PROJECT ACCESS NOW

# TrackVia User Management Application Guide (External)

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# TrackVia User Management App Guide (External)

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# 2 INTRODUCTION

The User Management App is used by PANOW health system partners to manage user access to PANOW's TrackVia program applications (C3CAP) and support applications (the Feedback App and the User Management App itself). Users with access to the User Management app are able to submit requests for new user accounts, reactivate and deactivate existing user accounts, and add/remove roles or user groups to existing user accounts. Requests submitted in the User Management App will be reviewed and completed by PANOW staff.

# 3 GETTING STARTED

## 3.1 General Warning – PLEASE READ

Please be aware that some of the screenshots and information that you will see and read in this manual may depict or refer to a version of TrackVia used by a different health system. All of the health systems which use TrackVia through PANOW access a slightly different version of TrackVia. TrackVia's appearance also changes over time, so please don't be alarmed if some of the screenshots that you see look different from what you see on your screen.

## 3.2 Accessing the User Management Application

Generally, only users who are currently listed as "Org Leads" or, in some cases, "Super Users" are given access to the User Management Application. Access to this application is limited, as anyone who has access to it is able to submit requests for new users or to deactivate existing accounts. If you need access to the application, please speak with your supervisor or organizational lead about submitting a request for access on your behalf.

## 3.3 User Roles

### 3.3.1 C3CAP:

**User** – (All Partners) User with the ability to create and edit client records, view available services and vendors, submit requests, access available request documents.

**Super User** – (All Partners except Trillium and Pacific Source) Has all the permissions of a User and can also request bulk supply orders.

**Org Lead** – (All Partners) User with all the permissions of a Super User and the ability to view user account data within their health system, access the User Management application, and access reporting in TrackVia. ***NOTE:*** For Health Share, the role that is just listed as "Org Lead" has access to ALL of Health Share's data (including Housing Benefit Pilot).

**Org Lead (PHP) –** (Health Share Only) Same as standard Org Lead role but restricted to just Providence Health Plan's data.

**Org Lead (KPHP)** – (Health Share Only) Same as standard Org Lead but restricted to just Kaiser Permanente Health Plan's data.

**Org Lead (OHSU)** – (Health Share Only) Same as standard Org Lead, but restricted to just OHSU Health Services plan data.

**Org Lead (Flex Services Only)** – (Health Share Only) Same as standard Org Lead role but without Housing Benefit Pilot data.

**User (Flex Services and Housing Benefit) –** (Health Share Only) Same as standard User, but with access to both Flex Services and Housing Benefit data.

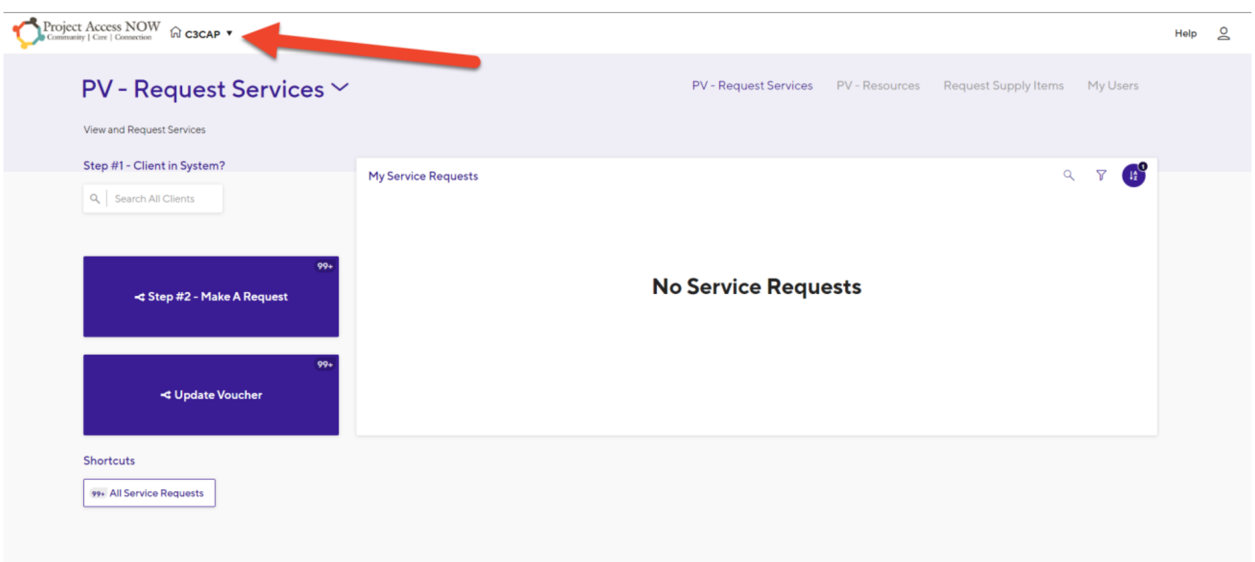
**Admin** – (**Trillium and OHSU** ) Only access to reporting, not able to submit service requests.

**Supply Requestor –** (CareOregon Only) Only access to submitting supply requests and entering supply assignments, no access to entering normal service requests.

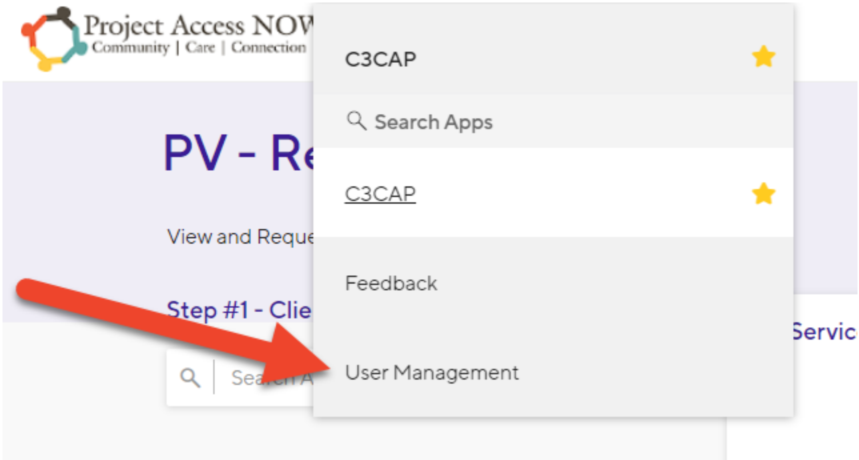
# 4 USING THE USER MANAGEMENT APPLICATION

## 4.1 Navigating to the User Management Application

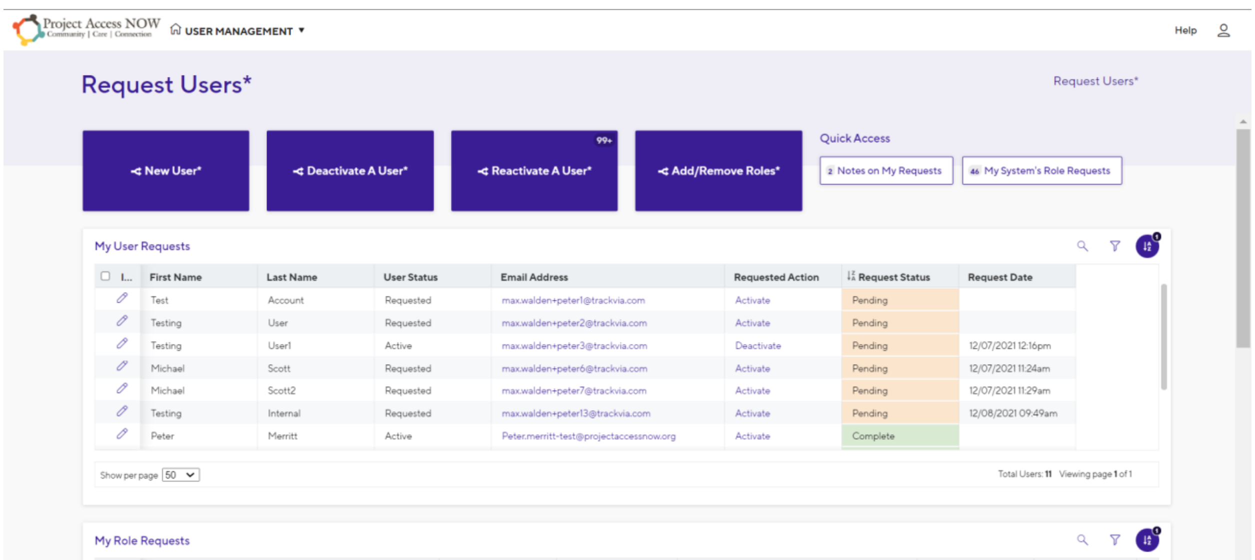
To navigate to the User Management Application, click the Applications menu to the right of the Project Access NOW logo in the upper left hand corner of your screen after logging into the system.



You will see a list of applications that your account has access to. Select the “User Management” option.




This will take you to the User Management application home page, the “Request Users” dashboard.

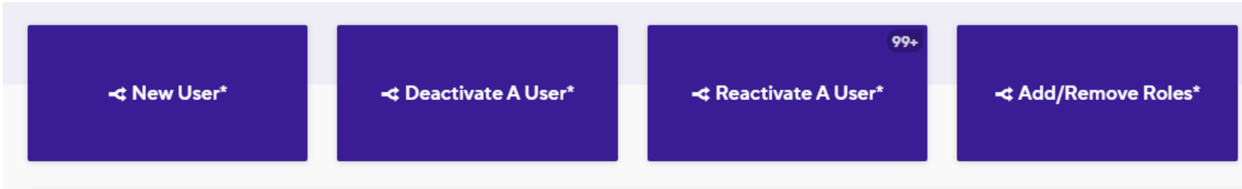



## 4.2 Request Users Dashboard

As mentioned above, the homepage of the User Management application is the “Request Users” dashboard. On this dashboard, you will find a variety of links and views that will allow you to do everything you may need to in the application.

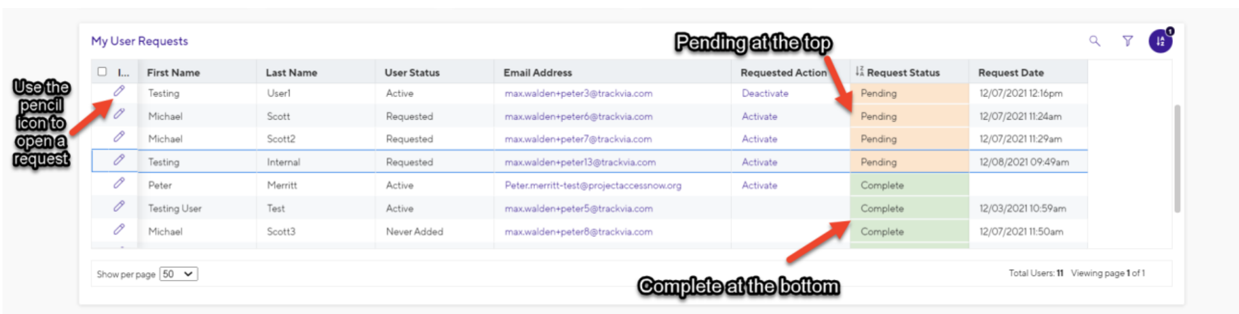
### 4.2.1 Flow Buttons

At the top of this dashboard, you will see four large purple buttons. These buttons all initiate a different flow, including: New User, Deactivate a User, Reactivate a User, and Add/Remove Roles. I’ll touch on all these flows later, but for now, just be aware these large purple buttons will be how you will initiate all of your User Management requests.



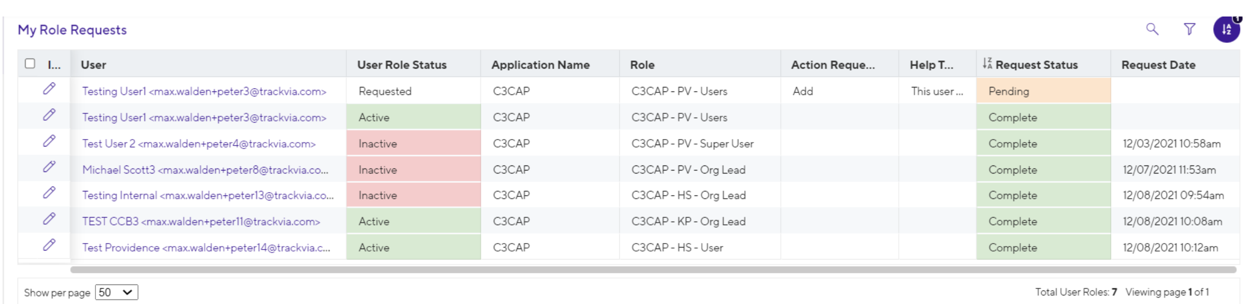

### 4.2.2 My User Requests View

Below the flow buttons, you'll find the "My User Requests" view. This view includes all the New User, Deactivate a User, and Reactivate a User requests that you have entered in the system. This view is organized first by Status; all "Pending" requests will be at the top of the view, with "Complete" requests below. Within the "Pending" and "Complete" sections, the requests will be organized by the date they were submitted, the "Request Date", from oldest to newest. Use the pencil icon to open a request and view more information about it or add a note.



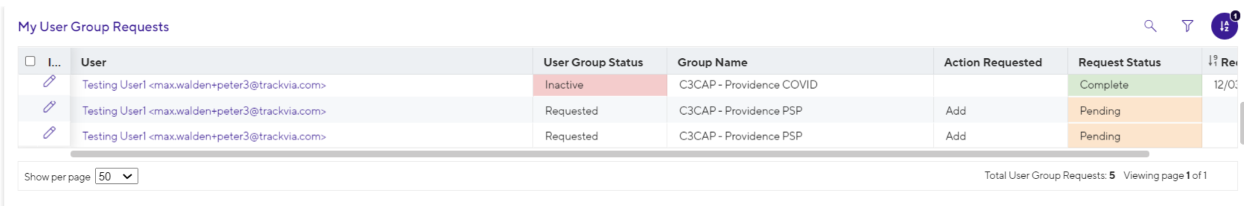

### 4.2.3 My Role Requests View

Below the "My User Requests" view, you will find the "My Role Requests" view. This view includes all of the "Role" requests that you have submitted in the system. Every time you submit a request for a New User, a Role request will automatically be created in addition to the User request, to ensure the new user is added to the correct Role in the system. You will also find requests here that you enter using the "Add/Remove Roles" flow for existing users. This view is organized in the same way the "My User Requests" view is, with Pending requests at the top, Complete requests at the bottom, and each of those sections organized from oldest to newest. Again, use the pencil icon to open a request.



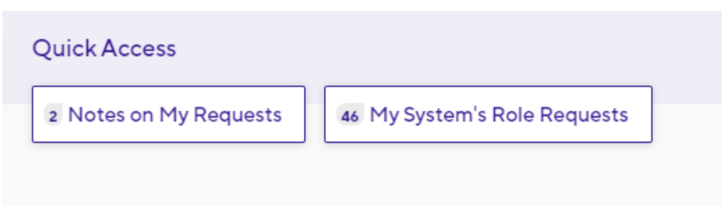
### 4.2.4 My User Group Requests View

At the bottom of the Request Users dashboard you will find the "My User Group Requests" view. Some of our health system partners have User Groups in addition to Roles: these User Groups usually indicate specific programs or departments. If you enter a request for a new User Group for an existing account using the "Add/Remove Roles" flow, it will appear here. As with the other flows, use the pencil icon to open a request.



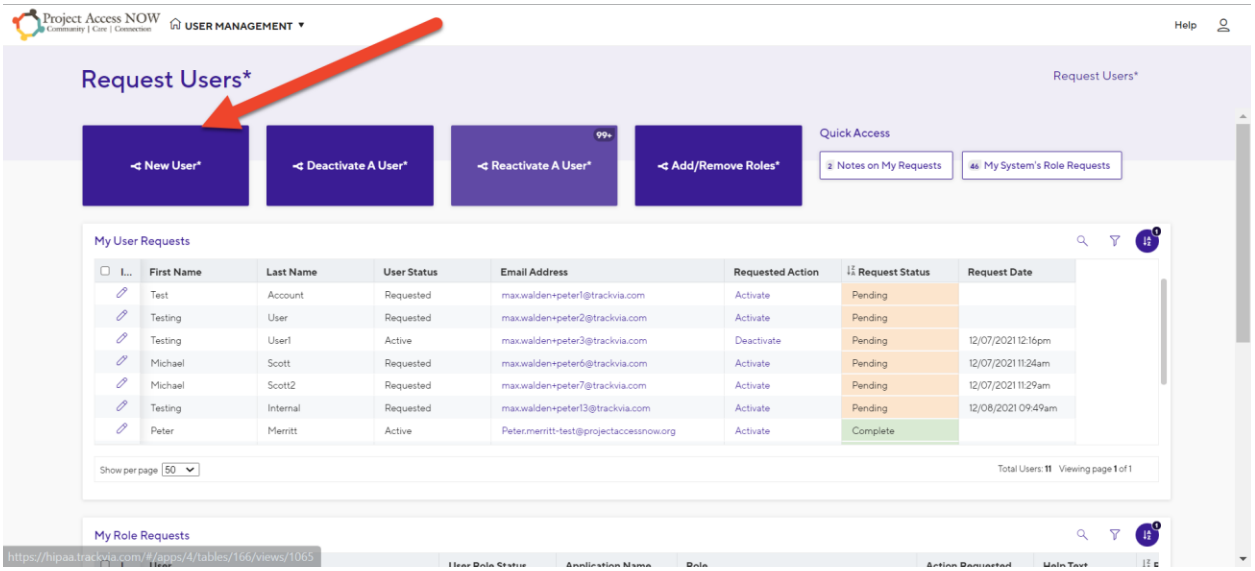

### 4.2.5 Additional Views

In the upper right corner of the Request Users dashboard, you will also find two other links to additional views: "Notes on My Requests" and "My System's Role Requests". The "Notes on My Requests" view will display all of the Notes that have been entered, either by you or a PANOW staff member, on requests that you submitted. The "My System's Role Requests" view displays all Role requests that have been submitted by any user from your health system. This may be useful for you to review recent requests to see if one has already been submitted for a specific user in question.



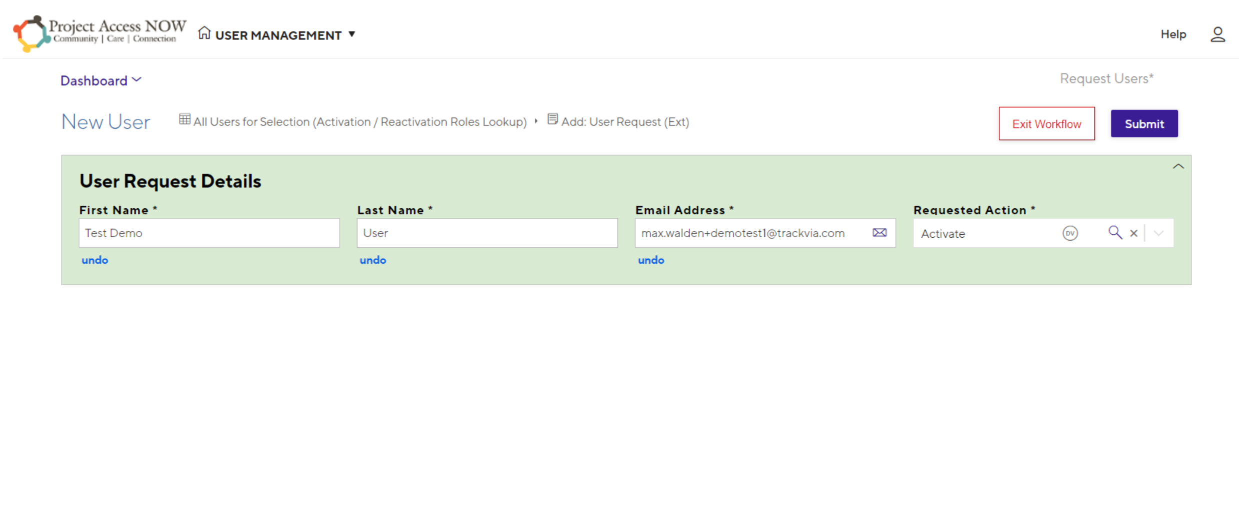

## 4.3 Submitting a New User Request

From the Request Users dashboard, click the large purple "New User" button to begin the New User Request flow.



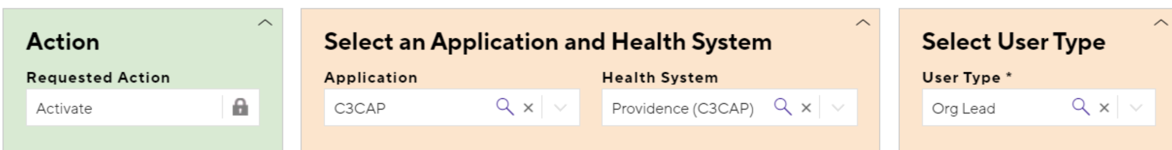

You will be prompted to enter the First Name, Last Name, Email Address, and Requested Action for the New User Request. Be sure to enter the user's work email address. There will only be one option in the Requested Action field: "Activate". Once you complete the form, click Submit in the upper right hand corner.

Please be aware that if there is already an account in the system using the email address you enter here, you will receive an error message. If you receive this error message, navigate to the "Reactivate a User" flow to see if the user's account already exists and needs to be reactivated.

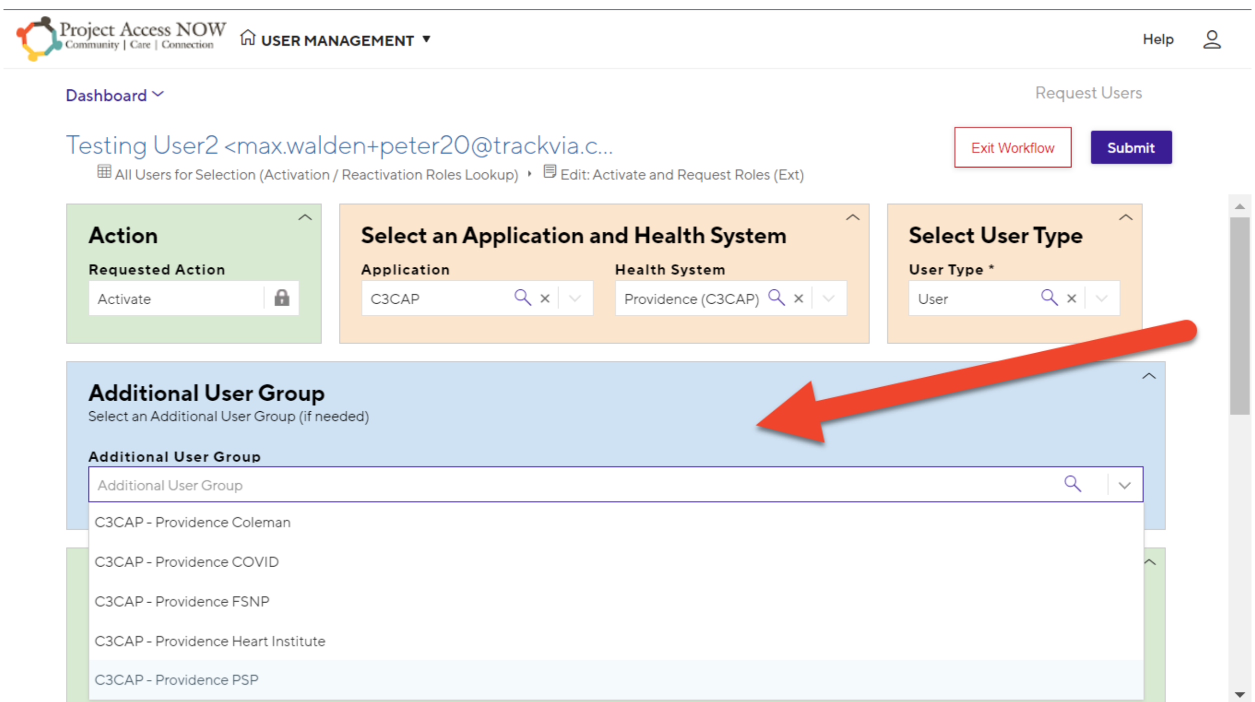



If the email address you use does not already exist in the system, the next step of the flow will prompt you to select which Application the User should be added to (either of the program applications, C3CAP or Classic, or the User Management application itself). Once an application is selected, you will be prompted to select the User's Health System, and then the User Type. Be aware that if you select a program application that does not match the application your user account is currently associated with (i.e. if you're a C3CAP user and try to add a Classic user or vice versa), no options will appear in the Health System field and you will be unable to proceed. If you select the correct application, you should only see options in the Health System dropdown for Health Systems your account is associated with.

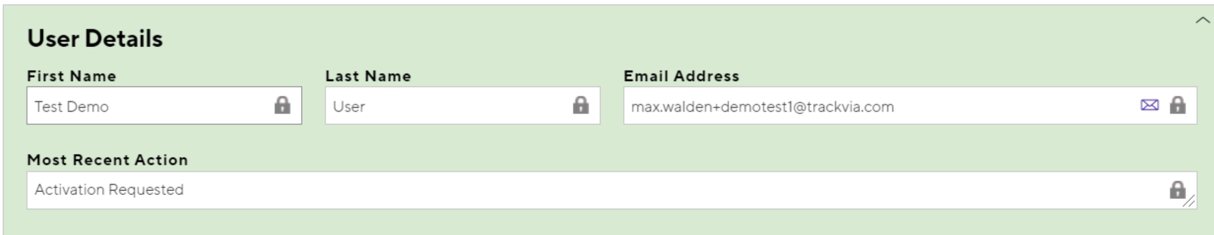
Select the correct Application, Health System, and User Type (see the "User Roles" section for more information on these User Types). This is all the information you will need to enter on this page unless your health system requires additional User Groups, so you can move on by clicking the Submit button in the upper right hand corner. If the "Additional User Groups" section doesn't appear for you after you select your Health System, you can click Submit once you have completed the Application, Health System, and User Type fields.



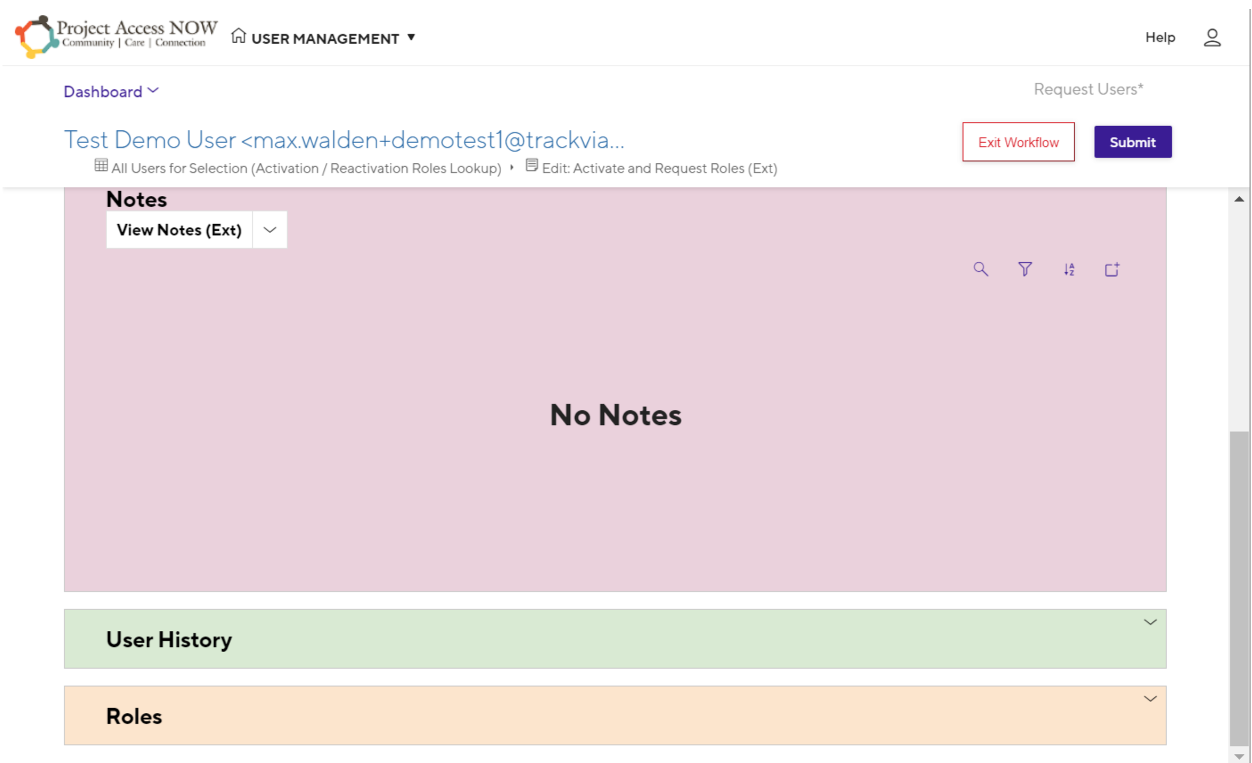

If your health system DOES have multiple User Groups, the "Additional User Group" section will appear when your health system is selected. Select the correct User Group and then click Submit to complete the request.



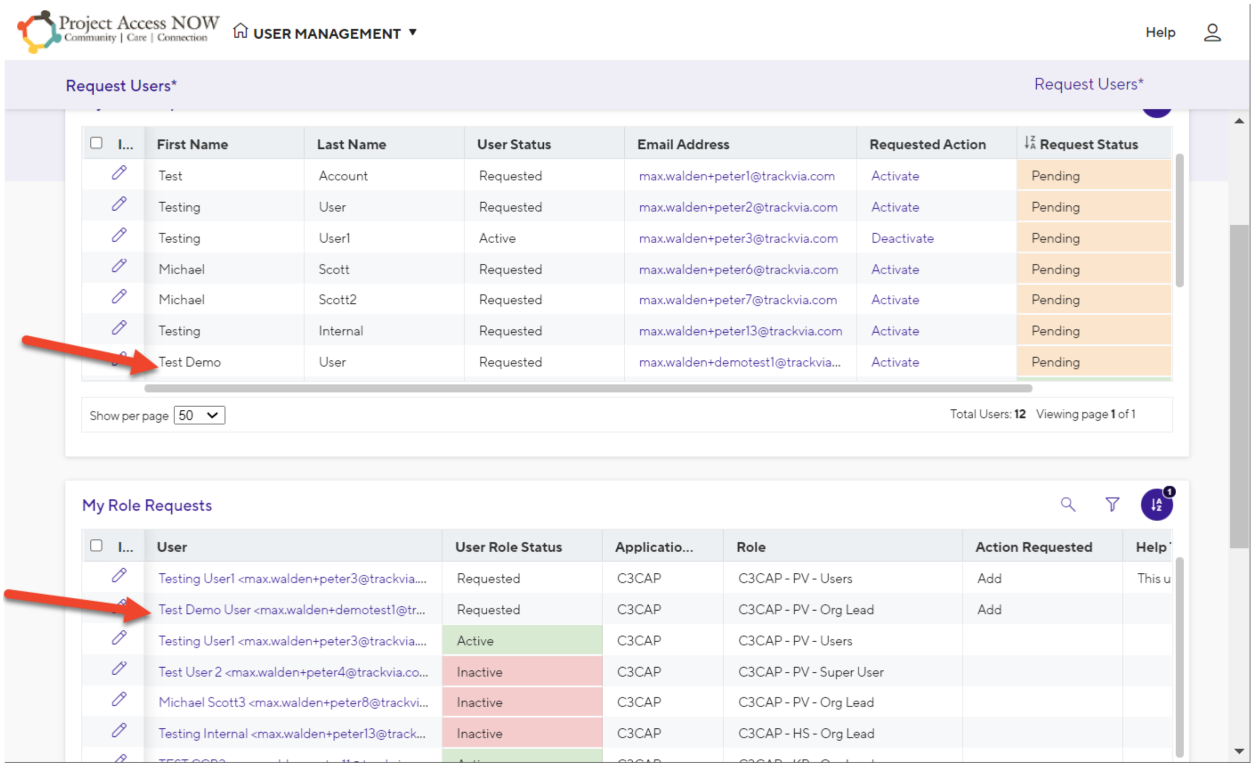
Below these fields, however, you'll see some other sections with potentially relevant information (but no other fields to complete), including the "User Details" section. This indicates the information you entered during the last step of the flow. These fields are locked and you will not be able to update them here.




Below this section is the Notes section, which you can learn more about in the [Notes](#) section of this guide. Below the Notes section, you will find the "User History" and "Roles" sections, which display historical information about the request and account. Since the request was just created, you won't find any relevant information here at this stage.



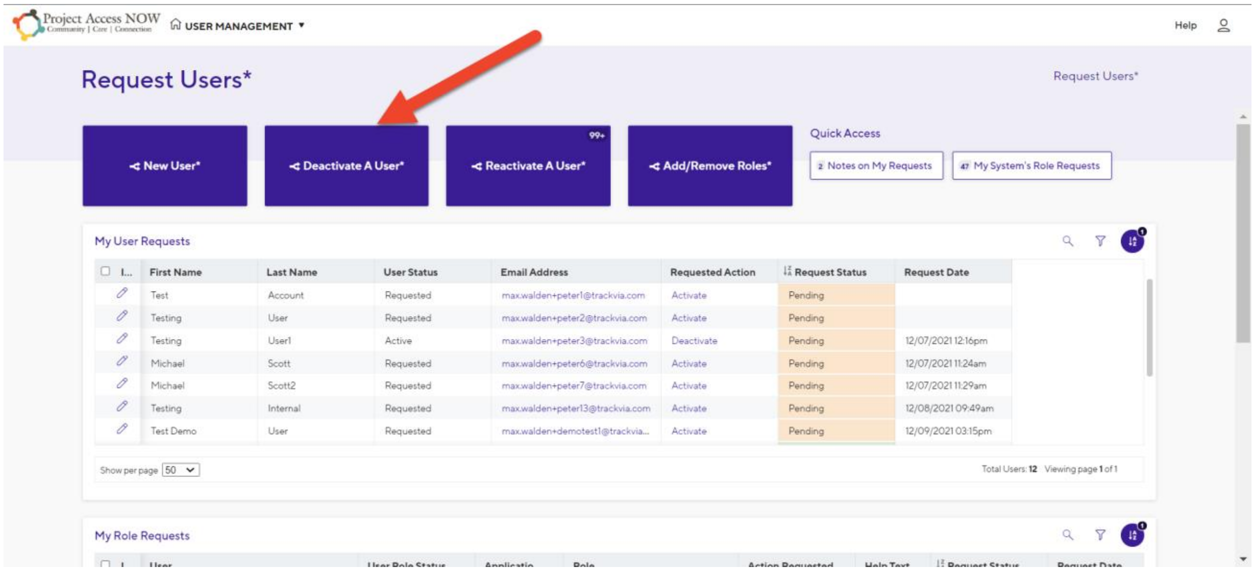

Once you click Submit, you will be returned to the Request Users dashboard, where your request will appear in two places: the My User Requests view, for the general creation of the account, and the My Role Requests view, so that the account can be added to the appropriate User Type role.



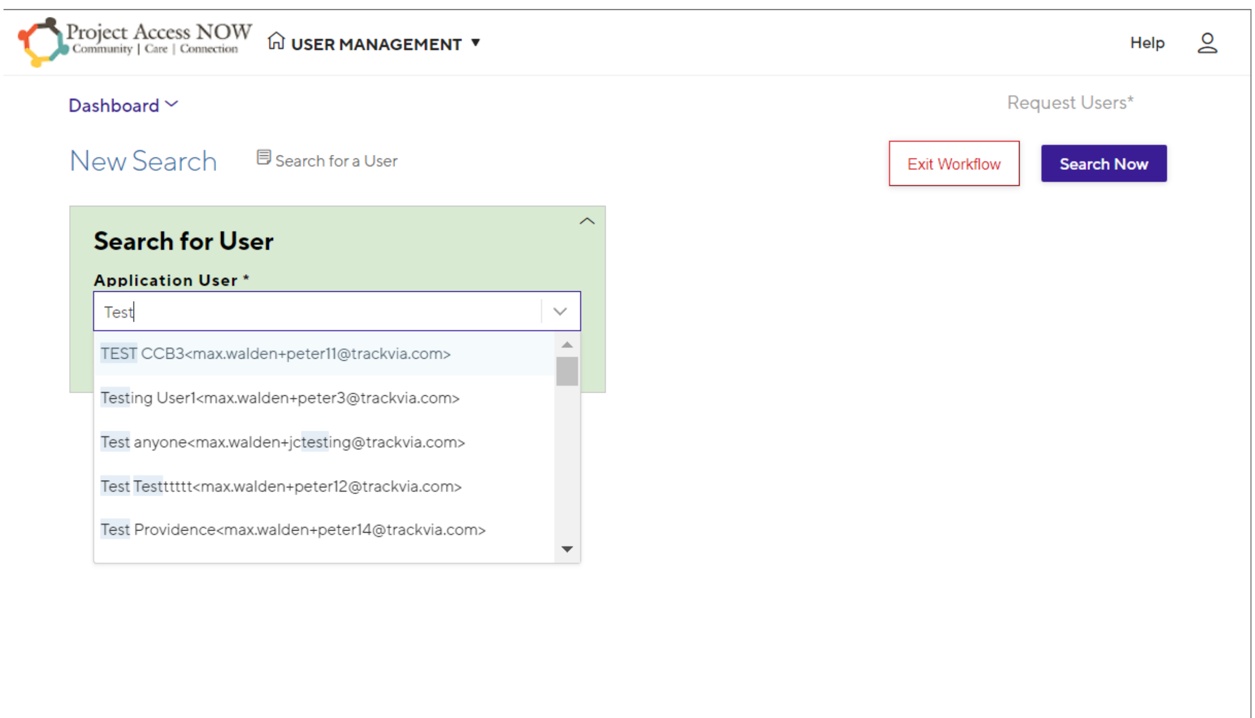
Once PANOW receives your request, it will be reviewed and the status will be updated. You will see those updates reflected here in these views. You will also receive an email notification when your request is updated, which you can learn more about in the Email Notifications section. At any time, you can click the pencil icon on either of these requests to view more information about the request or to add a Note (learn more about Notes here).

## 4.4 Deactivating a User

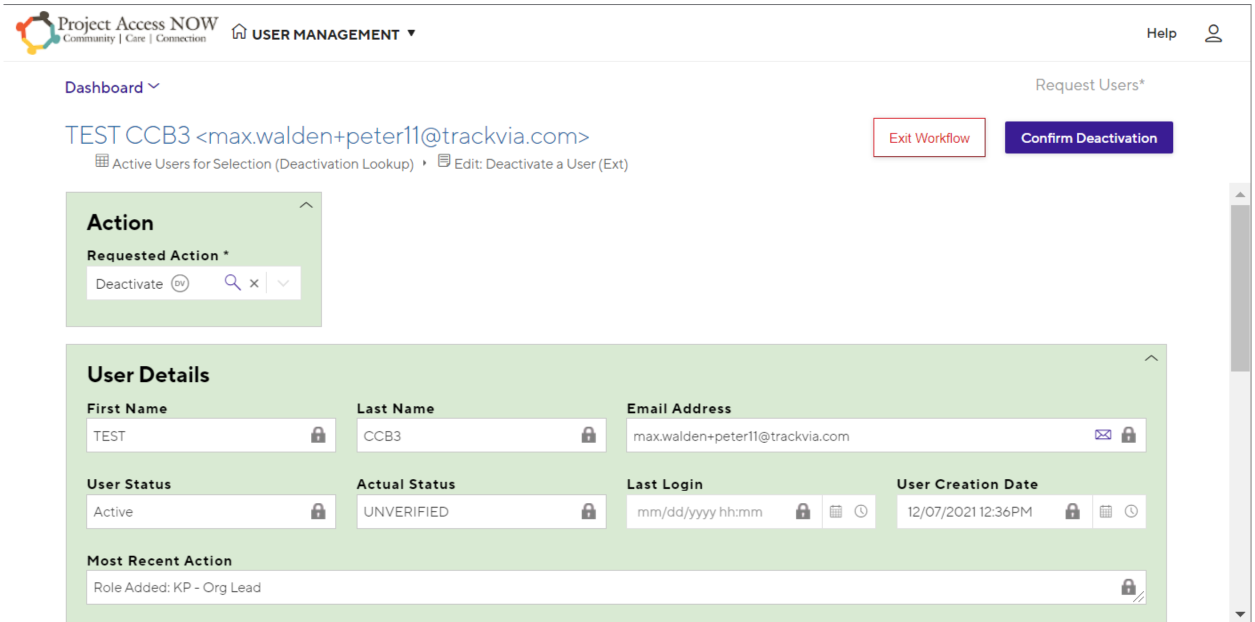
Start by clicking the large purple "Deactivate a User" button on the Request Users dashboard.




You will be taken to the “Search for User” page, where you can select the user’s account you wish to deactivate. Click the “Search Now” button when you’ve selected the correct account. Be aware that only ACTIVE accounts will appear here, so if you do not see the user’s account here you wish to deactivate, it may already be inactive.



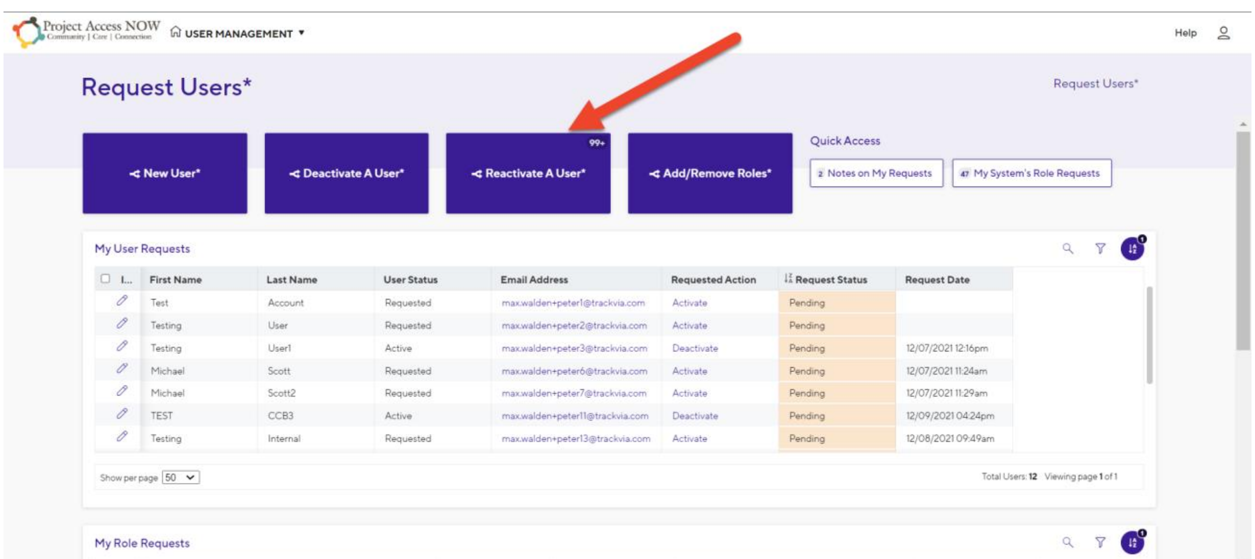

Once you select a user account to deactivate, you will be taken to a page that displays details about the account, so that you can confirm that you are choosing the correct account. None of this information will be editable, but you can add a Note further down on the page if you wish (see the Notes section for more information about notes). When you have confirmed that this is the correct account that you wish to deactivate, click the “Confirm Deactivation” button.



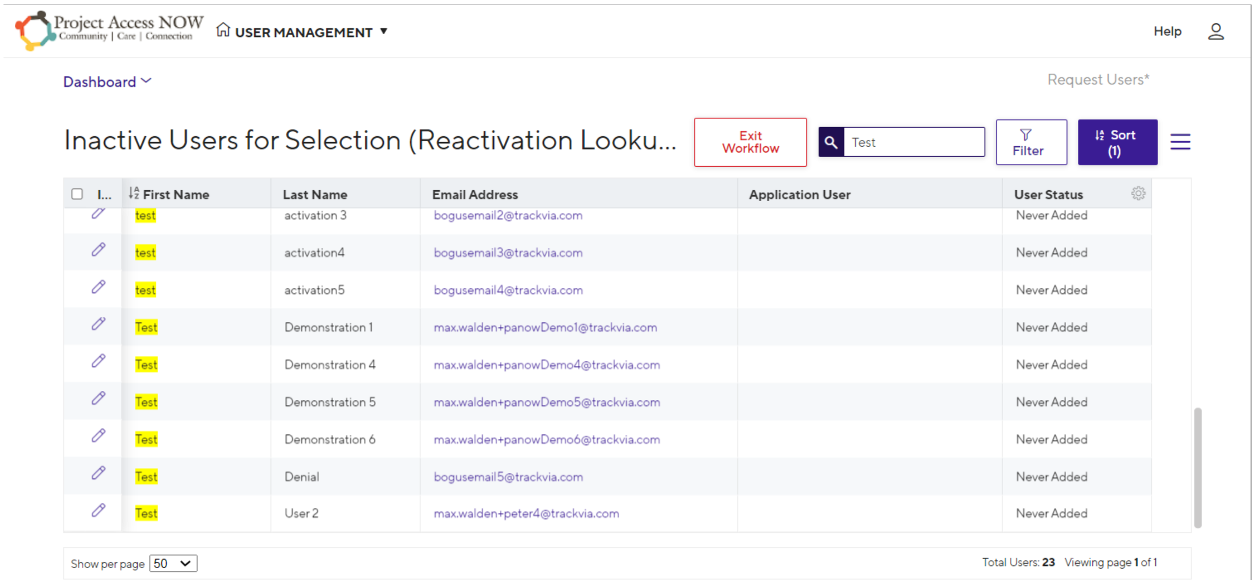

You will be returned to the Request Users dashboard. You will see that your request for deactivation is now included in the “My User Requests” view. Much like a New User request, this request will be reviewed by PANOW and then updated, which you will see reflected here. As usual, you can open the request using the pencil icon to see more information. You will also receive an email notification when the request is updated.

## 4.5 Reactivating a User

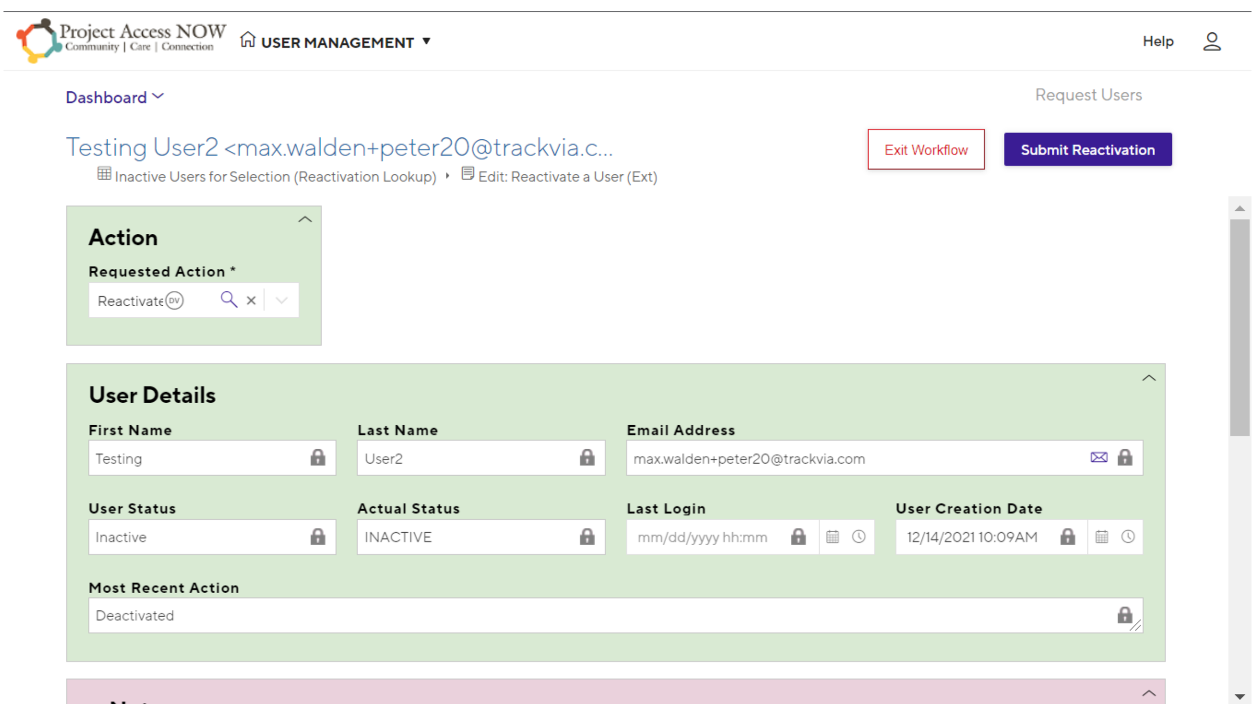
As usual, begin on the Request Users dashboard and click the “Reactivate a User” button.



You will be taken to the “Inactive Users for Selection” page, where you can search through the currently Inactive user accounts to find the one you wish to reactivate. If you do not find the account you’re looking for here, it either does not exist at all or it is currently active and does not need to be reactivated. Click the pencil icon to select the correct account.

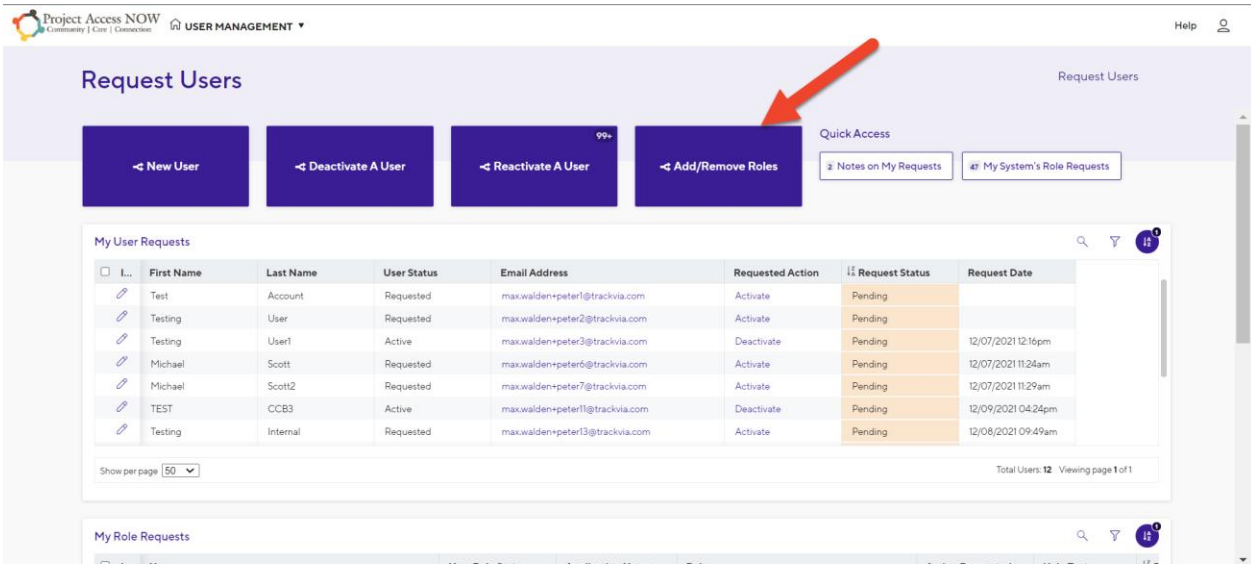



Similar to the Deactivation process, the next page you’ll be taken to will include information to allow you to confirm that you have selected the correct user. Once you have reviewed this page and confirmed you have selected the correct user, click the Submit Reactivation button to complete the request.

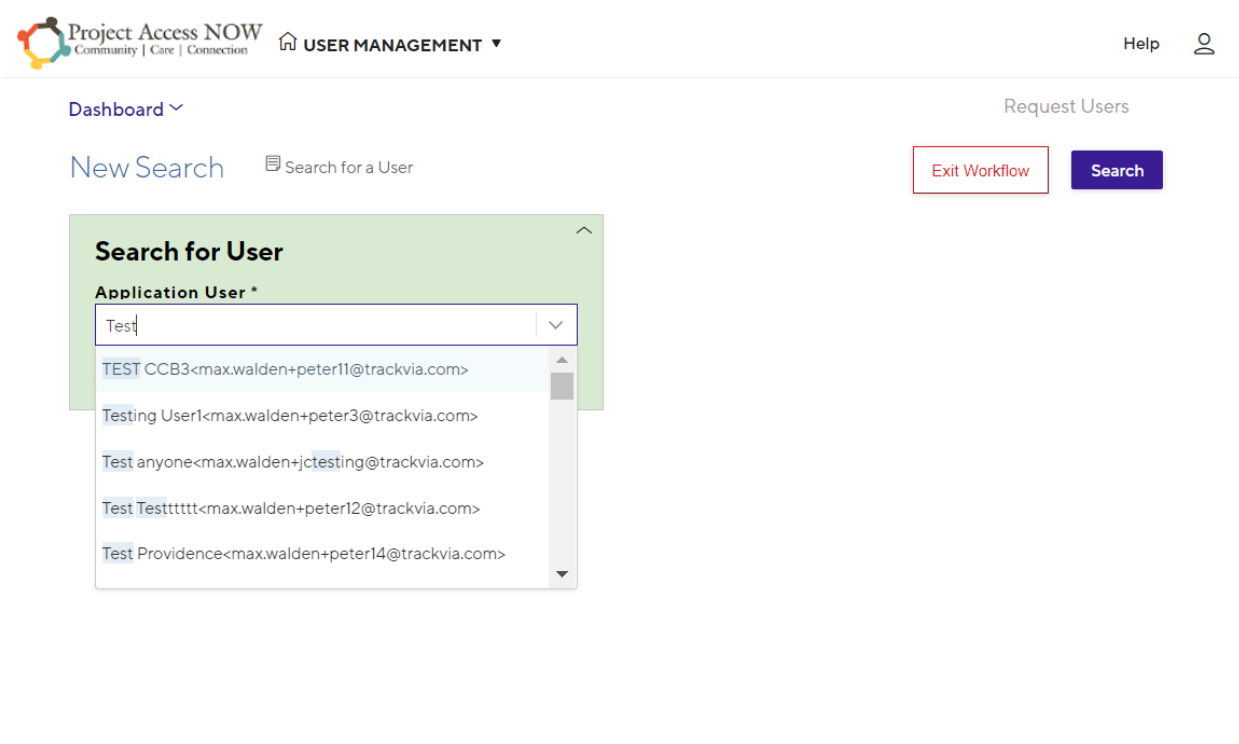


## 4.6 Adding/Removing Roles or User Groups

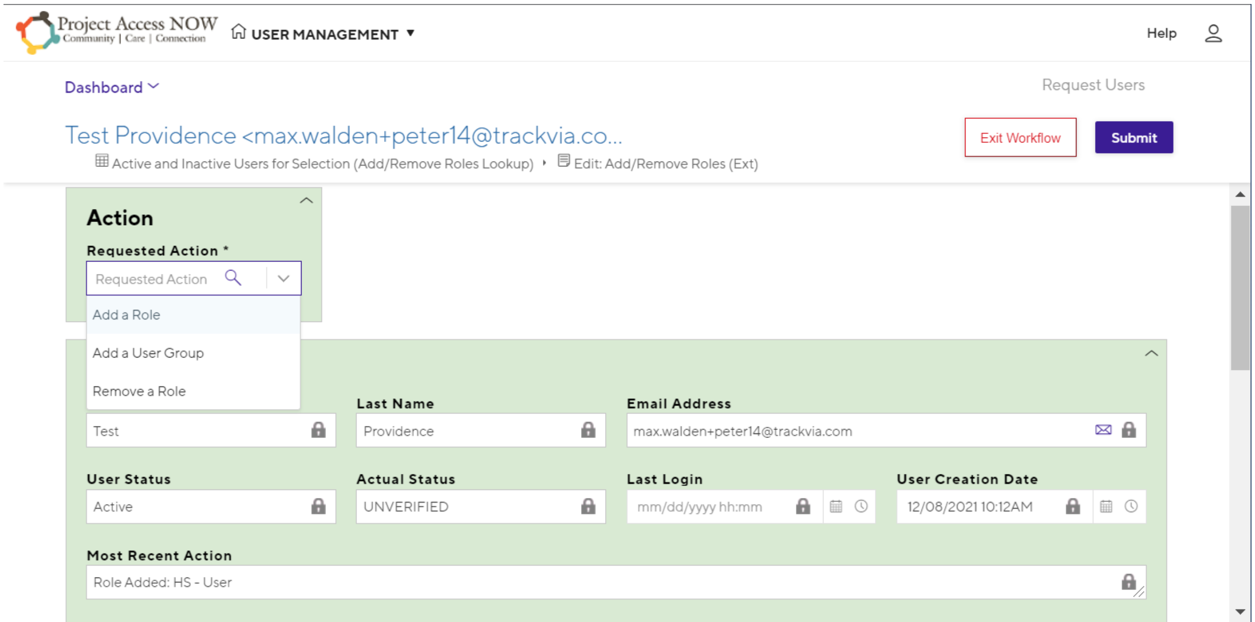
When adding a New User, you will be prompted to select a User Type/Role and User Group for the user, but sometimes you may need to change the user's Role or User Group after their account has already been created. In this circumstance, use the "Add/Remove Roles" flow, which can be found on the Request Users dashboard.



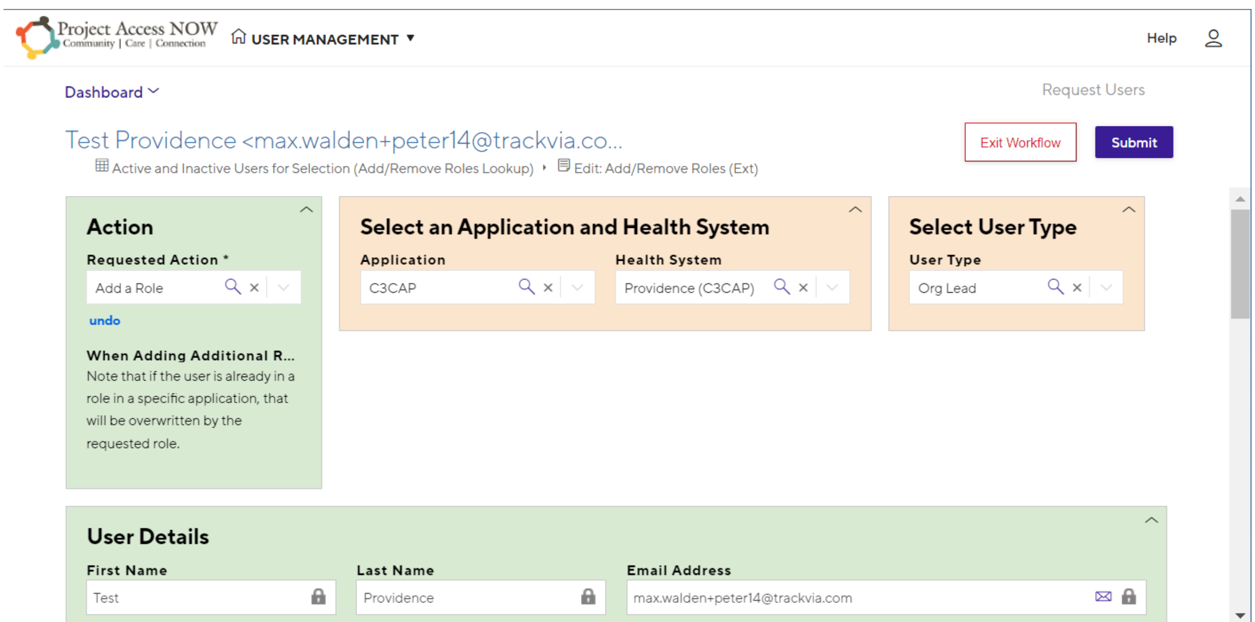

You will be taken to the "Search for User" screen. Select the correct user and click "Search".




On the next screen, the top field will prompt you to select the Requested Action.

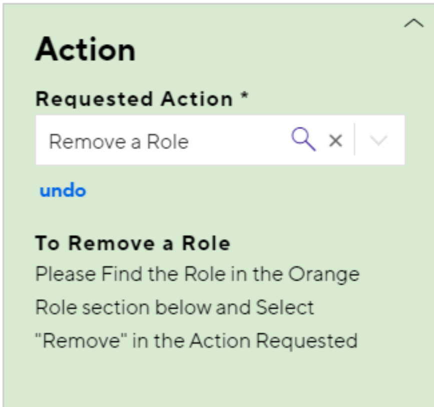



If you choose to Add a Role, select that action from the dropdown and then select the appropriate Application, Health System, and then the User Type (aka Role) from the final dropdown. Be aware that  if the user is already assigned to a role in the application requested, the existing role will be overwritten by the new requested role.

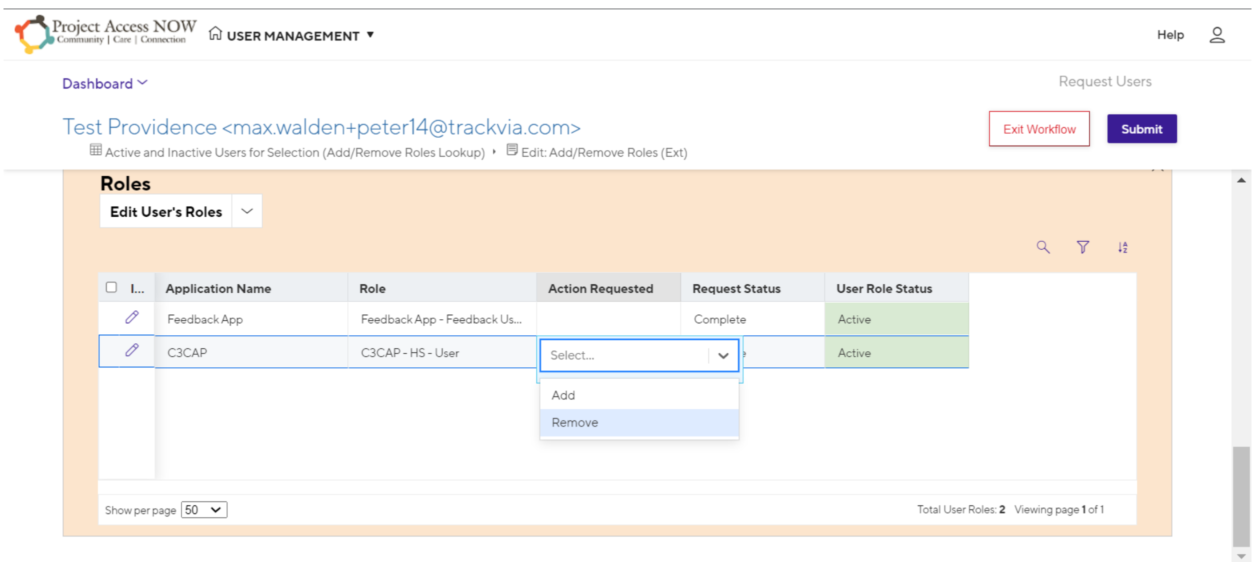



## 4.6.1 Remove a Role

Select the “Remove a Role” option and you’ll see the following message appear:



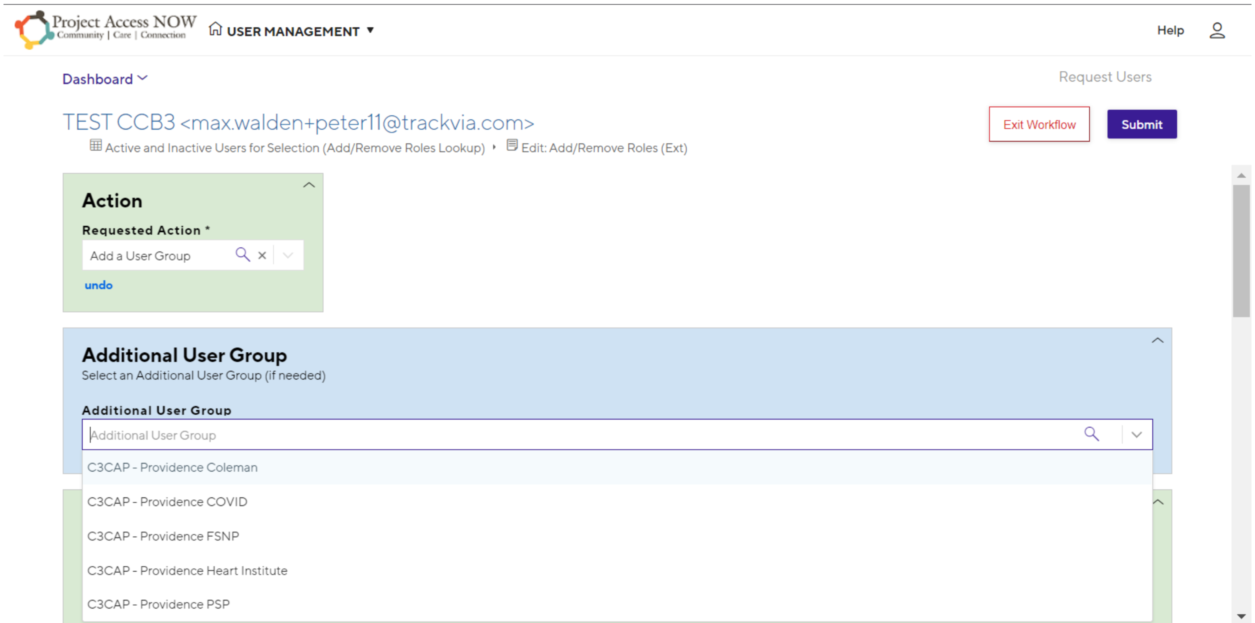

Follow the directions: scroll down to the "Roles" section and remove the role in question, as such:




Once you have changed the "Action Requested" to "Remove" for the role you wish to remove, click Submit in the upper right hand corner. This will complete the request.

### 4.6.2 Add a User Group

If your health system uses User Groups, you may need to add an additional one to an already existing user account at times. To do so, select "Add a User Group" from the Requested Action dropdown. This will open an "Additional User Group" field, where you can select one of the options from the list.

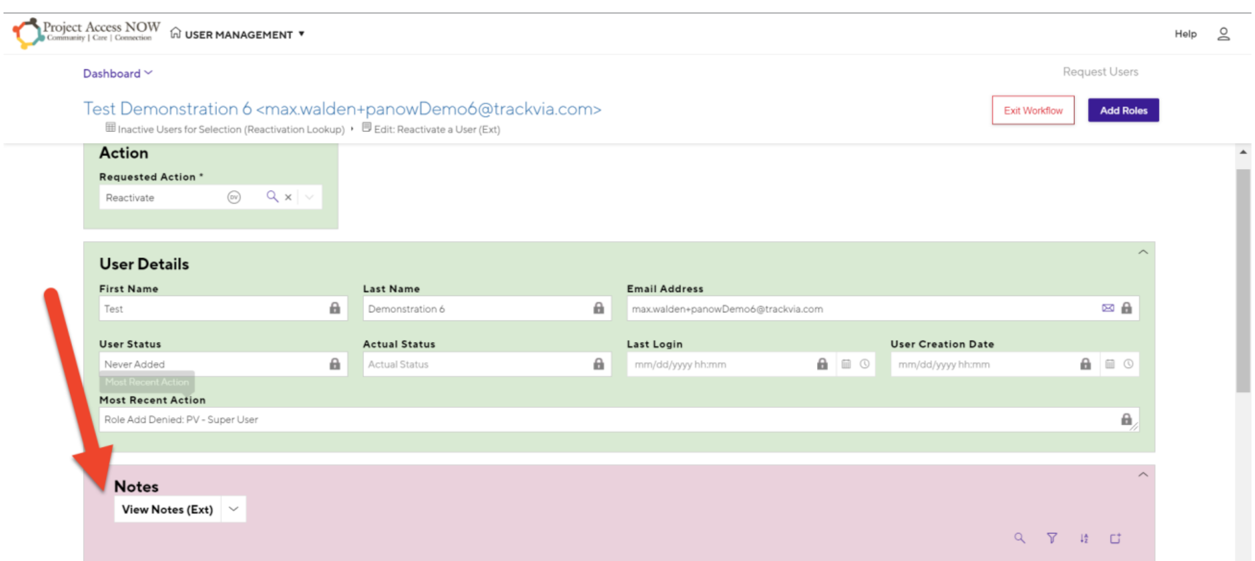



Select the User Group you want to add the user to, and click Submit.

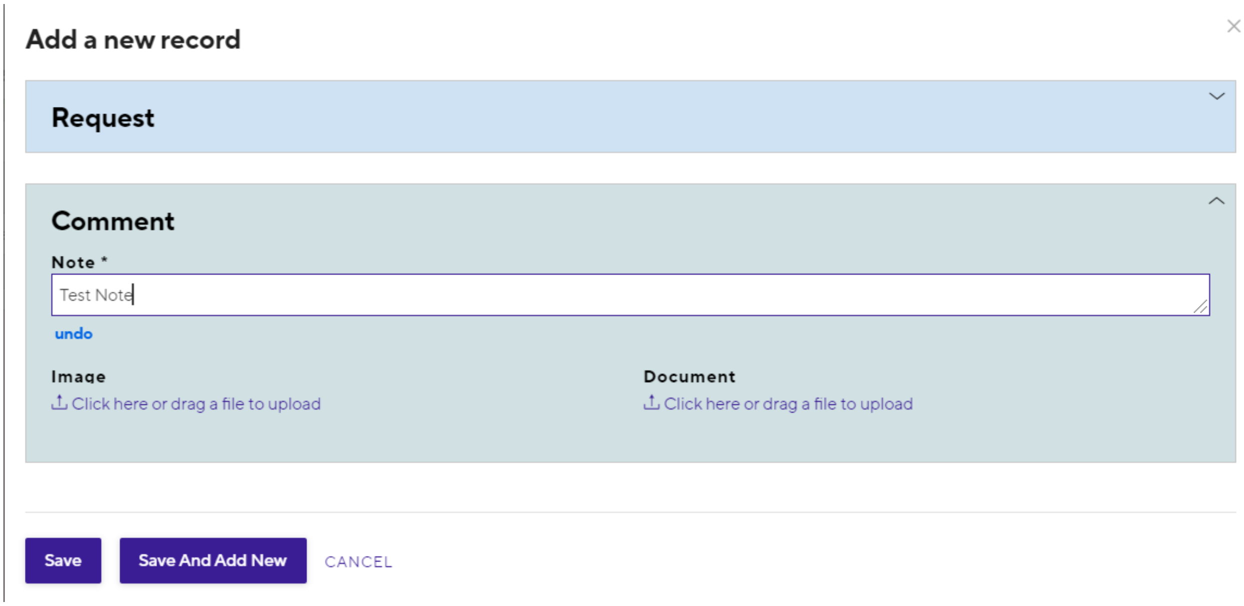
## 4.7 Notes

Notes are used to communicate between the requester and PANOW staff. You can add a Note to a request that you are either in the process of submitting or have already submitted to include additional information that may be relevant. PANOW staff may also add a Note to your request if they need to communicate with you, and you will receive an email notification if a Note is added by PANOW staff to your request.

To add a note while in the process of submitting a request (any type), simply navigate down to the “Notes” section once you reach the following stage of the request process with the “Requested Action” section at the top left of the page:

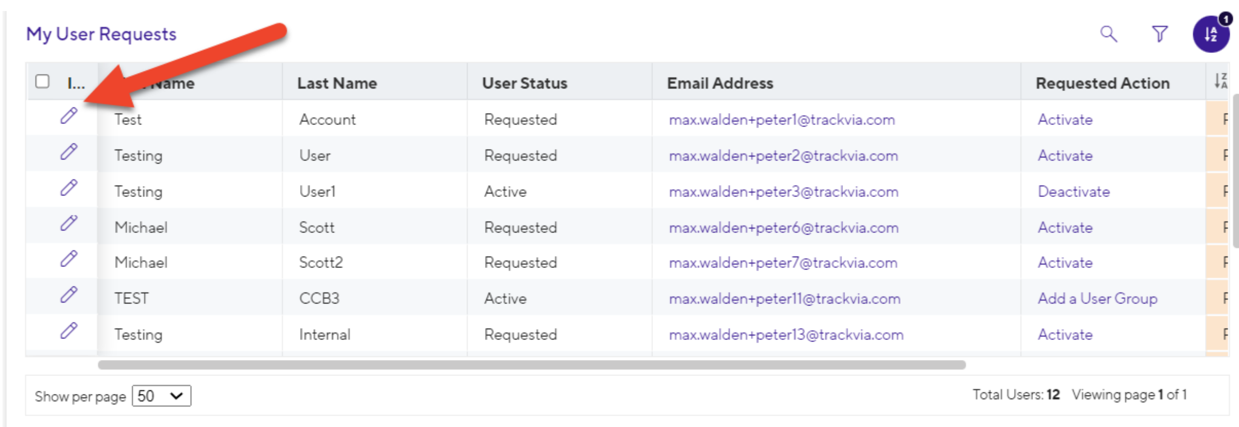


To add a note, click the small square with a plus symbol (the “Add” icon). You may add an Image or Document to your Note if you wish.

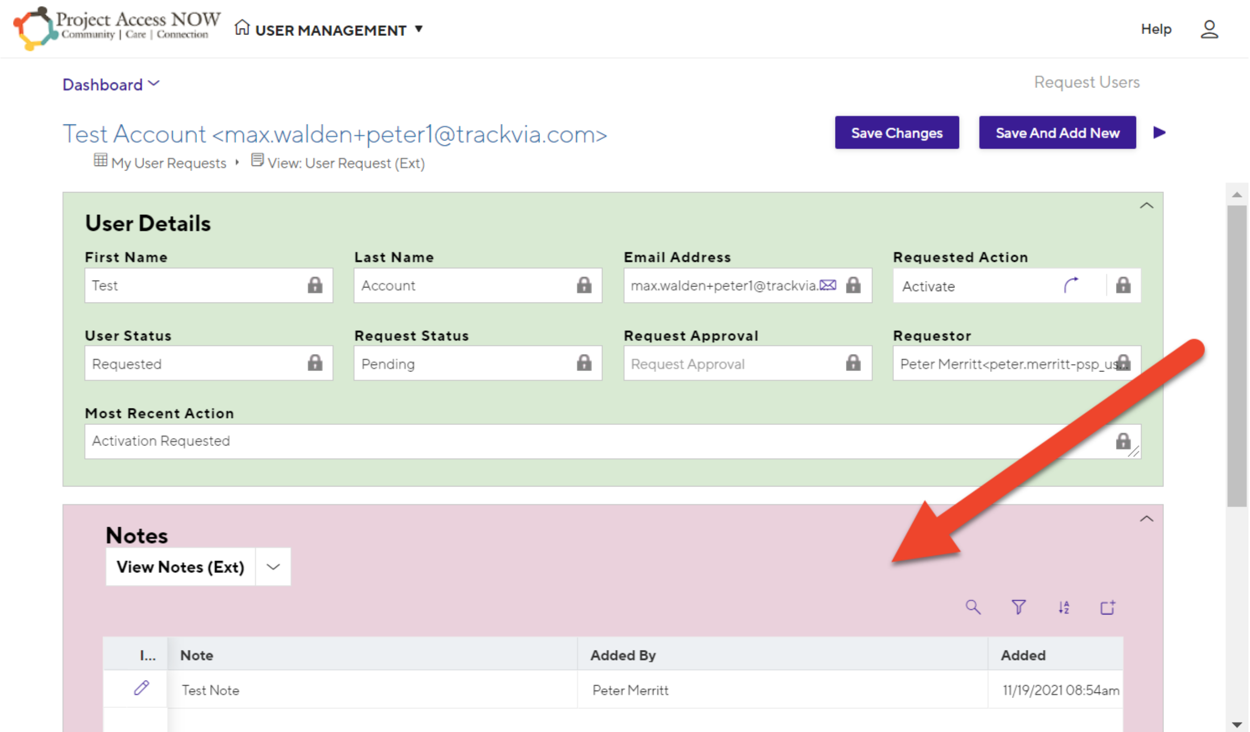



Click Save when you’re finished and the note will be submitted.

To add a note to an already existing request, simply click the pencil icon next to it on whichever view you have located it in to open the request.




Once you open the request, navigate down to the “Notes” section, and follow the same steps as you would when submitting a note during the request process.




## 4.8 Email Notifications

After you submit a request (New User, Deactivation, Reactivation, Add/Remove Role/User Group), you will receive an email notification when the status of your request is updated (to Approved, Denied, or Needs More Info) or a Note is added to your request.

# Your User Request has been Activated!

Workato Notification
Tue 12/14/2021 10:09 AM
To: Peter Merritt

Hello,

This email is to inform you that your request to have Testing User2 added to PANOW's TrackVia account has been approved and fulfilled. An invite email has been sent to max.walden+peter20@trackvia.com with instructions on how they can login.

Thank you!

----------------------------------------------------------

This email was generated by Workato on behalf of Project Access Now

Thank you! | Great, thank you so much! | I accept!

Are the suggestions above helpful? Yes No

## APPENDIX B: RECORD OF CHANGES

| Version Number | Date | Author/Owner | Description of Change |
|---|---|---|---|
| 1.2 | 01/2022 | Peter Merritt | Initial release |
| 1.3 | 10/24/2023 | Julie Chu | Added Title page and version control log table. |
| 1.4 | 06/04/2024 | Abel Quintero | Updated to account for Trillium, Unity, and PacificSource |
| 1.5 | 07/08/2025 | Kate Kye | Updated to account for Trillium and PacificSource not having Super User |