Registering and Approving New PRISM Users

Purpose: This standard operating procedure (SOP) outlines how provider office staff will register as PRISM users and obtain a PRISM provider portal account. This procedure also explains how the Provider Account Administrator approves the registration and assigns profiles to the new user.

Standard Operating Procedure (SOP):	PRISM Provider Portal
Title:	Approving a New User for the Provider Portal
Effective Date:	8/16/2016

BACKGROUND: After a Utah Medicaid provider's enrollment application is approved, the designated Provider Account Administrator can assign PRISM profiles to other staff members in their office. The staff member must complete the Provider Portal user registration process; detailed in the **Requesting Access to the Provider Portal (and PRISM)** section below, before a profile can be assigned.

RESPONSIBILITIES OF THE PROVIDER ACCOUNT ADMINISTRATOR: The EXT Provider Account Administrator access profile is considered privileged access for the purpose of user management and includes other security duties. This is the initial profile assigned to the user that completes a new provider enrollment or validates the converted provider data. This profile, referred to as Provider Account Administrator throughout this document, has the responsibility of approving all new users for the provider's domain, is accountable for maintaining user information in the system, maintaining appropriate access documentation and performing activity reviews, and removal of access. This profile should be restricted to user security management. If the Provider Account Administrator requires other portal access, that should be done through separate profiles assigned to that user.

This Standard Operating Procedure (SOP) covers the following procedures:

- User downloads and completes the Provider User Access Agreement
- User requests access to the Provider Portal
- Account Administrator reviews and approves the user's registration
- Account Administrator assigns the user PRISM profile(s)

REQUESTING ACCESS TO THE PROVIDER PORTAL (AND PRISM)

The following steps are required for a user to obtain access to PRISM. Once the user has completed a Provider User Access Agreement (UAA), he or she will need to complete Provider Portal Access registration, detailed in section II. Once access to PRISM is approved by the Provider Account Administrator, PRISM Profiles can be assigned to the user. ***Note:*** *A user accesses PRISM through the Provider Portal.*

I. USER DOWNLOADS AND COMPLETES THE PROVIDER USER ACCESS AGREEMENT

1. Navigate to (https://medicaid.utah.gov/Documents/cover-sheets/PRISM-SEC-AGRMNT.pdf)
2. Download a copy of the **Provider User Access Agreement** (The form should be filled out electronically for best readability before printing for signatures, not filled out on paper. Certain fields are marked as required on the PDF form.)
3. Fill out all fields in ***Section 1 – User Information*** (This section can be completed by either the employee's supervisor or the user requesting PRISM access, however the user's information should be entered. Note: the Utah-ID is a required field. If the user does not have a Utah-ID, see section II, item 3 on this section for those instructions, Return to this step after a Utah-ID is created.)

Section 1 - User Information		
Name	Email address	Utah-ID
Employer	Department/Office	Job Title
Street Address	City/State/Zip	Work phone #
Supervisor Name	Supervisor email	Supervisor phone #

4. Fill out all fields in ***Section 2 – Access Information***, and select the applicable checkboxes in the ***Requested Access*** boxes (This section should also be completed by the employee's supervisor not the Provider Account Administrator)
   - **Select**: New, Change, Suspend, or Remove
     - These checkboxes refer to the action you are taking for the profile(s) selected in the sections below
   - **Select**: All applicable profiles to be assigned
   - **Fill out:** Justification for access box

Section 2 - Access Information	☑ New ☐ Change ☐ Suspend ☐ Remove *(check one)*		
Request Date	Effective Date		Expiration Date (If temp access)
Requested Access *(to see a profile description, hover over the profile checkbox)*	PROVIDER ☐ Credentialing Specialist ☐ EDI Team ☐ File View (inquiry) ☐ Upload Files	PROVIDER EHR ☐ Incentive Specialist *(eMIPP system admin)*	PROVIDER SECURITY ☐ Account Administrator *(account admin requires additional approval in Section 4 below)*
Justification for access (required)			

5. Print the completed **Provider User Access Agreement** in order to manually sign and date the document in **Section 3 – Security Agreement/Approvals** (User and Supervisor or other approving official [not the Provider Account Administrator] must complete this section)
   - New user signs and dates the document
   - Supervisor or other Approver signs and dates the document
   - Return form to the Provider Account Administrator

Section 3 - Security Agreement/Approvals	
User Acknowledgement- *I agree to comply with the Utah Department of Health, Division of Medicaid and Health Financing PRISM Access Agreement (located at medicaid.utah.gov/become-medicaid-provider) and all other policies that are appropriate to the system profile assigned for my use.*	
User Signature:	Date:
Provider Approval- *I attest the requested access profile is appropriate and necessary for this individual to perform his/her assigned job duties. I understand training on system use is the supervisor's responsibility. Any changes in this employee's job duties which impact system use will be promptly reported to our PRISM account administrator.*	
Provider Signature:	Date:
Section 4 – Account Administrator Agreement/Approval	
User Acknowledgement _____ (initial) *I additionally acknowledge the Provider Account Administrator access profile is considered privileged access for the purpose of user management and includes other security duties such as, but not limited to, maintaining appropriate access documentation and performing activity reviews.*	
Provider Approval _____ (initial) *I additionally authorize this individual to serve as the PRISM account administrator for my organization.*	

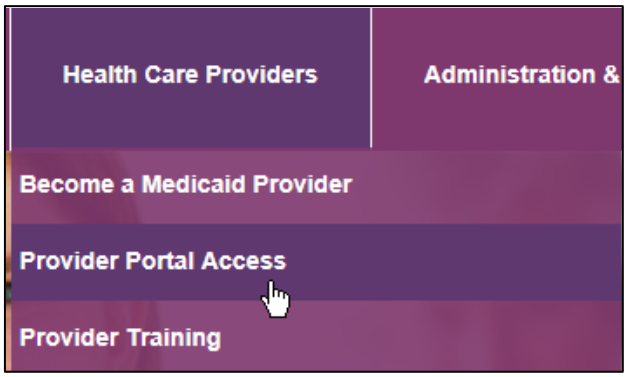
6. Utilize **Section 4** according to your internal business processes (This section is to be completed by the Provider Account Administrator after all business signatures have been added on the printed form.)

Section 4 - Security Tracking for Provider System Admin	☐ scanned form uploaded to PRISM
Completed by	Date Completed
Reviewed by	Date Reviewed
Security Notes	

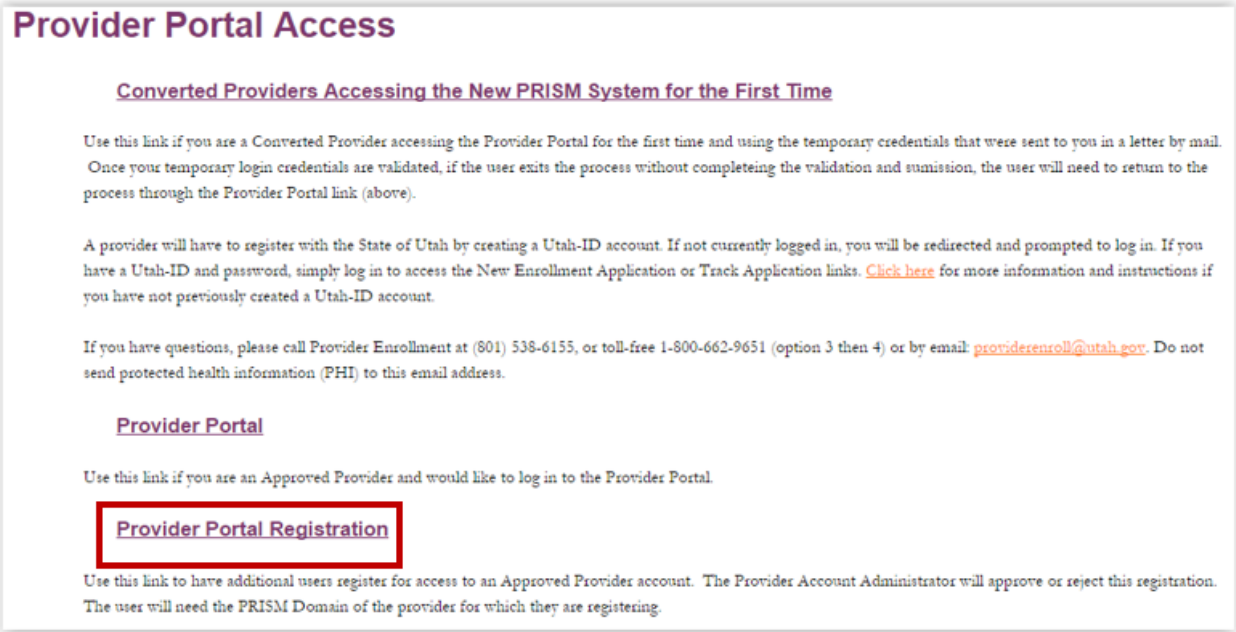
7. Provider Account Administrator scans and saves the completed Provider User Access Agreement to his/her computer in order to upload to PRISM during the Provider Portal Access approval process, as detailed in **Provider Account Administrator Grants User Access to PRISM – Section I**.
   a. Recommend using the following standard naming convention for the forms to be uploaded: username_User_Agreement.pdf
   b. The original signed paper agreement may be kept or shredded per internal business process.

II. User Requests Access to the Provider Portal

1. The Provider Account Administrator must provide the requesting user with the PRISM provider domain name
2. The Provider Account Administrator must direct the user to the Utah Medicaid website (https://medicaid.utah.gov/prism) and provide the following instructions to assist the user in navigating to the Provider Portal Registration page:
   - Hover over the ***Health Care Providers*** menu
   - Select **Provider Portal Access**



   - On the ***Provider Portal Access*** page, click the **Provider Portal Registration** hyperlink



Provider Portal Access

Converted Providers Accessing the New PRISM System for the First Time

Use this link if you are a Converted Provider accessing the Provider Portal for the first time and using the temporary credentials that were sent to you in a letter by mail. Once your temporary login credentials are validated, if the user exits the process without completeing the validation and sumission, the user will need to return to the process through the Provider Portal link (above).

A provider will have to register with the State of Utah by creating a Utah-ID account. If not currently logged in, you will be redirected and prompted to log in. If you have a Utah-ID and password, simply log in to access the New Enrollment Application or Track Application links. Click here for more information and instructions if you have not previously created a Utah-ID account.

If you have questions, please call Provider Enrollment at (801) 538-6155, or toll-free 1-800-662-9651 (option 3 then 4) or by email: providerenroll@utah.gov. Do not send protected health information (PHI) to this email address.

Provider Portal

Use this link if you are an Approved Provider and would like to log in to the Provider Portal.

Provider Portal Registration

Use this link to have additional users register for access to an Approved Provider account. The Provider Account Administrator will approve or reject this registration. The user will need the PRISM Domain of the provider for which they are registering.

3. The user will be prompted to enter his or her Utah-ID and password.

   Note: ***Utah-IDs are unique to each user and should not be shared with other users.***

   - If a Utah-ID and password needs to be created, click the **Create Account** hyperlink and use the following standards when creating a password

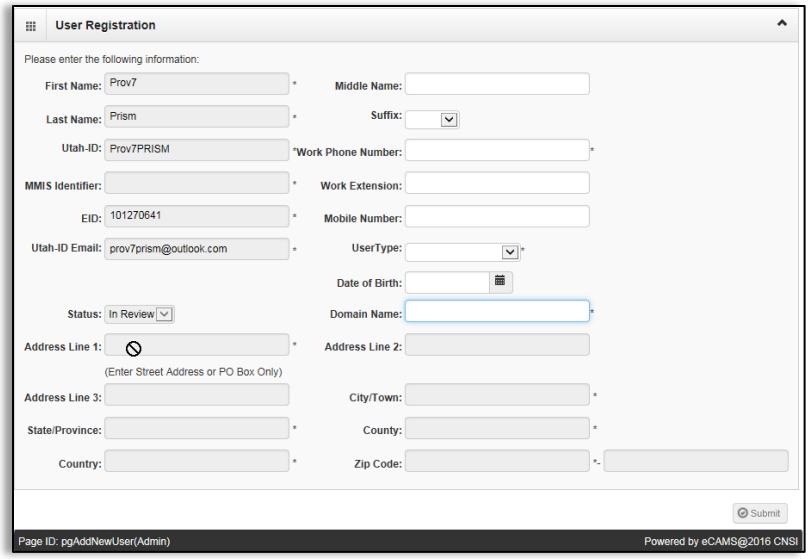
Utah-ID Password Standards

In order to access the PRISM Provider Portal, providers will need a Utah-ID password that meets the following standards:

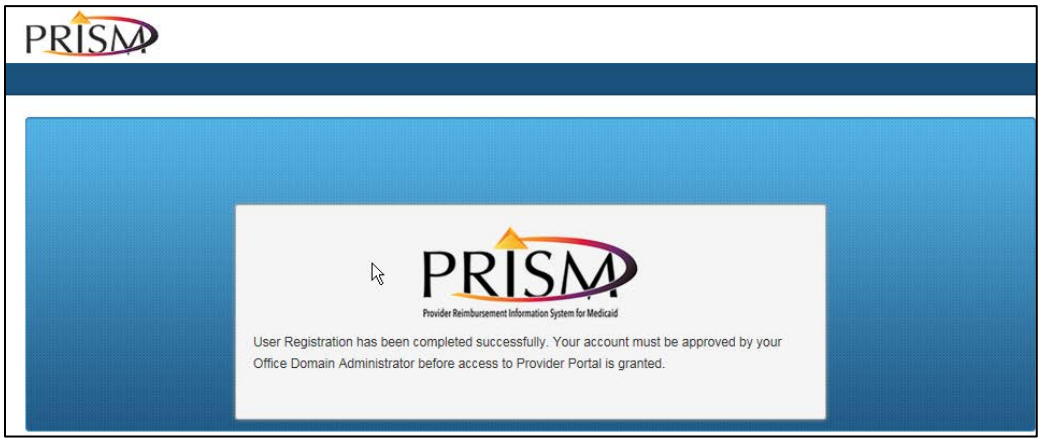
- At least eight characters in length
- Passwords must have a combination of letter, numeric digits and special characters
- Passwords must include at least one character from three of the following attributes:
    - Uppercase characters (A-Z)
    - Lowercase characters (a-z)
    - Numeric Characters (0-9)
    - Special Characters (i.e: ., !, @, #, $, %, ^, &, *,)

If the Utah-ID password previously created by the user does not meet these standards, providers will be forced to change their password to gain access to PRISM.

4. The user fills out the ***User Registration*** page by:
    - Entering the domain name provided by the Provider Account Administrator in the Domain Name field
    - Entering a phone number in the **Work Phone Number** field
    - Selecting a user type from the ***UserType*** drop-down menu
5. Click **Submit**



6. If the user has completed all of the required fields, a confirmation page will display.



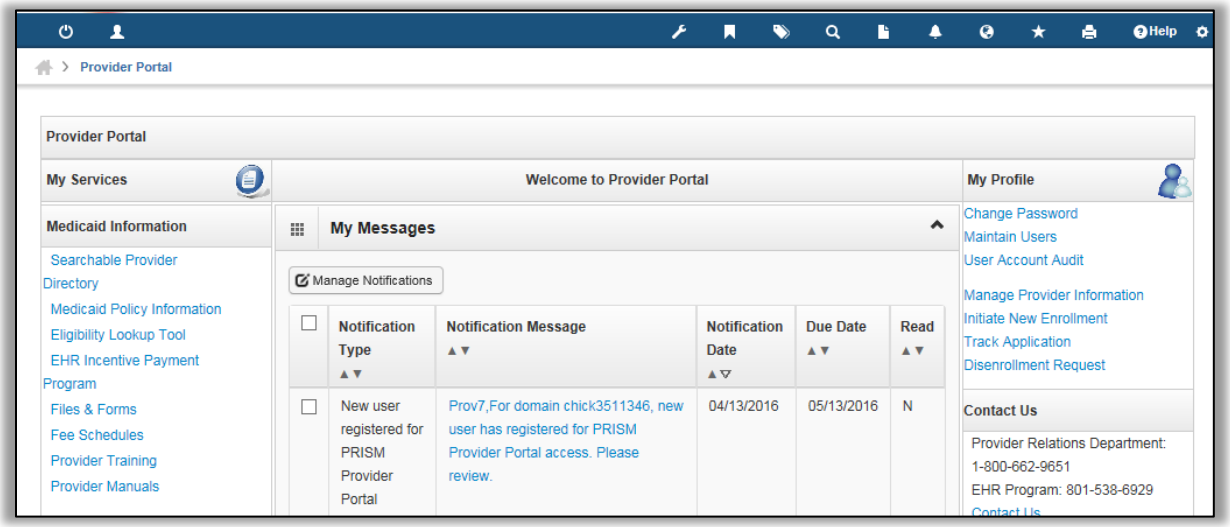
The Provider Account Administrator receives a notification that a new user account has been created and needs to be reviewed. He/she is now responsible for reviewing and approving the registration before the user can access the Provider Portal for that domain.

ACCOUNT ADMINISTRATOR GRANTS USER ACCESS TO PRISM

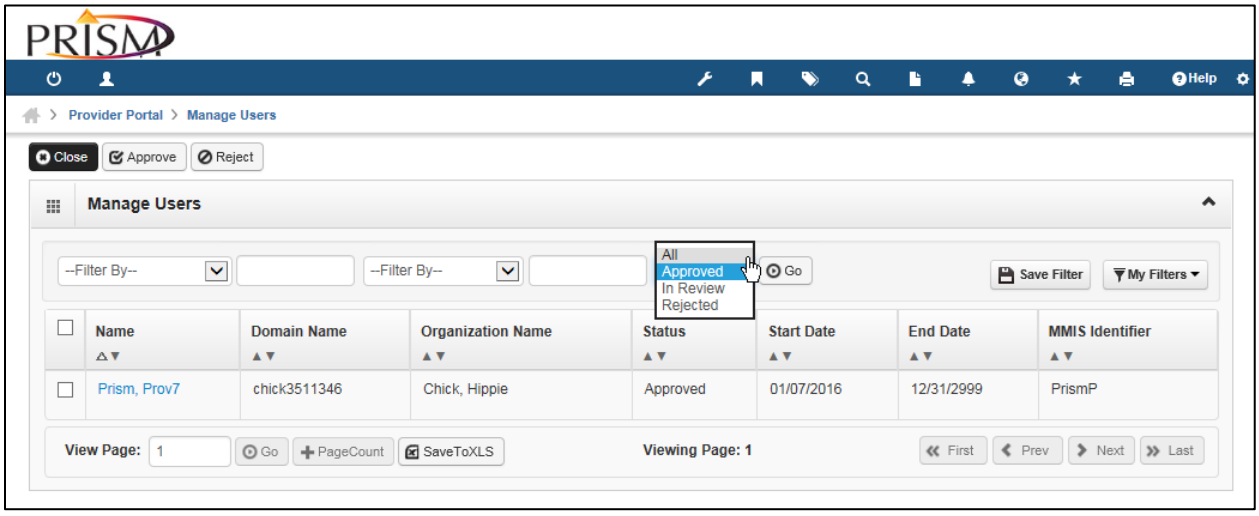
The following steps are required for a Provider Account Administrator to review and approve a user's PRISM Provider Portal registration, and then assign the user PRISM profiles.

I. PROVIDER ACCOUNT ADMINISTRATOR REVIEWS AND APPROVES THE USER'S PROVIDER PORTAL REGISTRATION

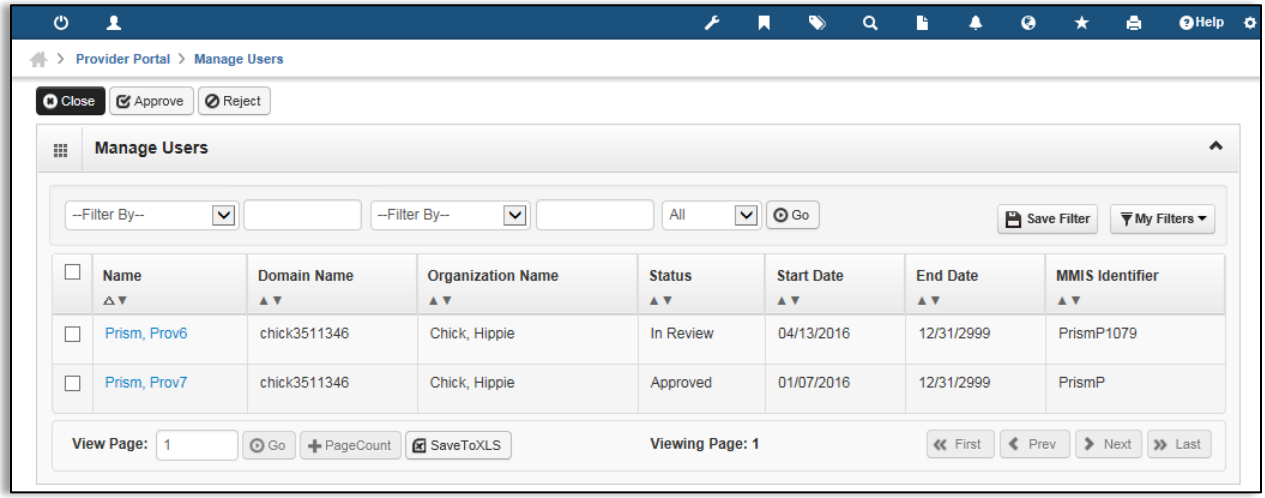
1. Log into the PRISM provider portal account
   - You will see a "New user registered for PRISM Provider Portal" notification displayed in the **My Messages** section
2. To begin your review/approval of the new user, click the **Maintain Users** link in the ***My Profile*** box



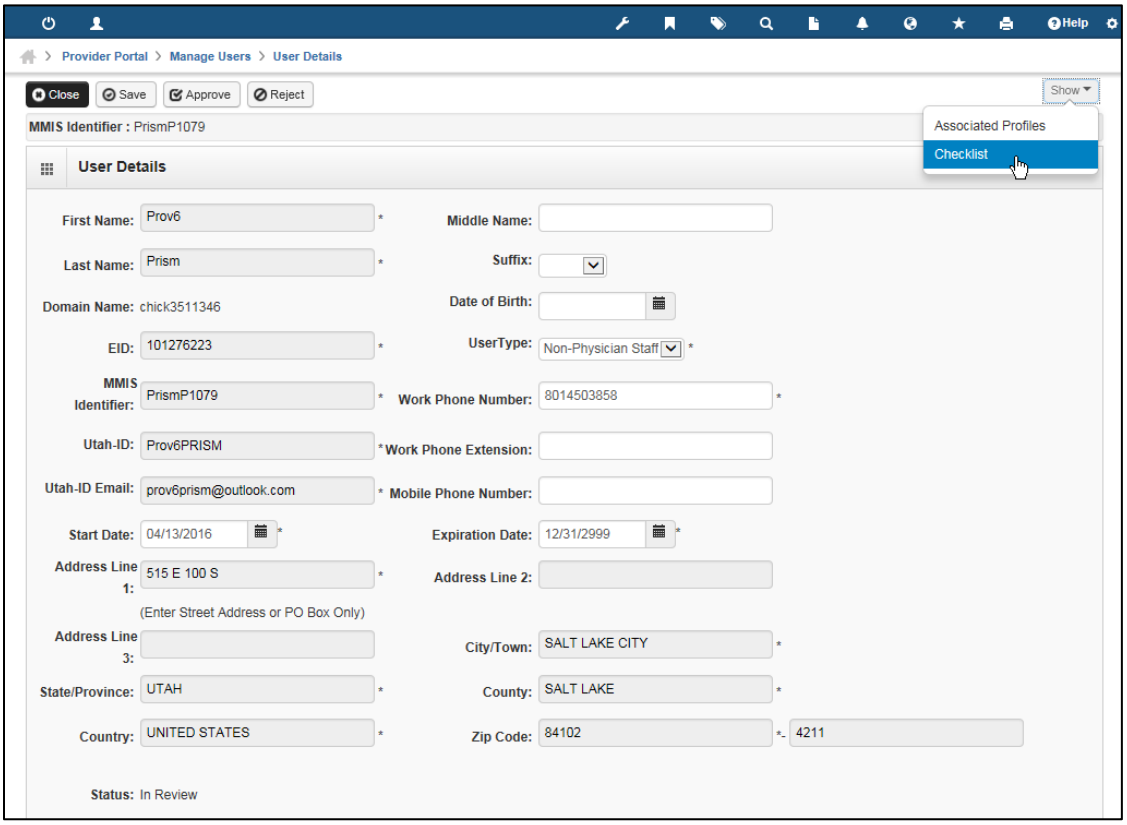
3. By default the ***Manage Users*** page displays only approved users. To change the view of this page:
   - Click the ***User Status*** drop-down menu
   - Select **All** or **In Review** (Note: selecting "In Review" is the most efficient way to complete this process)
   - Click the **Go** button



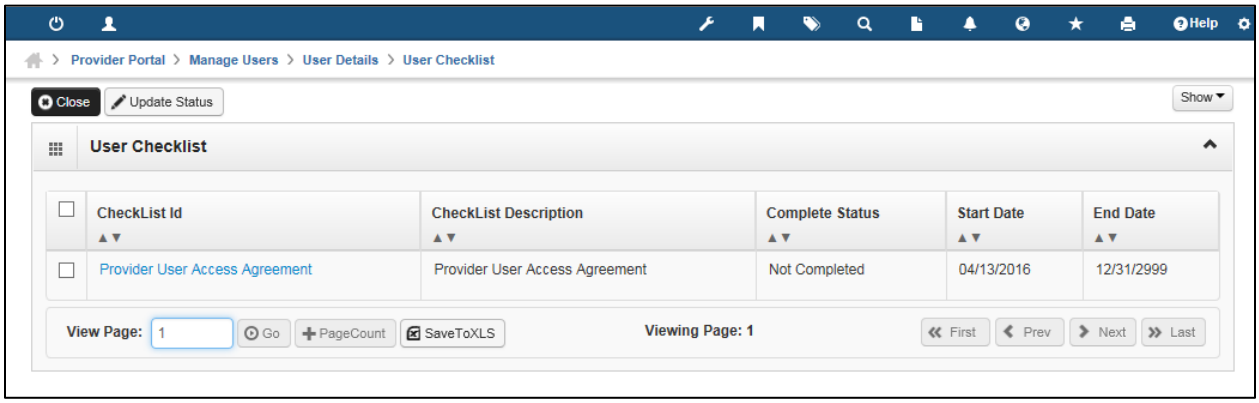
4. "In Review" records are now displayed on the ***Manage Users*** page. Click the **Name** hyperlink for the user registration you wish to review.



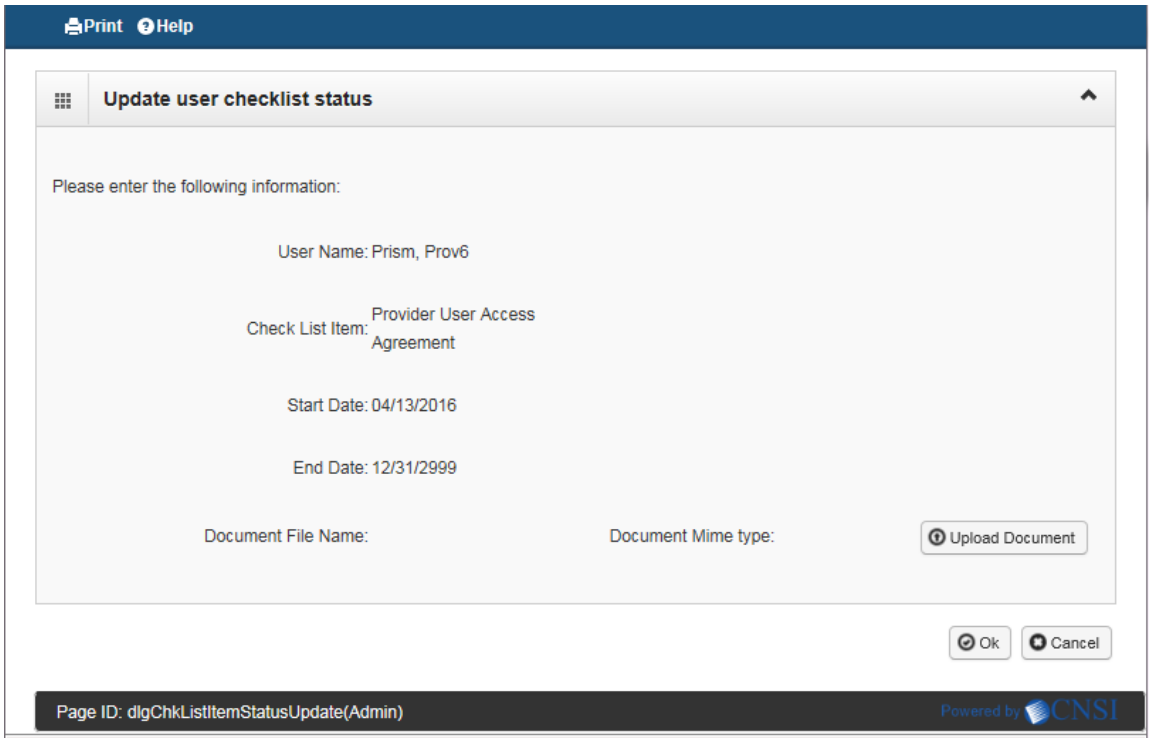
5. The ***User Details*** page displays for the selected user. Click the ***Show*** button in the top right-hand corner and select **Checklist**.



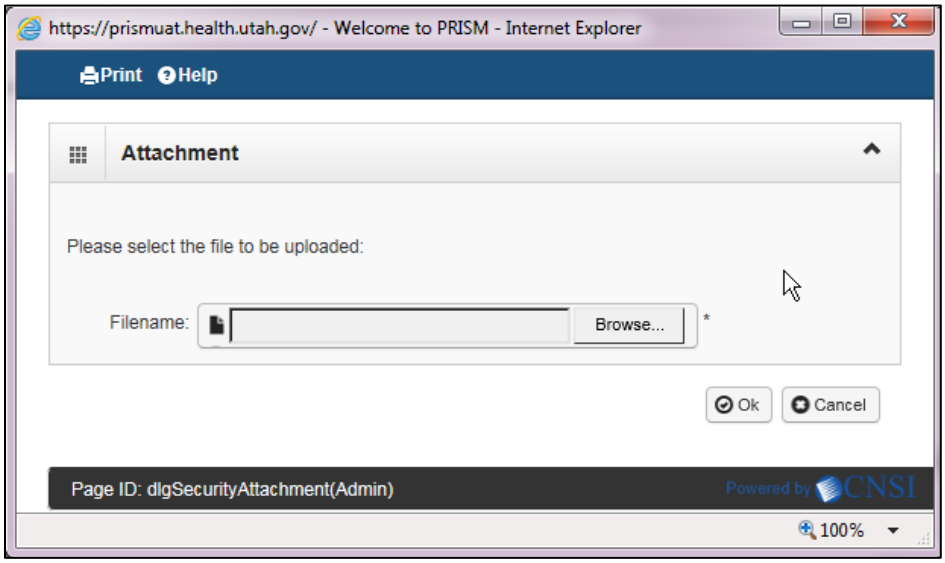
6. On the ***User Checklist*** page click the **Provider User Access Agreement** hyperlink.



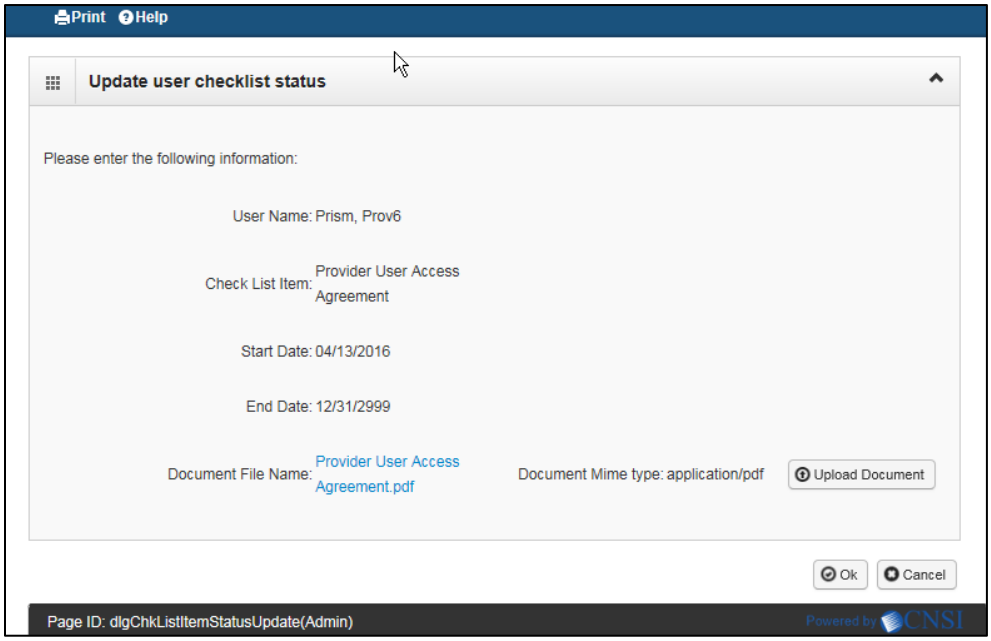
7. On the ***Update user checklist status*** page click the **Upload Document** button.



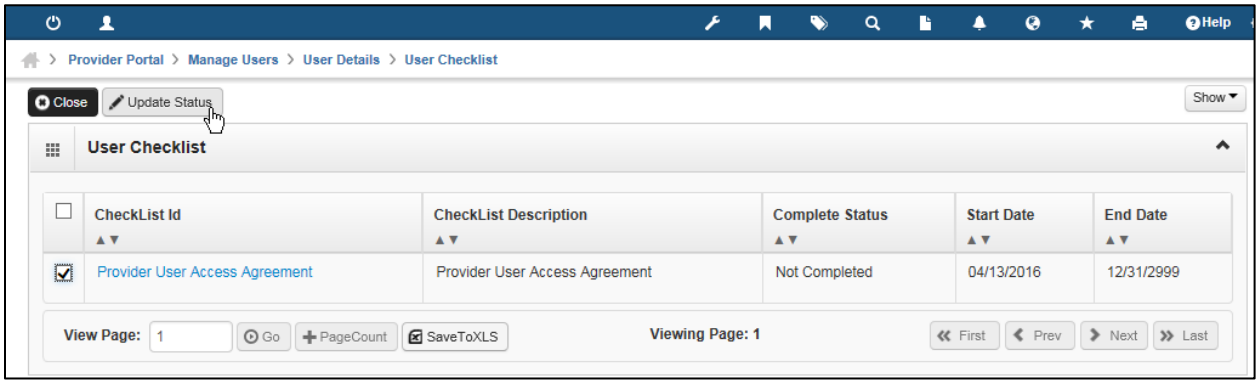
8. On the ***Attachment*** box click **Browse**. Navigate to and select the requesting user's completed Provider User Access Agreement and click **Ok**.
    a. Recommend using the following standard naming convention for the forms to be uploaded: username_User_Agreement.pdf



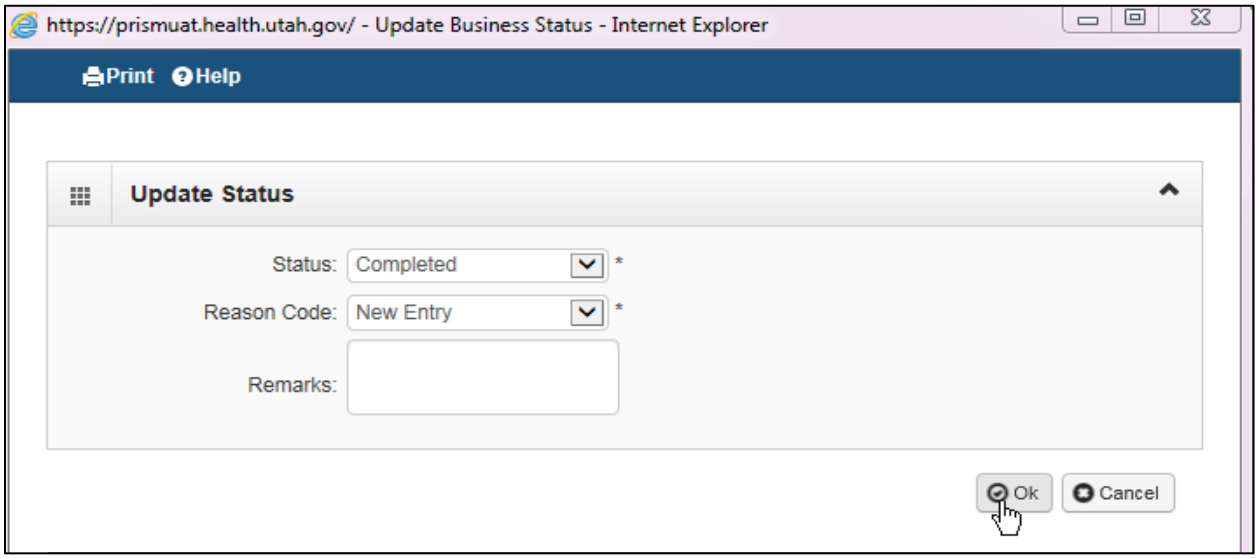
9. On the ***Update user checklist status*** page, click **Ok.**



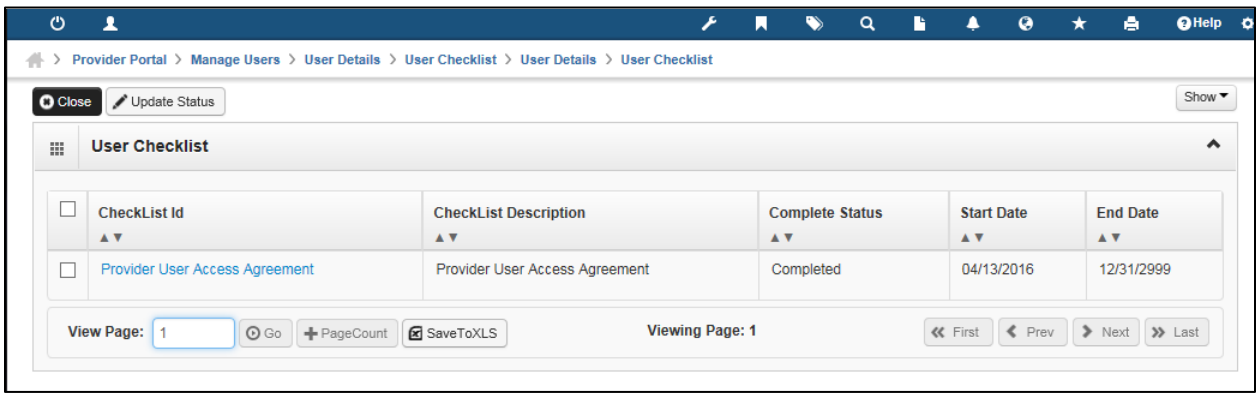
10. Notice that the **Complete Status** is "Not Completed". To change the status to "Completed", click the checkbox next to ***Provider User Access Agreement*** and click **Update Status** button.



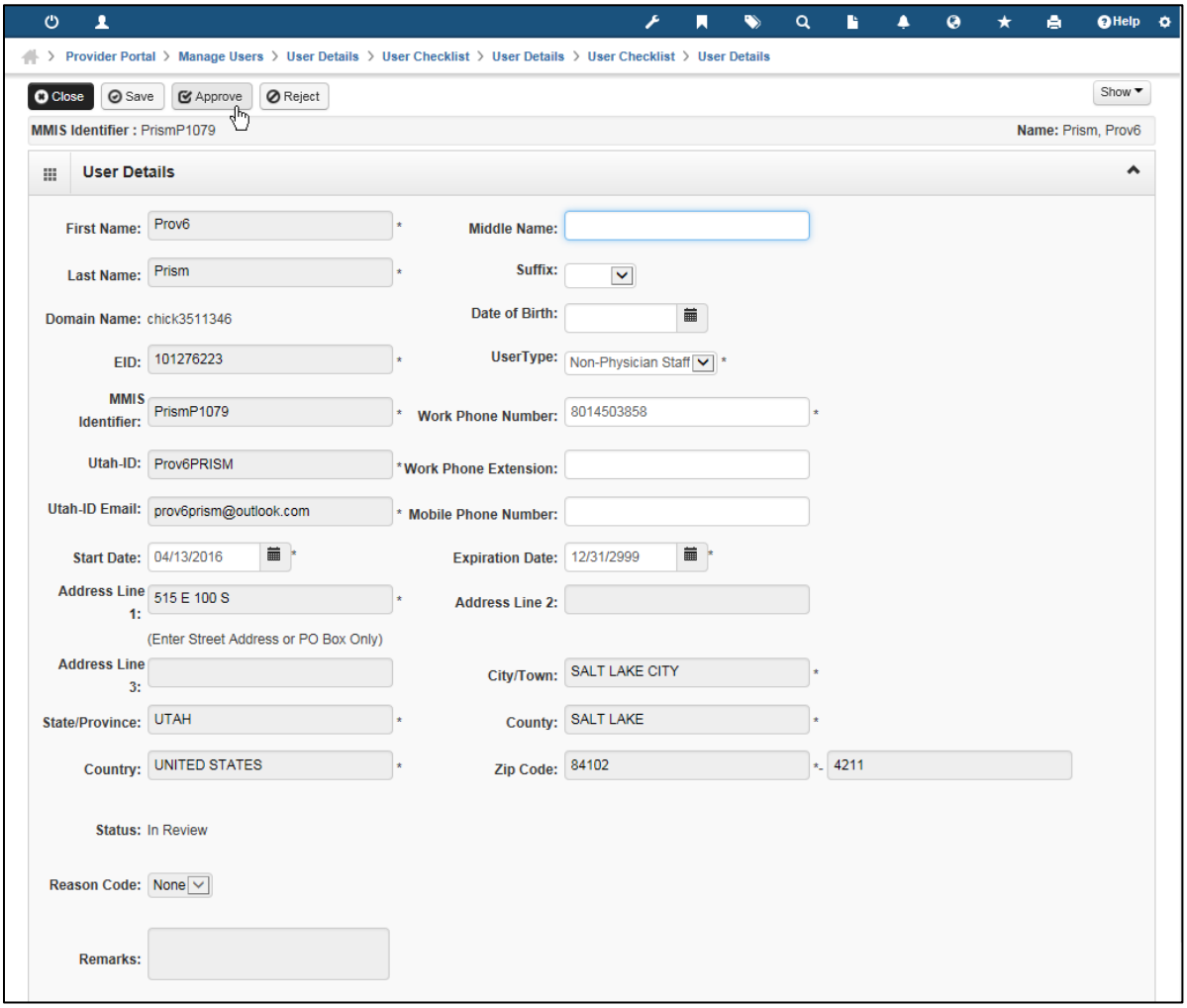
11. On the ***Update Status*** page, change the status to **Completed**, select a ***Reason Code*** and click the **Ok** button.



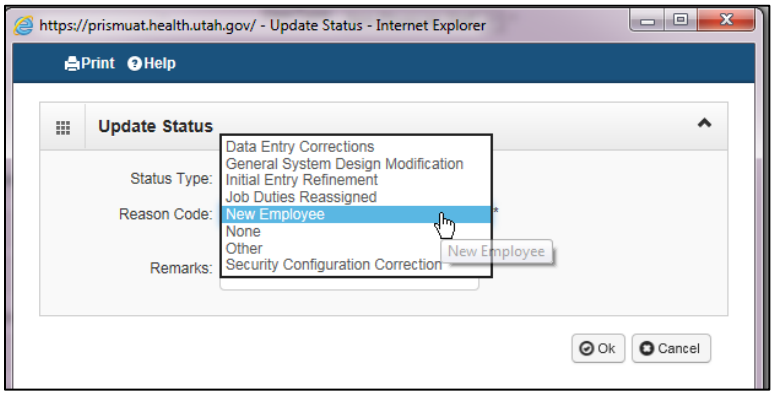
12. The **Complete Status** changes to **Completed**. To continue with your review and approval of the user's registration, click the ***Show*** button in the top-right corner and select **General** from the drop-down menu or click the Close button which will also return you to the User Details page.



13. The ***User Details*** page displays that the user's status is **In Review**. To change the status to **Approved**, click the **Approve** button.



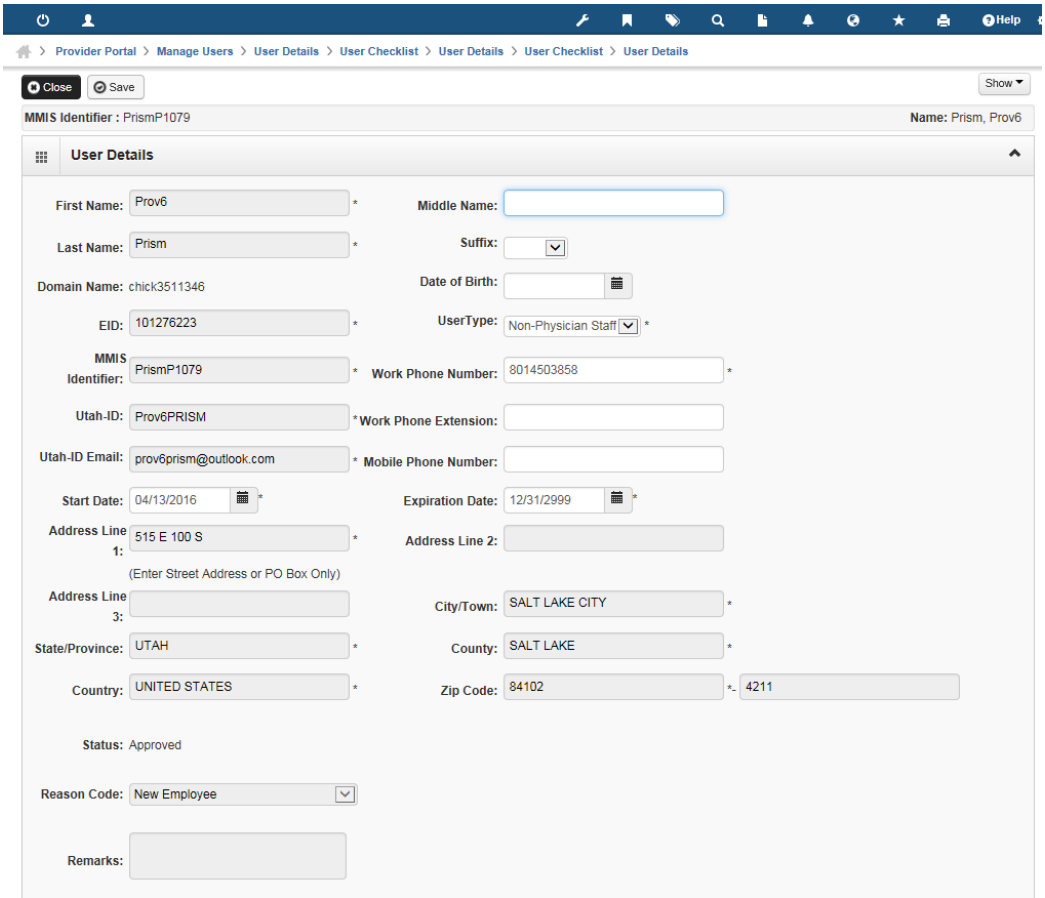
14. In the ***Update Status*** box select the **Approval Reason Code** and click the **Ok** button.



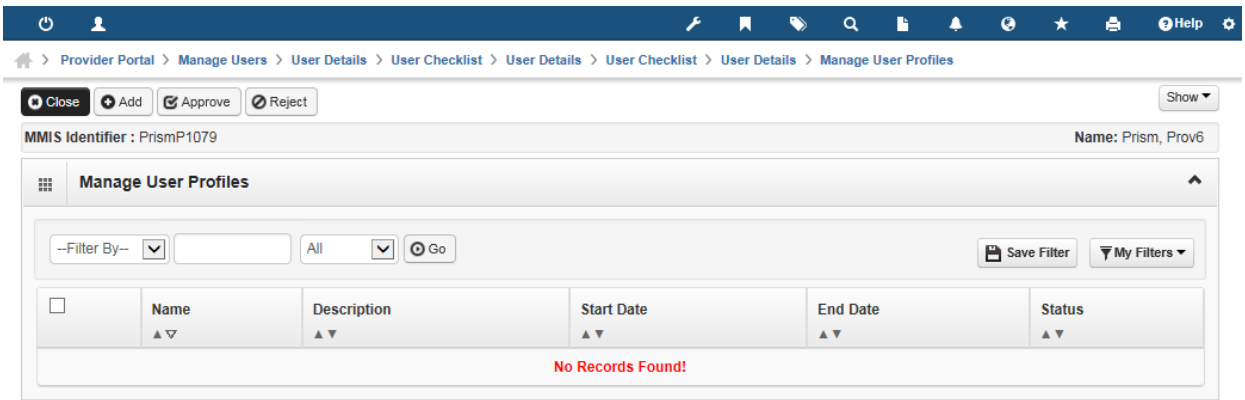
15. The User now has a status of "Approved". ***Continue to Section II - Step 1 to assign a PRISM Profile.***

II. Provider Account Administrator Assigns User PRISM Profile

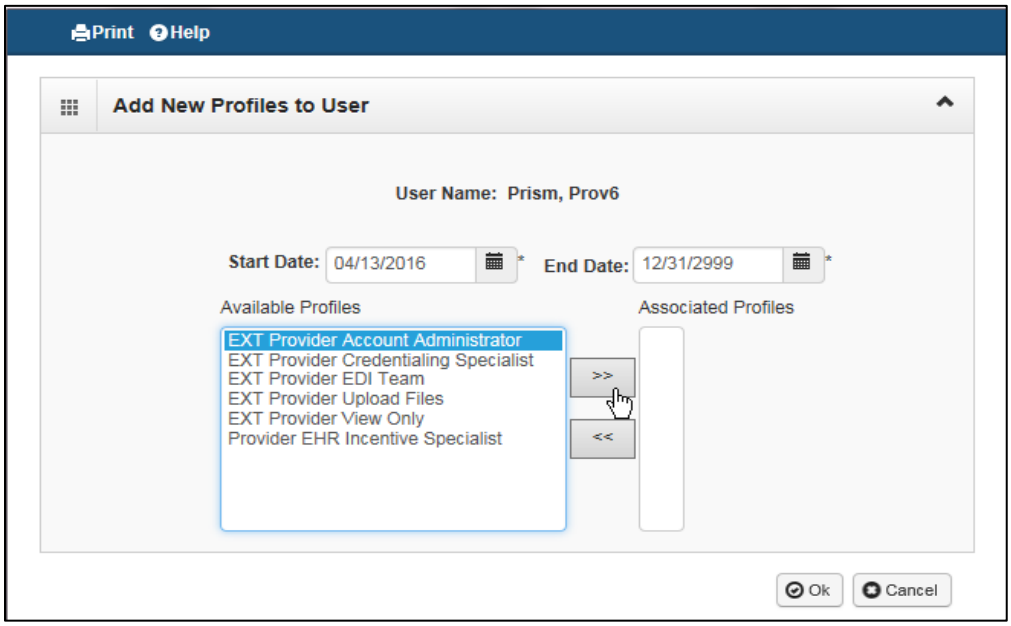
1. Click the **Show** button in the top right-hand corner and select **Associated Profiles** from the drop-down menu.



2. Next you will need to assign profiles to the user. On the ***Manage User Profiles*** page click the **Add** button**.**



3. The ***Add New Profiles to User*** page displays. Click on the profile(s) you would like to assign to the registering user and use the double arrow button at the center of the screen to move the desired profile to the ***Associate Profiles*** list box. If applicable, repeat this process for all profiles to be assigned to the user; or the user can hold the Ctrl key, select the appropriate profiles, and then hit the arrow key to select multiple profiles all at once. All of the selected profiles will then move to "Associated Profiles". Click the **Ok** button to proceed



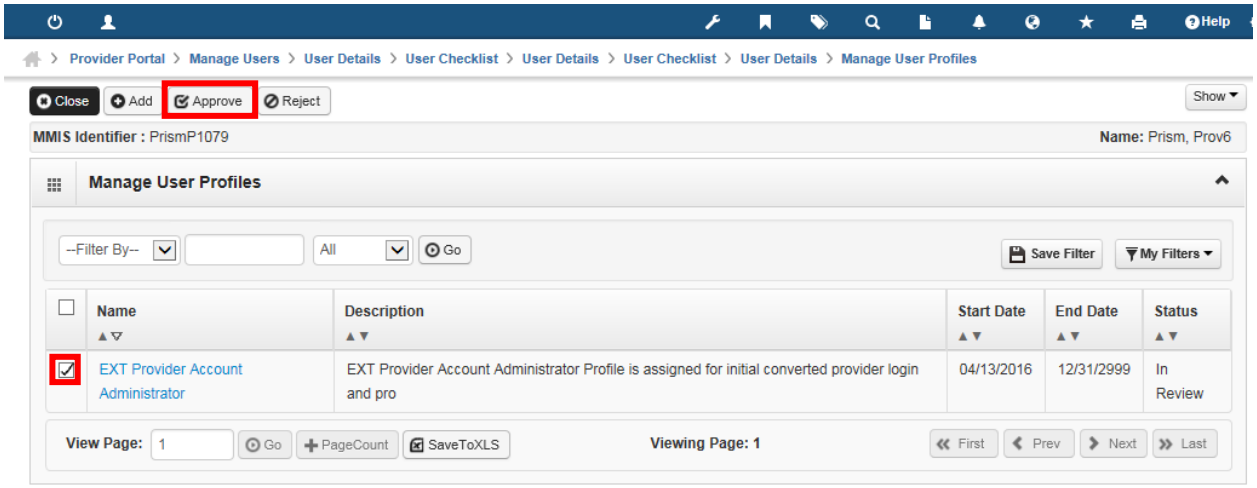
Note: The "PRISM Release 3 (R3) Provider Profile Descriptions" table should be used to determine the appropriate access to grant PRISM users.

PRISM Release 3 (R3) Provider Profile Descriptions

Profile	Description
PROVIDER	
EXT Provider Credentialing Specialist	Allows user to modify provider information, submit new enrollment, and disenrollment requests.
EXT Provider EDI Team	Allows user to add or modify EDI information including submission method, contact, and trading partner. User can submit changes to DOH.
EXT Provider View Only	User has view only access and cannot make modifications.
EXT Provider Upload Files	Allows user to view, upload and submit files to DOH.
PROVIDER EHR	
Provider EHR Incentive Specialist (Provider Domain Administrator - eMIPP)	Allows user to access EHR incentive information link and the eMIPP system to update/submit eligibility, appeals, audits and payment information.
PROVIDER SECURITY	

EXT Provider Account Administrator	This is the profile assigned to first user to complete new provider enrollment or validate converted provider data. This profile has the responsibility of approving any new users for the Provider's domain. User is responsible for user management for the organization, including uploading scanned user agreements, assigning user profiles and managing/terminating user access. Profile does not have access to EHR Incentives

4. The profile(s) newly associated to the user are listed as "In Review" on the ***Manage User Profiles*** page.
5. Click the check-box next to the PRISM profile(s) you wish to apply to the user and click the **Approve** button.
6. After the Approve button is clicked, a Reason code must be selected to finish approving a user account.



7. The user is now registered and approved to access PRISM using the assigned profile(s).
    - ***An email and PRISM Inbox notification is sent to the user when a PRISM profile is assigned.***
8. Click the PRISM **Home** icon in the top-left corner to return to the Provider Portal Home page.