General User's Guide
Healthcare
Covisint Connection and Administration
(My Profile Administration)

Document Revision Level 1.4

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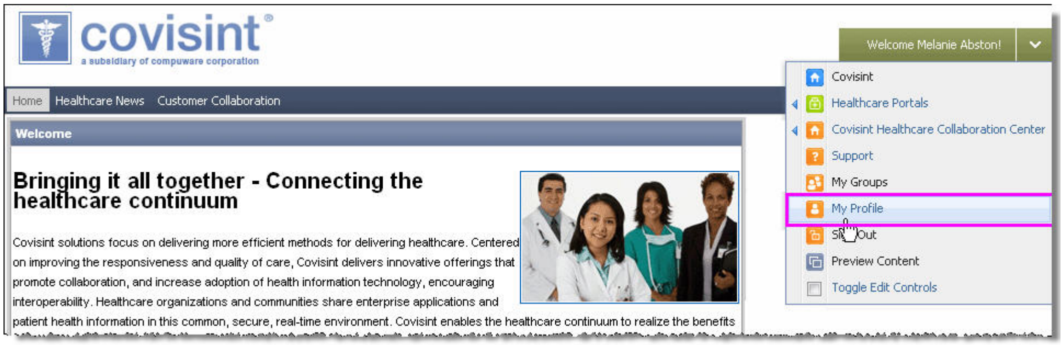
ALL PORTAL USERS

Accessing the "My Profile" Administration Application

1. Log in to your portal.



Bringing it all together - Connecting the healthcare continuum

Covisint solutions focus on delivering more efficient methods for delivering healthcare. Centered on improving the responsiveness and quality of care, Covisint delivers innovative offerings that promote collaboration, and increase adoption of health information technology, encouraging interoperability. Healthcare organizations and communities share enterprise applications and patient health information in this common, secure, real-time environment. Covisint enables the healthcare continuum to realize the benefits

2. Click **My Profile** from the Welcome drop down menu. The Home page of the Account Administration application is displayed.

RESULT:

You have successfully accessed the My Profile account administration application.

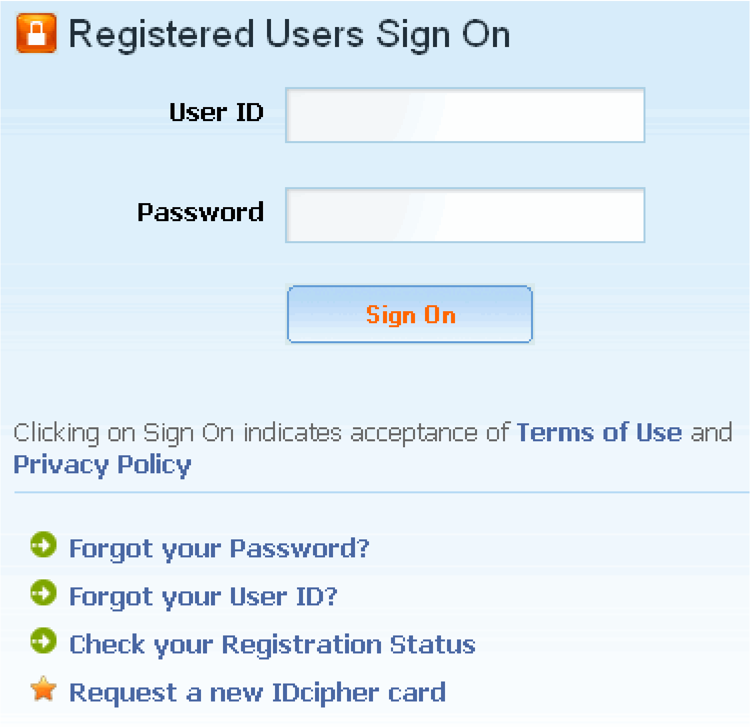
Reset Your Password

A Password reset is a multi-step process that entails:

- answering a security question
- obtaining a temporary password in two parts (one on the screen and one via email)
- entering your temporary password
- resetting to a new, chosen password
- logging in with your chosen password

If your organization also uses the IDcipher™ Card premium service, in addition to password login, then your existing IDcipher™ Card will become null and void upon successfully resetting your password via "forgot password" link. The system will automatically send you a new IDcipher™ Card upon password reset.

1. Navigate to the Login screen.



Clicking on Sign On indicates acceptance of Terms of Use and Privacy Policy

2. **Forgot Your Password?** link.
3. In the open text box, key in your User ID.
4. Click **Submit**. The Challenge Question screen is displayed.

5. Key in the answer to the Challenge Question, exactly as you did during registration.
6. Click **Submit**. The first half of your temporary password is displayed on the screen. The remaining four digits of your temporary password are sent to the email address with which you registered.
7. Write down the four numbers displayed on your screen on a sheet of paper.
8. Retrieve the remaining four digits from your email Inbox.
9. Key in your User ID in the open text field.
10. Key in your eight digit temporary password in the open text field.
11. Click **Sign On**. You are immediately prompted to change your password.
12. Key in the eight digit temporary password in the Old Password open text field.
13. Create a new password, and key it into the New Password open text field. Passwords must be adhere to specific rules. Refer to the password rules on your screen if necessary.
14. Key in your new password again in the Confirm New Password open text field.
15. Click **Update**.

ℹ If the IDcipher™ Card is required in addition to password sign on, then your existing IDcipher™ Card will become invalid upon successfully resetting your password. The system will automatically send you a new IDcipher™ Card upon password reset.

RESULT:

You have successfully reset your password and are now ready to sign on to the portal.

(IDcipher™ Card is a premium service available for purchase by portal customers. Please contact your Covisint sales representative for details)

Unlocking Your Account

For security purposes, your user account will become locked if you unsuccessfully attempt to log in to the portal beyond the predetermined login attempt limit. When this is the case, perform the Password Reset function to unlock your account.

If an IDcipher™ Card is required to sign on, your existing IDcipher™ Card will become invalid when your account is unlocked and the system will automatically send you a new IDcipher™ Card.

(IDcipher™ Card is a premium service available for purchase by portal customers. Please contact your Covisint sales representative for details)

How Do I Get An IDcipher™ Card?

The IDcipher™ card is used as a method for authentication that may optionally be used within Portals that require up-level authentication.

The process for obtaining an IDcipher™ Card is dependent upon your user status. Click on the link that best describes you:

➔I am an existing user, I can already log in to the portal, but I need a new IDcipher™ Card >>>

➔**I am new to the portal, and not yet a registered user? (You have not yet registered for the portal) >>>**

When you register for portal access, an IDcipher™ Card will automatically be generated and emailed to you upon approval of your registration request if the portal you are requesting access to requires the IDcipher™ Card for up-level authentication.

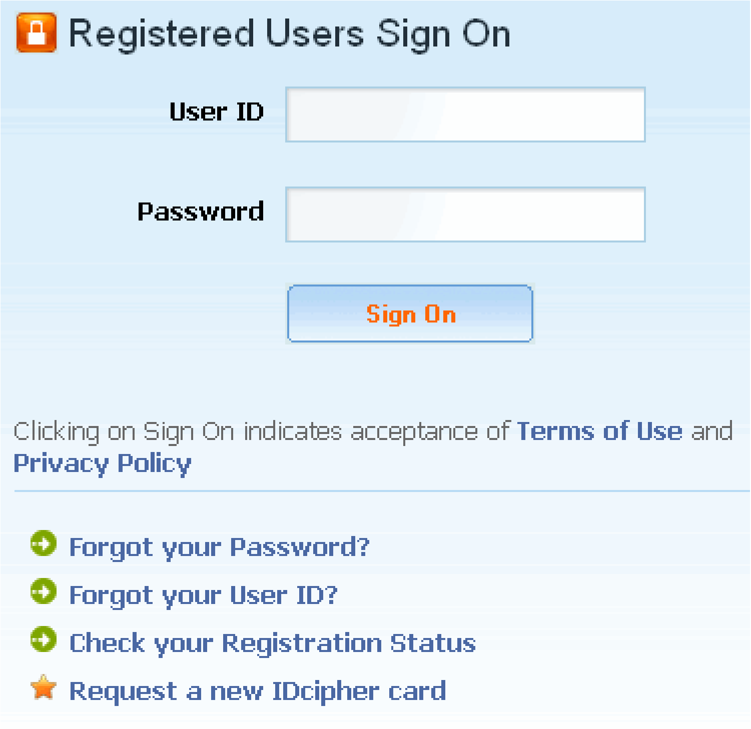
After submitting a registration request, users need not perform additional action to obtain an IDcipher™ Card.

(IDcipher™ Card is a premium service available for purchase by portal customers. Please contact your Covisint sales representative for details)

Existing Portal User - I Need a New IDcipher™ Card

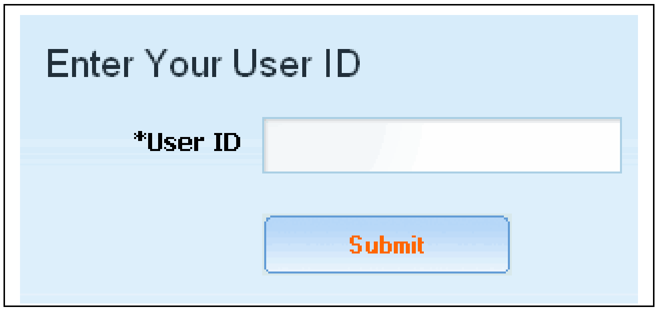
If you are not in possession of your IDcipher™ Card, you are able to generate a new card. Complete the following steps to generate a new card that will be emailed to the email address you provided during registration in your user profile. (The IDcipher™ Card will be sent to the email address registered in your profile).

1. Navigate to the portal sign on screen.



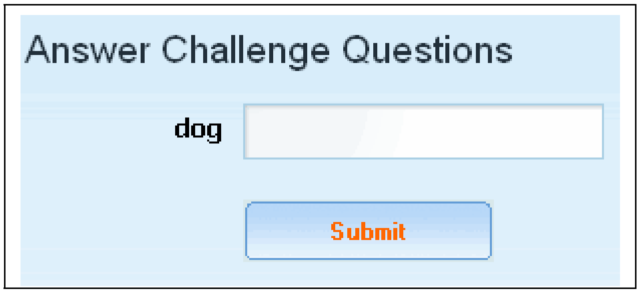
Clicking on Sign On indicates acceptance of Terms of Use and Privacy Policy

2. Click **Request a new IDcipher™ Card.** The **enter user ID screen** is displayed.



3. Key in your User ID in the open text field.

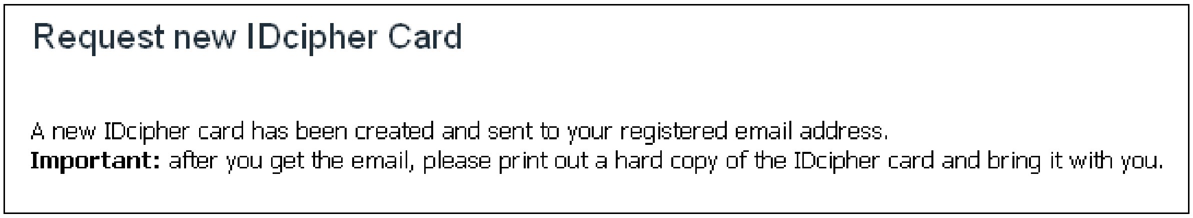
4. Click **Submit**. The **challenge question screen** is displayed. (***Learn more about a challenge question/answer >>>***)



Answer Challenge Questions

dog

5. Key in the answer to your challenge question.
6. Click **Submit**. A confirmation screen displays that a **new IDcipher™ Card** has been generated and emailed to you.



Request new IDcipher Card

A new IDcipher card has been created and sent to your registered email address.
Important: after you get the email, please print out a hard copy of the IDcipher card and bring it with you.

RESULT:

You have successfully obtained a new IDcipher™ Card.

(IDcipher™ Card is a premium service available for purchase by portal customers. Please contact your Covisint sales representative for details)

About the IDcipher™ Card

ℹ The IDcipher™ Card is used as a method for authentication that may optionally be used within Portals that require up-level authentication.

The IDcipher™ Card provides two-factor authentication (something the user knows and something the user has) which may be used when up-level authentication is required. The card provides a low-cost, easy-to-use, easy-to-deploy authentication mechanism that provides an extra level of assurance when a user is authenticated.

(IDcipher™ Card is a premium service available for purchase by portal customers. Please contact your Covisint sales representative for details)

When Will I Be Prompted To Use An IDcipher™ Card Number?

You will only be prompted to use an IDcipher™ Card when up-level authentication is required and the IDcipher™ Card was specified as the method of authentication required to complete the up-level authentication.

(IDcipher™ Card is a premium service available for purchase by portal customers. Please contact your Covisint sales representative for details)

Up-Level Authentication

Up-level authentication is an authentication process that prompts the user for an additional, stronger form of authentication than a user name and password, when a user attempts to gain access to a system resource that requires an additional level of protection. Additionally, the user may be prompted for up-level authentication based on specified criteria which can derived from user provided information (e.g. a specific user name), system collected information (e.g. an unknown PC IP Address), as well as transaction patterns (e.g. time of day the user signs on or how frequently the user is signing on).

Covisint has trademarked the IDcipher™ Card as a means of providing up-level authentication.

(IDcipher™ Card is a premium service available for purchase by portal customers. Please contact your Covisint sales representative for details)

Administrator Roles Matrix (Portal and User Security)

Two categories of roles are managed within the Administration too. Those are:

- Covisint Connection and Administration (CCA) Administrator roles
- Health Exchange Roles

The following table lists the privileges that are contained within CCA Administrator roles. When Division Administrators are assigned the Security Admin role perform tasks, each task is only applicable to that division. The role of Security Administrator applies to the division-level as well as the top-level organization. If your company sets up Divisions (aka practices) in this online structure, the Administrator at the Division level is also called a Security Administrator.

CCA Administrator roles are not tied to Health Exchange roles.

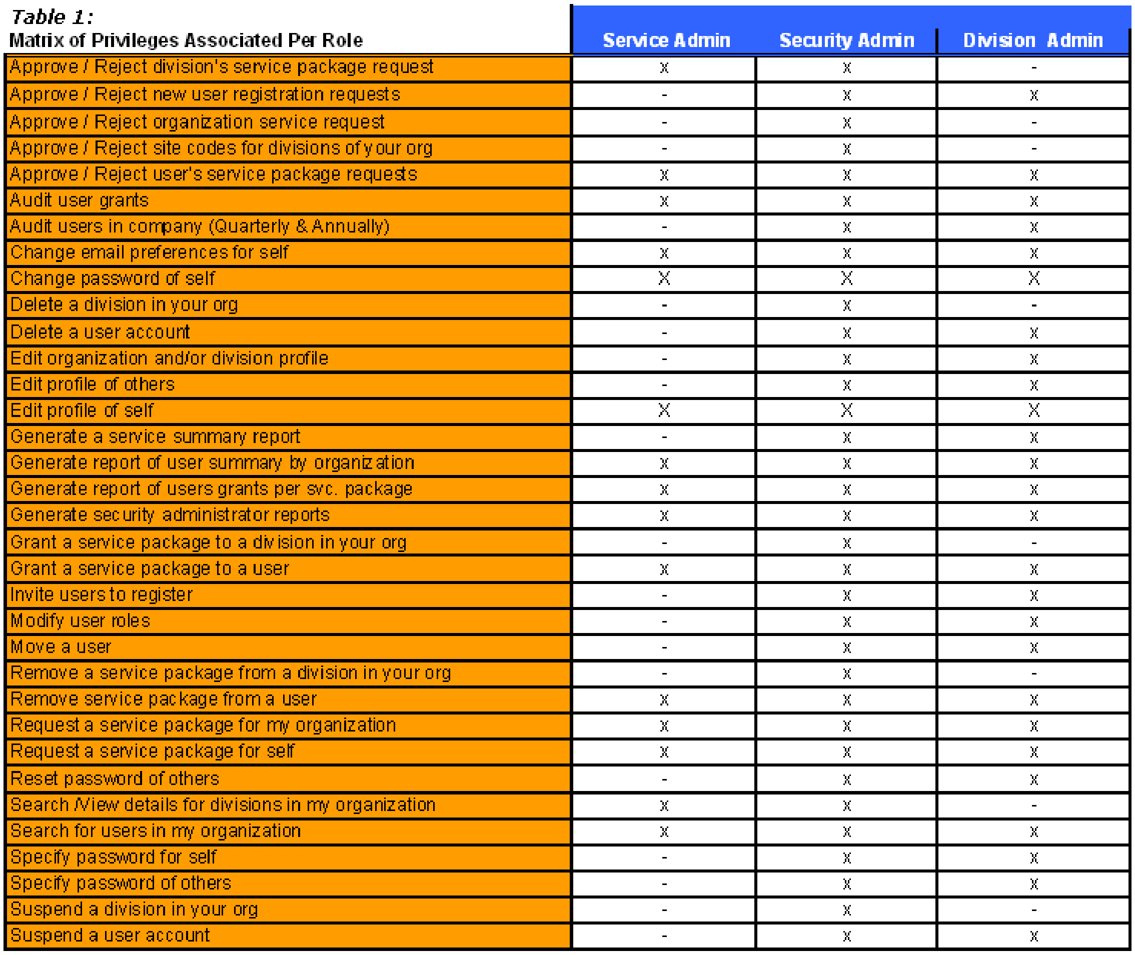


Table 1:

Matrix of Privileges Associated Per Role	**Service Admin**	**Security Admin**	**Division Admin**
Approve / Reject division's service package request	x	x	-
Approve / Reject new user registration requests	-	x	x
Approve / Reject organization service request	-	x	-
Approve / Reject site codes for divisions of your org	-	x	-
Approve / Reject user's service package requests	x	x	x
Audit user grants	x	x	x
Audit users in company (Quarterly & Annually)	-	x	x
Change email preferences for self	x	x	x
Change password of self	X	X	X
Delete a division in your org	-	x	-
Delete a user account	-	x	x
Edit organization and/or division profile	-	x	x
Edit profile of others	-	x	x
Edit profile of self	X	X	X
Generate a service summary report	-	x	x
Generate report of user summary by organization	x	x	x
Generate report of users grants per svc. package	x	x	x
Generate security administrator reports	x	x	x
Grant a service package to a division in your org	-	x	-
Grant a service package to a user	x	x	x
Invite users to register	-	x	x
Modify user roles	-	x	x
Move a user	-	x	x
Remove a service package from a division in your org	-	x	-
Remove service package from a user	x	x	x
Request a service package for my organization	x	x	x
Request a service package for self	x	x	x
Reset password of others	-	x	x
Search /View details for divisions in my organization	x	x	-
Search for users in my organization	x	x	x
Specify password for self	-	x	x
Specify password of others	-	x	x
Suspend a division in your org	-	x	-
Suspend a user account	-	x	x

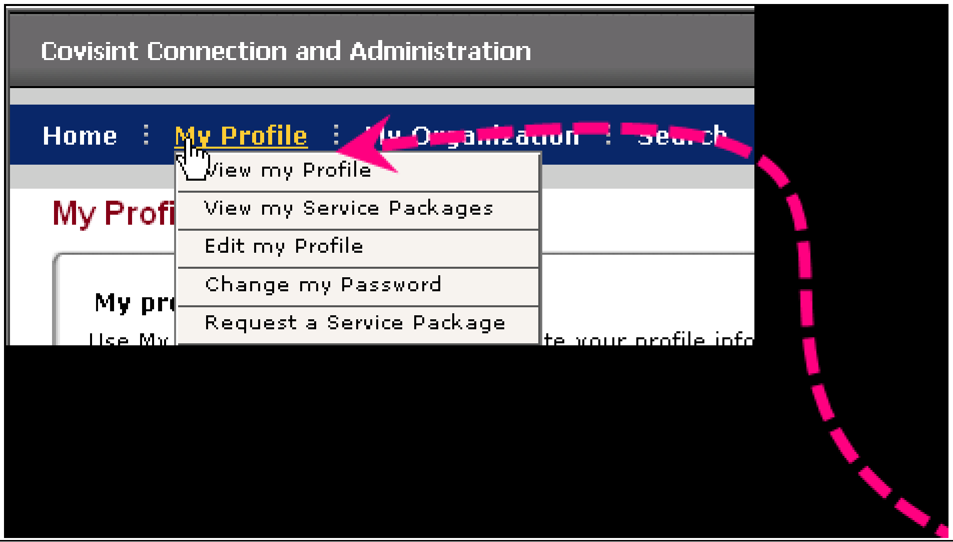
GENERAL USERS

Cancel a Pending Request

1. From the **My Profile drop-down menu**, click **View my profile.**

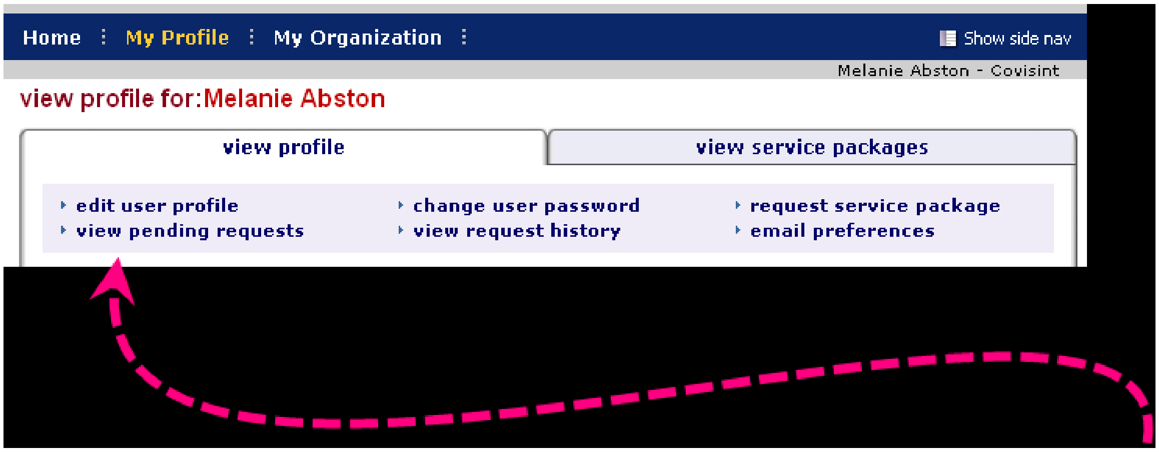
Where is the My Profile Drop-down Menu?

My Profile is located toward the top left of the toolbar.



2. Click **view pending requests**.

Where is the View Pending Requests link?



3. Enable the checkbox of each request you wish to cancel.
4. Click **cancel pending request**.
5. Click **Submit decision.**

RESULT:

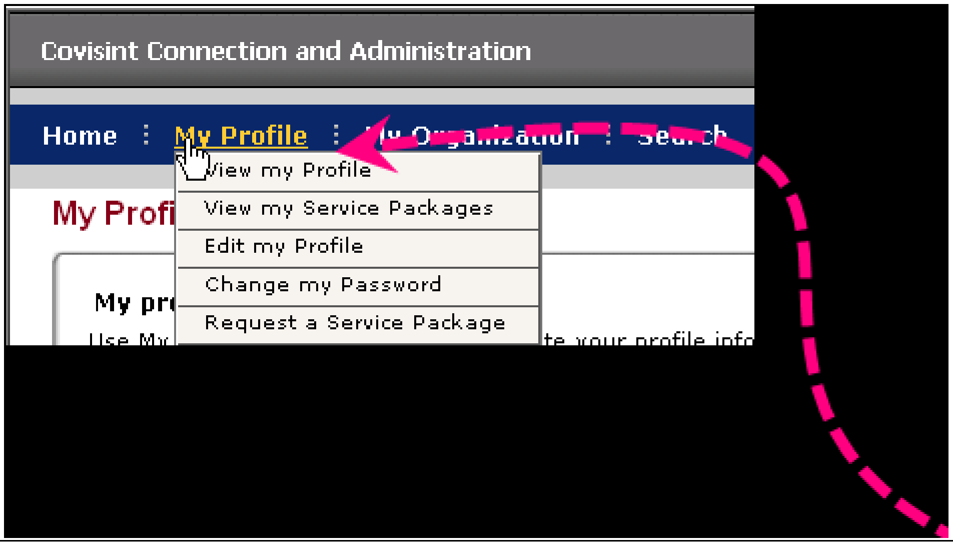
You have successfully cancelled a pending request.

Change Your Password

1. From the **My Profile drop-down menu**, click **Change Password**.

Where is the My Profile Drop-down Menu?

My Profile is located toward the top left of the toolbar.



2. In the New Password open text field, create a new password that adheres to specific rules. Refer to the password rules on your screen if necessary.
3. In the Re-enter New Password open text field, k*ey in the newly created password* to verify that you have typed it correctly.
4. Click **Submit password change**.

RESULT:

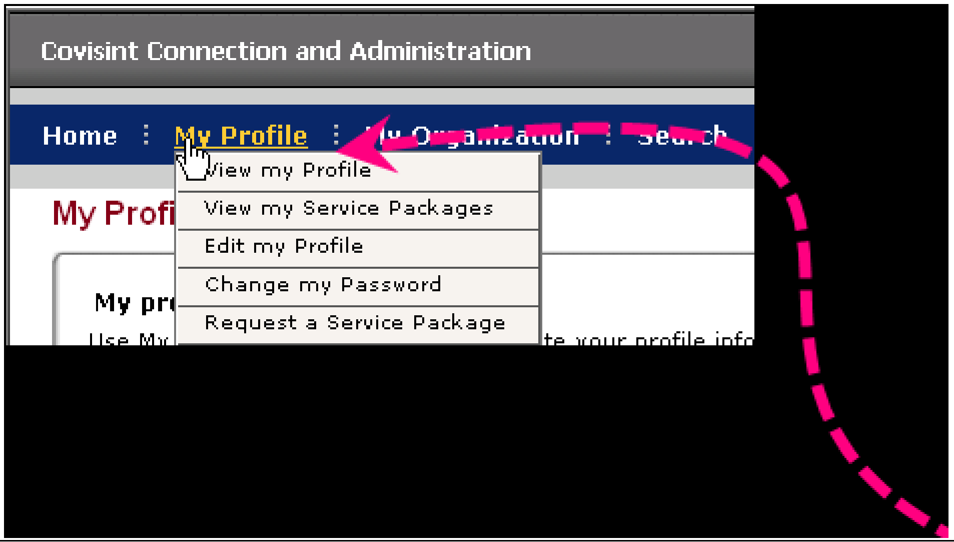
You have successfully changed your password.

Edit Your User Profile

1. From the **My Profile drop-down menu**, click **Edit My Profile**.

Where is the My Profile Drop-down Menu?

My Profile is located toward the top left of the toolbar.



2. Modify the information as desired.
3. Click **Save Changes**.

- The User ID can NEVER be modified
- Hover your mouse over a question mark icon to view help text related to that field
- Be sure to enter an email address to which you have access at any time. For example, if your company firewall blocks certain email accounts, such as yahoo.com or aol.com, do not use that email address for your user profile.

RESULT:

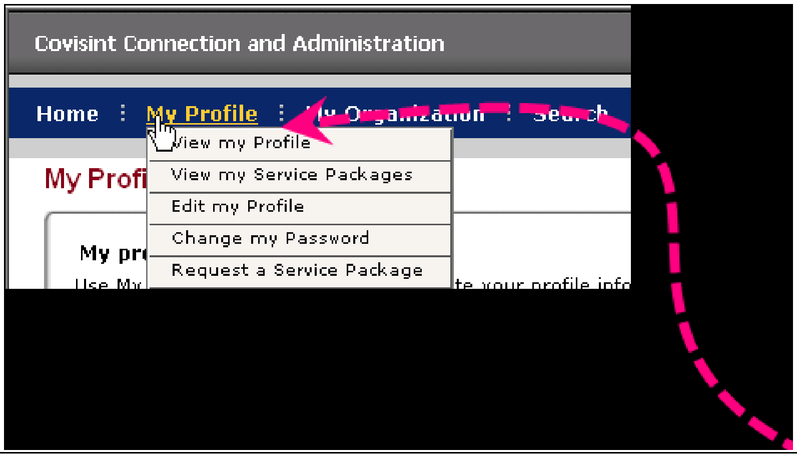
You have successfully edited your User Profile.

Opt Out of email Notices

1. From the **My Profile drop-down menu**, click **View my profile.**

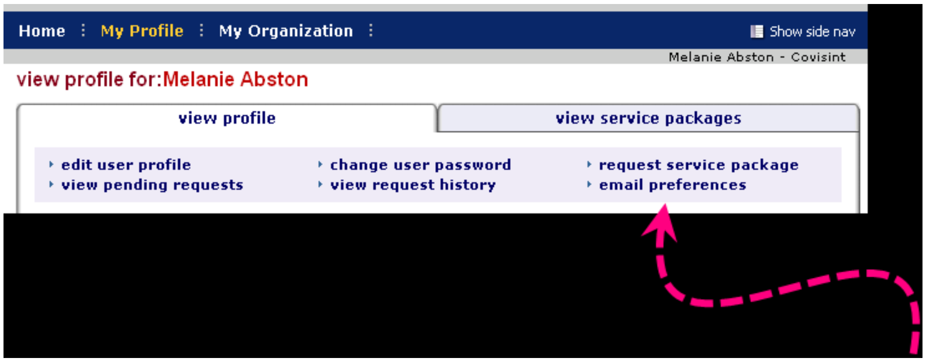
Where is the My Profile Drop-down Menu?

My Profile is located toward the top left of the toolbar.



2. Click **email preferences** link.

Where is the email preferences link?



3. Deselect the checkbox of each item you for which you do not wish to receive notification. (You are not able to opt out of password reset emails for security reasons).
4. Click **Save changes.**

RESULT:

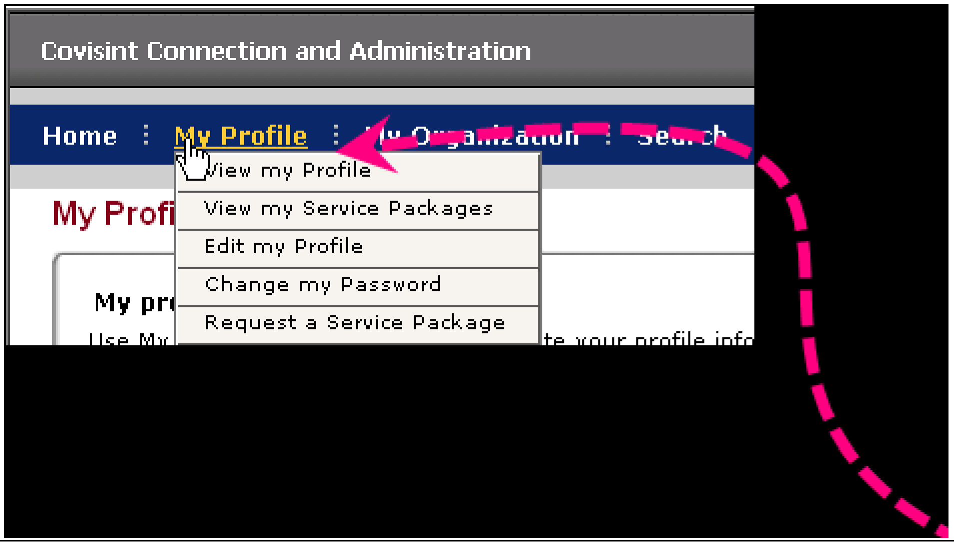
You have successfully opted out of email notices.

Request Service Packages

1. From the **My Profile drop-down menu**, click **Request Service Package**.

Where is the My Profile Drop-down Menu?

My Profile is located toward the top left of the toolbar.



2. Click **request** next to the package you wish to request.
3. Enter the reason for request in the open text box.
4. Click **continue**.
5. Repeat steps 1 – 4 as necessary for additional service packages.

RESULT:

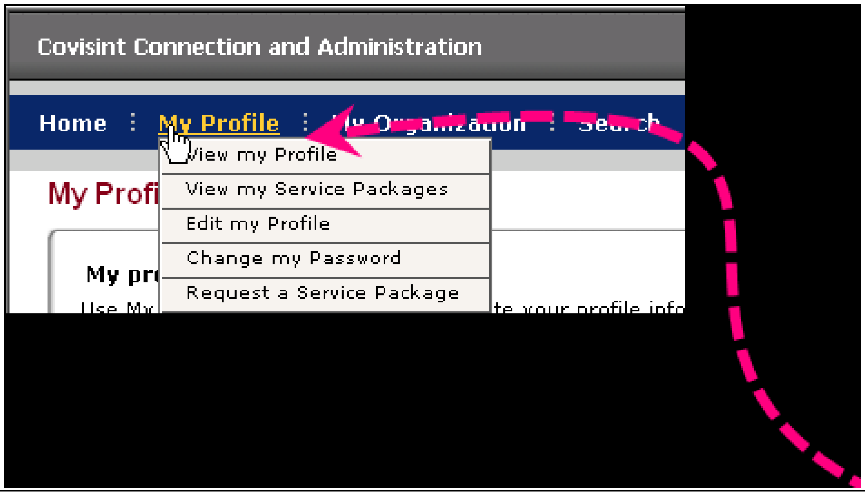
You have successfully requested service packages.

Send Pending Request Reminder to Administrator

1. From the **My Profile drop-down menu**, click **View my profile**.

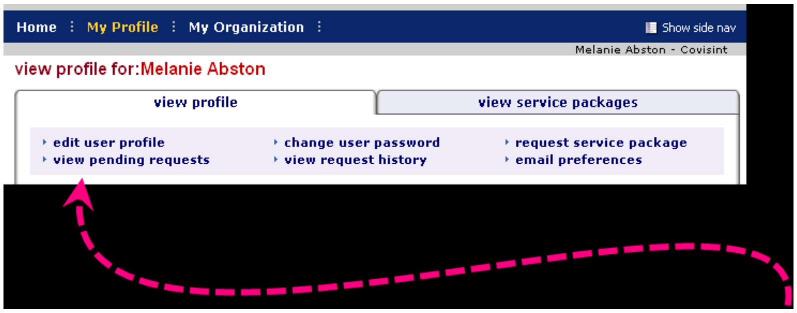
Where is the My Profile Drop-down Menu?

My Profile is located toward the top left of the toolbar.



2. Click **view pending requests**.

Where is the View Pending Requests link?



3. Enable the checkbox of each request
4. Click **Send Reminder.**
5. Key in the *reason for reminder*.
6. Click **Submit**.

RESULT:

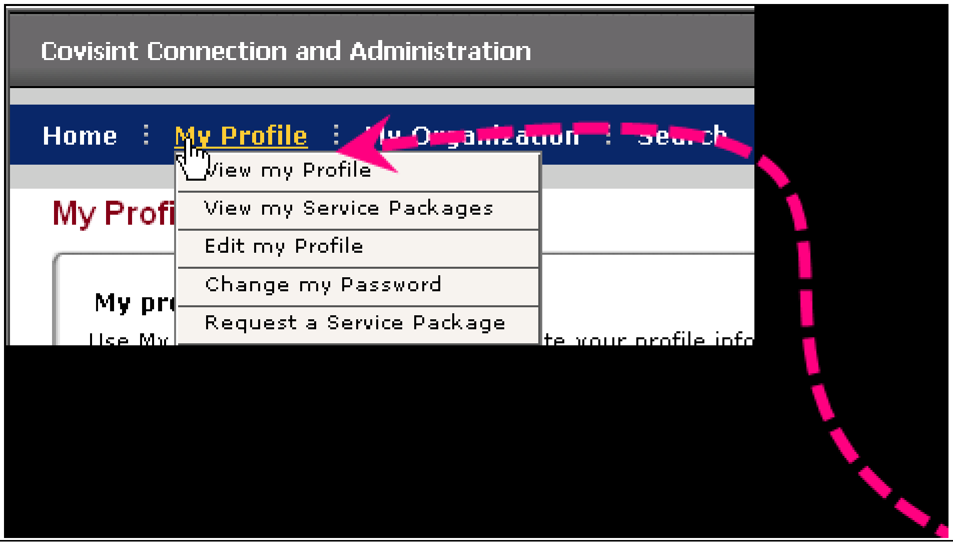
You have successfully sent a reminder to an administrator regarding your pending request.

View History of Your Requests

1. From the **My Profile drop-down menu**, click **View my profile**.

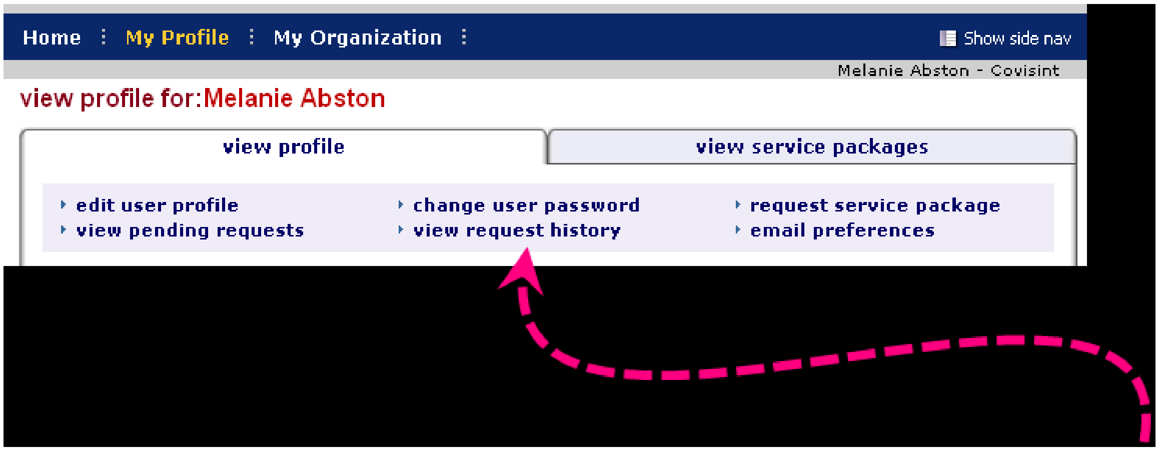
Where is the My Profile Drop-down Menu?

My Profile is located toward the top left of the toolbar.



2. Click **view request history**.

Where is the view request history link?



RESULT:

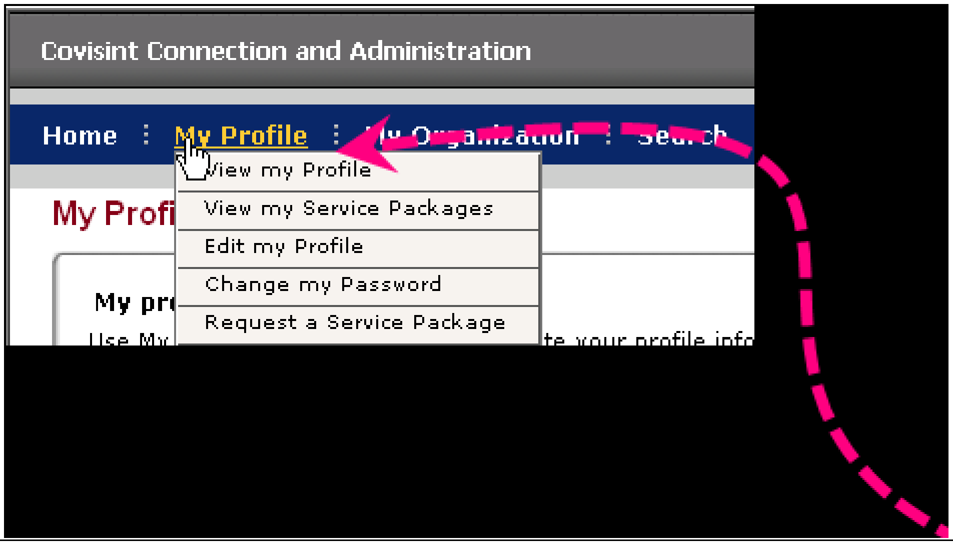
You have successfully viewed a history of your requests.

View Your Current Service Package Grants

1. From the **My Profile drop-down menu**, click **View my profile.**

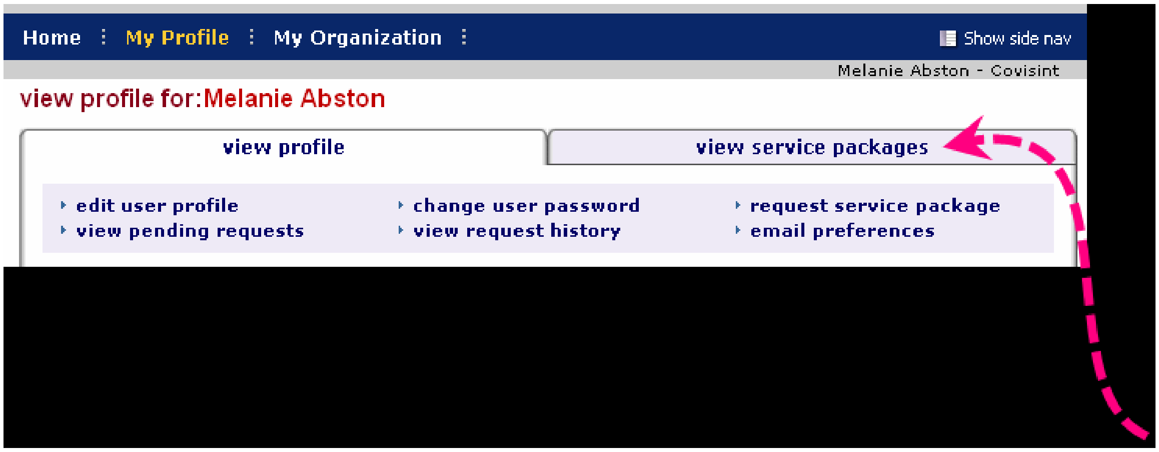
Where is the My Profile Drop-down Menu?

My Profile is located toward the top left of the toolbar.



2. Click **view service packages** tab.

Where is the view service packages tab?



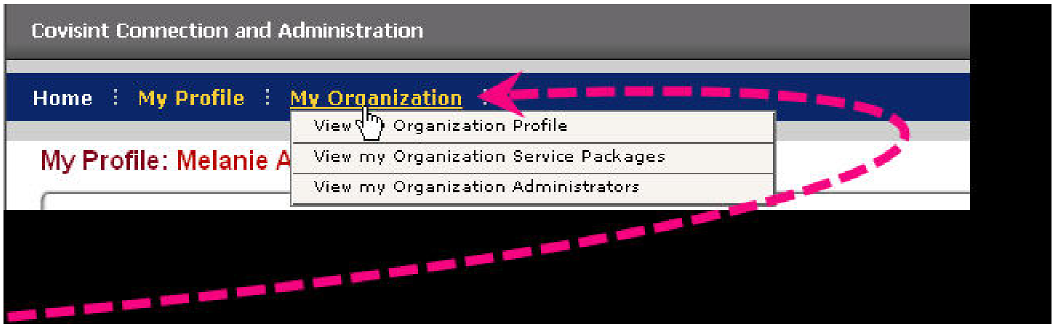
RESULT:

You have successfully viewed your service package grants.

View Your Organization Profile

1. Click **My Organization drop down menu**.

Where is the My Organization drop-down menu?



Covisint Connection and Administration
Home
My Profile
My Organization
View Organization Profile
View my Organization Service Packages
View my Organization Administrators
My Profile: Melanie A

2. Click **view my organization profile.**

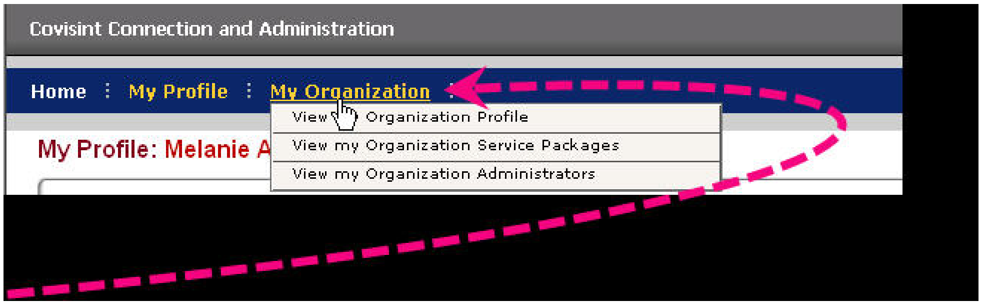
RESULT:

You have successfully viewed your organization profile.

View Your Organization Services

1. Click **My Organization drop down menu**.

Where is the My Organization drop-down menu?



Covisint Connection and Administration
Home
My Profile
My Organization
View Organization Profile
View my Organization Service Packages
View my Organization Administrators
My Profile: Melanie A

2. Click **view my organization services**.

RESULT:

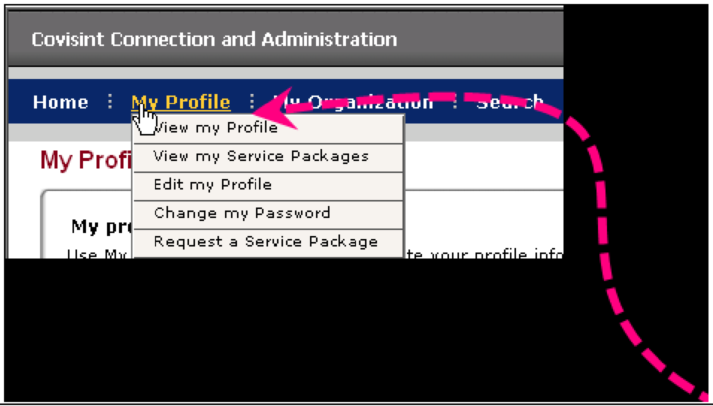
You have successfully viewed your organization services.

View Your Pending Requests

1. From the **My Profile drop-down menu**, click **View My Profile**.

Where is the My Profile Drop-down Menu?

My Profile is located toward the top left of the toolbar.



2. Click view pending requests.

RESULT:

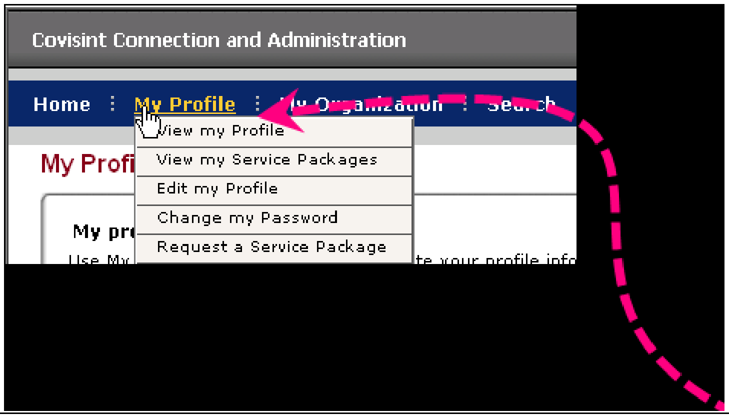
You have successfully viewed your pending requests.

View Your User Roles

1. From the **My Profile drop-down menu**, click **View my profile**.

Where is the My Profile Drop-down Menu?

My Profile is located toward the top left of the toolbar.



2. Scroll to the bottom of the screen to view the "user assigned roles" section. If you have roles assigned, they will be listed here.

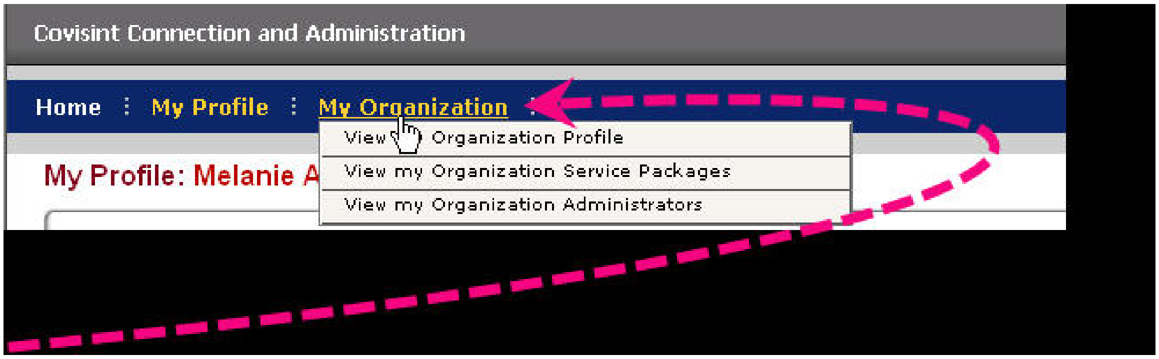
RESULT:

You have successfully viewed your user roles, if any are applicable.

Who are my Organization Security Administrators

1. Click **My Organization drop down menu**.

Where is the My Organization drop-down menu?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Home
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View my Organization Service Packages
View my Organization Administrators
My Profile: Melanie A

2. Click **View my organization administrators**.

What if the Security Administrator is no longer valid? Complete and submit the Security Administrator Change Request Form to change your security administrator. Download the form at the support site, at: https://portal.covisint.com/web/supporthc/ccahc

RESULT:

You have successfully viewed your Security Administrators.