Surrogate Users

Maintaining User Information

Changing Your Password
A password can be changed when logging into the website by selecting Manage Your Profile under User Maintenance. To change your password click on Modify Security Information and enter a new password in the New Password field and in the Confirm Password field then click Update. You may also change the security questions/answers on this screen.

Your password will expire on a regular basis. Upon expiration, you will be prompted to change your password the next time you login.

If you forget your password, you may click on the “forgot password” link to be prompted with the two questions created upon your first visit to the web site. Correctly answering the questions will reset your password and allow you to create a new password.

Assigning Surrogate Users
A trading partner may assign surrogate users to their trading partner ID. This will allow access to review eligibility verification and claim status checks for individuals within your organization without the need to share the password assigned to the trading partner.

Select Manage Your Profile under User Maintenance to assign surrogate users. The following page will be displayed:

The surrogate users will be listed in the Manage Your Team section of the screen.

To add users, click on Add User under User Maintenance. The following page will be displayed:
Under User Profile, you must enter the following fields:

User Name (must be 8 characters 2 of which must be numeric and it must begin with the letter ‘S’)
New Password (must be at least 6 alphanumeric characters)
Confirm Password (must be at least 6 alphanumeric characters and must match New Password)
First Name (User’s First Name)
Last Name (User’s Last Name)

The Email and Phone fields are not required.

Under Assign Privileges, you must enter at least one privilege, typically, Eligibility Status or Claims. The Add, Delete, Update, Suspend, Reset privileges allow the surrogate user to assign privileges to their own surrogate users.

Click on the Update button to save the information. Once users have been added they will be listed under the Manage Your Team section as shown below:
To make changes to the surrogate user information, click on Update under Action. This allows you to change the privileges previously assigned, or reset the password.

To delete the surrogate user id, click on delete.

To suspend access to the surrogate, click on suspend. Once the account is suspended, this action will appear as activate. Clicking on activate will reactivate the account. If a user is unsuccessful logging on, they will receive a message after the third try that the account has been suspended. The trading partner may reactivate the account by clicking on activate.