

Getting Started: Security Administrator's Quick Reference Guide

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What is a Security Administrator?

The Security Administrator is responsible for the establishment and management of your organization and its divisions, and serves as the main point of contact for your organization. Security administrators also manage the organizations users and access rights. Those with the Security Administrator role decide who gets to use the portal, and what they get access to in the portal.

Managing Users

The checklist below is provided to help you get started managing your organization's **users** as a Security Administrator. (Also view the checklist for managing your organization.)

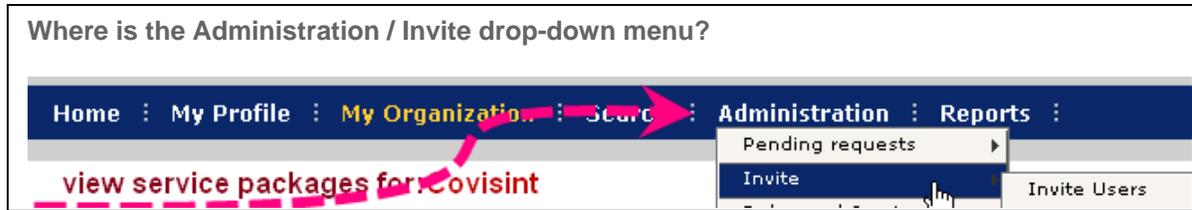
Tasks are **listed in the order in which they are typically performed**. (This is not a comprehensive list of everything you can do... just a list to help get you started with in your new role.)

SECURITY ADMINISTRATOR - MANAGING USERS

- Invite users to register for access to the portal
 - Approve pending new user access requests
 - Approve pending service package requests from users
 - Search for users in your Organization
 - Grant a service package to a user
 - Modify a user's role
 - Suspend a user's account
 - Specify a user's password
 - Edit a user's profile
-

Invite User to Register for Access to the Portal

1. Click **Invite Users** from the *Administration -> Invite* drop-down menu.



2. Key in the *email address for each recipient* you wish to invite, **separated by semi-colon (;)**
3. Click **send invitation**.
4. Click **OK**.



- The system does not validate the accuracy of the email addresses that you key in. If an email invitation cannot be delivered for any reason, you will not be notified of this failure.
- A good rule of thumb is that you do not modify the text of the email invitation, as editing the actual invitation URL within the subject text could break the link.

RESULT:

You have successfully invited a user to register for portal access.

What happens next?

- User will receive the invitation via email, and complete the steps for registration.
- You will receive an email regarding the user's pending request after the user submits the registration request.
- Approve the user request
- Optionally, grant service packages
- Optionally, modify user roles

Approve Pending New User Request

1. Click **User Requests** from the Administration -> Pending requests drop-down menu.
2. Click  to view details of request.
3. Enable the 'approve' radio button.
4. Click **submit decision**.
5. Click **OK**.



If your organization also uses the IDcipher™ card in addition to a user name and password for authentication, then the system will automatically generate and email an IDcipher™ card to the user upon your new user request approval.

RESULT:

You have successfully approved a pending account request. The user will receive an email notification regarding this approval, along with an IDcipher™ card, if applicable.

Approve User's Pending Service Package Request

1. Click **User Requests** from the *Administration -> Pending requests* drop-down menu.



- 2.
3. Click the **User Service Package** tab.
4. Click  to view details of request.
5. Enable the 'approve' radio button.
6. Click **submit decision**.
7. Click **OK**.

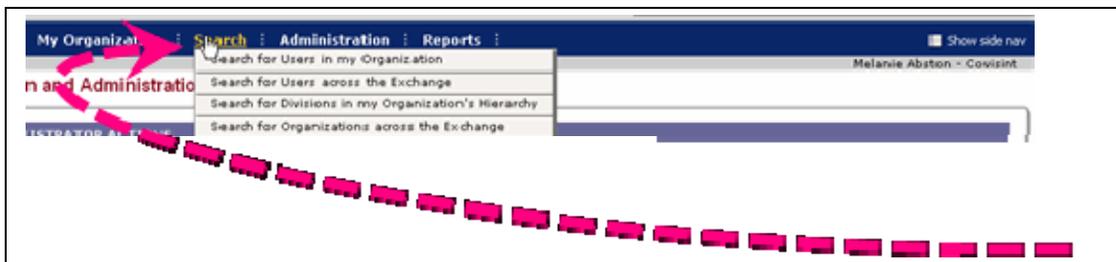
RESULT:

You have successfully approved a user's service package request.

Search for Users in My Organization

1. From the *Search* drop-down menu, click **Search for Users in my Organization**.

Where is the **Search** drop-down menu?



2. Select search criteria.
3. Click **Search**.

RESULT:

You have successfully searched for users in your organization

Grant Service Package to User

1. Perform a [user search](#).
2. From the search results, click on the *name of the user*.
3. Click **add service package**.
4. Enable the checkbox of each service package you wish to grant to this user.
5. Click **add checked...**
6. Click **continue**.
7. Click **submit**.



Some service packages are not grantable.

RESULT:

You have successfully granted a service package to a user.

Modify a User's Role



Please review the details when on assigning the Health Exchange Role Manager in the topic Managing the Health Exchange Role Manager role.

1. Perform a [user search](#).
2. From the search results, click on the *name of the user*.
3. Click **modify roles**.
4. Enable the checkbox of each role you wish to grant to the user.
5. Click **submit**.
6. Click **OK**.

RESULT:

You have successfully modified a user's role.

Specify a User's Password

1. Perform a [user search](#).
2. From the search results, click on the *name of the user*.
3. Click **specify user password**.
4. Validate the user's identity via the security questions.
5. In the first New Password open text field, *key in a new password* for this user.
6. In the second New Password open text field, *key in the password again*.
7. State the password to the user.
8. Click **Submit Password Change**. Inform user he/she will be forced to change this temporary password upon the next login.

RESULT:

You have successfully specified a user's password.

Managing Your Organization

Getting Started - Managing Your Organization

Security Administrators are responsible for the establishment and management of your organization and its divisions, and serve as the main point of contact for the organization.

The checklist below is provided to help you get started managing your **organization** as a Security Administrator, and is applicable for the Top Level Organization as well as at the Division Level Security Administrator.. (Also view the checklist for managing your users.)

Tasks are **listed in the order in which they are typically performed**. (This is not a comprehensive list of everything you can do... just a list to help get you started with in your new role.)

SECURITY ADMINISTRATOR - MANAGING THE ORGANIZATION

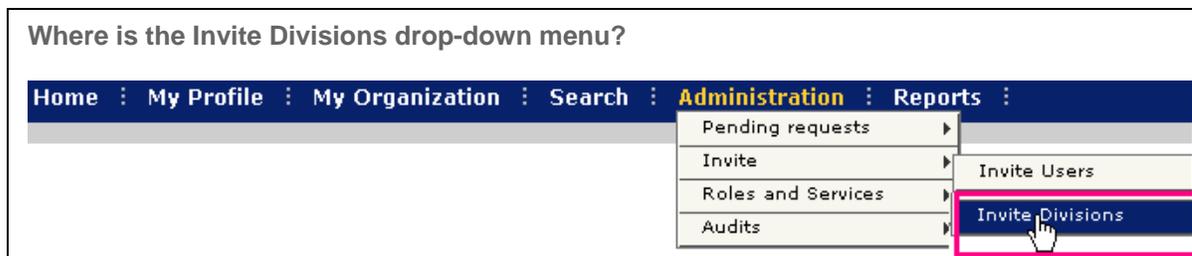
- Invite divisions (also known as practices) to register for access to the portal
 - View your organizational hierarchy within this system (and see all divisions belonging to your organization)
 - Approve pending division access requests
 - Approve pending service package requests from divisions
 - Request a sub/service package for your organization
 - Grant a service package to a division
 - View your organization's administrators
 - Edit the organization's profile
 - Manage your organization's users
-

Invite Division (aka Practice) to Register for Access to the Portal

What is a Division? A division is a part of your organization's hierarchy, such as a business unit, or practice. When inviting a division to your organization, it is important to understand that you are creating a hierarchy for your organization with a delegated administration model. This gives the security administrator of that division the authoritative power over the users of that division. Although the security administrator of the top level organization will still have authority over the users of the division all requests for services and new user accounts will be handled at the division level by the appropriate administrator.

You should only create divisions in your organization if you believe your organization would benefit by delegating the administrative responsibilities to an entirely new organization (the division), which will be managed by its own administrators.

1. Click **Invite Division** from the *Administration -> Invite* drop-down menu.



2. Key in the *email address for each division's recipient* you wish to invite, **separated by semi-colon (;)**
3. Click **send invitation**.
4. Click **OK**.



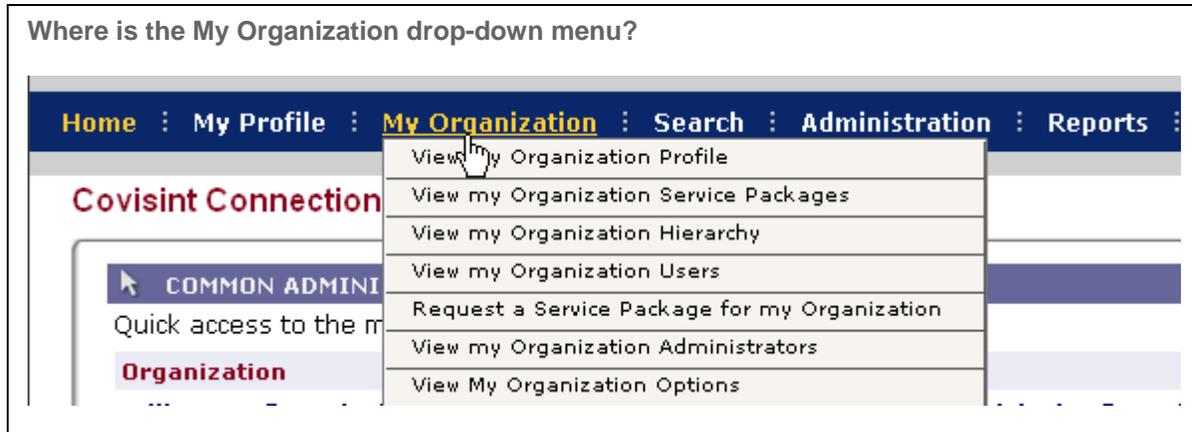
- The system does not validate the accuracy of the email addresses that you key in. If an email invitation cannot be delivered for any reason, you will not be notified of this failure.
- A good rule of thumb is that you do not modify the text of the email invitation, as editing the actual invitation URL within the subject text could break the link.

RESULT:

You have successfully invited a division to register for portal access.

View Organization Hierarchy (within CCA)

1. Click **View my Organization Profile** from the *My Organization* drop-down menu.



2. Click the **view hierarchy** tab. (To view an organization, click on its name within the tree).

RESULT:

You have successfully viewed your organization's hierarchy.

View Pending Organization Requests

1. Click **view my organization profile** from the *My Organization* drop-down menu.



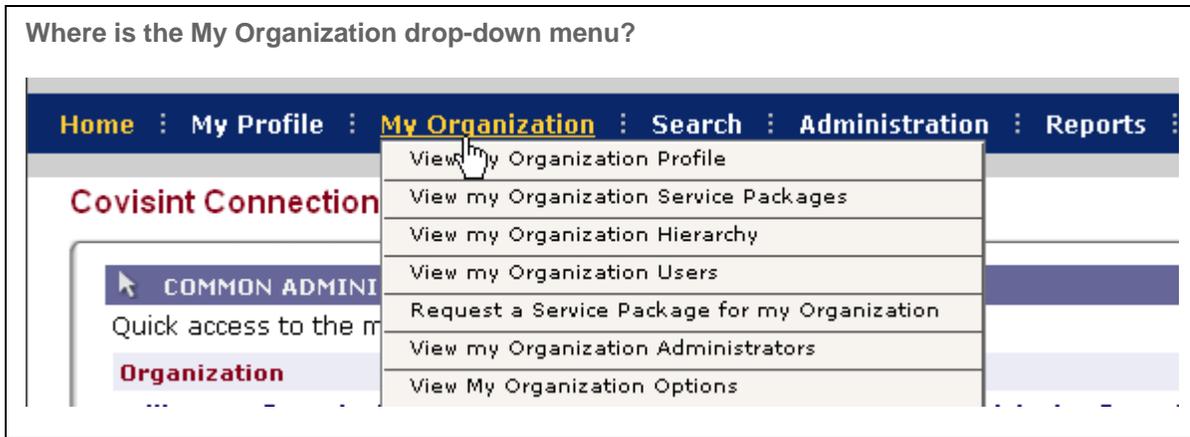
2. Click **view pending requests**.

RESULT:

You have successfully viewed your organization's pending requests.

Request Service Package for your Organization

1. Click **Request a Service Package for my organization** from the *My Organization drop-down menu*.



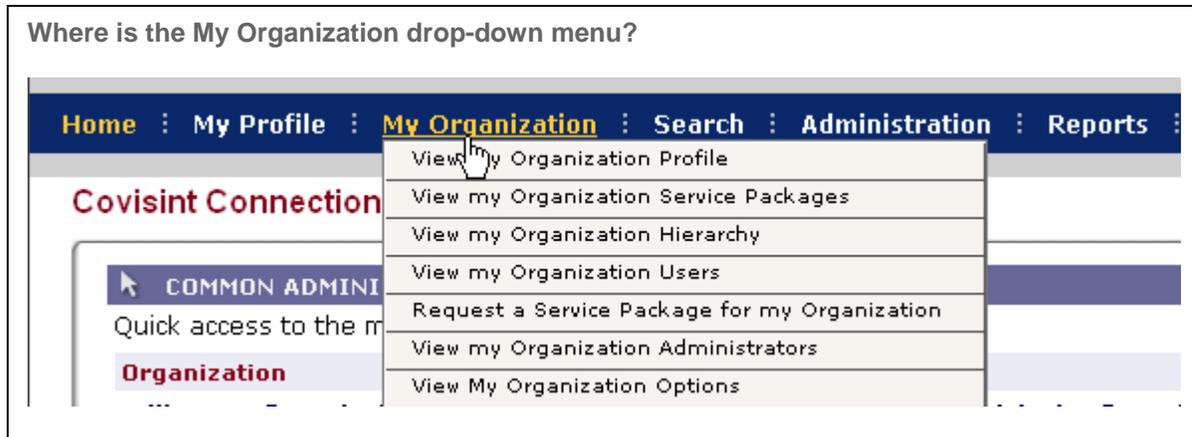
2. Click **request** next to the desired package.
3. Key in the *reason for request* in the open text box.
4. Click **continue**. This request for service packages is submitted to the approving administrator.

RESULT:

You have successfully requested a service package for your organization.

Request a Sub-Package for Your Organization

1. Click **Request a Service Package for my organization** from the *My Organization drop-down menu*.



2. Click **request sub package** next to the desired package.
3. Click **request**. This request for sub- package is submitted to the approving administrator.

RESULT:

You have successfully requested a sub-package for your organization.

Remove Service Packages from Practice

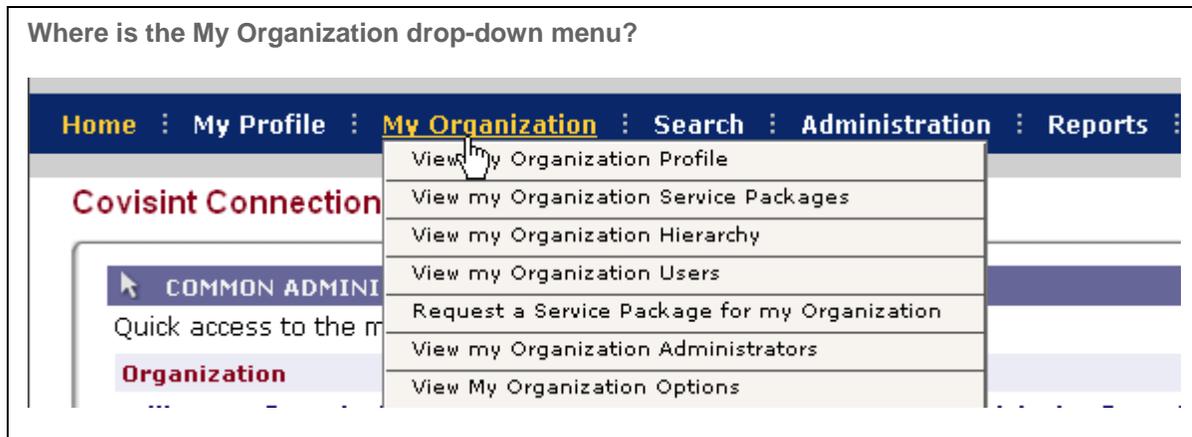
1. Click **Search for divisions in my organization hierarchy** from the **Search** drop-down menu.
2. Search for the practice from which you wish to remove a package.
3. From the search results, click on the *practice name*.
4. Click **view service packages** tab.
5. Click on the name of the service package you wish to remove.
6. Click
7. Click **add**.
8. Click **continue**.

RESULT:

You have successfully granted service packages to a practice.

View Organization Administrators

1. Click **View my Organization Profile** from the *My Organization* drop-down menu.



2. Click the **view administrator** tab. All administrators in the organization are displayed.

RESULT:

You have successfully viewed all administrators in your organization.