

# Office Manager

## OVERVIEW

Office Manager is a functionality within ProviderSource™. This means you can access it using the same ProviderSource™ website as Providers themselves would access in order to log into an Office Manager account. You will have to be sure to select “Office Manager” on the account creation page in order to have the role of “Office Manager.” Once the account is created and you are logged in, you’ll be navigated to Office manager homepage, where you will see a drop down of locations. On the Manage Practice page you can add multiple locations to your organization. On the Manage Provider page a.k.a. homepage you will be able to add a provider to your location, send email invites to add providers and manage provider applications.

## CREATING OFFICE MANAGER ACCOUNT ROLE

In screenshot #1, the top half of the Create Account page is shown. This is the same Create Account page used by providers, and it is important to remember to select the correct “Role” when initially creating your account. As an Office Manager, select this role in the “Please choose a Role” drop down menu illustrated in screenshot #2 on the next page.



### Create Account

•First Name	•Last Name
<input type="text"/>	<input type="text"/>
•Birth date (MM/DD/YYYY)	
<input type="text"/>	
•User name (Minimum 6 characters)	
<input type="text"/>	
•Password	•Confirm password
<input type="text"/>	<input type="text"/>
<small>(Minimum 8 characters with at least 1 uppercase, 1 lowercase, 1 numeric &amp; 1 special character.)</small>	
<b>Note: Please submit a valid email address below. This email will be used for all communications, including account activation.</b>	
•Email	•Security Question
<input type="text"/>	<input type="text"/>

Screenshot #1: Create Account Page

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• Email

• Security Question

• Security Answer

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• Please choose a Role

• Organization Name



• Enter the letters into the textbox

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I have read and agree to the ProviderSource™ [Terms of Service](#) and [Privacy Policy](#).

\* - required fields

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 Medversant understands how important the privacy of personal information is to you. We have implemented safeguards to help

Role Selection

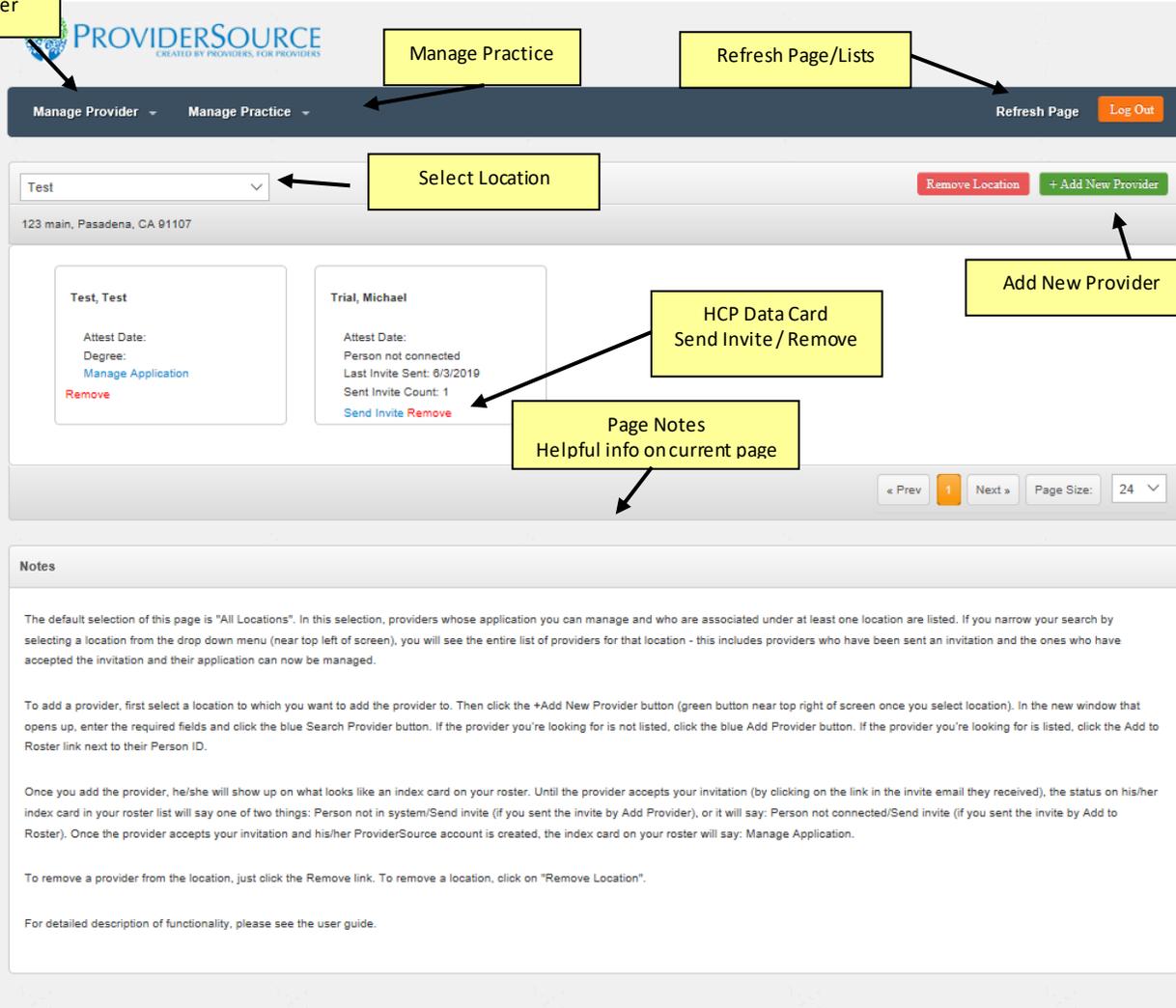


**Screenshot #2: Create Account Page – Select User Role: Office Manager**

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## OFFICE MANAGER HOMEPAGE/MANAGE PROVIDER

In screenshot #3, the Office Manager home page is shown. More precisely this is the “**Manage Provider**” page. It gives the fastest access to managing a provider’s application. From “**Select Location**” drop down you can select a location and based on this selection, the list of providers added to that location will be displayed. Providers can be added to the roster (provider list) using “**Add new Provider**” button. This will be explained in detail in one of the following sections. Providers connected to the office manager will have a “**Manage Application**” link and the unconnected providers will have a “**Send Invite**” link. Procedure to connect a provider to an office manager account has been given in the following section.



The screenshot displays the 'Manage Provider' interface. At the top, there is a navigation bar with 'Manage Provider' and 'Manage Practice' dropdown menus, and 'Refresh Page' and 'Log Out' buttons. Below this is a 'Select Location' dropdown menu currently set to 'Test', with 'Remove Location' and '+ Add New Provider' buttons to its right. The main content area shows a list of providers, with two cards visible: 'Test, Test' (status: Manage Application) and 'Trial, Michael' (status: Person not connected). The 'Trial, Michael' card includes links for 'Send Invite' and 'Remove'. A 'HCP Data Card Send Invite / Remove' annotation points to these links. At the bottom right of the provider list, there is an '+ Add New Provider' button. Below the provider list is a 'Page Notes' section with helpful information on current page. At the bottom of the page, there is a pagination control showing '1' of 24 pages.

**Screenshot #3: Office Manager Homepage**

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### SEND INVITATION EMAIL/CONNECT PROVIDER

Once an office manager clicks on the “Send Invite” button, they will see this pop-up. This page has basic email sending fields along with a mandatory & non-editable field which will be added to the message. This field has a link which when the provider will click, he will be asked to verify his existing account or create a new account. Also, the verified or new account will be connected to the office manager account.

### Send Email Invitation

Sender Name \*

Email To \* Email CC

Subject \*

Message

Invite Link message which will be added by the system

You are invited to connect to Office Manager account on ProviderSource.com. To agree to designate him/her as your office manager, please click the link.

Please do not close your browser until the page completely loads, which may take some time. If you do not wish to accept invitation, please disregard this message.

Link: <https://dwmhaqa.providersource.com/OfficeManager/SpecificBaseInfo.aspx?info=ConnectProvider&id=124422-632019-12161603>

Screenshot #4: Send Email Invitation

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### ADD NEW PROVIDER

In screenshot #5, “Add New Provider” page is shown. This is a pop-up page which displays up when the user clicks on “Add New Provider” button on “Manage Provider” page. As you can see, it first takes some data of the Provider office manager is searching for. After Search button is clicked, based on various data combinations, a grid is populated with matching results. At this point, the user has the option to either click on “Add to Roster” from the grid thereby adding an existing provider to their roster or they can click on “Add Provider” button, which will just take the data given in textboxes and create a new unconnected record for the provider. The provider will be sent an invitation to connect to the office manager in both cases, and also in both cases, will still get an option to connect this record to an existing ProviderSource™ account, if he has any. In case, they do not have any account, they will be asked to create a new one and once created, that account will automatically be connected to this office manager.

### Add New Provider

*First Name	Middle Name	*Last Name
<input type="text" value="Martin"/>	<input type="text" value="Test"/>	<input type="text" value="Johnson"/>
SSN	*Date of Birth (MM/DD/YYYY)	NPI
<input type="text" value="212222211"/>	<input type="text" value="07/14/1965"/>	<input type="text" value="64522365"/>
*Email		
<input type="text" value="martin.johnson@cigna.com"/>		

### Notes

Please enter the required fields and then click the “Search Provider” button.

A data grid may appear with possible results of providers matching the search criteria. From that list you can add a provider to your roster by clicking on the “Add to Roster” link given in front of its respective row. Adding a provider this way ensures that the system understands what provider is being added, it’s faster and connection creation is more efficient. After clicking that button, an invitation email is sent to the provider with a request for connection. Once the provider accepts the invitation by clicking on the link that was emailed, he/she will be connected with the Office Manager.

In the event you are not able to find a provider to add from the possible results, there is an “Add Provider” button (not for all users) given in the Search box itself. Clicking that button will send an invitation email to the email address given in the Email textbox. Then, once the provider receiving the invite clicks the invitation link, he/she will be taken to a connection page where either connection will be made based on his/her existing ProviderSource account or by requesting him/her to create a new account.

Once you have added the provider by either “Add to Roster” or “Add Provider”, please click on the “Refresh Page” button to view your updated roster.

If needed, you can send another invitation request by clicking on the “Send Invite” link from the provider’s tile on the “Manage Provider” page.

**Screenshot #5: Add New Provider**

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### MANAGE PRACTICE

Screenshot#6 shows the “**Manage Practice**” section. There are various functionalities and sub-functionalities shown here. Most of these will be covered in detail in following sections, but their description is given as follows:

“**Manage Locations**” is a tab which lists out all the added location for an Organization or Affiliate. Each location has sub-functionalities to associate/ disassociate affiliations, services and providers and to edit details of that location itself, for which links are provided.

“**Manage Affiliations**” tab works on Organization level and not on Location level. That means, if an affiliation, has to be added to an Organization, one should visit that tab and do it. And once an entity (affiliation) has been added to the Organization, office manager can click the link for “Associate Affiliation” or “Associate Service” and select the entity to be added to that specific location. Associating has been described in sections given ahead in the document.

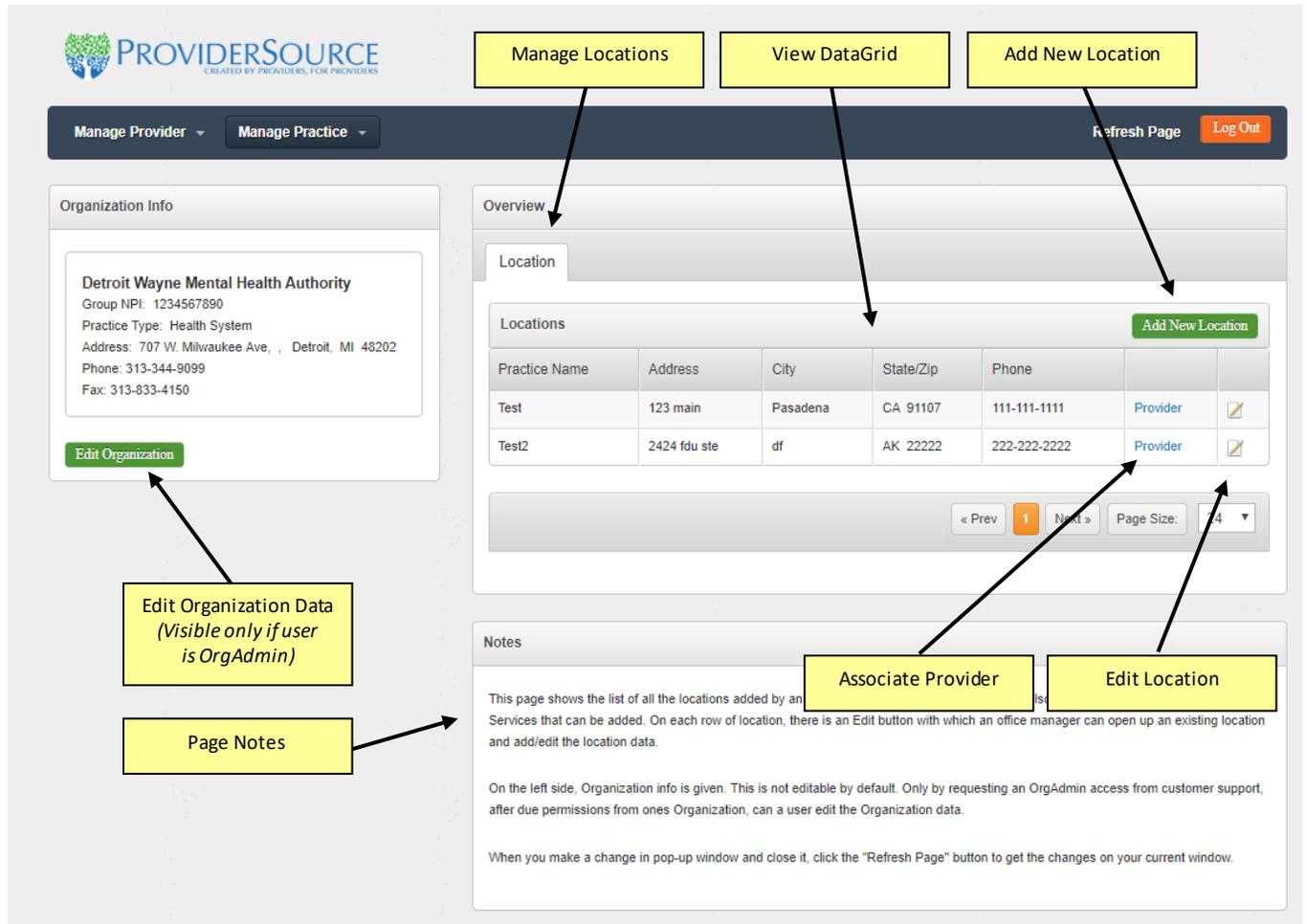
“**Add New Location**” and “**Edit Location**” as name suggests, opens a pop-up where the location details can be given to add or edit a location. This also has been covered in detail in sections ahead.

“**Associate Provider**” is a functionality to add a provider to a location. Please take care, that once you add a Provider to a location using “**Manage Provider**” page, and the provider has accepted your invitation, only then he will be available in this pop-up so that he can be simply associated with other locations as well. The theory is that once a user accepts an office manager, he should not need to resend invitations for adding him to more locations.

“**Edit Organization**” is straightforward. It only shows to “**OrgAdmin**” role members. For users, Office Manager Admin will have the role of "OrgAdmin" by default.

**Note:** After making any changes, please click on the Refresh Page link to see the updated information display.

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The screenshot shows the 'Manage Practice' interface. At the top, there are three yellow callout boxes: 'Manage Locations', 'View DataGrid', and 'Add New Location'. Below these are navigation buttons: 'Manage Provider', 'Manage Practice', 'Refresh Page', and 'Log Out'. The main content area is divided into three sections: 'Organization Info', 'Locations', and 'Notes'. The 'Organization Info' section displays details for 'Detroit Wayne Mental Health Authority' and includes an 'Edit Organization' button. The 'Locations' section features a table with columns for Practice Name, Address, City, State/Zip, and Phone, and includes an 'Add New Location' button. The 'Notes' section contains explanatory text. Annotations include arrows pointing from the callout boxes to their respective UI elements, and a yellow box labeled 'Edit Organization Data (Visible only if user is OrgAdmin)' pointing to the 'Edit Organization' button. Another yellow box labeled 'Page Notes' points to the 'Notes' section. Two yellow boxes labeled 'Associate Provider' and 'Edit Location' point to the 'Provider' column and the edit icon in the 'Locations' table, respectively.

**Organization Info**

Detroit Wayne Mental Health Authority  
 Group NPI: 1234567890  
 Practice Type: Health System  
 Address: 707 W. Milwaukee Ave, , Detroit, MI 48202  
 Phone: 313-344-9099  
 Fax: 313-833-4150

[Edit Organization](#)

**Locations**

Practice Name	Address	City	State/Zip	Phone	Provider	
Test	123 main	Pasadena	CA 91107	111-111-1111	Provider	
Test2	2424 fdu ste	df	AK 22222	222-222-2222	Provider	

« Prev 1 Next » Page Size: 4

**Notes**

This page shows the list of all the locations added by an... Services that can be added. On each row of location, there is an Edit button with which an office manager can open up an existing location and add/edit the location data.

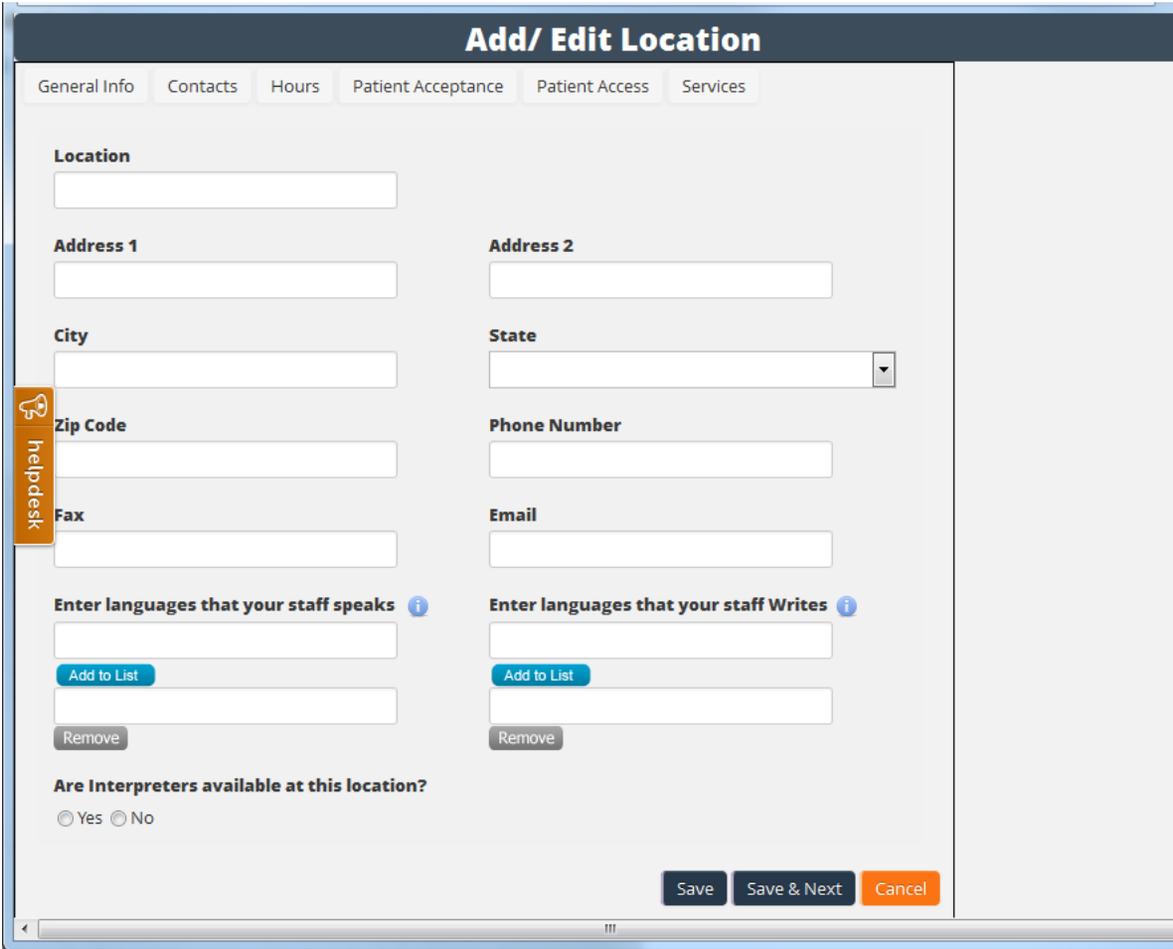
On the left side, Organization info is given. This is not editable by default. Only by requesting an OrgAdmin access from customer support, after due permissions from ones Organization, can a user edit the Organization data.

When you make a change in pop-up window and close it, click the "Refresh Page" button to get the changes on your current window.

**Screenshot #6: Manage Practice**

## Office Manager

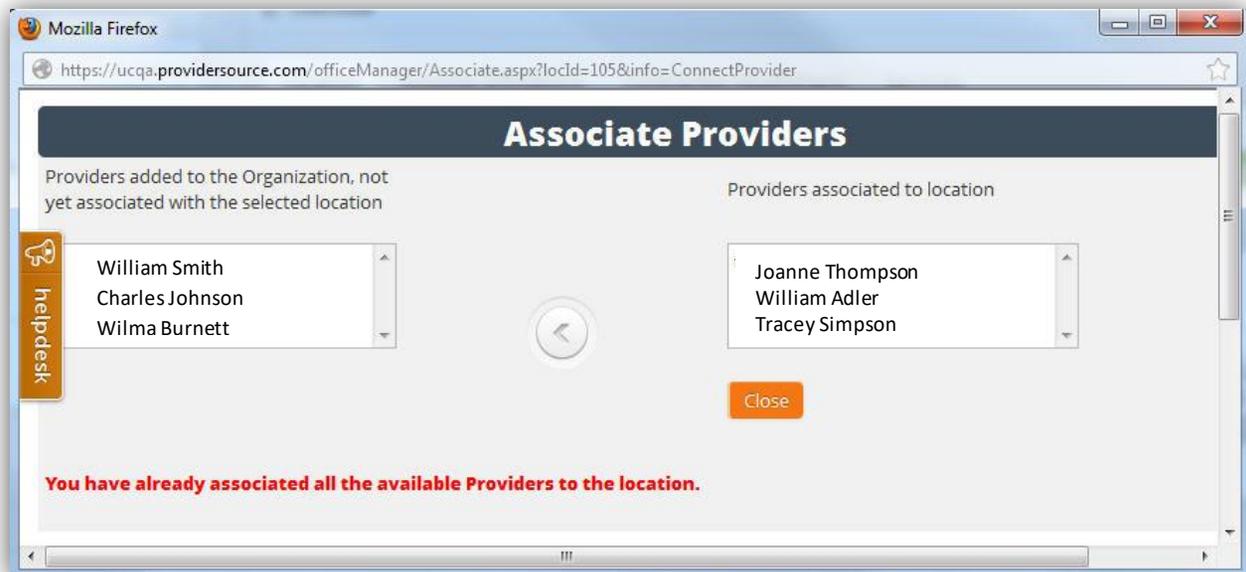
Screenshot #7, shows the window which is used to enter details of an Office/Practice Location. If the user has clicked the “EDIT” button on “Manage Practice” page then the fields will be filled up with data and the office manager will be able to edit and save it. As you can see there are 6 tabs of data to be filled out. It is not mandatory that all the tabs of data should be filled out for a successful record. But on each tab there are certain validations, such that if one starts filling out data, they have to give minimum required data for the record to be saved.



*Screenshot #7: Add/ Edit Location*

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Screenshot #8 shows the pop-up for “Associate Provider”. There are two list boxes on this pop-up. The left box is the collection of HCPs added to the Organization using “Add Provider” button. It is the collection of HCPs who have accepted office manager’s invitation irrespective of the location they were added to. Right list box is the collection of HCPs associated with this location. And when an entity is added from left list box to the right list box using the “Add” (>) button, it gets removed from the left box and shows up in the right box. Disassociation works in a similar way, that is by selecting entity from the right box and clicking “Remove” (<) button. That will move the item from right box to left box.



*Screenshot #8: Associate Providers*

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### PROVIDER STATUS EXAMPLES

The tiles below show how to interpret status information for providers. In the first tile the office manager can tell the provider has not accepted the invitations sent previously. In the second tile, the provider is not found in the system at all. The third tile shows an application in process, denoted by the lack of an “Attest Date”. The fourth and final tile shows a provider who is both associated and has attested to a complete application.

#### PROVIDER INVITED, NOT YET ACCEPTED

one test, friend

Attest Date: 9/18/2018

Person not connected

Last Invite Sent: 3/9/2018

Sent Invite Count: 2

[Send Invite](#) [Remove](#)

#### PROVIDER NOT IN PROVIDERSOURCE

Test, Test Provider

Person not in system

Last Invite Sent: 2/14/2018

Sent Invite Count: 1

[Send Invite](#) [Remove](#)

#### ASSOCIATED PROVIDER - APPLICATION IN PROCESS

Smith, John

Attest Date:

Degree: DMD

[Manage Application](#)

[Remove](#)

#### ASSOCIATED PROVIDER - APPLICATION COMPLETED

Washington, Jason D

Attest Date: 10/27/2017

Degree: DMD

[Manage Application](#)

[Remove](#)