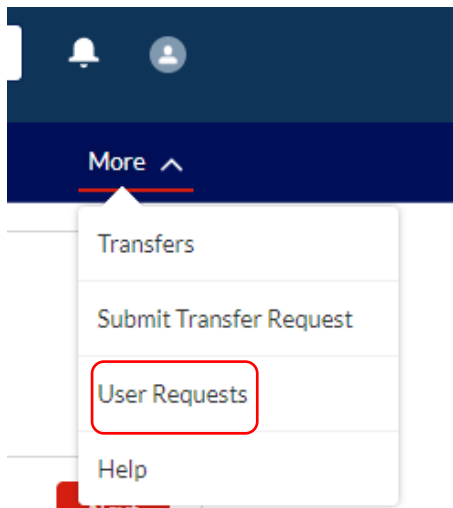


# Health Care Organization Administrator: How to Edit User Information

## Adding new users to your Health Care Organization (HCO) account

As an HCO Admin User, log into the Portal, and from the home page, click on the “More” tab. Select “User Requests” from the dropdown.



*User Request opening page example:*

Hello [REDACTED]

Please click next to begin.

As a reminder - in order to submit a request for a new user, you will need to submit [this](#) form.

Next

To request an code for [REDACTED] to be emailed to you for User Access Requests, please select Request Email below.

Request Email

1. To add new users, refer to the first message:

**“As a reminder - in order to submit a request for a new user, you will need to submit this form.”**

Click on the **blue** word “this” to open the Google form that allows you to add users.

2. The form requires you to enter the HCO code for your facility. If you do not have the code, you may obtain it by referring to the second sentence on the User Request Opening Page, which says:

**“To request a code for (your facility name will display here) to be emailed to you for User Access Requests, please select Request Email below.”**

Clicking on the Request Email button will send the code to the email address registered with your portal license.

***\*For HCO administrators who do not have portal access:***

Please use the Google form linked here to add users:

<https://forhealthconsulting.govfa.net/wf19yY9>

*If you do not have your HCO code, please email [DMHPASRR@umassmed.edu](mailto:DMHPASRR@umassmed.edu)*

## How do I manage users in my organization?

As an HCO administrator, you can request the following changes to your current HCO users through the portal:

- Update Name
- Update Email Address
- Change User to HCO Admin
- Deactivate User

On the User Request tab opening page, click on the red “Next” button page. This will bring you to your “Users” page:

Hello [REDACTED]  
Please click next to begin.

As a reminder - in order to submit a request for a new user, you will need to submit [this](#) form.



## Users Page Example:

Showing 4 of 4 items

First Name	Last Name	Email
<input type="radio"/> Kimberly	Ramponi	@mass.gov
<input checked="" type="radio"/> Withcoast	User	
<input type="radio"/> Diane	Pixley	@mass.gov
<input type="radio"/> Lisa	Hackett	@mass.gov

\*What would you like to do?

☐ Update Name

☐ Update Email Address

☐ Change User to HCO Admin

☐ Deactivate User

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To edit a user, click the circle next to their name and select the user you would like to update.

☒ Lisa

Select the action you would like to take by clicking on the circle:

\* What would you like to do?

☒ Update Name
 ☐ Update Email Address
 ☐ Change User to HCO Admin
 ☐ Deactivate User

## Update Name:

If the user's name has changed, or if the name is spelled incorrectly, you may choose this action to update it. You will enter the updated name in the pop-up box asking, ***“What should we update the Name to?”*** and click on “Next”:

\* What would you like to do?

☒ Update Name

\* What should we update the Name to

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You will receive the message:

Your Request has been successfully submitted.

This function opens a case with the ForHealth Salesforce team, and they will update the contact information.

**PLEASE NOTE: This is not to REPLACE a user (for example, a new social worker has come to your facility to replace the prior social worker). Each user of the portal must have their own license.**

## Update Email Address:

If the user's email address has changed (i.e., domain change), or if the address is misspelled, you may choose this action to update it. You will enter the updated email address in the pop-up box asking, **"What should we update the Email to?"** and click on "Next":

\* What would you like to do?

☐ Update Name

☒ Update Email Address

\* What should we update the Email to

Lisa.Smith@NFRehab.com

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You will receive the message:

Your Request has been successfully submitted.

This function opens a case with the ForHealth Salesforce team, and they will update the contact information.

## Change User to HCO Admin:

If you wish to grant HCO Admin status to an already active user, choose the “Change User to HCO Admin” option:

\* What would you like to do?

☐ Update Name

☐ Update Email Address

☒ Change User to HCO Admin

☐ Deactivate User

The system will ask you to confirm this request. Check the box next to “Yes” and click on “Next.”

\* Confirm that this user need HCO Admin Access

☒ Yes

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You will receive the message:

Your Request has been successfully submitted.

This function opens a case with the ForHealth Salesforce team, and they will update the contact information.

## Deactivate User:

To deactivate users who no longer require access to the portal or are no longer with your facility, choose “Deactivate User” and click on “Next”:

\* What would you like to do?

☐ Update Name

☐ Update Email Address

☐ Change User to HCO Admin

☒ Deactivate User

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You will receive the following message request you to confirm the action ***“I acknowledge that if this user requires access in the future, I must complete the form anew to initiate the user-provisioning process. If they utilize the same email account, they will not be required to undergo training again”***. Check the button to confirm and click on “Next”.

\* Please confirm

☒ I acknowledge that if this user requires access in the future, I must complete the form anew to initiate the user-provisioning process. If they utilize the same email account, they will not be required to undergo training again

Next

You will receive the second confirmation request, ***“Confirm if this user can be de-activated.”*** Check the box next to “Yes” and click on “Next”.

\* Confirm If this user can be de-activated

☒ Yes

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Next

You will receive the following message:

***We have reviewed your request and made the necessary updates. If you would like to undo any of these changes - please submit a ticket using [this](#) form.***

Click on the **blue** “this” to open the google form to request the User not be deactivated.