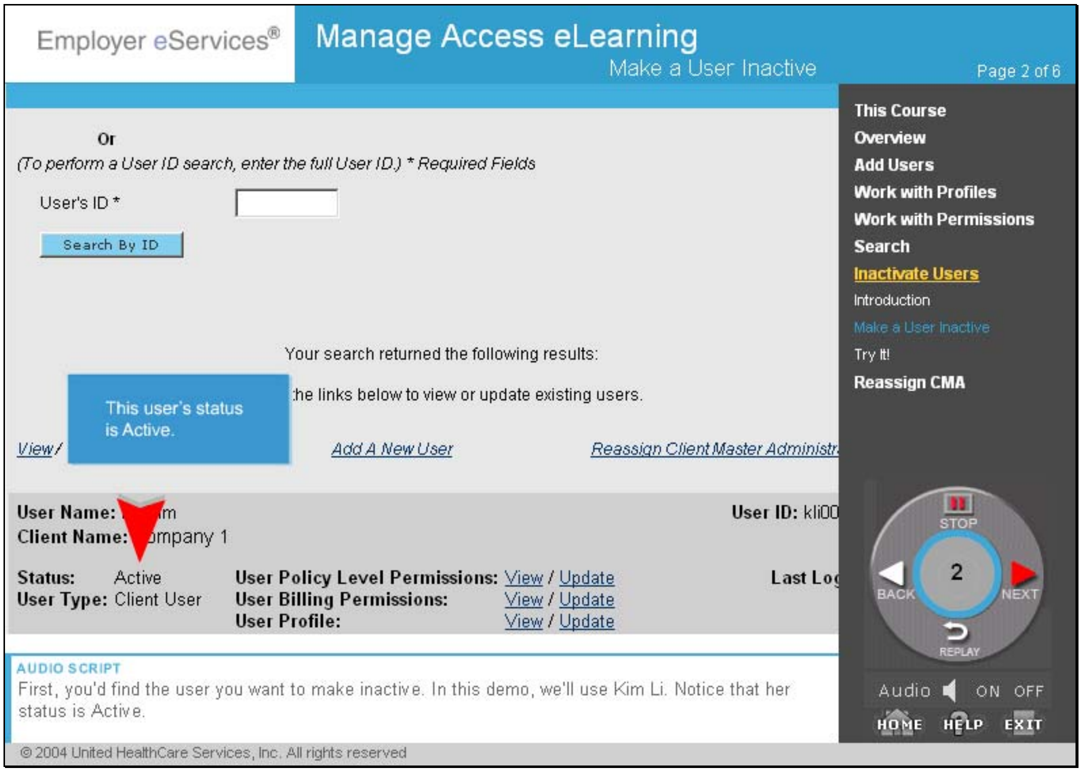
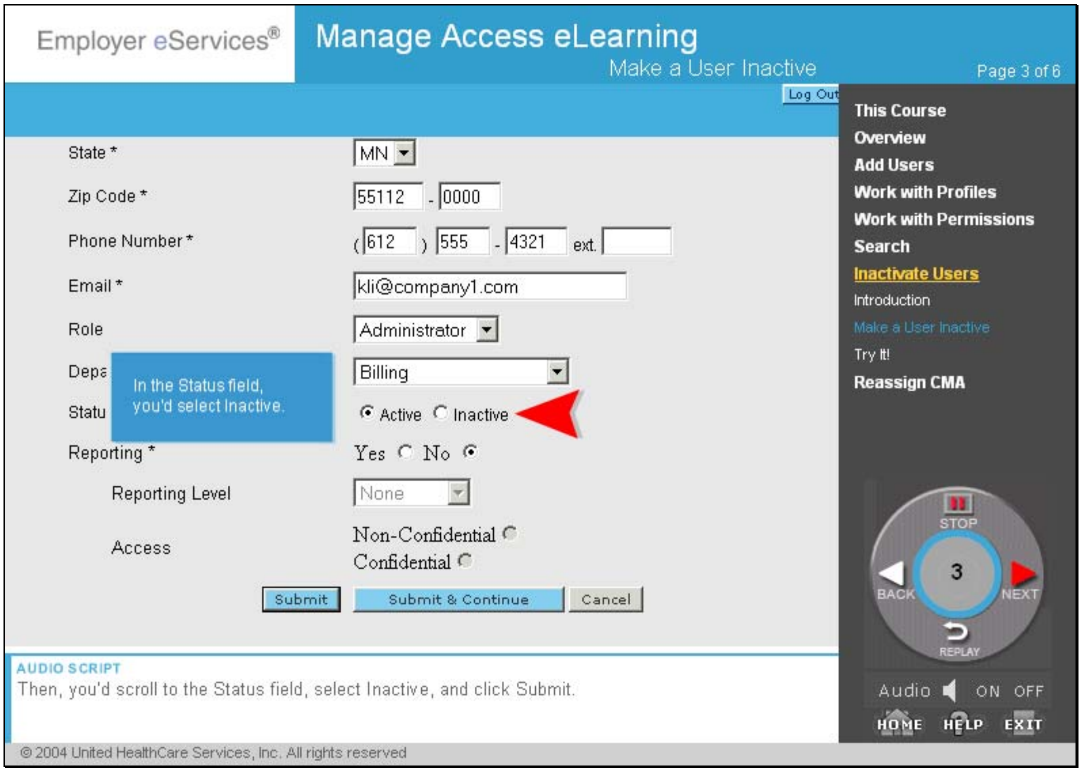
Inactivate Users



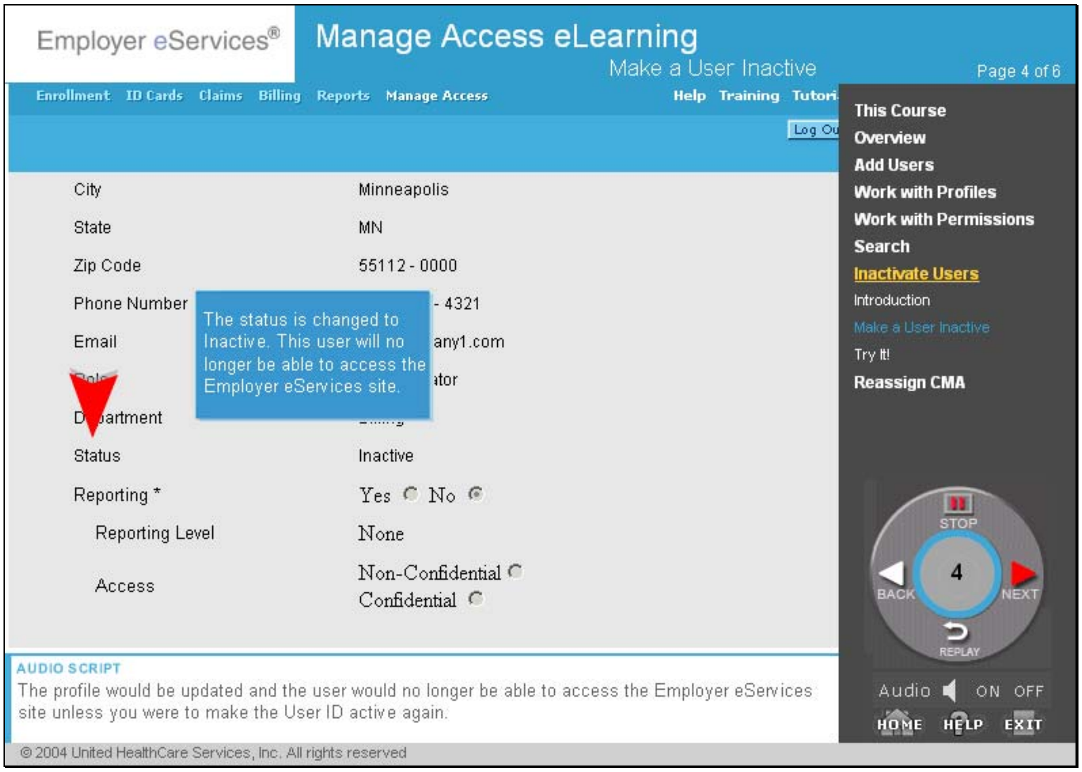
When users in your organization no longer need access to Employer eServices, you must inactivate their user IDs as soon as possible because the application contains confidential data. In this module, you'll learn how to make users inactive. First, you'll see a step-by-step demo, and then you'll gain hands-on experience in the Try It! exercise.



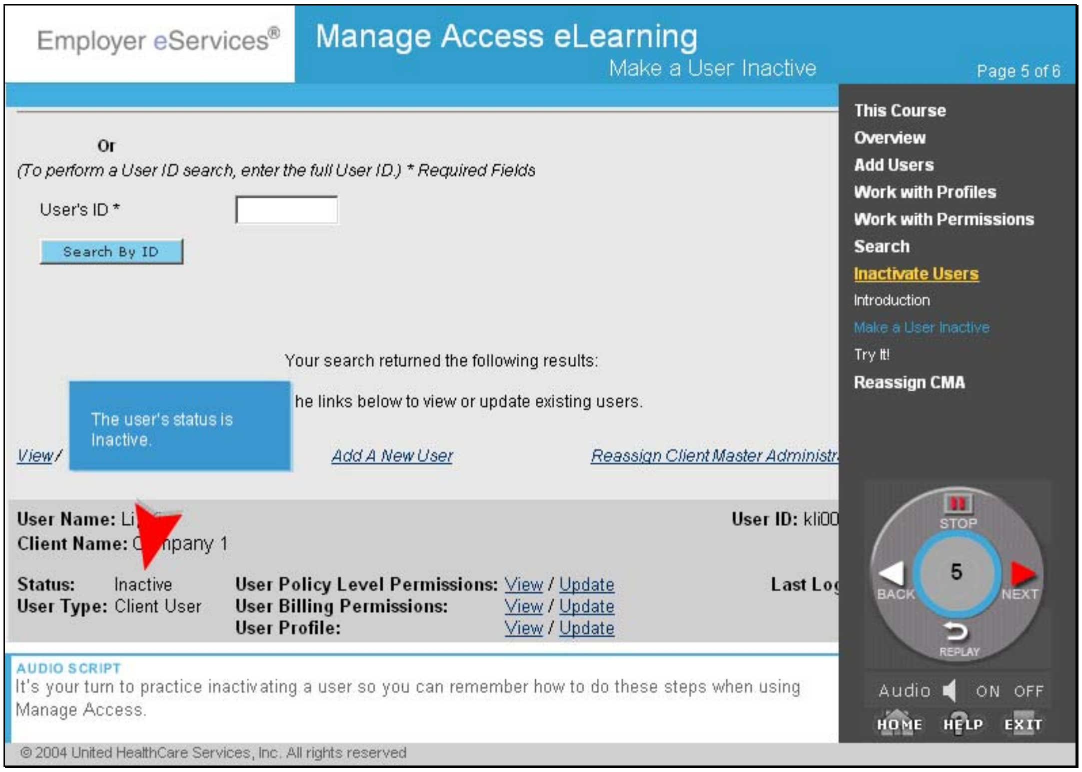
First, you'd find the user you want to make inactive. In this demo, we'll use Kim Li. Notice that her status is Active. Users are made inactive by updating their profiles. To do this, you'd click Update located next to User Profile.



Then, you'd scroll to the Status field, select Inactive, and click Submit.

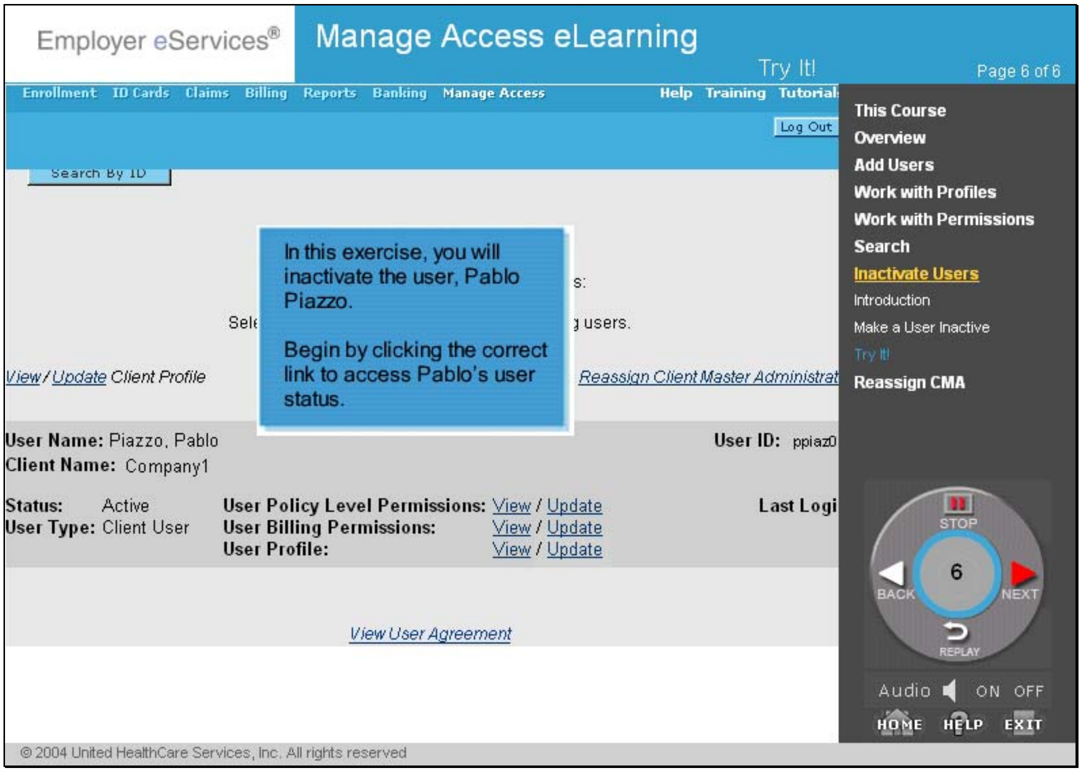


The profile would be updated and the user would no longer be able to access the Employer eServices site unless you were to make the User ID active again.



If you were to search for the user you just made inactive, you'd see her Status is now Inactive.

It's your turn to practice inactivating a user so you can remember how to do these steps when using Manage Access.


Employer eServices®
Manage Access eLearning
Try It!
Page 6 of 6
Enrollment ID Cards Claims Billing Reports Banking Manage Access
Help Training Tutorial
Log Out
Search By ID
In this exercise, you will inactivate the user, Pablo Piazzo.
Begin by clicking the correct link to access Pablo's user status.
View / Update Client Profile
Reassign Client Master Administrat
User Name: Piazzo, Pablo
Client Name: Company1
User ID: ppiaz0
Status: Active
User Type: Client User
User Policy Level Permissions: View / Update
User Billing Permissions: View / Update
User Profile: View / Update
Last Logi
View User Agreement
This Course
Overview
Add Users
Work with Profiles
Work with Permissions
Search
Inactivate Users
Introduction
Make a User Inactive
Try It!
Reassign CMA
STOP
BACK
6
NEXT
REPLAY
Audio ON OFF
HOME HELP EXIT
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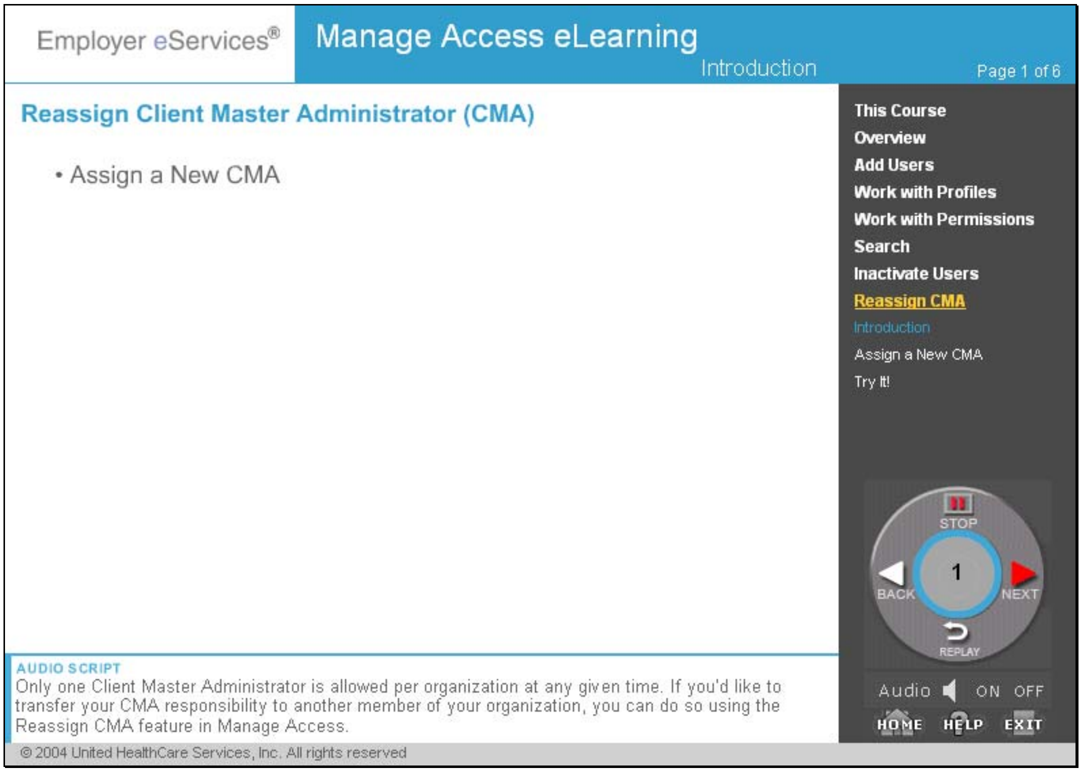
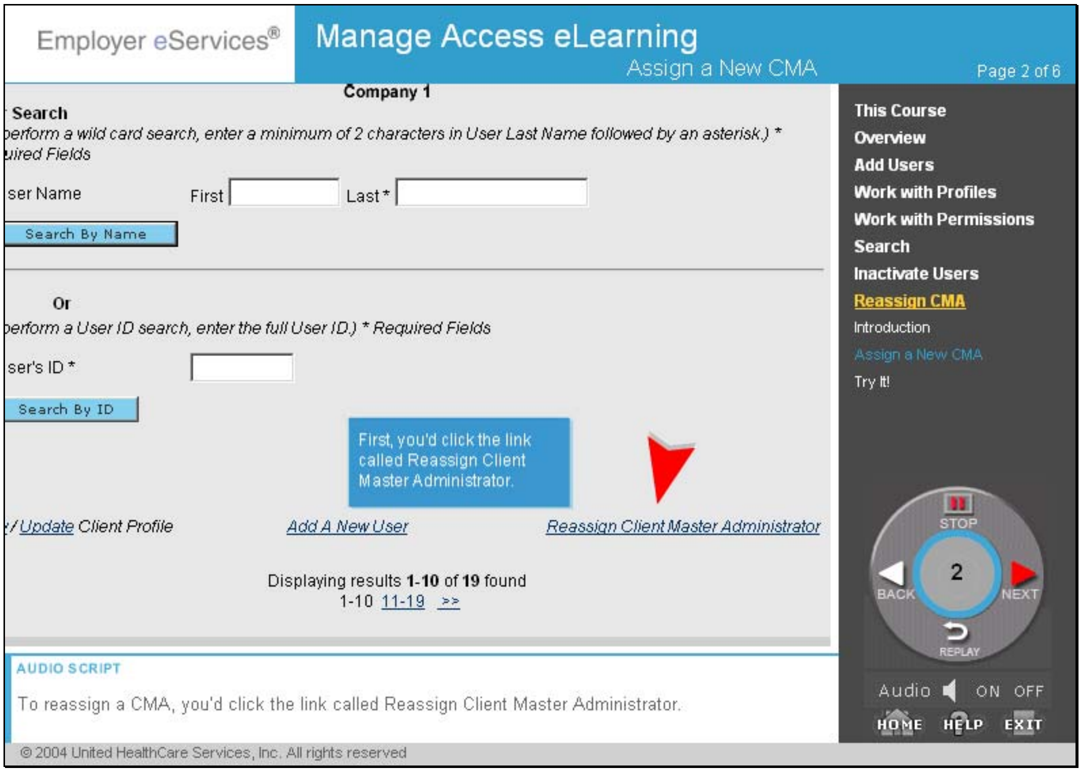
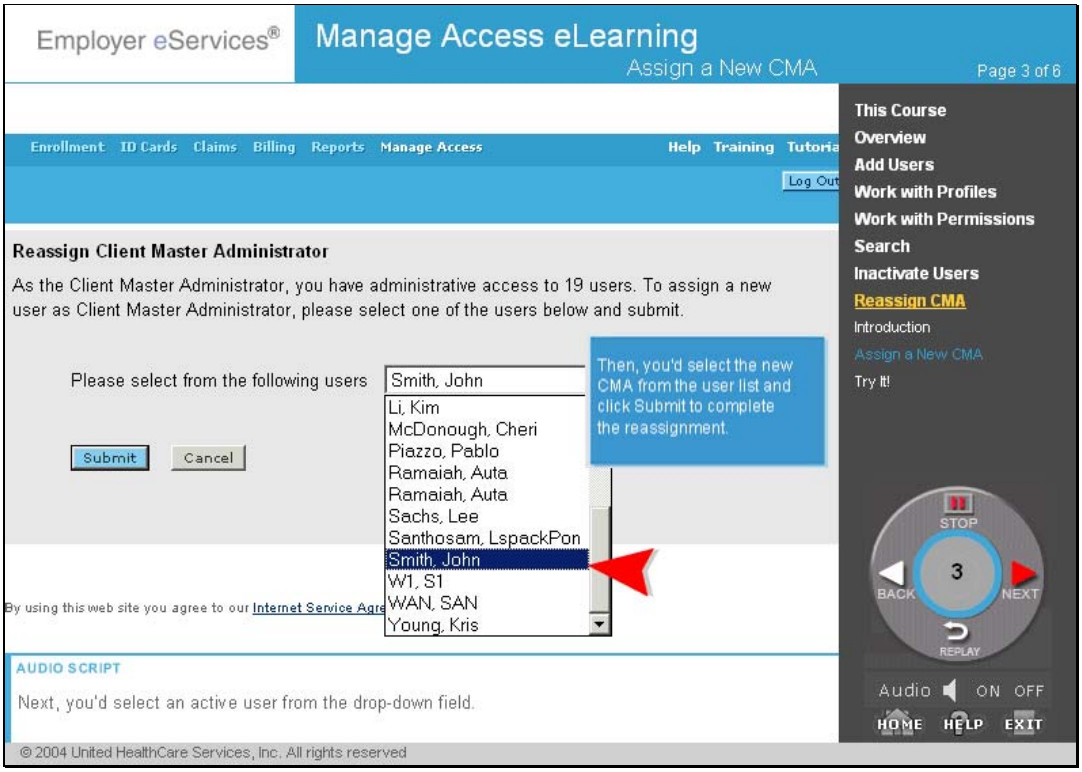
Reassign CMA



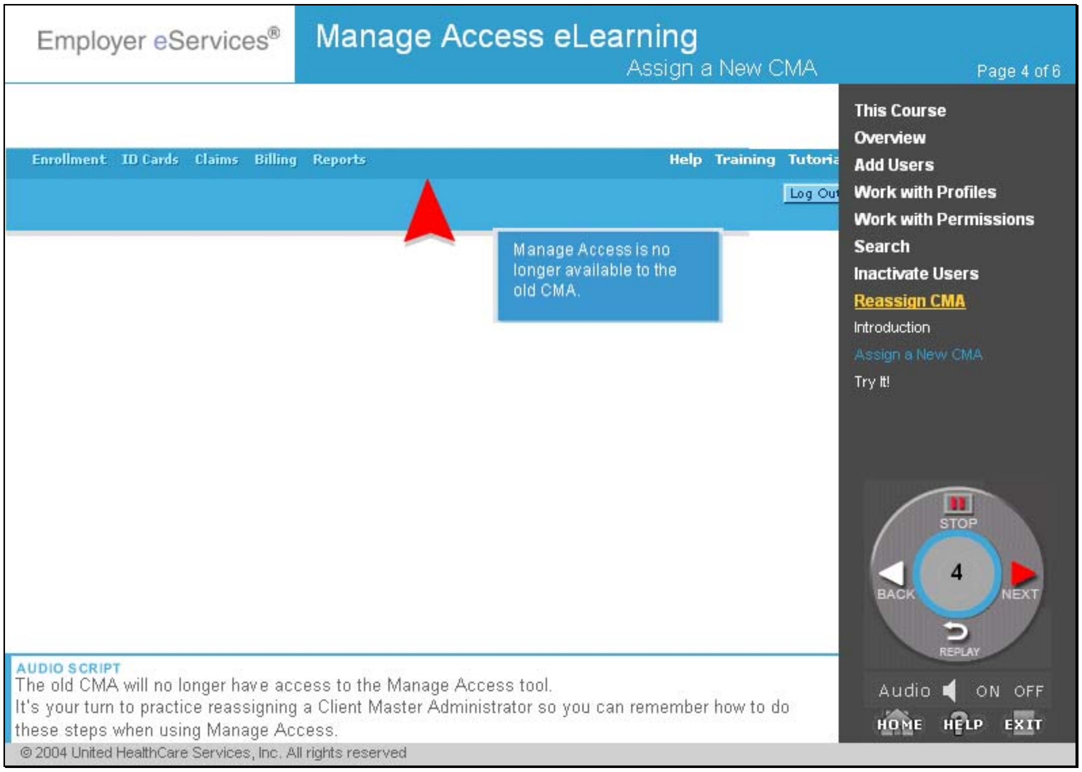
Only one Client Master Administrator is allowed per organization at any given time. If you'd like to transfer your CMA responsibility to another member of your organization, you can do so using the Reassign CMA feature in Manage Access. In this module, we'll demonstrate how easily you can reassign a CMA, and then give you the opportunity to practice in the Try It! exercise.



To reassign a CMA, you'd click the link called Reassign Client Master Administrator.

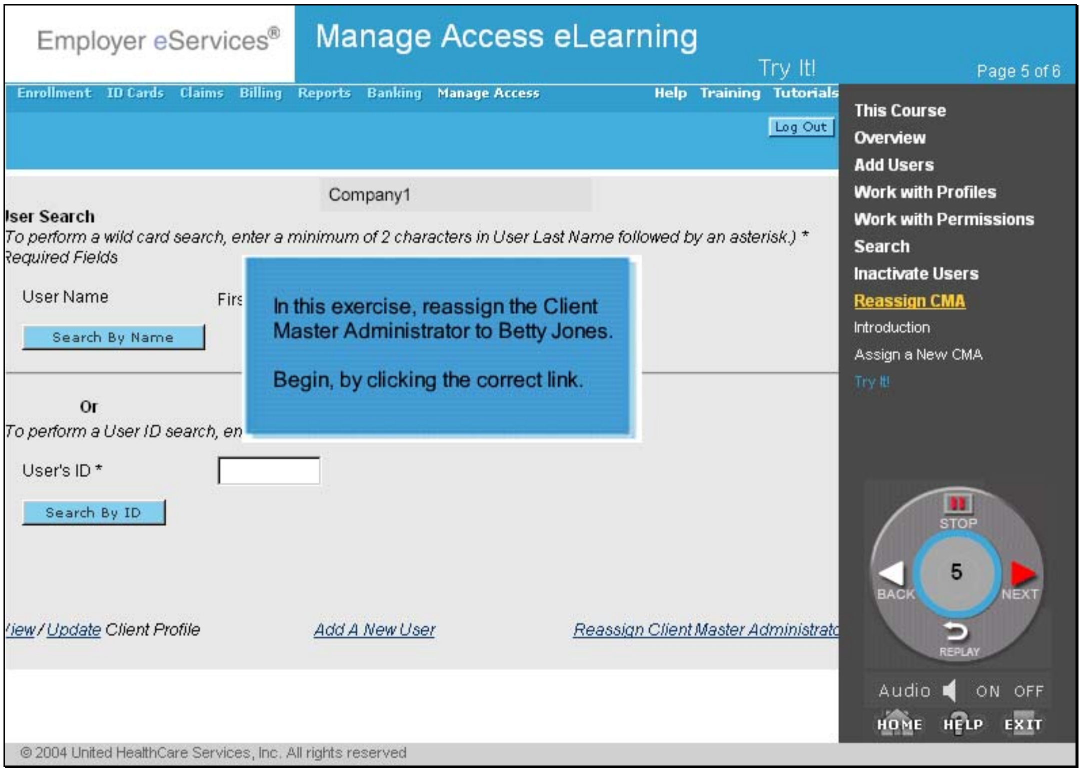


Next, you'd select an active user from the drop-down field. In this demo, the new Client Master Administrator will be John Smith.



Once you've Submitted the name of the new CMA, the change is effective immediately. The system will automatically change the user type for the old CMA to User and the newly selected CMA to Client Master Administrator. The old CMA will no longer have access to the Manage Access tool.

It's your turn to practice reassigning a Client Master Administrator so you can remember how to do these steps when using Manage Access.


Employer eServices®
Manage Access eLearning
Try It!
Page 5 of 6
Enrollment ID Cards Claims Billing Reports Banking Manage Access
Help Training Tutorials
Log Out
Company1
User Search
To perform a wild card search, enter a minimum of 2 characters in User Last Name followed by an asterisk.) *
Required Fields
User Name
Search By Name
In this exercise, reassign the Client Master Administrator to Betty Jones.
Begin, by clicking the correct link.
Or
User's ID *
Search By ID
View / Update Client Profile
Add A New User
Reassign Client Master Administrato
This Course
Overview
Add Users
Work with Profiles
Work with Permissions
Search
Inactivate Users
Reassign CMA
Introduction
Assign a New CMA
Try It!
STOP
BACK
5
NEXT
REPLAY
Audio ON OFF
HOME HELP EXIT
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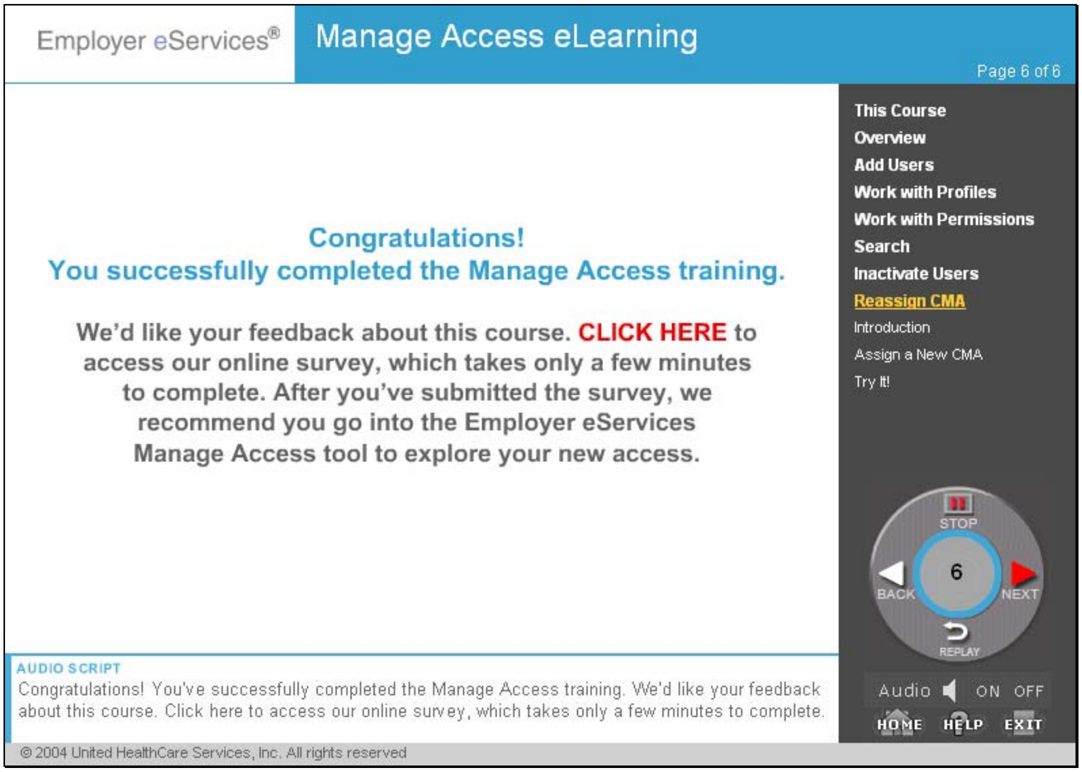

Congratulations! You've successfully completed the Manage Access training. We'd like your feedback about this course. Click here to access our online survey, which takes only a few minutes to complete. After you've submitted the survey, we recommend you go into the Employer eServices Manage Access tool to explore your new access.