Requesting a User Setup in Provide Enterprise – User Guide

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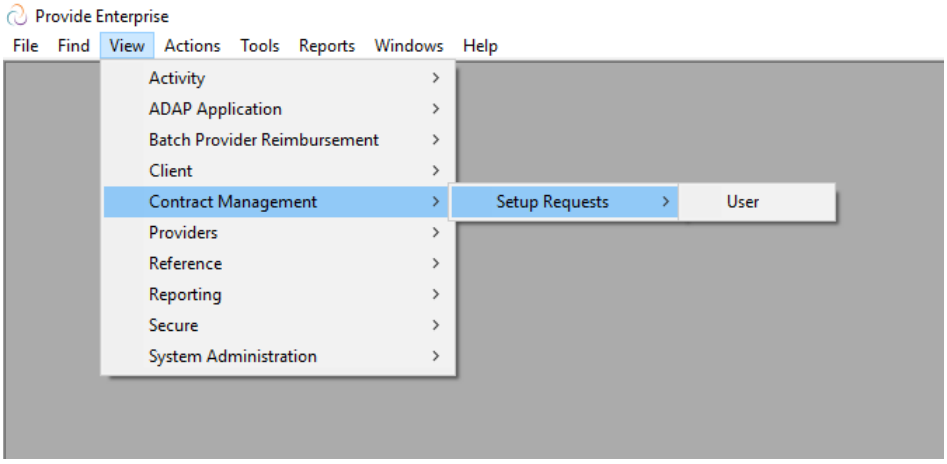
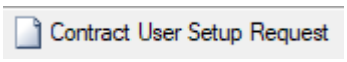
Requesting a User Setup in Provide Enterprise

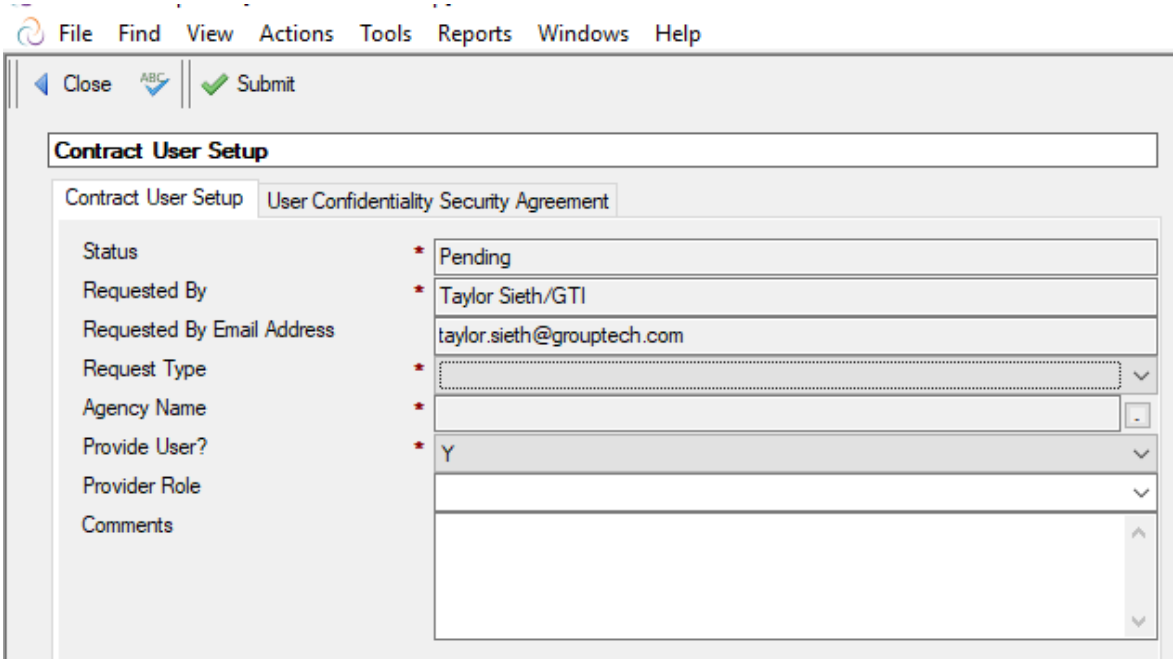
Changes were made in the South Carolina Provide database to allow Provide users to submit user setup requests. Below is outlined how to request to add a user, replace a user, or delete a user.

In the View menu, choose *Contract Management →Setup Requests →User*



Click on the 

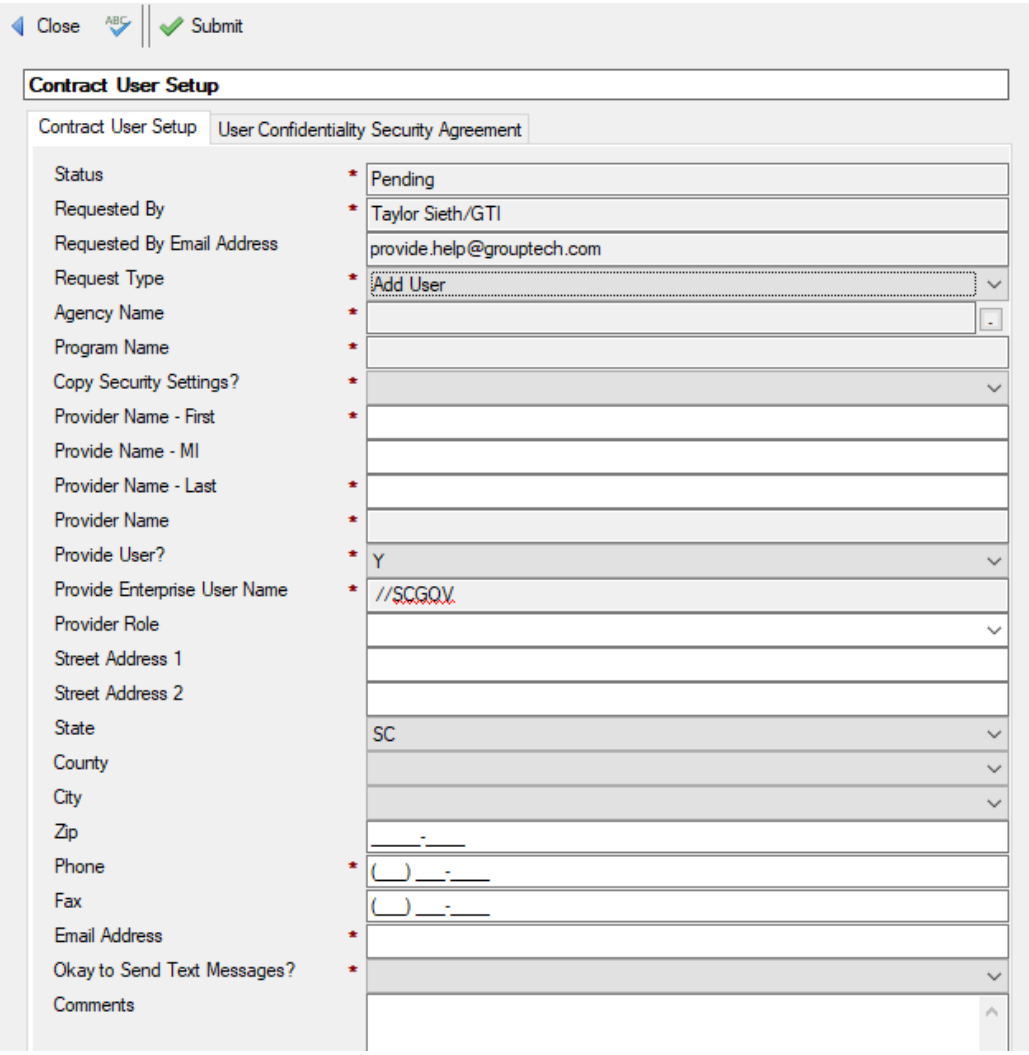
button at the top of the page. A page similar to the image seen below will appear.



Adding a User

Contract User Setup Tab

In the Request Type field, select “Add User”. Once this is selected, the page will look like this:



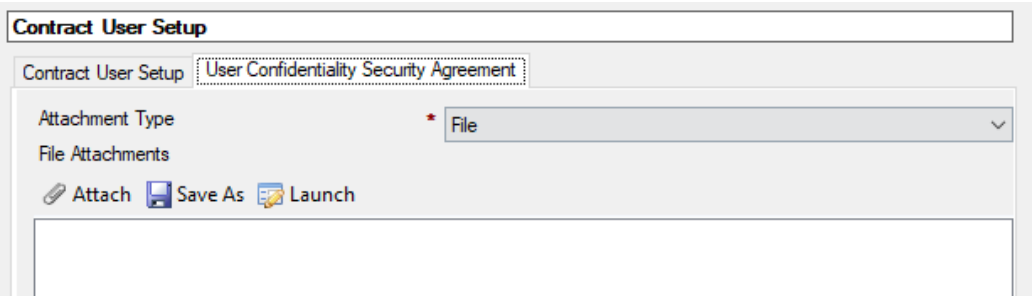
Fill in all required fields:

- **Agency Name**: Select the Agency Name by clicking on the button to the right of the field.
- **Copy Security Settings?**
  - If yes, choose who to copy security setting from.
  - If no, manually choose the security settings from the list. (The specific roles are defined later in this document.)
- **Provider Name:** automatically populates once the new user’s first and last name are entered in
- **Provide Enterprise User Name:** automatically populates based on the new user’s first and last name

NOTE: Once the new user request is processed, the new user’s log in information will be emailed to the email address in the “Requested By Email Address” field.

User Confidentiality Security Agreement Tab

Fill out and attach the SC New User Request Form you have been emailing the Provide Help Desk.



When all required fields are filled out, click on the

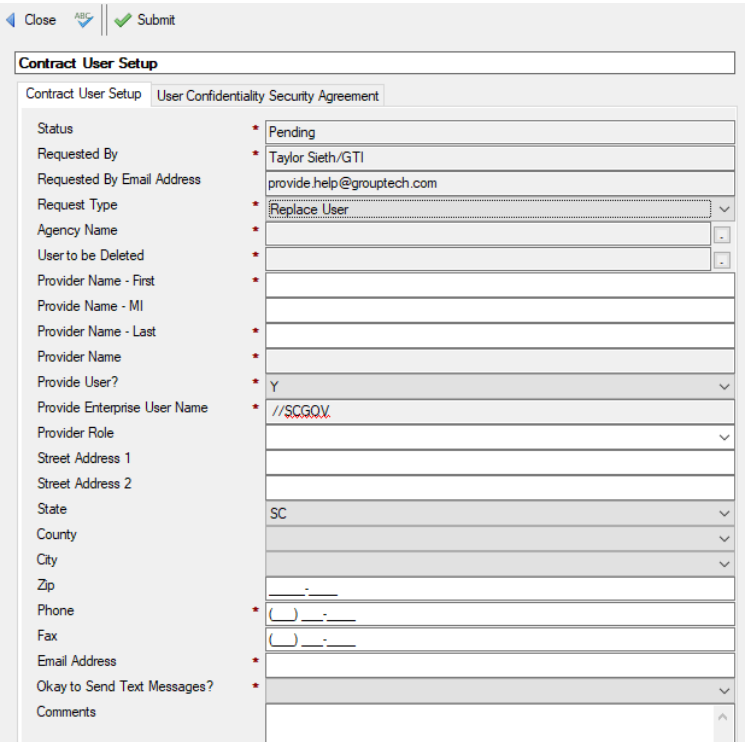
button at the top of the page. This will put the User Setup request into a submitted status.

Once the request is approved, the Provide Help Desk will process the request, the new user account will be created, and an email with the new user's log in information will be sent.

Replacing a User

Contract User Setup Tab

In the Request Type field, select "Replace User". Once this is selected, the page will now look like this:



Fill in all required fields:

- **Agency Name**: Select the Agency Name by clicking on the button to the right of the field.
- **User to be Deleted**: Click on the button and select the user to delete from the list. Only current Provider Users for the selected agency will appear on this list.

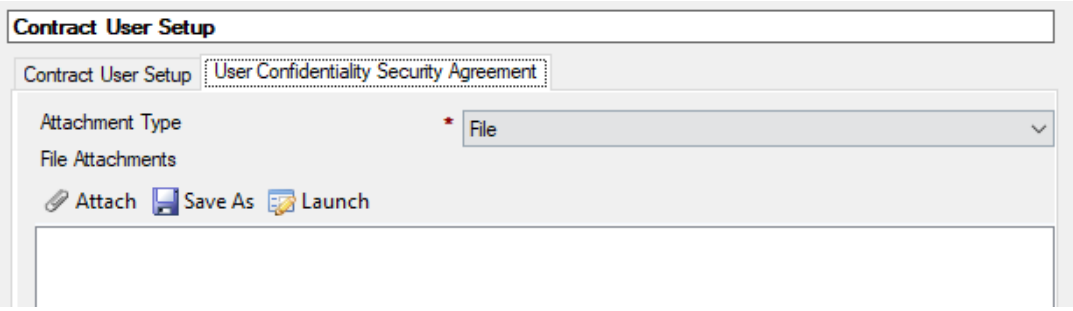
  NOTE: The new user's security settings will automatically be copied from the user you select to delete.

The "Provider Name" and "Provide Enterprise User Name" fields will automatically populate once the new user's first and last name are entered in.

> **NOTE:** Once the new user request is processed, the new user's log in information will be emailed to the email address in the "Requested By Email Address" field.

User Confidentiality Security Agreement Tab

Fill out and attach the SC New User Request Form you have been emailing the Provide Help Desk.



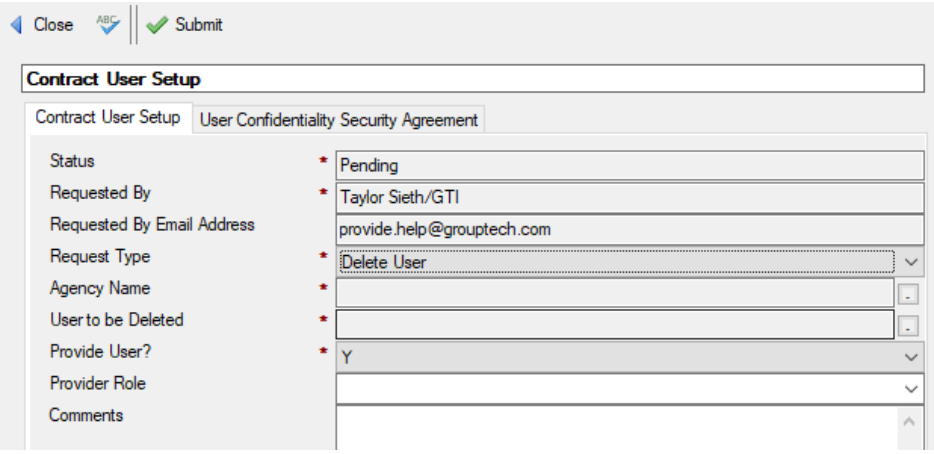
When all required fields are filled out, click on the Submit button at the top of the page. This will put the User Setup request into a submitted status.

Once the request is approved, the Provide Help Desk will process the request, the selected user account will be deleted, the new user account will be created, and an email with the new user's log in information will be sent.

Deleting a User

Contract User Setup Tab

In the Request Type field, select “Delete User”. Once this is selected, the page will now look like this:



Fill in all required fields:

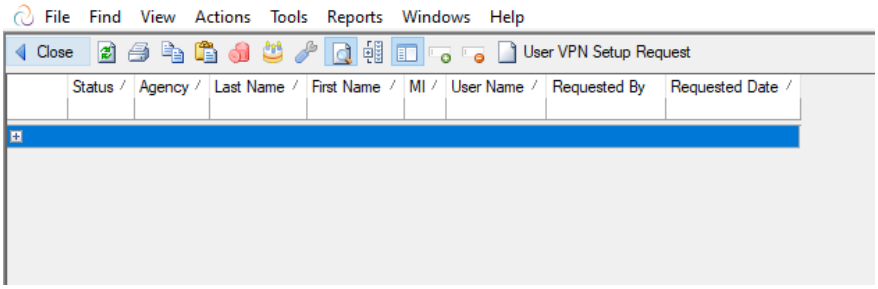
- **Agency Name**: Select the Agency Name by clicking on the button to the right of the field.
- **User to be Deleted**: Click on the button and select the user to delete from the list. Only current Provider Users for the selected agency will appear on this list.

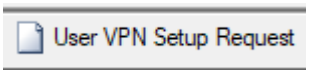
When all required fields are filled out, click on the Submit button at the top of the page. This will put the User Setup request into a submitted status.

Once the request is approved, the Provide Help Desk will process the request and the user account will be deleted.

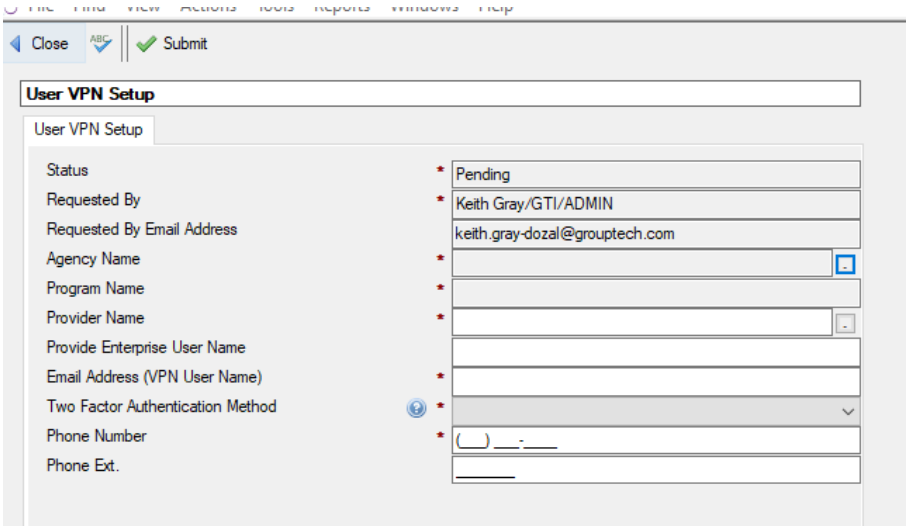
Adding a VPN Account

A User VPN Setup Request should be created when an individual needs a GT provided VPN account to provide them with a secure connection over the internet to the Provide Enterprise Server. The VPN account is an additional cost and GT will work with you to define the payer for these requests. To request a VPN account for a user, navigate to *View\User Management\User VPN Setup Requests*.



Click on the 

button. The following form will open.



Fill out the fields as appropriate.

NOTE: You will need to be provided a new (two factor authentication) VPN account via Open Client VPN software. With 2-factor authentication, an extra layer of security is added to your account to prevent someone from logging in, even if they have your password. This extra security measure requires you to verify your identity using one of two methods:

- **Telephone Call:** You can choose to receive a telephone call to a land or mobile phone number (static number) to authenticate whenever you are logging into the VPN Software. You will need to answer this telephone call to authenticate. NOTE: the phone number you provide is not required to be a land line (you can provide a mobile phone number), but the VPN software recognizes all phone call authentications as a "landline" call.
- **Smart Phone Application:** You can choose to install an app (application) on your smart phone that will push an authorization code to your phone whenever you are logging into the VPN software. You will need to enter this code to authenticate. If you choose this method of Authentication, please select "Push (Mobile Phone App)" when completing the attached spreadsheet.

Once complete, click the **Submit** button to submit the request.

Role Definitions

Note, if you choose not to copy settings from an existing user, you will be required to select the appropriate security roles. These are outlined below:

- **Provide.CM.Access:** This is normal PE user access. This must be checked for all users that are not supervisors.

- **Provide.CM.Super:** Supervisory Level Access. Ability to delete activity records created by other staff members at the agency. This also provides the ability to Edit, View and submit User Setup Requests.

- **Provide.CM.UpperSuper:** Expanded Supervisory Level Access. This will allow the user to use the "Supervisor Edit" button in Progress Logs.

- **Provide.Reimbursement.Approve:** This allows the user to use a variety of buttons in the Reimbursement record, Batch and Provider Reimbursements forms, including approving and rejecting these record types.

- **Provide.Reporting.Editors:** Ability to run specific federal reports (i.e. RSR, Incare Campaign, HOPWA Report, ARTAS Reports).

- **Provide.Secure.Editors:** This role allows the user to be able to utilize the secure messaging portal within Provide Enterprise. They will only have access to secure messages sent by or to them.

- **Provide.Secure.Editors.Agency:** This role allows the user to be able to utilize the secure messaging portal within Provide Enterprise. They will only have access to all secure message addressed to the agency they are associated with.

- **Provide.Users.ADAP:** This role defines ADAP staff and allows them to access ADAP specific views, client specific forms and views, as well as update and approve ADAP Applications.

- **Provide.Users.ADAP.Admin:** Expanded ADAP abilities, including creating and deleting dispense records, changing recertification dates, backdating certifications, etc.

- **Provide.Users.ADAP.ProviderReimbursement.Override:** This allows the user to Mass submit the provider reimbursement in spite of potential errors in that batch.

- **Provide.Users.ARTAS:** This role allows the user to document ARTAS activities.

- **Provide.Users.Catawba:** This role is for "Affinity Health Center" staff only. It allows them access to views specifically built for this agency.

- **Provide.Users.ClinicalSummary:** Users in this role are able to access the Clinical Summary records in Provide.

- **Provide.Users.QM:** Users in this role have the ability to run the SC Quality Management related reports.

- **Provide.Users.SetURNSuffix:** This role allows the user to add a suffix to the client URN. This is needed in the case of client files that are duplicates to de-duplicate those files in the federal Ryan White reports.

- **Provide.Users.USCDOM:** This role is for staff members for the USCSM Department of Medicine staff. It allows them access to views and documents that are specific to this agency.