



## **Payer Administrator User Guide**

# RadPort™

Version 3.0

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# Chapter 1

## *Introduction*

### **Objectives**

After reading this chapter you will be able to:

- Log in to *RadPort*
- Log out of *RadPort*
- Briefly describe the function of *RadPort*'s main tabs
- Explain the function of common icons and hyperlinks used in *RadPort*

# RadPort™ Overview

Veriphy's *RadPort* is an evidence-based clinical decision support system designed to help organizations select the most appropriate exam for their patients. When a user selects an exam type and the patient's symptoms, *RadPort* generates a *utility score* based on the selections. The higher the utility score (on a scale of 1 through 9), the more appropriate the exam.

This version (3.0) of *RadPort* is payer-based. This means that the participating insurance companies feed their patient, or subscriber, information into the *RadPort* database using an enterprise transaction link, or ETL. This helps ensure that *RadPort* has the most current patient information.

## Benefits

- **Payers** (insurance providers) benefit from the cost-effective management of appropriate high-tech imaging.
- **Providers** benefit from improved ordering patterns and pre-certification without the need for costly radiology benefits management companies.
- **Patients** benefit from knowing that the appropriate order is placed the first time around, which helps limit exposure to excessive radiation, reduce additional healthcare bills, and limits the loss of work and family time.

# Payer Administrator Tasks

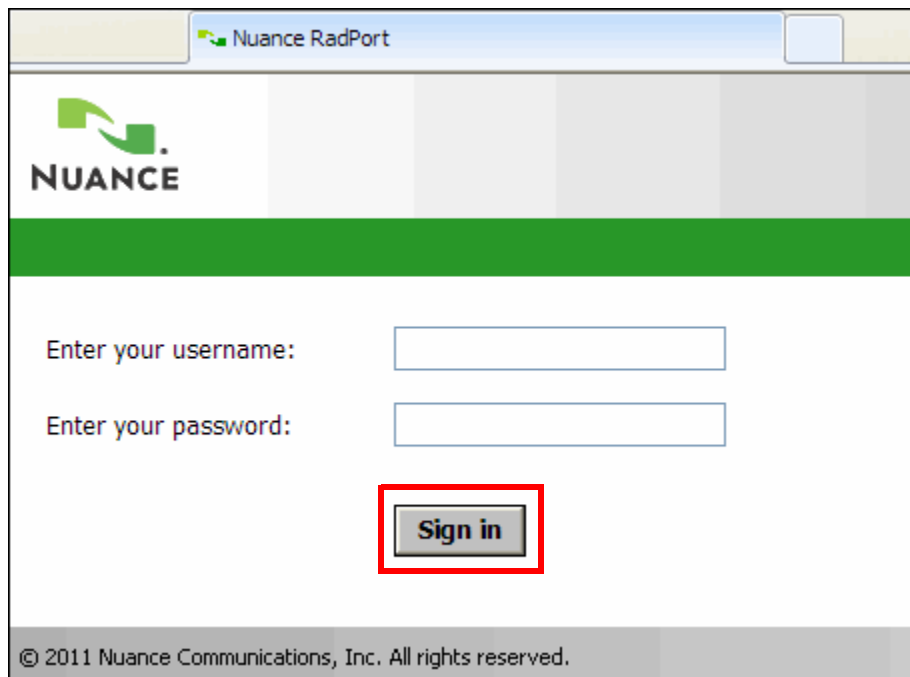
As a payer administrator, you have access to the **Exams**, **Patients**, and **Accounts** tabs. Use these tabs to:

- View the exams for your subscribers; however, they cannot cancel any of those exams
- View and edit your subscribers
- View (but not edit) all your providers

## Logging In to RadPort

### To log in:

1. Open Internet Explorer and type the following URL:  
<https://<RadPort server name>/RadPort/login.aspx>  
(Replace <RadPort server name> with the name of the server where the *RadPort* server software is installed.)
2. Type your username.
3. Type your password. At your first login, you are required to change your password. Follow the prompts to change the password, and then continue.
4. Click **Sign in**.



Nuance RadPort

**NUANCE**

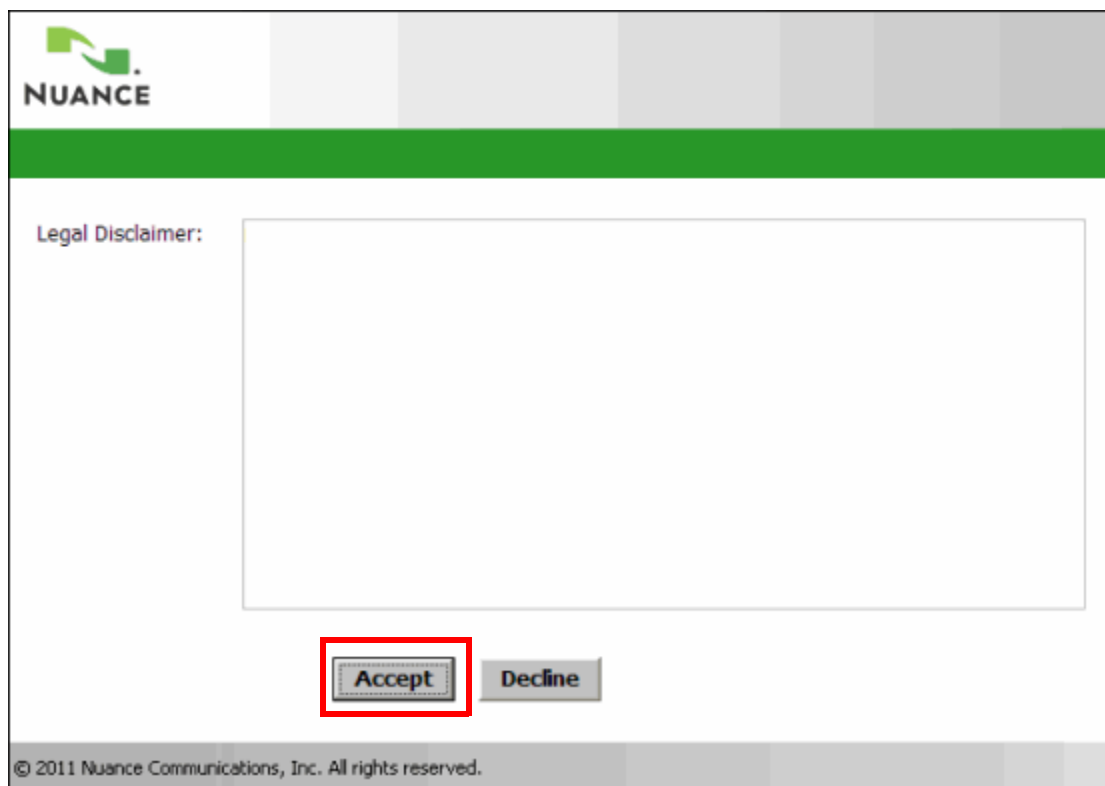
Enter your username:

Enter your password:

**Sign in**

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5. At the legal disclaimer dialog box, click **Accept**.



## Logging Out of RadPort

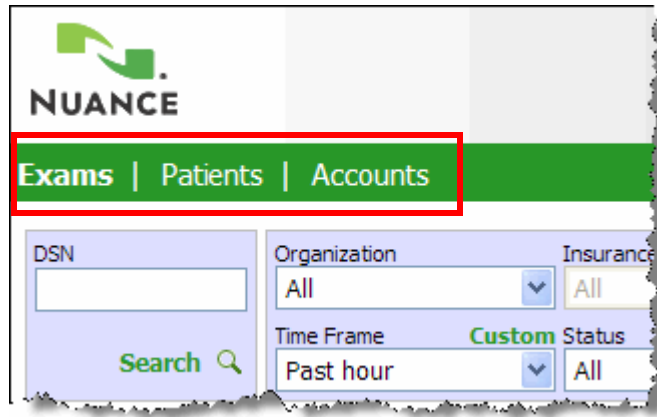
To log out of *RadPort*, click the **Sign out** link located in the upper-right corner of the main window.





# Tabs Overview

The tasks you perform as a payer administrator are based upon three tabs that are available from the main window once you log in. The illustration below shows the tabs.



## Working with the Tabs

- *RadPort* remembers what tab you were on when you last logged off of the system. (Sometimes referred to as *sticky tabs*.)
- Bold text indicates which tab you are currently viewing; for example, the **Exams** tab is active in the above illustration.

## Brief Description of Each Tab

Each tab allows you to perform specific tasks that help to maintain the system and troubleshoot any issues that might occur. The following list briefly describes the tasks each tab allows you to perform:

- **Exams:** Search for ordered exams; review exam status and scores; cancel exams
- **Patients:** Search for patients; edit existing patient demographics (cannot *add* a new patient); edit a patient's insurance information
- **Accounts:** Search for, add, and edit other *RadPort* payer administrators

# Common Objects and Elements

The following items are found on many of the *RadPort* administrator tabs.

## Links

In addition, many of the tabs in *RadPort* contain hyperlinks to help you when creating or modifying accounts, practices, and other items.

**Create New** 

Use to create a new item; available before you search for and select an item (group, location, and so on) or after you click **Clear**; replaces the **Save Changes** link

**Clear** 

Removes the data from a window; does *not* delete the data from the system; changes the **Save Changes** link to the **Create New** link;

**Save Changes** 

Saves any changes you made to an item; also, replaces the **Create New** link when you click it to create a new item

**Delete** 

Removes the item (group, location, user account, and so on) from the system

## Results Table Elements

Most of the tabs in *RadPort* allow you to perform a search for one or more items. The results tables that open contain some elements that are common across all tabs.

**Reset and Search** 

Once you have selected your search filters, click **Search** to begin the search. To return your search filters to their default values, click **Reset**.

**Page Numbers** 

If you receive a large number of results, *RadPort* creates multiple pages to simplify viewing. Click a page number to go to a specific page. The selected page number appears grayed out.

## Increase/Decrease Page Size

Page 1 [2] [3] ↓

Page 1 ↑

- **To view multiple pages as a single page:** Click the orange down arrow next to the page numbers.
- **To return to multiple pages:** Scroll to the bottom of the page and click the up arrow.

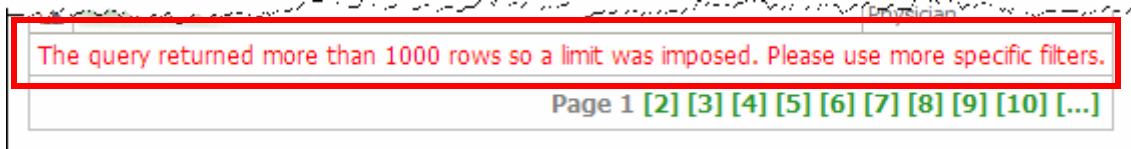
## More Than Ten Results Pages

Page 1 [2] [3] [4] [5] [6] [7] [8] [9] [10] [...]

If your search returns more than 10 pages of results, the first ten page links are displayed automatically. You can either select one of these pages, or click the ellipsis to advance to the next ten pages, and so on.


## More Results Returned Than Allowed by System

A system-wide parameter (set by a system administrator) determines how many items can be retrieved in a query. If you exceed that limit, a message similar to the following appears.



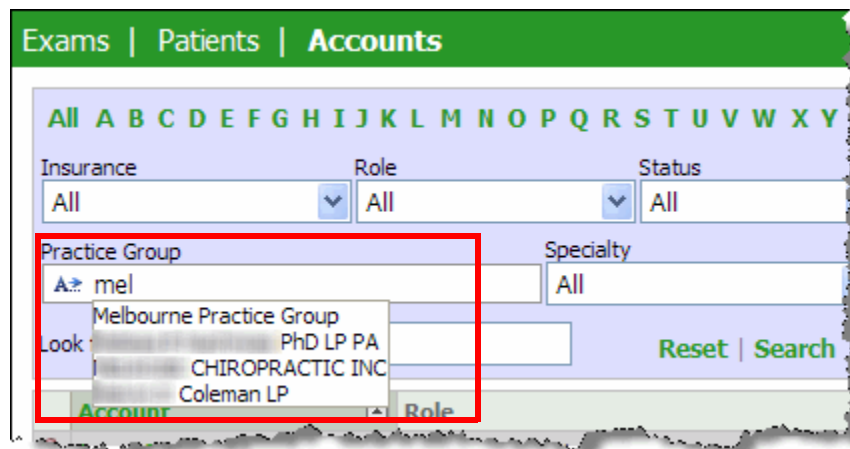
Narrow your search criteria and click **Search** again.

## Incremental Search Fields

An incremental search field helps you to search for information when you only know a partial name of an account or practice group. These fields contain the incremental search icon .

To use this type of field, type the first couple of letters of the name you want to locate. In a few seconds, *RadPort* presents a list of names from which you can make a selection. If no names appear, try using fewer letters to widen the search.

The illustration below shows an example of searching for practice groups that begin with the letters **mel**.





## Chapter 2

# *Exams Tab*

### **Objectives**

Use the **Exams** tab to perform the following tasks:

- Search for exams
- Review exam status and exam scores
- View exam details
- Cancel exams

# Using the Exams Tab

Use the **Exams** tab to perform the following tasks:


- Search for exams
- Review exam status and exam scores
- View exam details
- Cancel exams

The screenshot displays the RadPort Payer Administrator interface. At the top left is the NUANCE logo. The navigation bar includes 'Exams' (highlighted with a red box), 'Patients', and 'Accounts'. A 'Sign out' link is located at the top right. Below the navigation bar is a search filter section with the following fields: DSN (text input), Organization (dropdown menu), Insurance (dropdown menu), Score (dropdown menu), Practice Group (text input), Practice Location (text input), Time Frame (dropdown menu), Status (dropdown menu), User (text input), and Provider (text input). A 'Search' button with a magnifying glass icon is located to the left of the search filters. Below the search filters is a 'Cancel Exams' section with a checkbox and a table. The table has the following columns: DSN, Date, Insurance, Practice Group, Practice Location, Provider, User, User Group, Exam, Score, and Status. The 'Page 1' indicator is located at the bottom right of the interface.

## Search for Exams

Find an exam by using one or more of the search criteria. Note that the search fields are cumulative; if you select a value for more than one field (for example, Score and Time Frame), your results must match the values you selected for both fields.

### Incremental Search Fields

The Practice Group, Practice Location, User, and Provider fields are examples of incremental search fields. Each of these fields contain the incremental search icon . To use this type of field, type the first couple of letters of the name of the group, practice, user, or provider you want to locate. In a few seconds, *RadPort* presents a list of names from which you can make a selection.

### Search Field Descriptions

After you make your selections, click the **Search** link to generate your results list. Use the following table as a guide when making your selections.

Search Field	Description
DSN	If you know the decision support number (DSN) for the exam you want to find, enter it here and click <b>Search</b> .
Organization	Select an organization from the list.
Insurance	Select an insurance provider from the list. The insurance drop-down list is unavailable if you do not select a specific organization.
Score	Select a utility score of All; Not Indicated (0-3); Indicated (4-10); Unknown (0); Low (1-3); Medium (4-6); High (7-9); or Permitted (10).
Practice Group and Practice Location	Type the first couple of letters of the name of the group or practice you want to locate. In a few seconds, <i>RadPort</i> presents a list of names that match what you typed from which you can make a selection.
Time Frame	Select Past hour; Past 4 hours; Today; Yesterday; Past 2 days; Past 3 days; Past week; Past 2 weeks; Past month; or No limit. In addition, you can click <b>Custom</b> to open a calendar from which you can select a time frame. From there, if you click the month and year link, you can select a month from the current year. And from there, if you click the current year link, you can select a different year. Click the right and left icons to change the group of years available. To return to the original drop-down list, click the <b>List</b> link.
Status	Select All; Open; Closed; Pending; Not authorized; Cancelled; Rejected; or Archived.
User	Use this field to locate other payer administrators. Like Practice Group, this is an incremental search field, so type the first couple of letters of the user you want to locate.

Search Field	Description
Provider	Type the first couple of letters of the name of the provider you want to locate. In a few seconds, <i>RadPort</i> presents a list of names that match what you typed from which you can make a selection.
Reset link	Click the <b>Reset</b> link to return all of the search parameters to their default values.

## Review Exam Status and Scores

Once you select your filters and click **Search**, the results appear in the window, as shown in the following example.

The screenshot shows the Nuance Payer Administrator interface. At the top left is the Nuance logo. A green navigation bar contains 'Exams', 'Patients', and 'Accounts', with 'Exams' highlighted. A 'Sign out' link is at the top right. Below the navigation bar is a search filter section with dropdown menus for Organization (All), Insurance (All), Score (All), Practice Group (A\*), and Practice Location (A\*). There are also input fields for Time Frame (Today), Status (All), User (A\*), and Provider (A\*). A 'Search' button with a magnifying glass icon is on the left, and 'Reset' and 'Search' buttons are on the right. Below the filters is a 'Cancel Exams' section with a red border. It contains a table with the following data:

<input type="checkbox"/>	DSN	Date	Insurance	Practice Group	Practice Location	Provider	User	User Group	Exam	Score	Status
<input type="checkbox"/>	1RB	3:32:34 PM	Aetna	Accend Services Inc	Accend Services Inc	BRAND, BR	Admin, Sys	Accend Services Inc	Hand CT	8	Cancelled

The following table describes each results column:

Search Field	Description
DSN	Click the link in this field to see the exam details
Date	Date that the exam was ordered. Hover your cursor over the actual date to see the full date and time information. (Note that the example above shows only a time; this is because the time frame selected in the search was set to <b>Today</b> .)
Insurance	Name of the insurance company paying for the exam.
Practice Group	Name of the practice group. Hover your cursor over the group name to see its group identification number.
Practice Location	Name of the practice location. Hover your cursor over the group name to see its location identification number.
Provider	Last name and first name of the provider who requested the exam. Hover your cursor over the provider's name to see their NPI (national provider identifier) identification number.
User	Name of the person who entered the order into the system. Hover your cursor over the user's name to see their account identification number.



Search Field	Description
User Group	Name of the medical group with which the user who entered the order is associated. (Keep in mind that all users must be associated with some type of medical group.) Hover your cursor over the user group name to see its identification number.
Exam	Name of the exam ordered.
Score	Displays the exam's utility score.
Status	Displays the exam's status (Open; Closed; Pending; Not authorized; Cancelled; Rejected; or Archived).

## View Exam Details Window

Click the link in the **DSN** column of the results table to view the exam details window.

**DS Session Details - Windows Internet Explorer**

https://radport3.radportds.net/RadPort/admin/dsessionpreview.aspx?dsn=1R13

**Session**

**DSN:** 1R13 **Started:** 6/8/2011 8:29:47 AM EST  
**Status:** Closed **Ended:** 6/8/2011 8:30:15 AM EST  
**Patient:** [redacted] (19yrs. - Male) **User:** [redacted]  
**DOB:** 3/5/1992

**Practice**

**Group:** Accend Services Inc **Provider:** [redacted]  
**Location:** Accend Services Inc **NPI:** 1111111

**Insurance**

**Plan:** Aetna **Effective:** 6/7/2011 - 1/1/0001  
**Subscriber ID:** 55555 **Ins. Relationship:**

**Iteration #1 - 6/8/2011 8:30:07 AM**

**Starting Exam:** Wrist MR (Score: 6 - Marginal)  
**Indications:** 733.90 - Bone pain, 839.8 - Dislocation  
**Alternate Exams:** Wrist X-Ray (8), Wrist Bone Scan (8), Wrist CT (7), Wrist MRA (3), Wrist CTA (1), Wrist Angiography (1), Wrist PET (1)  
**Alternate Pick:** Wrist X-Ray (8)

[Print this Page...](#) | [Close Window](#)

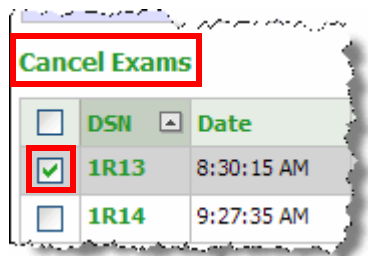
Note in example above, the order entry user who chose the starting exam (wrist MR) replaced it with an alternate pick (wrist x-ray) suggested by the *RadPort* system.

## Cancel an Exam

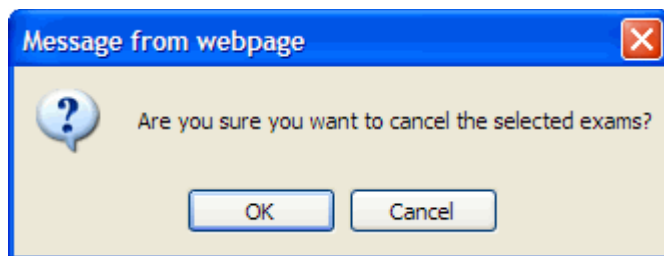
In some cases, you might need to cancel an exam.

### To cancel an exam:

1. Search for the exam or exams you want to cancel.
2. Click the check box to the left of the exams you want to cancel.
3. Click the **Cancel Exams** link.



A message box opens, asking if you want to continue with the cancellation.



4. Click **OK** to cancel the exam. The status field for the exam changes to **Cancelled**.

# *Patients Tab*

## **Objectives**

Use the **Patients** tab to perform the following tasks:

- Search for patients
- Edit patient information
- Edit patient insurance information

# Using the Patients Tab

Use the **Patients** tab to perform the following tasks:

- Search for patients
- Edit patient information
- Edit patient insurance information



**Note:** Payer administrators **cannot** create new patients.

The screenshot displays the RadPort Payer Administrator interface. At the top left is the NUANCE logo. A navigation bar contains 'Exams', 'Patients' (highlighted with a red box), and 'Accounts'. On the right, it says 'Welcome, [User Name]' and 'Sign out'. Below the navigation bar, there are filters for 'Organization', 'Insurance', and 'Coverage', all set to 'All'. A search section shows 'Look for: Last Name' with a search button. A table below has columns for 'Patient', 'Insurance', and 'Subscriber ID', with 'Page 1' at the bottom right. The main area is split into 'Patient' and 'Insurance' tabs, with 'Patient' selected. It features a 'Save Changes | Delete' button and a form with the following fields: 'General' (Gender: Select, DOB: [text], Deceased: checkbox, Date: [text]), 'Name' (Prefix, First, Middle, Last, Suffix, Degree), 'ID' (SSN, Alternate), 'Contact' (E-mail, IM, Fax, Home, Work, Mobile, Pager), and 'Address' (Street, City, State: Select, Zip, Country: Select).

## Search for Patients

Find a patient by using one or more of the search criteria. Note that the search fields are cumulative; if you select a value for more than one field (for example, Insurance and Coverage), your results must match the values you selected for both fields.

### Search Field Descriptions

After you make your selections, click the **Search** link to generate your results list. Use the following table as a guide when making your selections.

Search Field	Description
Organization	Select an organization from the list.
Insurance	Select an insurance provider from the list. The insurance drop-down list is unavailable if you do not select a specific organization.
Coverage	Select the patient's insurance coverage: Current, Expired, or All
Look for (and text field to the right)	Select either <b>Last Name</b> or <b>Subscriber ID</b> . Then, in the text field, enter the patient's last name or subscriber ID. If you do not know the full last name or ID, enter the first few letters or numbers, followed by an asterisk (*) to retrieve a list of possible patients.
Reset link	Click the <b>Reset</b> link to return all of the search parameters to their default values.

### Search Results Example

After you click **Search**, the results table displays the patients who match your criteria (see example illustration below).

The screenshot shows a web interface for searching patients. At the top, there are three tabs: 'Exams', 'Patients' (highlighted with a red box), and 'Accounts'. Below the tabs are three dropdown menus for 'Organization', 'Insurance', and 'Coverage', all set to 'All'. A 'Look for:' section has a dropdown menu set to 'Subscriber ID' and an empty text input field. To the right of the text field are 'Reset' and 'Search' (with a magnifying glass icon) links. Below the search filters is a table with three columns: 'Patient', 'Insurance', and 'Subscriber ID'. The first row of the table shows 'Lansing, Steve' in the Patient column, 'Aetna' in the Insurance column, and '55555' in the Subscriber ID column. The 'Patient' cell is highlighted with a red box. At the bottom right of the table area, it says 'Page 1'.

Patient	Insurance	Subscriber ID
Lansing, Steve	Aetna	55555

## Edit Patient Information

To edit patient information:

1. Using the parameters described above, search for the patient whose information you want to edit.
2. In the **Patient** column, click the patient's name.

Patient	Insurance	Subscriber ID
Lansing, Steve	Aetna	55555

The patient information appears in the right portion of the window.

**Save Changes** | Delete

**General**

Gender: Male | DOB: 7/5/1984 | Deceased:

Name: Prefix: First: Steve | Middle: | Last: Lansing | Suffix: | Degree:

SSN: | Alternate: | E-mail: | IM: | Fax: | Home: | Work: | Mobile: | Pager: | Street: | City: | State: Select | Zip: | Country: Select

3. Modify or add information as needed. Fields in **bold** text (Gender, DOB, First, and Last) are required; all of the other fields are optional.
4. When finished, click the **Save Changes** link.

## Delete a Patient

To delete a patient:

1. Search for and select the patient you want to delete.
2. Click the **Delete** link.
3. In the message box that opens, click **OK** to confirm the deletion.

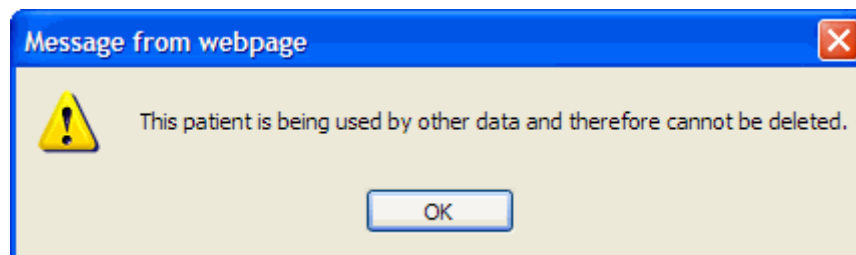
The screenshot shows a web application interface for patient management. At the top right, there is a green bar with a 'Sign out' link. Below it, there are two tabs: 'Patient' (selected) and 'Insurance'. A green bar contains two buttons: 'Save Changes' and 'Delete' (highlighted with a red box). The main form area contains fields for patient information:
 

- General:** Gender (Male), DOB (7/5/1984), and a checkbox for 'Deceased'.
- Name:** Fields for Prefix, First, Middle, Last, Suffix, and Degree.
- ID:** A field with a question mark icon.
- Contact:** Fields for phone number and pager.
- Address:** Fields for Street, City, State (dropdown), Zip, and Country (dropdown).

 A blue dialog box titled 'Message from webpage' is overlaid on the form. It contains a question mark icon and the text: 'Are you sure you want to delete this patient information?'. There are 'OK' and 'Cancel' buttons at the bottom of the dialog.

## Cannot Delete Patient Message

If a patient has any data associated with it (for example, exams have been ordered for this patient), you cannot delete the patient. The following message box opens.



Click **OK** to close the message box. The patient information remains in the system.

## Edit Insurance Information

To edit insurance information for a patient:

1. Using the parameters described above, search for the patient whose information you want to edit.
2. In the **Patient** column, click the patient's name.

Patient	Insurance	Subscriber ID
Lansing, Steve	Aetna	55555

3. Click the **Insurance** tab on the right side of the window.

Save Changes | Delete

**Plan**: Aetna      **Effective Date**: 6/24/2011      Expiration Date: \_\_\_\_\_

**ID**: 55555      Insured Relationship: Select

Group: Name: \_\_\_\_\_ Number: \_\_\_\_\_

Employer Name: \_\_\_\_\_ Employer ID: \_\_\_\_\_

The insurance information tab displays the patient's current information.

4. Modify or add information as needed. Fields in **bold** text (Plan, Effective Date, and ID) are required; all of the other fields are optional.
5. When finished, click the **Save Changes** link.



# *Accounts Tab*

## **Objectives**

Use the **Accounts** tab to perform the following tasks:

- Create new payer administrator accounts
- Search for existing payer administrator accounts
- Edit existing payer administrator accounts, which allows you to:
  - Change the user's password
  - Deactivate and activate accounts
  - Unlock accounts
  - View account activity
  - Delete an account

# Using the Accounts Tab

Use the **Accounts** tab to perform the following tasks:

- Create new payer administrator accounts
- Search for existing payer administrator accounts
- Edit existing payer administrator accounts, which also allows you to:
  - Change the user’s password
  - Deactivate and activate accounts
  - Unlock accounts
  - View account activity
  - Delete an account

The screenshot displays the Nuance RadPort Payer Administrator User Guide interface. At the top left is the Nuance logo. The navigation bar includes 'Exams', 'Patients', and 'Accounts' (highlighted in red). A 'Sign out' link is visible on the right. Below the navigation bar is a search and filter section with dropdown menus for Insurance, Role, Status, Practice Group, and Specialty. A search bar is also present. The main content area is divided into two panels. The left panel shows a table with columns for 'Account' and 'Role'. The right panel is a form for creating a new account, with fields for Username, Role, Payer, Password, Confirm, Name (Prefix, First, Middle, Last, Suffix, Degree), SSN, Alternate, ID, E-mail, IM, Fax, Contact (Home, Work, Mobile, Pager), Address (Street, City, State, Zip), and Country (United States).

## Create a New Account

Each new user account is required to have the following fields:

- **Username:** Login name for the user
- **Role:** Only selection for payer administrators is Payer Administrator
- **Payer:** Select the insurance payer for this account
- **Password:** Initial password; at first login, the user must change their password
- **Confirm:** Confirm initial password
- **First:** User's first name
- **Last:** User's last name

Any fields that appear in **bold type** are required.

The screenshot shows a web form titled "Create New Account" with a "Sign out" button in the top right. The form has a header bar with links: "Create New", "Clear", "Delete", "Password", "Activate", "Unlock", and "Audit...". The form fields are organized as follows:

- Username:** A text input field labeled "Login:".
- Role:** A dropdown menu currently showing "Payer Admin".
- Payer:** A dropdown menu currently showing "Aetna".
- Password:** A text input field.
- Confirm:** A text input field.
- Name:** A series of text input fields for "Prefix", "First", "Middle", "Last", "Suffix", and "Degree".
- ID:** Two text input fields for "SSN" and "Alternate".
- Contact:** Text input fields for "E-mail", "IM", and "Fax". Below these are four more text input fields for "Home", "Work", "Mobile", and "Pager".
- Address:** Text input fields for "Street", "City", "State" (a dropdown menu showing "Select"), "Zip", and "Country" (a dropdown menu showing "Select").

### To create a new account:

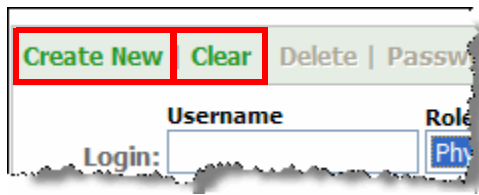
1. If the account information section (right side of the window) already contains data from another account, click the **Clear** link.



**Note:** Clicking this link does **not** delete the practice group from the system; it simply removes its data from the window, allowing you to enter data for the new practice group.

2. In the **Username** field, type a login name for the account.

3. From the **Role** drop-down list, select a role for this account. Remember that the only role available for payer administrators to select is **Payer Administrator**.
4. Select the **Payer** from the drop-down list.
5. Enter and confirm the user’s password. Remember that the user must change this password when they first log in to the system.
6. Enter the user’s first and last names in the appropriate fields.
7. When finished, click the **Create New** link. Notice that this link changes to a **Save Changes** link, allowing you to modify this account when necessary.
8. To create another new account, click **Clear** to remove the current data from the fields.



## Search for Existing Accounts

Find an account by using one or more of the search criteria. Note that the search fields are cumulative; if you select a value for more than one field (for example, **Role** and **Status**), your results must match the values you selected for both fields.

### Search Field Descriptions



After you make your selections, click the **Search** link to generate your results list. Use the following table as a guide when making your selections.

Search Field	Description
Insurance	Select an insurance provider from the list, or select All.
Role	Select a specific role from the list, or select All.
Status	Select either Active, Inactive, Locked-out, Logged on now, Logged on today, or All.
Practice Group	Begin typing the first few letters of the practice group name with which the account is associated, and select the group from the list that appears.
Speciality	Select a speciality from more than 60 choices.
Look for (and text field to the right)	Select either <b>Last Name</b> , <b>First Name</b> , <b>Email</b> , <b>NPI</b> , <b>Payer Alias</b> or <b>User Name</b> . Then, in the text field, enter the all or part of the name or identifier. If you do not know the full name or identifier, enter the first few letters or numbers, followed by an asterisk (*) to retrieve a list of possible user accounts.
Reset link	Click the <b>Reset</b> link to return all of the search parameters to their default values.

## Search Results Example



After you click **Search**, the results table displays the accounts that match your criteria (see example illustration below).

The screenshot shows the 'Accounts' tab selected in a navigation bar. Below the navigation bar is a search interface with several filters: Insurance (All), Role (All), Status (All), Practice Group (A\*), and Specialty (All). The search criteria is set to 'Last Name'. A single search result is displayed in a table, with the first row highlighted in red. The table has columns for 'Account' and 'Role'. The result shows an active administrator account with the role 'Payer Admin: Aetna'. The page number 'Page 1' is visible at the bottom right.

Account	Role
 	Payer Admin: Aetna

## Account Icons

Located to the left of each account name is an icon that indicates the general type of account as well as its status.

-  Indicates an active administrator account
-  Indicates an inactive account

## Edit an Existing Account

To edit an existing account:

1. If you haven't already done so, search for the account you want to edit using the steps described in the previous topic, [Search for Existing Accounts](#).
2. In the **Account** column, click the name of the user you want to edit. The information for the account appears in the right portion of the window.

Sign out

Save Changes | Clear | Delete | Password ▼ | Deactivate | Unlock | Audit...

**Username**      **Role**      **Payer**

Login: talba      Payer Admin ▼      Aetna ▼

**Name:**      Prefix      **First**      Middle      **Last**      Suffix      Degree

SSN      Alternate

**ID:**      E-mail      IM      Fax

**Contact:**      Home      Work      Mobile      Pager

**Address:**      Street      City      State      Zip

Country: United States ▼

Account Created: 6/28/2011 9:20:55 AM      Last Logon: Never

3. Make your edits and click **Save Changes**.

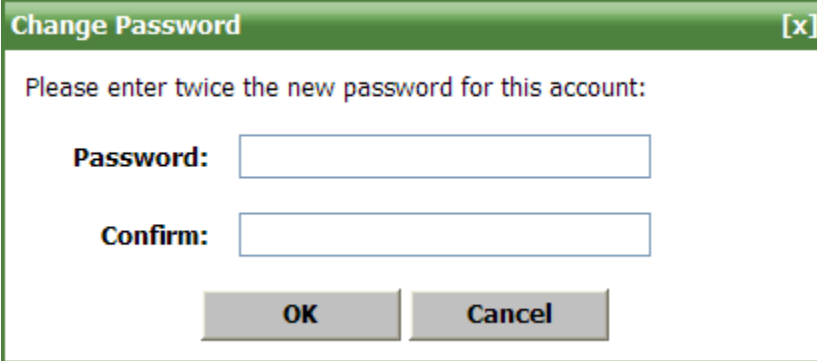
## Change or Reset the User Password

For password security, you can either

- *change* a user's password for them, or
- *force a reset* of their password, which forces the user to change their own password at their next login.

**To change a user's password:**

1. Click the **Password** drop-down link and select **Change**. The **Change Password** dialog box opens.

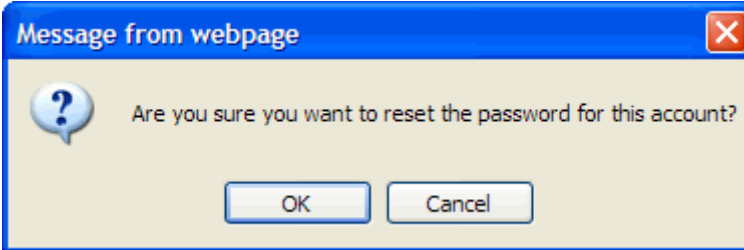


A dialog box titled "Change Password" with a close button [x] in the top right corner. The text inside reads "Please enter twice the new password for this account:". Below this text are two input fields: "Password:" followed by an empty text box, and "Confirm:" followed by another empty text box. At the bottom of the dialog are two buttons: "OK" and "Cancel".

2. In the **Password** field, enter the new password.
3. In the **Confirm** field, re-enter the new password.
4. Click **OK**.

**To reset a user's password:**

1. Click the **Password** drop-down link and select **Reset**. A message box opens, asking if you are sure you want to reset the password.



A dialog box titled "Message from webpage" with a close button [X] in the top right corner. On the left is a question mark icon. The text reads "Are you sure you want to reset the password for this account?". At the bottom are two buttons: "OK" and "Cancel".

2. Click **OK**. The next time the user logs in they are prompted to change their password.

## Deactivate/Activate an Account

In many cases, deactivating an account is a useful alternative to deleting an account. When you deactivate an account, the user no longer has access to the system. If they try to log in they will receive the message “**Access is denied because your account <user account name> has been deactivated.**”

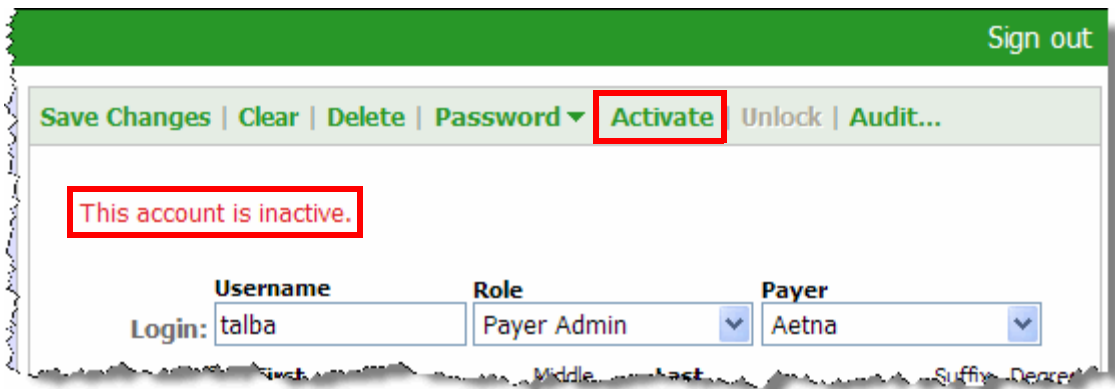
In addition, deactivating an account allows for the possibility to reactivate the account should the user be allowed to access the system in the future.

**To deactivate an account:**

1. Locate and select the user account you want to deactivate.
2. Click the **Deactivate** link in the account window.



A message appears stating that the account is inactive. In addition, the **Deactivate** button changes to an **Activate** button, allowing you to activate the account at any time.



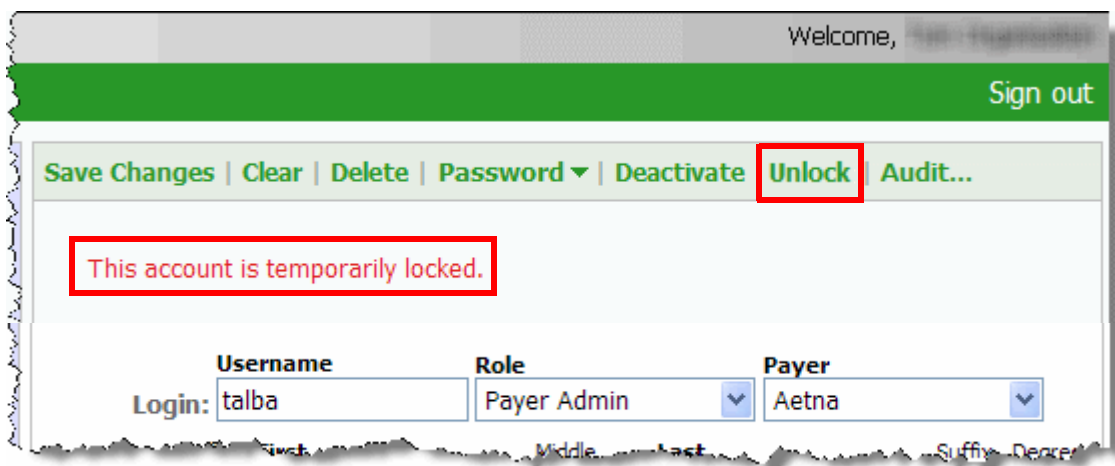
## Unlock an Account

*RadPort* allows you to select a number of login attempts and a lockout time period. If your system has values set for these items, there is a possibility that users could lock themselves out of the system. After their final login attempt, the user receives the message “**The allowed number of logon attempts is exceeded and your account is temporarily deactivated. You can sign in again after <minutes, hours, until next login>.**”

If the lockout time period is lengthy, you might get a phone call or email from the user asking you to unlock their account.

### To unlock a user account:

1. Search for and select the user account. (A quick way to do this is to select **Locked-out** from the **Status** drop-down list and click **Search**.) The account information appears in the window to the right with the message “**This account is temporarily locked.**”



2. Click the **Unlock** link to allow the user to log in once again.



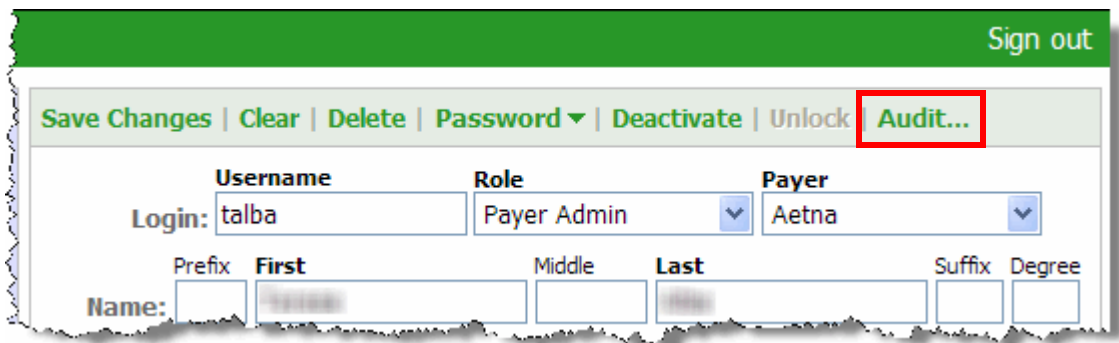
## View Account Activity (Audit)

In some instances, you might want to see what type of events have taken place in a user's account. These events include:

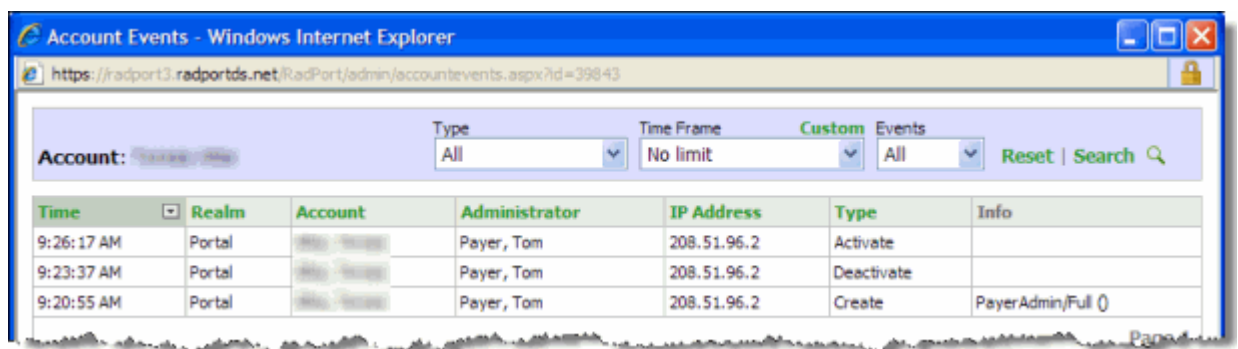
- Account creation and deletion
- Password changes
- Role changes
- Logon and logoff events
- Account activations, deactivations, and lockouts

To view account activity:

1. Search for and select the account you want to audit.
2. Click the **Audit** button.



The **Account Events** window opens and displays events based on the current search filter selections.



### Using the Search Filters

You can limit the type of events your search returns by using the **Type**, **Time Frame**, and **Events** filters.

- **Type:** Select either Create, Delete, Change Password, Change Role, Logon, Logoff, Activate, Deactivate, Lockout, Edit, or All. The default selection is **All**.

- **Time Frame:** Select from one of the times (hours, days, weeks, and so on) from the drop-down list, or click **Custom** and select a date from the calendar that opens. The default selection is **Past Month**.
- **Events:** Select either Account, Admin, or All. The default selection is **All**.

Once you've made your selections, click **Search** to see your filtered results. You can click **Reset** to return your search filters to their default values.

When finished, you can print the audit results (**Print this Page**), or just close the window.

## Account Event Tips

- All of the columns (with the exception of **Info**) are sortable by clicking the green column heading. Click again to reverse the sort order.
- Hover your cursor over the content of the **Time** field to see the time of day as well as the date.
- The search filters (Type, Time Frame, and Events) are *sticky*. For example, you might want to see how many times a user got locked out of their account in the past week. You select Lockout from Type, Past Week from Time Frame, and Account from Events, and click **Search**. The next time you click Audit (for any user, not necessarily the user you last audited), those same parameters automatically act as your search filter.

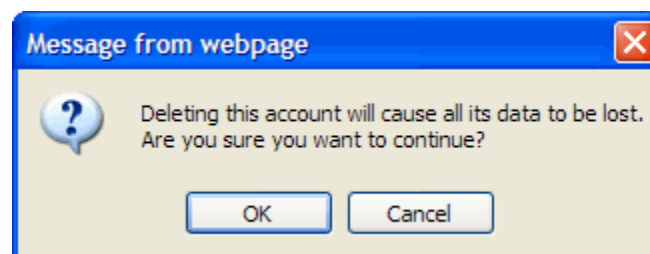
## Delete an Account



**Caution:** RadPort allows payer administrators to delete user accounts from the system. However, in many cases, disabling an account is a better choice. If you delete an account, all of the past history of the account is deleted as well. A time might come when you need information about a former user. You can still see information about a user account that has been disabled; this is not the case for a deleted account.

### To delete a user account:

1. Locate and select the user account you want to delete.
2. Click the **Delete** link in the account window. The following message window opens.



3. To delete the account, click **OK**. If you decide not to delete the account, click **Cancel**.