Optum

InterQual®: Creating user accounts

The User Administration feature enables a Site Manager at your organization to create user accounts and provide access to the features within the application. You can create a user account as follows:

- **Invite User** (applies to InterQual® Mobile accounts only) -- enables you to create an account for one user at a time or for multiple users at once.

- **Create User** -- enables you to create an account for one user at a time.

    Note: The Administration Module is not optimized for mobile devices and should be accessed from a desktop device.

Invite a user

1. Open the ADMINISTRATION > USER ADMINISTRATION tab.

2. Before creating a user account, search for the user to see if an account already exists by entering or selecting criteria in one or more of the search fields and selecting SEARCH. Search fields are not case sensitive.

    If the account does not exist, you can create a new account.

3. Select INVITE USER.

    The Invite User dialog appears and shows three sections you must complete to create an account: User Email, Facility Access, and User Roles.


4. Add user email:

    a. Enter a single email address or multiple email addresses separated by a space, comma, semicolon, or new line. Each email address must be between 6 and 254 characters.

    b. When you finish entering email address(es), collapse the User Email section by selecting the minus (-) sign.

    c. Continue to the Facility Access section.

5. Assign facility access.

You provide access to the facilities with which the user is associated. As you assign facilities, note that you can assign access only to facilities to which you also have access. If the user needs access to a facility to which you do not have access, contact your system administrator.

    a. Expand the Facility Access section by selecting the plus (+) sign.

    b. If the facility does not automatically appear in the list, enter search text to find it.

    c. Select a facility. Selected facilities change to green.
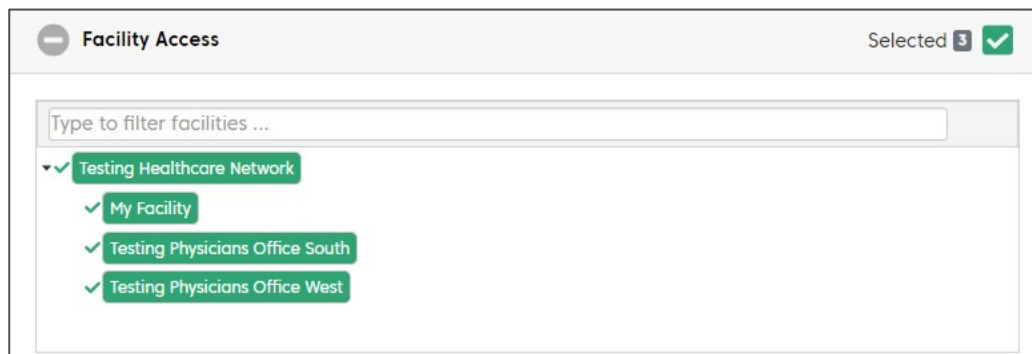
    d. When you finish assigning facilities, collapse the Facility Access section by selecting the minus (-) sign.

    e. Continue to the User Roles section.

6. Assign a user role.

A user role controls the access the user has within the application.

    a. Expand the User Roles section by selecting the plus (+) sign.

    b. Select the option button for a user role:

- **Mobile** -- enables user to access the InterQual Mobile application to conduct a review but not manage accounts.

- **Mobile Site Manager** -- enables user to access the InterQual Mobile application to conduct a review and manage accounts for InterQual Mobile.
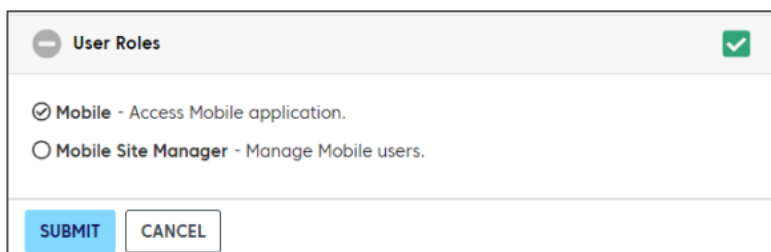
    c. Collapse the User Role section by selecting the minus (-) sign.

7. When you finish entering all required information in the three sections, select SUBMIT to save the user account.

Next steps

After you select SUBMIT, an automatically generated email (from sender: noreply-interqual@changehealthcare.com) is sent to each user with a link that enables them to complete their own registration. The user registration form must be completed by the user within 5 days of the date the email was sent.

After a user completes and submits the registration, the InterQual Mobile Sign in screen displays and the user can log in and start using the InterQual Mobile application.

Create a user

1. Open the ADMINISTRATION > USER ADMINISTRATION tab.

2. Before creating an account, search for the user to see if an account already exists. Enter or select criteria in one or more of the search fields and select SEARCH. Search fields are not case sensitive.

   If the account already exists, you can view or edit it (if your role allows). Otherwise, you can create a new user.

3. Select CREATE USER.

   The Create User dialog appears and shows three sections you must complete to create an account: User Details, Facility Access, and User Roles.

Add user details

1. Expand the User Details section by selecting the plus (+) sign.

2. Enter information in the following fields:

   – **First Name and Last Name** -- first and last name of the user.

   – **Username** -- unique username the person will use to log in to the application. The username must be at least 6 characters and must not contain spaces. We recommend using the new user's email as their username.

   – **Password** -- password the user will use to log in to the application. The user will be required to change their password the first time they log in. The show/hide ⊙ toggle buttons enable you to show or hide the password as you type it.
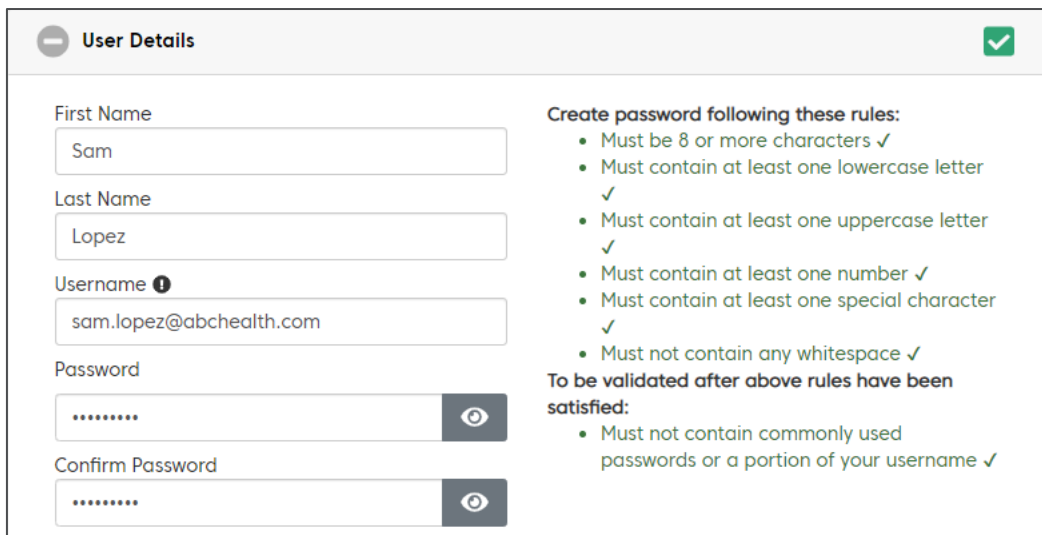
   The password you create is immediately validated to ensure it follows these rules:

   - Must be 8 or more characters

   - Must contain at least one lowercase letter

   - Must contain at least one uppercase letter

   - Must contain at least one number

   - Must contain at least one of these special characters ~`!@#$%^&*()_-+=

   - Must not contain any whitespace

   - Must not contain commonly used passwords or a portion of your username (validated after the rules listed above)

   When the password meets the rule requirements, the rule changes to green, and a check mark appears next to the rule.

   – **Confirm Password** -- enter the password again to confirm it.

   When all requirements of the User Details section are satisfied, a green check mark ✅ appears in the top right of the section.
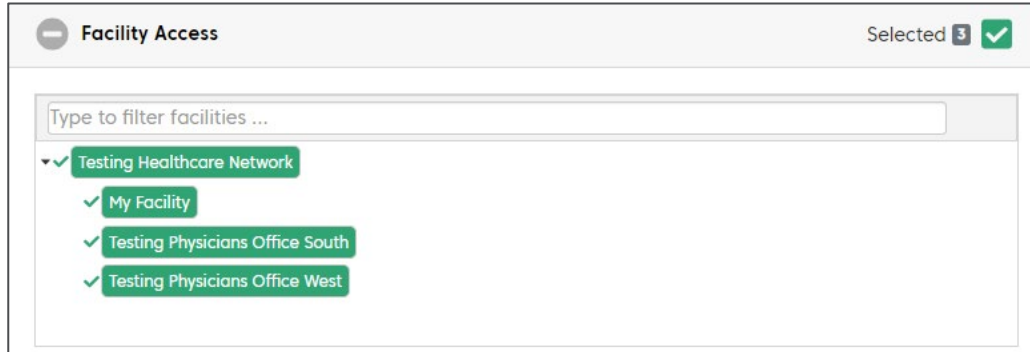

3. When you have finished entering information, collapse the User Details section by selecting the minus (-) sign.

4. Continue to the Facility Access section.

Assign Facility Access

You provide access to the facilities with which the user is associated. As you add facilities, keep in mind that you can assign access only to a facility to which you also have access. If the user needs access to a facility that you do not have access to, contact your system administrator.

1. Expand the Facility Access section by selecting the plus (+) sign.

2. If the facility does not automatically appear in the list, enter search text to find the facility.

3. Select a facility. Selected facilities change to green.

   The Selected counter indicates the number of facilities you selected, and the check mark changes to green, indicating you have satisfied the requirements of the Facility Access section.

4. When you have finished assigning facilities to the user, collapse the Facility Access section by selecting the minus (-) sign.

5. Continue to the User Roles section.

Assign a user role

A user role controls the access the user has within the application.

1. Expand the User Role section by selecting the plus (+) sign.

2. Select the option button for a user role:

   – **Mobile** -- enables user to access to the InterQual Mobile application features to conduct a review but not manage user accounts.

   – **Mobile Site Manager** -- enables user to access the InterQual Mobile application features to conduct a review and manage user accounts for InterQual Mobile.

   – **Reviewer** -- enables user to access the features to conduct a review in the InterQual® Cloud solutions application and the InterQual Mobile application.

   – **Site Manager** -- enables user to access the features to conduct a review, manage user accounts (including InterQual Mobile accounts), and manage facility settings.

Save the user account

When you finish adding all required information in the three sections, select SAVE to save the user account.

The user account is now ready and once you provide the user with their username and password, they can log in and start using the application.

Search for an existing user

1. Select the ADMINISTATION > USER ADMINISTRATION tab.

   Before creating a new user account, you should search to see if an account already exists for the user.

2. Search for the user by entering or selecting criteria in one or more of the search fields. Search fields are not case sensitive.

- **Last Name and First Name** -- partial (starts with) or complete last name and/or first name of the user.

- **Username** -- partial (starts with) or complete username that the person uses to log in to the application. This is usually the user's email address.

- **Facility** -- partial (starts with) name of the location the user is associated with.

- **Role** -- job function of the user:

  • **All** -- includes all roles in the search.

  • **Mobile** -- user can access the InterQual Mobile application features to conduct a review, but not manage user accounts.

  • **Mobile Site Manager** -- user can access the InterQual Mobile application features to conduct a review and manage user accounts for InterQual Mobile.

  • **Reviewer** -- user can access the features to conduct a review in the InterQual® Cloud solutions application and the InterQual Mobile application.

  • **Site Manager** -- user can access the features to conduct a review, manage user accounts (including InterQual Mobile accounts), and manage facility settings.

- **Status** -- status of the user account:

  • **Enabled** -- accounts that are active.

  • **Disabled** -- accounts that are inactive. If a user does not log in for 120 days, their account automatically becomes inactive.

  • **Temp Locked** -- accounts that are temporarily locked. Accounts may be locked because the user exceeded the number of login attempts allowed. The account will lock after 5 failed login attempts.

3. Select SEARCH. If the account exists, you can view or edit it (if your role allows). Refer to the Help for information about editing accounts.