# Table of Contents

Introduction ..................................................................................................................................... 3

User Accounts Overview ............................................................................................................ 3
  Tier Structure .......................................................................................................................... 3
  Security Roles ......................................................................................................................... 4

Guide Conventions ...................................................................................................................... 4

Portal Fields ................................................................................................................................ 4
  Enter Information into a Field................................................................................................. 4
  Use a Drop-down List ............................................................................................................. 5
  Enter a Date ............................................................................................................................. 6
  Select a Date Using the Pop-Up Calendar .............................................................................. 6
  View Help Text for a Field ..................................................................................................... 6

Result Column Headings ............................................................................................................ 7

Using the Breadcrumb Trail ........................................................................................................ 7

Common Tools ............................................................................................................................ 8

Web Portal Login Page ................................................................................................................... 9
  Logging into Your Portal: ......................................................................................................... 9
    Log into Your Portal ............................................................................................................. 9

Provider Home Page ..................................................................................................................... 13

Administration Menu .................................................................................................................... 15
  Using the Dentist List ........................................................................................................... 15
    Provider Office Tiers ........................................................................................................... 16
    Search for a Dentist/Office ................................................................................................. 17
    The Dentist Detail Page ...................................................................................................... 18

Creating Your Office User Accounts ........................................................................................ 20

Editing a User Account .............................................................................................................. 23
  Delete an Employee .............................................................................................................. 25

Using the User List ................................................................................................................... 26
  Search for a User ................................................................................................................... 26
  Edit a User ............................................................................................................................ 27
  Unlock a User ....................................................................................................................... 29
  Reset a User Password ........................................................................................................... 30
  Delete a User ........................................................................................................................ 31
Introduction

This guide is intended for Provider Super Users only.

This training guide covers the Provider portal administration features for office administrators (Provider Super Users). If you are a Provider Super User you can add, edit, and delete users. For the other portal features, please see the Provider Portal User Guide.

User Accounts Overview

Each provider group is set up with three separate tiers. The primary Provider Super User for the provider group is responsible for setting up the users for your group and determining what access they should be allowed. This is determined based on the tier and security role you assign them. A user’s Tier Assignment determines the offices and providers to which they have access. The Security Role controls what functions they are allowed to perform. The following outlines the tier structure and the security roles.

You need to decide what information your users need access to and what functions they perform before you assign them a Tier and Security Role. For information on creating your initial user accounts, see “Creating Your Office User Accounts” on page 20.

NOTE: A sole proprietary dentist office can create all the users at tier one (the business entity). A larger organization may want to create users at each of their service offices and can create a Provider Super User account at each Service Office to manage the users in that office. For more information, see “Using the User List” on page 26.

Tier Structure

A user assigned to the… is able to access information…

Business Entity (tier 1)

for all providers at all locations. You should assign a user at this level if you want them to be able to view and/or maintain information for your entire organization (all service offices/locations) and all providers.

SO - Service Office (tier 2)

for all providers in a specific location. You should assign a user at this level if you have staff members who view and/or maintain information for a specific service office/location and the providers assigned to the specific service office/location.

Individual Dentist (tier 3)

Users are not assigned to this tier. This tier lists the individual dentists.

NOTE: Remember, Service Office users can only access information for the dentists assigned to that service office, if a user needs to access dentists at all locations, create the user at the Business Entity level regardless of where they work.
Security Roles
If a user is assigned the role of… at the tier they have been assigned they are able to…

1 - Provider Super User
- Create and manage user accounts for staff
- Perform Member Eligibility searches
- View EOBs (Explanation of Benefits)
- Check status of Claims/Pre-authorizations/Referrals
- Enter and submit Claims, Pre-Authorizations and Referrals

2 - Provider Office User
- Perform Member Eligibility searches
- View EOBs (Explanation of Benefits)
- Check status of Claims/Pre-authorizations/Referrals
- Enter and submit Claims, Pre-Authorizations and Referrals

3 - Provider Office User, No Remit
- Perform Member Eligibility searches
- Check status of Claims/Pre-authorizations/Referrals
- Enter and submit Claims, Pre-Authorizations and Referrals

Guide Conventions
The following conventions are used throughout this training guide:

1. Notes
   
   NOTE: All notes providing you with additional information appear in a grey box.

2. The names of fields, buttons, menus, and other elements that appear in the portal appear in **Bold Format**.

Portal Fields
The tab key allows you to move from field to field, minimizing mouse use.

NOTE: Required fields are marked with a red asterisk (*).

Enter Information into a Field

1. Move your mouse pointer over the field and click once.
   
   NOTE: The term “click” in this guide refers to a left-click using your mouse. The term “right-click” is used when a right-click is necessary.

2. Once the cursor is flashing in the field, begin entering data.
   
   NOTE: Only use the **Enter** key after you enter all the information for the current page. Hitting the **Enter** key submits the page. Use the **Tab** key or your mouse to move to the next field.
Use a Drop-down List

Many fields are configured as drop-down lists that allow you to select from a list of options.

1. Click the arrow in the field ( ARISING) to display the drop-down list.
2. Click the option you want with your mouse.

<table>
<thead>
<tr>
<th>Network Name</th>
<th>— All Networks —</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>— All Networks —</td>
</tr>
<tr>
<td></td>
<td>Medicaid Adults</td>
</tr>
<tr>
<td></td>
<td>Medicaid Children</td>
</tr>
</tbody>
</table>

**NOTE:** You can use the *Down-Arrow* key to highlight the option you want, and then hit the *Tab* key to select it. You can also type the first letter of the name to move the cursor to the beginning of names that begin with that letter and then scroll from there.
**Enter a Date**
Enter dates in the following format: MM/DD/YYYY. For example, enter 08/20/2009 for August 20, 2009.

**Select a Date Using the Pop-Up Calendar**

1. Click the Calendar icon next to the date field for which you are selecting a date.

   ![Calendar Icon](image)

   Member Number
   DOB

2. In the pop-up Calendar that appears, navigate to the date you want to select:
   a. Click on the left or right arrow to select a month.
   b. Click on the left or right arrow to select a year.
   c. Click the number for the day of the month you want to select on the calendar to enter that date in the Date field.

The calendar closes and the Date field is populated with the date you selected.

**View Help Text for a Field**

Fields that have associated help text appear with a help icon displayed next to the field. Move your mouse pointer over the help icon to display the help text.

<table>
<thead>
<tr>
<th>Password Question</th>
<th>What is your favorite color?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password Answer</td>
<td>RED</td>
</tr>
</tbody>
</table>
Result Column Headings

Many of the pages in this portal have the following structure:

1. A Search section
2. A Results section

Whenever you see a Results section in this portal, you can sort the information by clicking on one of the column headings. The data is sorted in alphabetical or numeric order depending on the type of data in the column.

**NOTE:** To reverse the order of the sort, click the column heading a second time.

---

Using the Breadcrumb Trail

The breadcrumb trail in the upper-left corner of your page lists all of the previous pages that you have navigated through to reach the current page. Use the breadcrumb trail to return to any previous page by clicking the link for the page to which you want to return.

**WARNING:** Do not use your browser’s Back button. The portal does not support the use of the browser’s back button, which is why the breadcrumb trail is available for you to return to a previous page.

---

Revision Date: 7/30/2012
Common Tools

There are common tools you can use on various pages throughout the portal when available.

1. The **Download File** link allows you to download tables of information in a comma separated values (.csv) text file. Use Excel or another application that can handle (.csv) text files to view the file.
   a. Click the **Download File** link.
   b. In the **File Download** dialog window that appears, click **Save**.
   c. In the **Save As** dialog window that appears, select the location where you want to save the file, change the file name if necessary, and then click **Save**.

2. The **Printer Friendly Format** link allows you to print the information on the current page in a printer friendly format.
   a. Click the **Printer Friendly Format** link.
      A new browser window opens with the information on the current page in printer friendly format.
   b. Click **File > Print…** from the new browser window menu to print the page on your configured printer.

3. There are navigation arrows beneath the **Results** section when the results of a search do not fit on a single page.
   To navigate between pages for multi-page search results, use the left and right arrows:
Web Portal Login Page

The **Login** page allows you to login to the Provider Portal.

**Logging into Your Portal:**

To login to the portal, you must have a unique username and password, which you receive from your supervisor.

**NOTE:** Your welcome package contains instructions for self-registering your primary Provider Super User account. Use this account to create additional Provider Super User and Provider User accounts.

**Log into Your Portal**

1. Use your web browser to navigate to the DentaQuest website at [www.dentaquest.com](http://www.dentaquest.com).
2. Click on **Dentists** in the upper-center of the web page and choose **Dentists**.
3. On the new page that appears, click on the **Login** and select either **Dentists in Massachusetts** or **Dentists in all other States** or click on the **Login Here** link in the Welcome Dentists section.

**NOTE:** If you want specific information on your state click on the state link.
4. On the portal login page that appears, enter your username in the Username field, your password in the Password field, and then click the Login button.

**NOTE:** If you do not have or remember your password, you can request your password from DentaQuest with the **Forgot Password** link.

**NOTE:** If you are a Massachusetts provider you will also be prompted to select Provider Web Portal (PWP), Web Provider Serv. (WPS) or Provider Quest Web Portal before you reach the login page.

5. The first time you log in, you are prompted to enter a new password:

**NOTE:** Your password needs to be 8 to 16 characters, contain at least one upper case, one lower case and one number and/or special character. You cannot use the following special characters: (, \, {, }, [, ], *, %, ~, *, :). You are prompted to change your password every sixty days. You can not use any of your last ten passwords.

a. Type a new password into **Password** field.
b. Type the same password into the **Confirm Password** field.
c. Click the **Submit** button below these fields.
6. The first time you log in, you are prompted to accept the Web Portal Provider User Agreement:
   a. If you accept the term, select the Yes, I agree with the statement option.
   b. Click the Next button.

Your Home page appears after a successful login.
**Provider Home Page**

The **Home** page has the following elements:

1. **Portal Menus** – The **Administration**, **Claims/Pre-Authorizations**, **Patient**, **Tools**, **Privacy Policy**, and **Provider User Agreement** menus are displayed along the left side of the **Provider** portal.

2. **Welcome** – This section contains the DentaQuest welcome message.

3. **Plan Messages** – This section contains any plan messages from DentaQuest to your plan. You can access message details when available by clicking the message link.

4. **Health News** – This section contains information and news articles of interest. You can access the news articles by clicking on their respective links.

5. **My Health Tools/Resources** – This section links to various health resources.

6. **Contact** – This section contains DentaQuest’s contact information.

7. **Message Center** – This section contains messages sent to you from DentaQuest.

   **NOTE:** The Message Center only appears on your **Home** page if there are messages in your **Inbox**.

8. **FAQ** – This link opens the **View FAQ** page where you can view frequently asked questions.

9. **Sign Out** – This link signs you out when you are done.

10. **Event Calendar** – This link opens the **Event Calendar**.

11. **Related Documents** – This link opens the Document List page.
Administration Menu

Click the Administration menu on the left-side of the page to display the following menu items:

- **Dentist List** – use this menu item to search for and select provider offices or specific dentists that are affiliated with your business entity depending on your Tier Assignment (you can only view your assigned tier and below). Provider Super Users can add and edit users via the Dentist List.

- **User List** (Provider Super Users Only) – use this menu item to view and edit user accounts for the tier to which they belong. Use the Dentist List to edit user accounts at a lower tier.

- **Billed Amount** – use these menu items to add and associate billed amount lists. See the “DQ Provider Portal User Guide” for more information.

Using the Dentist List

The Administration > Dentist List menu item allows you to open the Dentist List page and search for and select a location or specific dentist.
**Provider Office Tiers**
The tiers are listed on the Dentist List page:

**NOTE:** This is one of the main differences between the Dentist List and the Find a Dentist pages. The Find a Dentist page never shows Business Entity (Tier 1) information.

1. **Business Entity**
   This is considered Tier 1 and users created for the business entity office can see and access provider information for all office locations, so they see all three tiers.
   The business entity appears on the Dental List page with an EIN/NPI as a Dentist Identifier and has no Network Name.

2. **Service Office/Location**
   This is considered a Tier 2 level and users created for a service office can only see and access provider information and dentists assigned to that location, so they will not see tier 1 (the business entity) or other tier 2 service offices.
   A service office appears on the Dental List page with a Network Name (which is how you can tell a service office from a business entity). If a service office has an NPI, it is a type 2 NPI (also known as a subpart NPI).

3. **Individual Dentist**
   Individual dentists are considered Tier 3.
   A dentist appears on the Dental List page with any relevant IDs, such as a state license, NPI (National Provider Identifier), Medicaid and Medicare IDs listed in the Dentist Identifier column.

**NOTE:** The service offices/locations and individual dentists are listed by network, so for a single service office or dentist an entry appears for each network that they are affiliated with. These links take you to the same service office or dentist details page.
Search for a Dentist/Office

1. If you see the **Dentist/Office Name** link you are looking for in the **Results** section, click on it to open the **Dentist Detail** page and view details for that office or dentist. Otherwise continue to search for the dentist or office you want.

2. On the **Dentist List** page, none of the search fields are mandatory, so type in as much information as you need to narrow down your search results. By default all results initially appear in the list.
   - If you know the dentist’s last name or the name of the dental office, type it into the **Dentist Last Name/Office Name** field.
   - If you know the dentist’s first name, type it into the **Dentist First Name** field.
   - You can select the network from the **Network Name** drop-down list.
   - You can type the city into the **City** field.
   - You can select the state from the **State** drop-down list.

3. Click the **Search** button.

4. Click a **Dentist/Office Name** link to open the **Dentist Detail** page and view details for that office or dentist.
The Dentist Detail Page

This page contains the following sections (use the scroll-bar to view all sections):

**NOTE:** The information shown for each section varies depending on the tier you are viewing (business entity, service office, or individual dentist).

- **General Information** – This section lists all the general information for a dentist, service office, or business entity.

- **Provider Identifiers** – This section lists any provider identifiers for a dentist or business entity (Medicaid/Medicare IDs, State License, NPI, and EIN) and whether or not an identifier is the primary identifier for HIPAA requirements.

  **NOTE:** The service office does not usually have any identifiers.

- **Provider Languages** – This section lists the languages for a dentist or service office and whether it’s their primary language. It has no entries for a business entity. Click a Language link to view language details on the Provider Language Detail page.

  **NOTE:** For a service office, all the languages for the dentists in that office are listed.

- **Specialties & Certifications** – This section lists all the specialties and certificates for a dentist or service office. It has no entries for a business entity. Click a Specialties & Certifications link to view the associated web site outside of the portal. For example, click the ABO link to see The American Board of Orthodontics’ website.

  **NOTE:** For a service office, all the specialties for the dentists in that office are listed.

- **Provider Locations** – This section lists the office location(s) for a dentist with basic details and contact information. When you are viewing a business entity or service office, it lists that location. Click an Office Name link to view location details on the Provider Location Detail page.

- **Provider Affiliations** – If you are viewing a business entity, this section lists all the service offices. If you are viewing a service office, it lists all the dentists in that service office. It has no entries for a dentist.

- **Business/Service Office** – If you are looking at a dentist, this section lists the service office(s) for that dentist. If you are looking at a service office, it lists the business entity. It has no entries for a business entity.

- **Patient Restrictions** – When you are looking at a dentist, this section lists any restrictions the dentist has on accepting patients for each of their networks. It has no entries for a business entity or service office.

- **Provider Employees** – This section lists the employees at this business entity or service office/location. Click a Name link to view an employee’s details on the Dentist Employee Detail page.

  **NOTE:** Users are not currently added at the individual dentist (tier 3) level, so this section should have no entries when viewing a dentist.

- **User Account Information** – This section only appears for an individual dentist at tier 3. It is used to display the user account information for the selected dentist you are viewing, but since we are not currently adding users at tier three, it should be blank.
Dentist Detail
This page allows you to view detailed information for the selected Dentist/Service Office. The view panel roster link allows you to see a list of members who have selected this dentist as PGP.

General Information
- Dentist Last Name: Smith
- Dentist First Name: Joan
- Middle Name: 
- Suffix: 
- Title: 
- Gender: Female
- DOB: 04/01/1970
- EIN: 
- Degree: DDS
- Tax Information: 
- Phone: 
- Fax: 
- Email: 
- URL: 

Provider Identifiers

<table>
<thead>
<tr>
<th>Identifier</th>
<th>Type</th>
<th>NPI/AA Primary</th>
<th>Specialty</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>12345</td>
<td>State License</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12124212</td>
<td>NA</td>
<td>Y</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Provider Languages

<table>
<thead>
<tr>
<th>Language</th>
<th>Use of Language</th>
<th>In Primary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spanish</td>
<td></td>
<td>N</td>
</tr>
</tbody>
</table>

Specialties & Certifications
Check the most current board certification status by going to the ADA, ORAL, or ABO websites.

Provider Locations

<table>
<thead>
<tr>
<th>Office Name</th>
<th>Address 1</th>
<th>Address 2</th>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
<th>Contact Name</th>
<th>Office Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smith Dental</td>
<td>10 Main St</td>
<td>El Paso</td>
<td>TX</td>
<td>79926</td>
<td></td>
<td></td>
<td>(555) 555-5555</td>
</tr>
<tr>
<td>Smith Dental</td>
<td>15 Elm St</td>
<td>El Paso</td>
<td>TX</td>
<td>79912</td>
<td></td>
<td></td>
<td>(555) 555-5555</td>
</tr>
</tbody>
</table>

Provider Affiliations

<table>
<thead>
<tr>
<th>Name</th>
<th>Provider No</th>
<th>Affiliated Location</th>
<th>Effective Date</th>
<th>Expiration Date</th>
</tr>
</thead>
</table>

No results found.

Business Service Office

<table>
<thead>
<tr>
<th>Name</th>
<th>Affiliated Location</th>
<th>Effective Date</th>
<th>Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smith Dental</td>
<td>10 Main St</td>
<td>El Paso, TX 79925</td>
<td>06/15/2007</td>
</tr>
<tr>
<td>Smith Dental</td>
<td>15 Elm St</td>
<td>El Paso, TX 79925</td>
<td>06/15/2007</td>
</tr>
</tbody>
</table>

Patient Restrictions

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>Provider Taxonomy</th>
<th>Network Name</th>
<th>Line Of Business Name</th>
<th>Location</th>
<th>Affiliation</th>
<th>Patient Age Range</th>
<th>Accepting Patient</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Network A</td>
<td>10 Main St</td>
<td>El Paso, TX 79925</td>
<td>0-999</td>
<td>Accepting New and Existing Patients</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Network B</td>
<td>15 Elm St</td>
<td>El Paso, TX 79925</td>
<td>0-999</td>
<td>Accepting New and Existing Patients</td>
<td></td>
</tr>
</tbody>
</table>

Provider Employees

<table>
<thead>
<tr>
<th>Name</th>
<th>Title/Position</th>
<th>Telephone</th>
</tr>
</thead>
</table>

No results found.

User Account Information

No provider employee login account is established.
Creating Your Office User Accounts

Only Provider Super Users can create new user accounts. You need to create an employee record before you create a user account. The following procedure walks you through creating your business entity and service office user accounts.

1. From the Dentist List page, select the Business Entity office or the Service Office where you are adding users.

   **NOTE:** Remember, Service Office users can only access information for the dentists assigned to that service office, if a user needs to access all dentist information, create the user at the Business Entity level regardless of where they work.

2. On the Dentist Detail page, click the Add Employee link in the upper-right corner of the Provider Employees section.

   The Add Provider Employee page appears.

   - **Name:** Smith, Jane
   - **Title/Position:** Administration
   - **Telephone:** (123) 123-4567

3. Type in the employee’s last name and first name in the required Last Name and First Name fields.

   **NOTE:** The other fields are optional and are not required by DentaQuest.

4. Click the Submit button to add the new employee. The Provider Employee Detail page appears for that employee.
5. In the upper-right corner of the **User Account Information** section, click the **Create User Account** link. The **Add User** page appears with the user’s first and last name pre-populated from the employee record you created.

6. Select a user role for this employee’s account from the User Role drop-down list. For more information, see “Security Roles” on page 4.

7. Enter a user ID for the employee in the **User ID** field (3-18 characters).

8. Type in an initial password for the employee in the **Password** field.

   **NOTE:** Your password needs to be 8 to 16 characters, contain at least one upper case, one lower case and one number and/or special character. You cannot use the following special characters: (;, \, {, }, [, ], " , %, ~, *, : ). You are prompted to change your password every sixty days. You cannot use any of your last ten passwords.

9. Type the initial password into the **Confirm Password** field.

10. Type the employee’s email address into the **Email** field.

11. Click the **Submit** button to create the user account.

   **NOTE:** Make sure you pass on the **User ID** and **Password** to the employee who is going to use this user account. They will have the option to change their password, security question, and e-mail address once they logon.

12. Repeat this procedure for each office user you need to create.
Add User

This page steps you through definition of a new user. The following are the basic steps:

1. Select User Type and click Next. Depending on the user type, the following pages displays:
   - Client
   - Health Plan
   - Health Plan Offices
   - Covered Employee
2. Select the office that the new user is to be associated with, then select a user.
3. Enter required information needed to complete the account and click submit.

User Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Last Name</td>
<td>Jones</td>
</tr>
<tr>
<td>User First Name</td>
<td>Edward</td>
</tr>
<tr>
<td>User Role</td>
<td></td>
</tr>
<tr>
<td>New Password</td>
<td></td>
</tr>
<tr>
<td>Confirm New Password</td>
<td></td>
</tr>
<tr>
<td>Password Question</td>
<td></td>
</tr>
<tr>
<td>Password Answer</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:ejones@myoffice.com">ejones@myoffice.com</a></td>
</tr>
</tbody>
</table>

Preferences

[THIS SECTION IS NOT CURRENTLY USED]
Editing a User Account

Only Provider Super Users can edit user accounts.

1. From the Dentist List page, select the Business Entity office or Service Office for the employee user account you want to edit.

2. In the Providers Employee section, select the Name link for the user you want to edit.

3. In the Provider Employee Detail page that appears, click the Edit User Account link in the upper-right corner of the User Account Information section to edit this user account. The Edit User page appears.
4. Edit the fields with the changes you need to make for this user account:
   - To change the user’s role, select the new role for this user from the **User Role** drop-down list.
   - To change the user’s password question, select a new password question from the **Password Question** drop-down list and type a new answer for the password question into the **Password Answer** field.
   - To lock a user out of the system, select **Yes** in the **Locked** drop-down list.
   - To delete a user, select **Yes** in the **Deleted** drop-down list.
   - To edit the user’s email address, type the new email address into the **Email** field.

5. Click the **Submit** button. Your changes are saved in the system.
Delete an Employee
Before you can delete an employee, you must delete their user account if they have one configured. See “Editing a User Account” on page 23.

1. In the Provider Employees section of the Dentist Detail page, click the name link for the employee you want to delete.

2. In the Provider Employee Detail page that appears, click in the upper-right corner of the Provider Type section to delete this employee.

3. In the pop-window that appears, click OK to delete the employee.
Using the User List

Only Provider Super Users see this menu item. The Administration > User List menu item allows a Provider Super User to open the User List page and search for and select a user. A business entity Provider Super User can access all users; a service office Provider Super User can only access all the users in their service office.

Search for a User

1. Select the Administration > User List menu item from the portal menus on the left side of the page.
2. None of the search fields are mandatory, so type in as much information as you can to narrow down your search results:
   - If you know the user’s last name, type it into the User Last Name field.
   - If you know the user’s user ID, type it into the User ID field.
   - If you are searching for a user with a specific role, select that role from the Role drop-down list.
   - If you are searching for a user that is locked out of the system, select Yes in the Locked drop-down list.
   - If you are searching for a deleted user, select Yes in the Deleted drop-down list.
3. Click the Search button. Your search results appear in the Results section.
   - Click a Name link to view details for that user on the User Detail page.
   - Click the Delete link on the row for a user in the Results section to delete a user.
Edit a User
This includes changing a user’s name, e-mail address, their user role, their password question, as well as locking, unlocking, deleting, and un-deleting their account.

1. Find the user you want to edit, see “Search for a User” on page 26.
2. Click the Name link to view the User Detail page for the user you want to edit.
3. In the User Detail page that appears, click the Edit User link in the upper-right corner of the User Information section to edit this user account.
4. On the Edit User page that appears, edit the fields with the changes you need to make for this user account:

   **NOTE:** You can never edit the user’s User ID.

   - To edit the user’s name, type in any changes into the User Last Name, User First Name, and Middle Name fields.
   - To change the user’s role, select the new role for this user from the User Role drop-down list.
   - To change the user’s password question, select a new password question from the Password Question drop-down list and type a new answer for the password question into the Password Answer field.
   - To lock a user out of the system, select Yes in the Locked drop-down list.
• To unlock a user, change the **Yes** to **No** in the **Locked** drop-down list; you would have selected **Yes** in this field when searching to find locked user accounts.

• To delete a user, select **Yes** in the **Deleted** drop-down list.

• To un-delete a user, change the **Yes** to **No** in the **Deleted** drop-down list; you would have selected **Yes** in this field when searching to find deleted user accounts.

• To edit the user’s email address, type the new email address into the **Email** field.

5. Click the **Submit** button to save your changes for this user.
Unlock a User

1. Click the Tools > User List menu item in the Portal Menus on the left side of the page.
2. Find the user you need to unlock, see “Search for a User” on page 26.
   
   **NOTE:** Select “Yes” in the Locked drop-down list to search for locked users.

3. Click the Name link to view the User Detail page for that user.

4. Click the Unlock link.

The user is now unlocked.
**Reset a User Password**

**NOTE:** A user can change their own password from their User Profile; see the Client Portal User Guide for more information.

1. Find the user you are resetting a password for, see “Search for a User” on page 26.
2. Click the **Name** link to view the **User Detail** page for that user.

   ![User Detail Table]

3. Click the **Reset Password** link.

4. On the **Reset User Password** page that appears, click the **Reset Password** button. A password is randomly generated and appears in the **New Password** field.

   **NOTE:** The user will receive an e-mail with their temporary password, and they will be prompted to change the password the next time they log in.

5. Click the **Submit** button to save the new password for this user. The user receives the new password in an email message.
Delete a User

1. Find the user you want to delete, see “Search for a User” on page 26.
2. Click the **Delete** link on the row for the user in the **Results** section.

3. On the **Delete User** page that appears, click the **Delete** button at the bottom of the page. The user is deleted.

**NOTE:** This procedure deletes a user account, but can be reversed. If you want to delete an employee record completely, see “Delete an Employee” on page 25.