



NC DEPARTMENT OF **HEALTH AND HUMAN SERVICES**

Managing User Accounts

Provider Administrator User Guide
Long Term Care Providers
Version 01
June 2018

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Introduction

The NC DHHS ABCMS allows provider administrative users to view and manage the user accounts associated with their providers. From the **User Accounts** screen, you may:

- Search for an Existing User
- Enable/Disable a User Account
- Add a New User
- Edit an Existing User's Account Information
- Reset a User's Password

Searching for an Existing User

1. Go to **Admin > User Accounts** on the navigation bar. The **Administration: User Accounts** screen appears.

Administration: User Accounts

* Required

User Account

Status: Enabled

* Is Pending: No

* Username:

* First Name:

* Last Name:

* Email:

Phone:

* User Type:

* Roles

Position Title:

Comment:

Address Line 1:

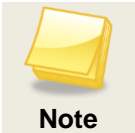
Address Line 2:

City:

State:

Zip:

Back to Search Save



The **Status** field defaults to **Enabled**. If you are unable to find a user, it may be because the user's account is locked due to too many incorrect password attempts. Clearing the **Status** dropdown box will enable you to search for all users in the system regardless of status.

- 2. Click the **Search** button for a list of all user accounts for your provider or select a search criterion (for example, enter a user name) and then click **Search**. **User Search Results** will show all possible matches to your search criteria.

Administration: User Accounts

Filter Criteria

Type: First Name:

Role: Last Name:

Status: Username:

Provider: Is Pending:

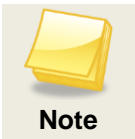
Email:

Search

Add New User

User Search Results

| UserName | Name | Email | Type | Status | Is Pending | Actions |
|---------------|-----------------|--|----------|---------|------------|--|
| alstonsunrise | Alston, Christy | christy.alston@dhhs.nc.gov | Provider | Enabled | No | Edit Disable Delete Add Note Upload Document |
| CCameron | Cameron, Cheryl | Cheryl.Cameron@dhhs.nc.gov | State | Enabled | No | Edit Disable Add Note Upload Document |
| | | | | | | Edit Disable |



Any portion of a username or email address may be entered to perform the search.

Note

Enabling/Disabling a User Account

If a user has been locked out of the ABCMS due to too many incorrect password attempts, an administrator will need to enable the user's account. If a user is no longer with the provider, an administrator will need to disable the user's account.

1. Go to **Admin > User Accounts** on the navigation bar. The **Administration: User Accounts** screen appears.

Administration: User Accounts

** Required*

User Account

| | |
|--|--|
| Status: Enabled <input type="button" value="v"/> | Address Line 1: <input type="text"/> |
| * Is Pending: No <input type="button" value="v"/> | Address Line 2: <input type="text"/> |
| * Username: <input type="text"/> | City: <input type="text"/> |
| * First Name: <input type="text"/> | State: <input type="button" value="v"/> |
| * Last Name: <input type="text"/> | Zip: <input type="text"/> |
| * Email: <input type="text"/> | |
| Phone: <input type="text"/> | |
| * User Type: <input type="button" value="v"/> | |
| * Roles | |
| Position Title: <input type="text"/> | |
| Comment: <input type="text"/> | |

- To enable a locked user account, select **"Locked"** from the Status drop down list and click the Search button. A list of locked accounts will display. Click the **Enable** link for the user in the **Actions** column, and the system will change the status of the user account to **"Enabled."** The user will be allowed to log in.

Administration: User Accounts

Filter Criteria

Type: First Name:

Role: Last Name:

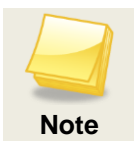
Status: Username:

Provider: Is Pending:

Email:

User Search Results

| UserName | Name | Email | Type | Status | Is Pending | Actions |
|---------------|-----------------|--|----------|---------|------------|---|
| alstonsunrise | Alston, Christy | christy.alston@dhhs.nc.gov | Provider | Enabled | No | <input type="button" value="Edit"/> <input type="button" value="Disable"/> <input type="button" value="Delete"/> <input type="button" value="Add Note"/> <input type="button" value="Upload Document"/> |
| CCameron | Cameron, Cheryl | Cheryl.Cameron@dhhs.nc.gov | State | Enabled | No | <input type="button" value="Edit"/> <input type="button" value="Disable"/> <input type="button" value="Add Note"/> <input type="button" value="Upload Document"/> |
| | | | | | | <input type="button" value="Edit"/> <input type="button" value="Disable"/> |



Enabling a user does not reset the password. The user can use the **Forgot Password** link on the login screen to reset his or her password.

- To disable a user account, select "Enabled" from the **Status** drop down list and click the **Search** button. A list of enabled accounts will display. Click the **Disable** link for the user in the **Actions** column, and the system will change the status of the user account to "Disabled." The user will NOT be allowed to log in.

Administration: User Accounts

Filter Criteria

| | |
|---|---|
| Type: <input type="text" value=""/> | First Name: <input type="text" value=""/> |
| Role: <input type="text" value=""/> | Last Name: <input type="text" value=""/> |
| Status: <input type="text" value=""/> | Username: <input type="text" value=""/> |
| Provider: <input type="text" value=""/> | Is Pending: <input type="text" value=""/> |
| | Email: <input type="text" value=""/> |

[Search](#)

[Add New User](#)

User Search Results

| UserName | Name | Email | Type | Status | Is Pending | Actions |
|---------------|-----------------|--|----------|---------|------------|--|
| alstonsunrise | Alston, Christy | christy.alston@dhhs.nc.gov | Provider | Enabled | No | Edit Disable Delete Add Note Upload Document |
| CCameron | Cameron, Cheryl | Cheryl.Cameron@dhhs.nc.gov | State | Enabled | No | Edit Disable Add Note Upload Document |
| | | | | | | Edit Disable |

Adding a New User

1. Go to **Admin > User Accounts** on the navigation bar. The **Administration: User Accounts** screen appears.

The screenshot displays the 'Administration: User Accounts' interface. At the top, a navigation bar includes links for Home, Applications, Employees, Search, Reports, Reference, and Admin. Below this, a secondary navigation bar lists 'User Accounts' (highlighted in yellow) along with Password Maintenance, Roles, Manage Emails, Templates, Task Schedule, Failed Task Items, Settings, Site Data, and Caching. The main content area is titled 'Administration: User Accounts' and contains a 'Filter Criteria' section. This section includes several input fields: 'Type' (a dropdown menu with a blue highlight), 'Role' (a dropdown menu), 'Status' (a dropdown menu), 'Provider' (a dropdown menu), 'First Name' (a text input field), 'Last Name' (a text input field), 'Username' (a text input field), 'Is Pending' (a dropdown menu), and 'Email' (a text input field). A 'Search' button is located below the filter criteria. At the bottom of the form, there is an 'Add New User' button.

2. Click the **Add New User** button. The **User Accounts** screen appears.

Administration: User Accounts

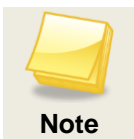
* Required

User Account

| | |
|---|---|
| Status: Enabled | Address Line 1: <input type="text"/> |
| * Is Pending: No | Address Line 2: <input type="text"/> |
| * Username: <input type="text"/> | City: <input type="text"/> |
| * First Name: <input type="text"/> | State: <input type="text"/> |
| * Last Name: <input type="text"/> | Zip: <input type="text"/> |
| * Email: <input type="text"/> | |
| Phone: <input type="text"/> | |
| * User Type: <input type="text"/> | |
| * Roles | |
| Position Title: <input type="text"/> | |
| Comment: <input type="text"/> | |

Back to Search Save

3. Enter the user's information. In the **Username** text box, enter a unique username for the account. Other required information includes the user's **First Name**, **Last Name**, and **Email** address. The **User Type** will always be "Provider."



As an administrator, you will need to communicate the username to the user. For security reasons, the ABCMS does not email usernames

Note

4. In **Role(s)**, select the roles for the user. User roles control what a user can see and do in the system. It is possible for a user to have more than one role. When this occurs, the user will have access to all the functions for the roles they are assigned. Click the **Selected** checkbox for each role that you want to assign to the user account you are creating. If the user account you are creating has permission to create additional user accounts, click the **Grantable** checkbox if you want the user to be able to grant the user role to other users.

For example, you might create an account for Sally that has a Provider Admin user role, in which case you would click the **selected** checkbox, but you don't want Sally to be able to give that user role to other users; therefore you would leave the **Grantable** checkbox unselected.

5. Click **Assign Providers** to connect the user account to one or more providers. The **Assign Providers** dialog box appears. Begin typing the provider name in the **Search for Provider** text box. After typing in the first three letters, the system will return all possible matches. Select a provider by clicking on the provider's name. The provider name will appear in the **Providers Assigned to the User** section. Click **Save**.

Assign Providers

Search for Provider - Enter at least 3 characters

Hom

Select Provider(s)

[Helping Hands Home Health](#)

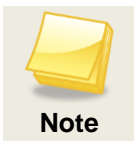
[Jen's Nursing Home](#)

[Roberts' Home Health](#)

[Sunnyside Nursing Home](#)

Providers Assigned to User

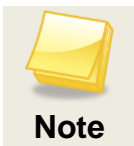
Cancel Save



At any time you may remove an assigned provider from a user account by returning to the **Assign Providers** dialog box and clicking **Remove**.

Note

6. After assigning a provider, click the **Save** button on the **User Accounts** screen to add the user to the system. The system will auto-generate a password for the user and send it to the user at the email address entered for the user in the account you just created.

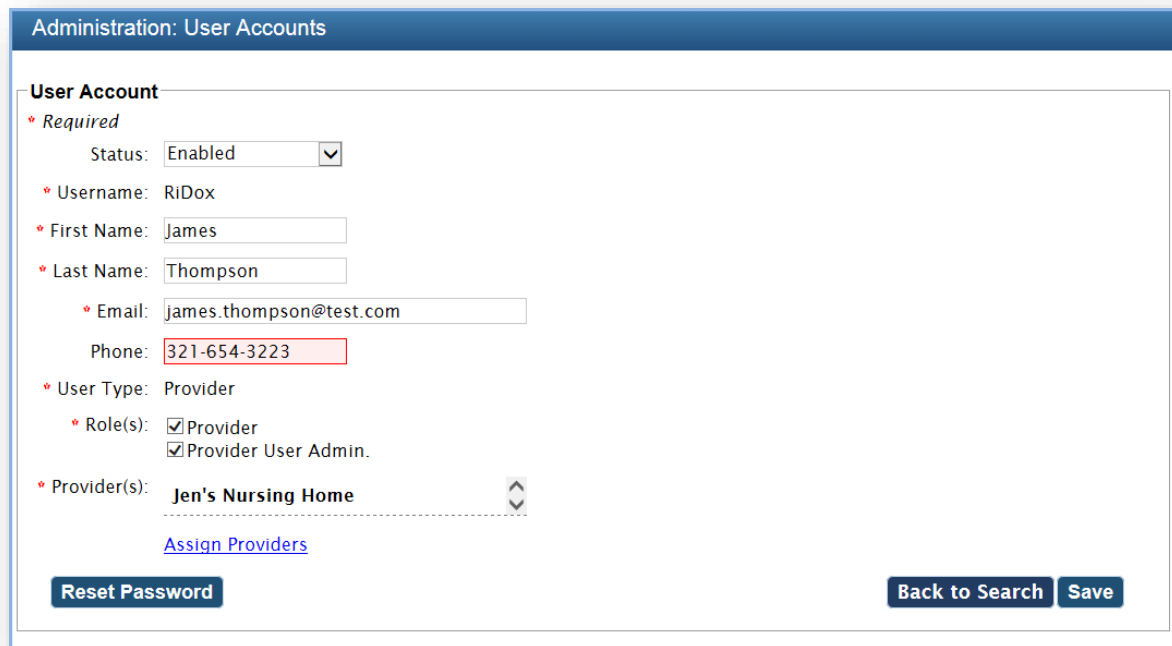


If **Is Pending** is set to “Yes” the user password will not be generated until the value is changed to “No.” In this way, an administrator can setup many user accounts at once ahead of time and then “activate” them all at once by changing **Is Pending** to “No.” Go to the **Admin > Password Maintenance** screen to do this.

Note

Editing an Existing User's Account Information

1. Go to **Admin > User Accounts** on the navigation bar. The **Administration: User Accounts** screen appears.
2. Click the **Search** button for a list of all user accounts for your provider or select a search criteria (for example, enter a user name) and then click **Search**.
3. In the **User Search Results**, click the **Edit** link in the **Actions** column for the user whose information you wish to edit. The **User Account** screen appears.



The screenshot shows the 'Administration: User Accounts' interface. The main form is titled 'User Account' and contains the following fields and options:

- Status:** A dropdown menu set to 'Enabled'.
- Username:** RiDox
- First Name:** James
- Last Name:** Thompson
- Email:** james.thompson@test.com
- Phone:** 321-654-3223
- User Type:** Provider
- Role(s):** Two checkboxes are checked: 'Provider' and 'Provider User Admin.'
- Provider(s):** Jen's Nursing Home

At the bottom of the form, there is a blue link labeled 'Assign Providers'. Below the form are three buttons: 'Reset Password', 'Back to Search', and 'Save'.

4. Edit the user information as desired and click **Save**. (You cannot edit the **Username**.)

Resetting a User's Password

As a provider system administrator, you can reset a user's password. To do this, click **Reset Password** on the **User Account** edit screen. An email will be sent to the user with a new temporary password.

Users can reset their own password using the **Forgot Password** button on the login screen or by clicking on the **Change My Password** button on the **My Account** page.

The system requires users to change their passwords every 90 days.

User Roles

System Administrator- The person selected by the provider to hold the main account for the NC DHHS ABCMS and has the authority to add system users.

System Users- Provider staff selected to have access to the system for completing background checks on applicants.