



## Authorized Official Training User Guide

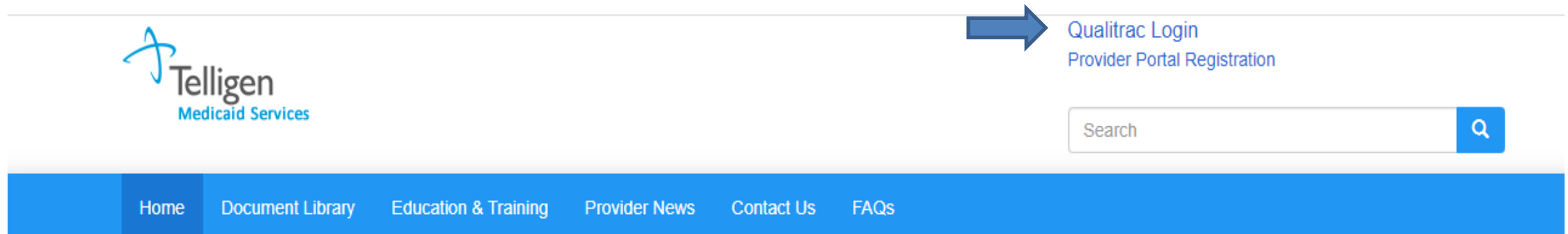
January 2021



# Welcome to Qualitrac!



- Click on the “Qualitrac Login” link located on the top right corner of the website to access Qualitrac.



# Authorized Official Training User Guide



- The Authorized Official will be the point of contact for the organization.
- The AO will be able to see all users associated with any organizations/physicians the AO has access to.
- The AO can click on any of the blue links in the line to get to the user's details.

User Org Report						User Client Report	Add User
Client	User Name	First Name	Last Name	Email Address	Phone Number		
Client Name	swilsonmp	First Name	Last Name	Email Address	Phone Number		
Montana - Mountain Pacific	swilsonMP	Stephanie	Wilson	swilson@telligen.com	(515) 555-5555		

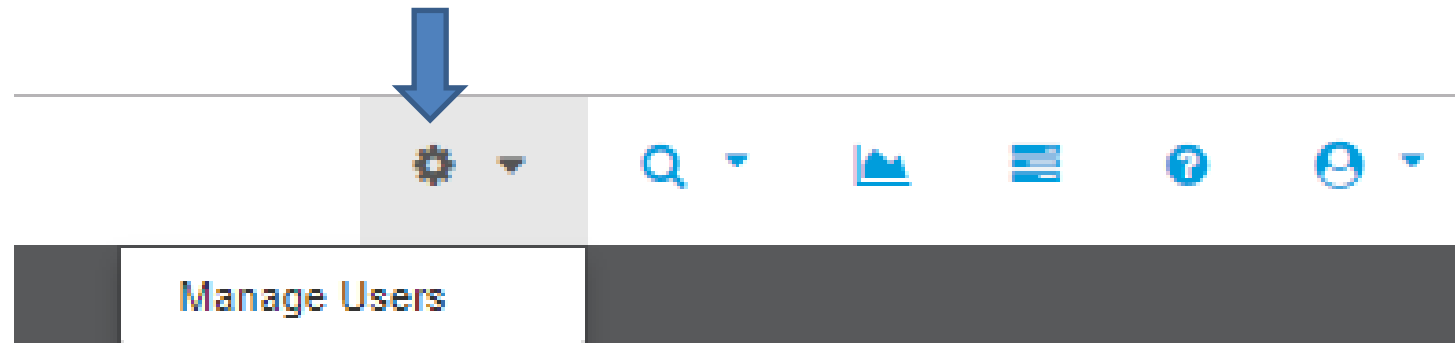
Show 10 entries      Showing 1 to 1 of 1 entries      Previous 1 Next



# Authorized Official Training User Guide



- Authorized Officials are the only users with access to the Admin tool. Provider Practice users will not see this icon.
- To add/edit/deactivate users, the AO must click on the Admin icon and select **Manage Users**.



## Authorized Official Training User Guide: Set Up a New User



- To create a new user, the AO must click the **Add User** button located on the top right corner of the **Manage Users** page.
- Fields with a red asterisk (\*) are required fields.
- The Organization's drop-down will allow the AO to associate users to the organization(s)/physician group(s) available for the AO to select from. Check the box next to each one to select (see next slide) then click Save.

The screenshot shows the 'Manage Users' interface. At the top right, there is an orange 'Add User' button with a blue arrow pointing to it. Below this is a table with columns for Client, User Name, First Name, Last Name, Email Address, and Phone Number. The table contains two entries for 'MARYLAND'. At the bottom, there is a pagination control showing 'Showing 1 to 2 of 2 entries' and a 'Previous 1 Next' navigation bar.

Client	User Name	First Name	Last Name	Email Address	Phone Number
MARYLAND	swilsonMD	Stephanie	Wilson	swilson@telligen.com	(515) 555-5555
MARYLAND	swilsonAO	Stephanie	Wilson	swilson@telligen.com	(515) 555-5555

Show 10 entries      Showing 1 to 2 of 2 entries      Previous 1 Next

# Authorized Official Training User Guide: Set Up a New User



Qualitrac Account

**Client \***  
IDAHO ▾

**Organization \***  
None selected ▾  
 ABUNDANT LIFE VEIN CENTERS LLC  
 ST LUKE'S REGIONAL MEDICAL CENTER

**First Name \***  
Stephanie

**Middle Name**

**Last Name \***  
Wilson

**Display Name \***  
swilson

**Username \***  
swilson

**Email \***  
swilson@Telligen.com

**Address Line 1 \*** ⚠ Address Line 1 is a required field

**Address Line 2**

**City \*** **State \*** **Zip \***

**Phone Number \*** **Ext** **Phone Type \***

**Preferred Contact Method \***  
 Phone  
 Email

Cancel Save

# Authorized Official Training User Guide: Set Up a New User

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- After clicking save, the system will send a Welcome email to the new user where they will be prompted to Activate their Qualitrac Account and then prompted to enter a Password.

Hi karen,

A Qualitrac user account has been created for you.

**Click the following link to activate your Qualitrac account:**

[Activate Qualitrac Account](#)

This link expires in 7 days.

Your username is **kmendozatest1**

# Authorized Official Training User Guide

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- The Authorized Official and User will be able to edit any of their information (address, phone, email, last name, etc.) except the Username field.
- Once a username is created, it cannot be changed. The user would have to be deactivated and set up again to have a different username.
- Username must be distinct in the system. If another user is set up and matches on a username already in the system, the user will not be saved, and the AO will be forced to enter a new username that does not match with any others.



- The AO has ability to send a Password Reset to any user the AO has access to. This tab can be located on the bottom left of the user's account details.

A rectangular button with an orange-to-yellow gradient background. On the left side, there is a white envelope icon. To the right of the icon, the text 'Send Password Reset' is written in a white, sans-serif font.

- After clicking Send Password Reset, the system will generate a Qualitrac Password Reset Requested email to the email address on user's record.
- The user will then be prompted to Reset Password (see next slide).

# Authorized Official Training User Guide: Password Reset




## Qualitrac Password Reset Requested



Qualitrac Do Not Reply <donotreply@telligen.com>

To  Karen Mendoza

[Retention Policy](#) [Delete Email Older than 3 Years \(3 years\)](#)

 If there are problems with how this message is displayed, click here to view it in a web browser.

Hi karen,

A password reset request was made for your Qualitrac account. If you did not make this request, please contact your authorized official immediately.

Click this link to reset the password for your username, kmendozatest1:

[Reset Password](#)

This link expires in 3 days.

# Authorized Official Training User Guide: Password Reset



- The user will need to click **Reset Password** and be taken to the Reset Password page.

The screenshot shows the Qualitrac password reset interface. At the top is the Qualitrac logo. Below it is the heading 'Reset your Okta password'. Underneath, the text 'Password requirements:' is followed by a bulleted list: 'At least 8 characters', 'A lowercase letter', 'An uppercase letter', 'A number', 'A symbol', and 'Your password cannot be any of your last 4 passwords'. There are two input fields: 'New password' and 'Repeat password'. A blue 'Reset Password' button is positioned below the fields. In the bottom right corner, there is a 'Sign Out' link.

# Authorized Official Training User Guide: Deactivate Users



- To deactivate a user, the AO can simply go to the **Manage Users** tab, find the username account and click **Deactivate User**.

A screenshot of the Telligen user management interface. The page is titled 'Qualtrac Account' and 'Client Specific Contact Information'. It contains two main columns of form fields. The left column includes fields for Client (MARYLAND), First Name (Stephanie), Middle Name, Last Name (Wilson), Display Name (swilsonMD), Username (swilsonMD), and Email (swilson@telligen.com). The right column includes fields for Role (Operations Manager), Address Line 1 (1778 West Lakes Parkway), Address Line 2, City (West Des Moines), State (Iowa), Zip (50206), Phone Number ((515) 555-5555), Ext, Phone Type (Work), and Preferred Contact Method (Email). At the bottom left, there are two buttons: 'Deactivate User' (highlighted with a blue arrow) and 'Send Password Reset'. At the bottom right, there are 'Cancel' and 'Save' buttons. A copyright notice at the bottom center reads '© Copyright 2017, 2020 Telligen. All Rights Reserved.'

# Authorized Official Training User Guide

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- Questions
- Concerns
- Feedback

Thank you for your time!

