

# Provider Administration Tool (PAT) Training for Organization Administrators







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## User guide details

	<p><b>Audience</b></p> <p>This user guide applies to Organization Administrators.</p>
	<p><b>Overview</b></p> <p>This user guide provides a comprehensive overview of the Provider Administrative Tool (PAT) and how you can use it to perform Provider Engagement, Analytics &amp; Reporting, or PEAR, portal administrative tasks at your provider organization.</p> <p>As an Organization Administrator, you will receive requests to access the PEAR portal from potential end users. This user guide covers the detailed steps you will use to manage PEAR portal access for your organization. Together, Organization and Location Administrators are responsible for granting PEAR access to all end users at the provider organization. End users should not contact the plan to get access to the PEAR portal.</p>
	<p><b>Objectives</b></p> <p>This user guide will help you:</p> <ul style="list-style-type: none"> <li>• Launch PAT from the PEAR portal</li> <li>• Perform administrative actions for users, practices, and entities (as applicable) in PAT</li> <li>• Assign a Location Administrator in PAT</li> <li>• Generate and review an audit log in PAT</li> <li>• Initiate PEAR access for a known third-party organization or request access for a new third-party organization</li> </ul>
	<p><b>Notes</b></p> <p>The member/provider data shown is used for training purposes only and does not reflect actual member/provider data.</p> <p>You may see minor screen variations when logging onto the portal. Process steps remain the same and applicable to Independence Blue Cross, Independence Administrators, AmeriHealth Pennsylvania, AmeriHealth New Jersey, and AmeriHealth Administrators.</p>

## Key terms

<p><b>Provider Engagement, Analytics &amp; Reporting (PEAR)</b></p>	<p>The portal that serves as the central access point to multiple digital tools for participating health care providers. The portal serves the following plans: Independence Blue Cross, Independence Administrators, AmeriHealth Pennsylvania, AmeriHealth New Jersey, and AmeriHealth Administrators.</p>
<p><b>Provider Administration Tool (PAT)</b></p>	<p>The tool that Organization Administrators and Location Administrators use to manage user access to the PEAR portal and its applications.</p>
<p><b>Organization Administrator</b></p>	<p>A person who has the most access to all licensed materials and license data delivered through the PEAR portal for your provider organization. The person is responsible for provisioning access to the PEAR portal and its applications to end users within the provider organization. This includes provisioning access to the Location Administrators. The Organization Administrator can add, disable, terminate, or edit end-user access for all locations across the provider organization. Each provider organization, as defined by a single Tax ID or a group of Tax IDs, has two Organization Administrators.</p>
<p><b>Location Administrator</b></p>	<p>A portal user that manages PEAR portal access at one or more provider locations. The Location Administrator can add, disable, terminate, or edit end-user access for his/her designated location(s). Only the Organization Administrators can identify Location Administrators. This is an optional role, and there can be unlimited Location Administrators.</p>
<p><b>Portal end user</b></p>	<p>Someone in the practice or facility that is granted access to specific PEAR portal applications and roles by either the Organization Administrator or Location Administrator. There is no limit to the number of end users that can be created.</p>
<p><b>Custom Group</b></p>	<p>An administrative record tying together all owned practices or facilities associated with a single provider Tax ID number.</p>
<p><b>Contract Parent</b></p>	<p>An administrative record tying together all owned entities associated with provider organizations with multiple Tax ID numbers.</p>
<p><b>Contract Entity</b></p>	<p>An administrative record tied to a Contract Parent associating specific practices or facilities to an entity. Larger health systems may have one or more entities tied to a Contract Parent.</p>

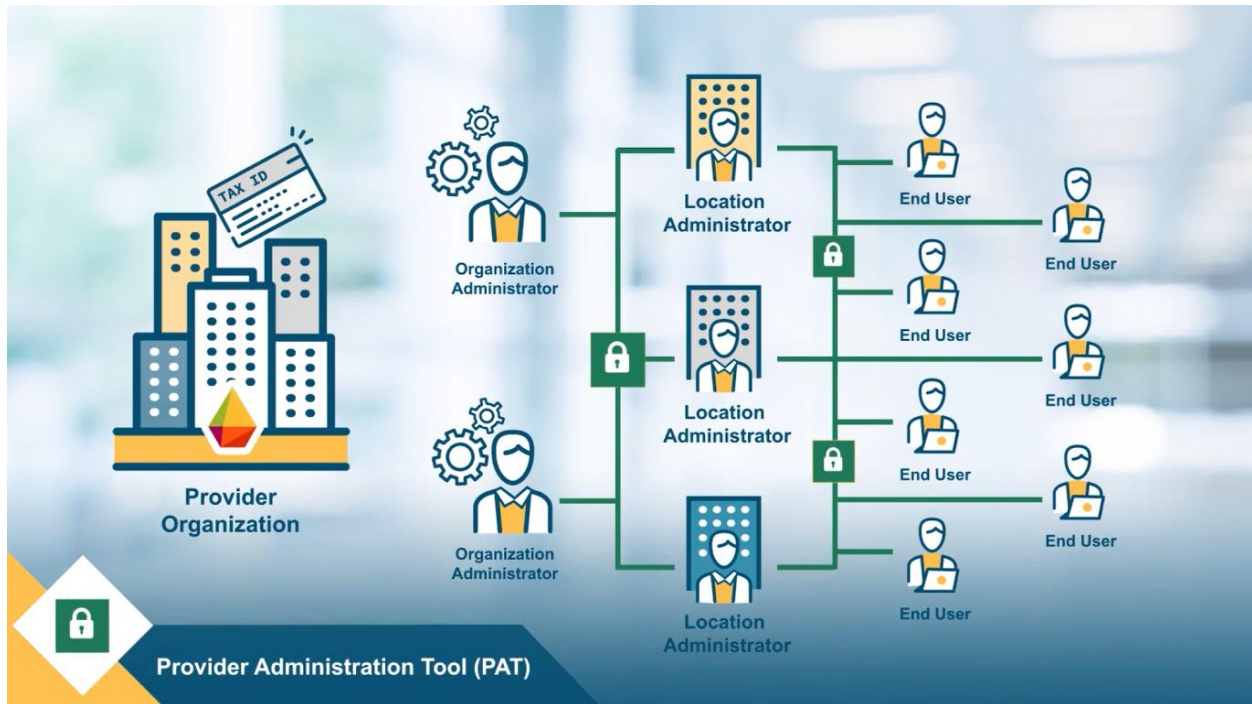
<p><b>Provider ID</b></p>	<p>An internal plan identification number representing an individual facility or professional practice that is used by a provider organization for internal purposes.</p>
<p><b>Audit log report</b></p>	<p>A report generated in PAT to view the various administrative actions performed to manage users of different practices and entities during different time periods.</p>
<p><b>Known third-party</b></p>	<p>A third-party organization that has been previously identified by a provider organization and approved to access the PEAR portal and its applications on behalf of a provider organization, such as a billing company.</p>

## PEAR applications

<p><b>PEAR Analytics &amp; Reporting (PEAR AR)</b></p>	<p>An on-demand reporting application within the PEAR portal designed to help providers provide even better care. It delivers access to timely data including clinical care gaps, actionable incentive program reports, specialist reports, and more. Formerly IndexPro™.</p>
<p><b>PEAR Practice Management (PEAR PM)</b></p>	<p>The application that provides a connection point to the plan information and transactions you use every day in caring for patients. From eligibility checks to referrals and beyond, PEAR PM provides you with a streamlined and simplified experience through its all-in-one <i>Member Center</i> and the <i>Transactions</i> tab.</p>
<p><b>PEAR Comprehensive Visit (PEAR CV)</b></p>	<p>A point-of-care application designed to assist primary care physicians in capturing accurate documentation of a patient’s well visit, assessment, and treatment plan. This information will support a patient’s holistic care coordination including managing chronic conditions and addressing quality measures.</p>

## Section 1: PAT Overview

PAT is the application used to manage access to the PEAR portal and its applications. It is available only to Organization and Location Administrators within your organization.

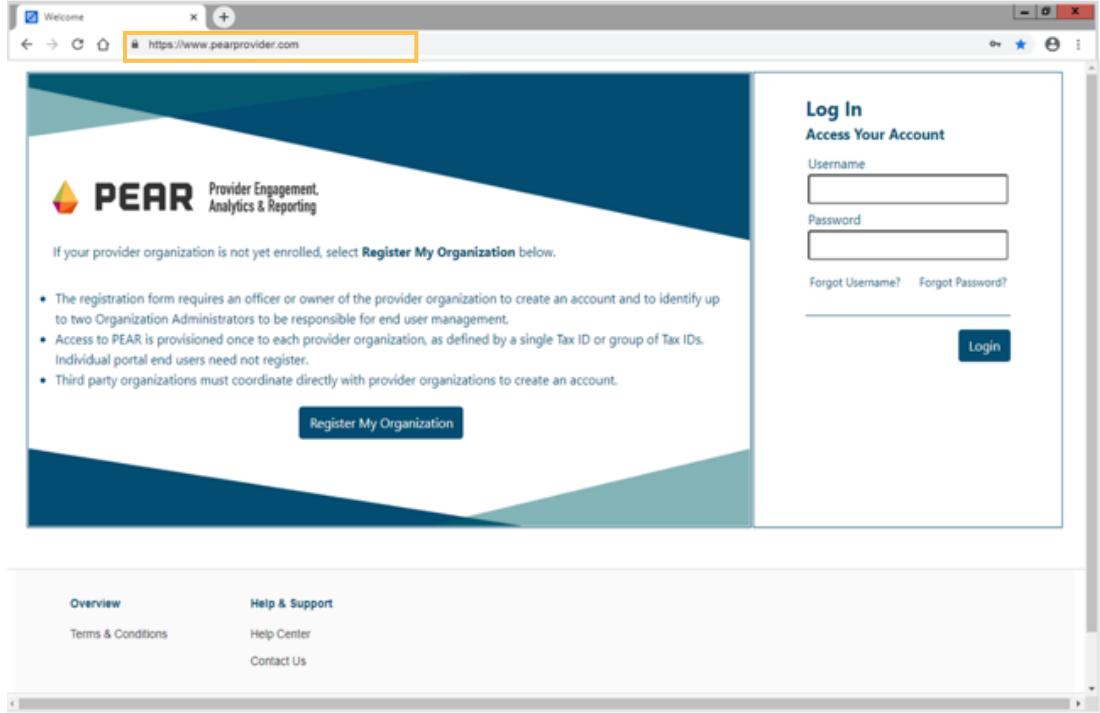


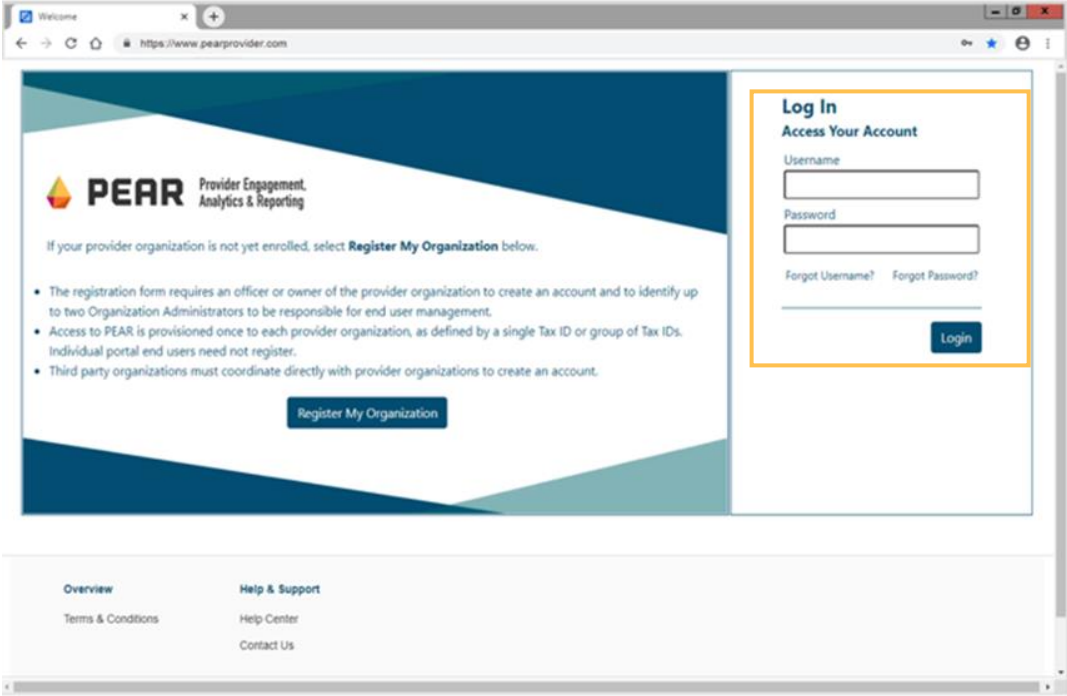
For more on the two administrator roles and processes in PAT, see the "Managing Access in PEAR" video in the [Help Center](#).

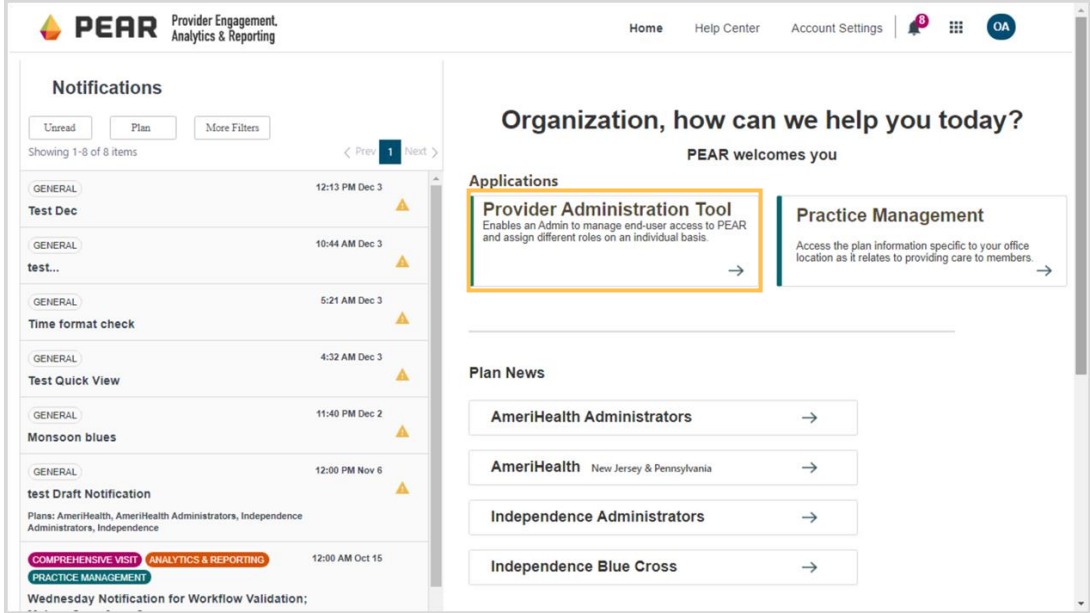
### Accessing PAT

To access PAT, you need to first log onto the PEAR portal.

Perform the following steps to log onto the PEAR portal and access PAT:

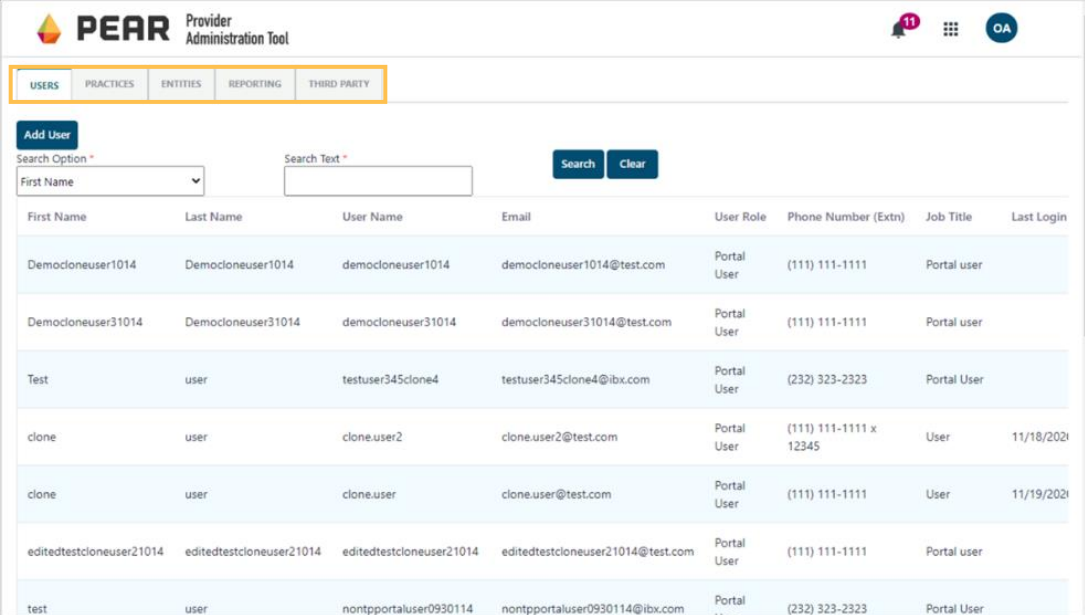
Step #	Action
1.	<p>Enter <i>https://www.pearprovider.com</i> in any Internet browser window.</p>  <p>The screenshot shows a web browser window with the URL <a href="https://www.pearprovider.com">https://www.pearprovider.com</a> in the address bar. The page features the PEAR logo (Provider Engagement, Analytics &amp; Reporting) and a 'Log In' section with fields for Username and Password, and a 'Login' button. Below the logo, there is a 'Register My Organization' button and a list of instructions for registration. The footer contains links for Overview, Help &amp; Support, Terms &amp; Conditions, Help Center, and Contact Us.</p> <p><b>Note:</b> Google Chrome, Microsoft Edge, and Internet Explorer (IE) 11 or later are supported. However, IE is not recommended.</p>

Step #	Action
2.	<p data-bbox="326 258 1133 289">Enter your username and password and click the <i>Login</i> button.</p>  <p data-bbox="326 1052 402 1083"><b>Note:</b></p> <ul data-bbox="375 1094 1406 1266" style="list-style-type: none"> <li>• For more details on how to login to the PEAR portal, view the <b>PEAR Portal Overview</b> course.</li> <li>• If this is your first time logging onto the PEAR portal, you will be prompted to review and attest to the Third Party Organization Administrator User License Agreement and PEAR terms and conditions.</li> </ul>

Step #	Action
3.	<p>The PEAR portal home page is displayed. Click <i>Provider Administration Tool</i> under <i>Applications</i> to launch PAT.</p> 

## PAT home page

Upon launch, the PAT home page shows five tabs: *USERS*, *PRACTICES*, *ENTITIES* (if applicable), *REPORTING*, and *THIRD PARTY*. The *USERS* tab is selected by default.



First Name	Last Name	User Name	Email	User Role	Phone Number (Extn)	Job Title	Last Login
Democloneuser1014	Democloneuser1014	democloneuser1014	democloneuser1014@test.com	Portal User	(111) 111-1111	Portal user	
Democloneuser31014	Democloneuser31014	democloneuser31014	democloneuser31014@test.com	Portal User	(111) 111-1111	Portal user	
Test	user	testuser345clone4	testuser345clone4@ibx.com	Portal User	(232) 323-2323	Portal User	
clone	user	clone.user2	clone.user2@test.com	Portal User	(111) 111-1111 x 12345	User	11/18/2021
clone	user	clone.user	clone.user@test.com	Portal User	(111) 111-1111	User	11/19/2021
editedtestcloneuser21014	editedtestcloneuser21014	editedtestcloneuser21014	editedtestcloneuser21014@test.com	Portal User	(111) 111-1111	Portal user	
test	user	nontportaluser0930114	nontportaluser0930114@ibx.com	Portal User	(232) 323-2323	Portal User	

## USERS tab

As an Organization Administrator, the *USERS* tab displays a list of all PEAR portal end users associated with your organization. For the Location Administrators on your team, the *USERS* tab will only display the end users at the locations they manage.

As an Organization Administrator, you are encouraged to review the list of active and disabled users to ensure access remains appropriate and up to date.

You can use this tab to add, view, and search users. You can also use this tab to assign Location Administrators.

First Name	Last Name	User Name	Email	User Role	Phone Number (Extn)	Job Title	Last Login
Democloneuser1014	Democloneuser1014	democloneuser1014	democloneuser1014@test.com	Portal User	(111) 111-1111	Portal user	
Democloneuser31014	Democloneuser31014	democloneuser31014	democloneuser31014@test.com	Portal User	(111) 111-1111	Portal user	
Test	user	testuser345clone4	testuser345clone4@ibx.com	Portal User	(232) 323-2323	Portal User	
clone	user	clone.user2	clone.user2@test.com	Portal User	(111) 111-1111 x 12345	User	11/18/2021
clone	user	clone.user	clone.user@test.com	Portal User	(111) 111-1111	User	11/19/2021
editedtestcloneuser21014	editedtestcloneuser21014	editedtestcloneuser21014	editedtestcloneuser21014@test.com	Portal User	(111) 111-1111	Portal user	
test	user	nontportaluser0930114	nontportaluser0930114@ibx.com	Portal User	(232) 323-2323	Portal User	

## PRACTICES tab

The *PRACTICES* tab displays a list of all practices. As an Organization Administrator, you will be able to view all the practices and facilities within your organization on this tab.

Location Administrators can view only the practices or facilities for which they are provisioned.

Practice Name	Provider Type	Contract Parent	Contract Entity/ Custom Group	Value Based Entity	Plan	NPI	TAX ID	Active User Count	Active Location Admin Count	Active Org Admin Count
Ambulance Transport Company - (004335868)	ANC		Training Providers (Custom Group)		AH,BCAHA,IA	1427484419	123456789	2	0	2
Ambulatory Infusion Associates - (004335864)			Training Providers (Custom Group)		AH,BCAHA,IA	1922376552	123456789	2	0	2
Ancillary Surgical Center - (004335869)	FAC		Training Providers (Custom Group)		AH,BCAHA,IA	1679773746	123456789	2	0	2
Best Ever Hospital - (004335862)	FAC		Training Providers (Custom Group)		AH,BCAHA,IA	1306114970	123456789	2	0	2
Chemoinfusion Practice - (004335875)	SPEC		Training Providers (Custom Group)		AH,BCAHA,IA	1568980167	123456789	2	0	2
Durable Medical Company - (004335863)	ANC		Training Providers (Custom Group)		AH,BCAHA,IA	1669707584	123456789	2	0	2
Elite Skilled Nursing Facility - (004335865)	FAC		Training Providers (Custom Group)		AH,BCAHA,IA	1801264320	123456789	2	0	2
Home Health Agency - (004335866)	FAC		Training Providers (Custom Group)		AH,BCAHA,IA	1902316854	123456789	2	0	2
Home Infusion Agency - (004335867)	ANC		Training Providers (Custom Group)		AH,BCAHA,IA	170035336	123456789	2	0	2

### ENTITIES tab

The *ENTITIES* tab displays a list of all contract entities associated with your organization. This tab is only available to larger health systems tied to multiple Tax IDs.

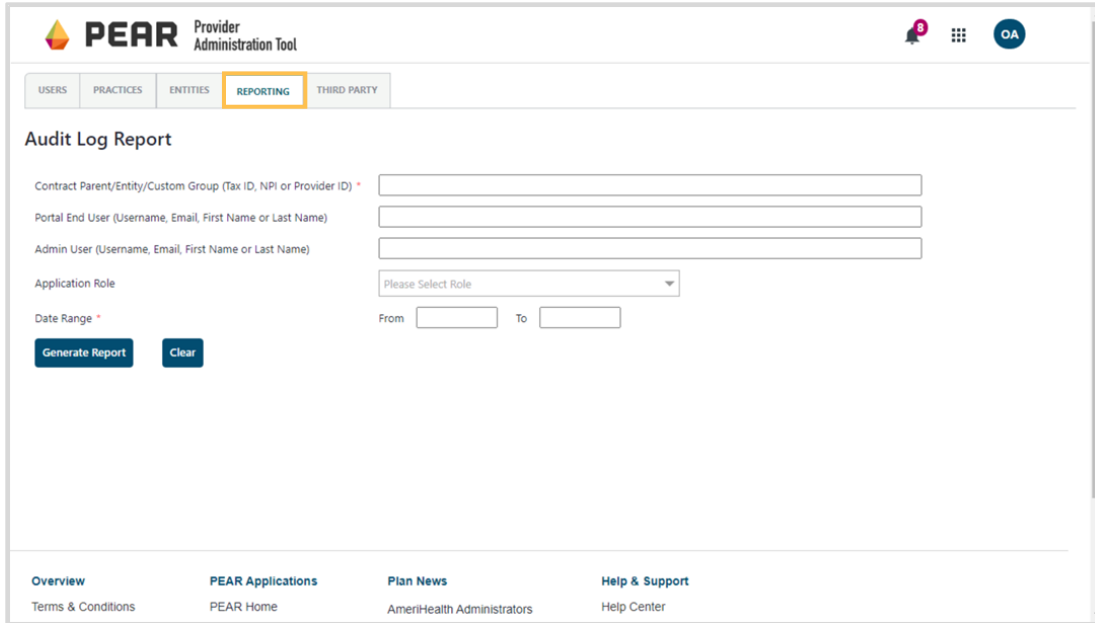
You can use the *ENTITIES* tab to view and search for entities tied to your provider organization.

Contract Entity / Value Based Entity	Contract Parent	Practice Count	Active User Count	Active Location Admin Count	Active Org Admin Count
Training Providers (Custom Group)		25	361	0	11

**Note:** The *ENTITIES* tab and functionality is only available to large health systems with multiple Tax IDs. Independent practices, or provider organizations not tied to multiple Tax IDs will not have access to this tab.

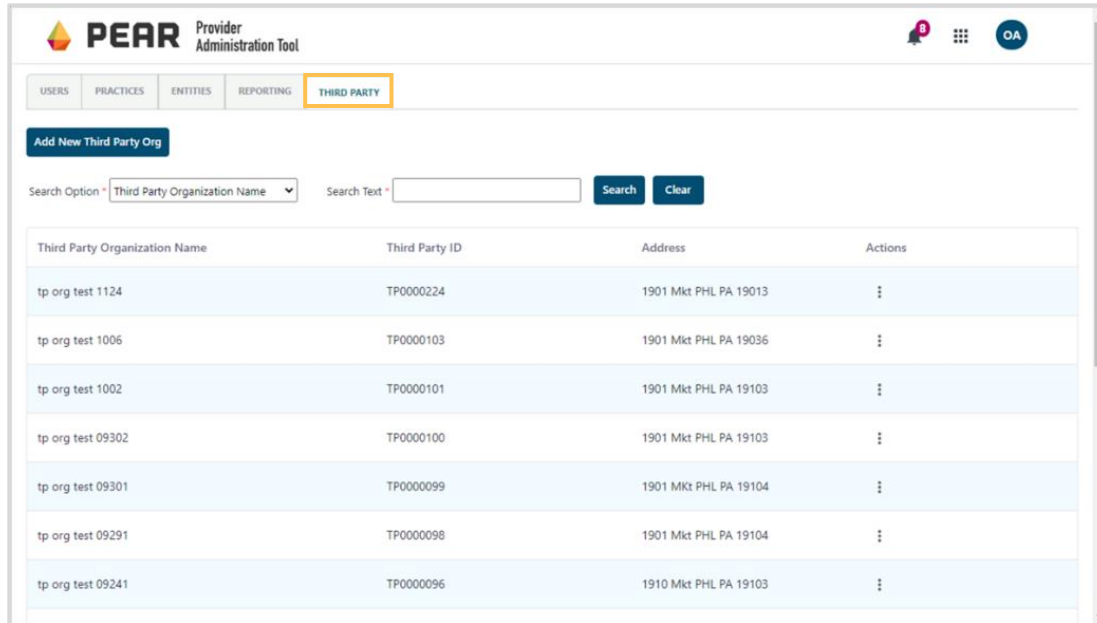
### REPORTING tab

The *REPORTING* tab allows you to generate and view the audit log report. This report provides insights into the various administrative actions performed to manage PEAR portal users.



### THIRD PARTY tab

The *THIRD PARTY* tab displays a list of all known third-party organizations supporting network provider organizations. You can access the *THIRD PARTY* tab to initiate PEAR PM access for a known third-party organization, manage the access of known third-party organizations, or request access for a new third-party organization.



**Note:**

- The *THIRD PARTY* tab and functionality is only available to Organization Administrators.
- A known third-party organization is a third-party organization that has been previously identified by a provider organization and approved to access the PEAR portal and its applications on behalf of a provider organization such as a billing company.

## Section 2: Managing users in PAT

The *USERS* tab within PAT is where you can view and manage your organization's end users. You can perform the following functions from the *USERS* tab:

- [Add a new user](#)
- [View user log](#)
- [Search for existing users](#)
- [Edit an existing user](#)
- [Clone an existing user](#)
- [Reset a user's password](#)
- [Disable an existing user](#)
- [Enable a disabled user](#)
- [Terminate an existing user](#)

Click a function to navigate to its steps.

### Adding a new user in PAT

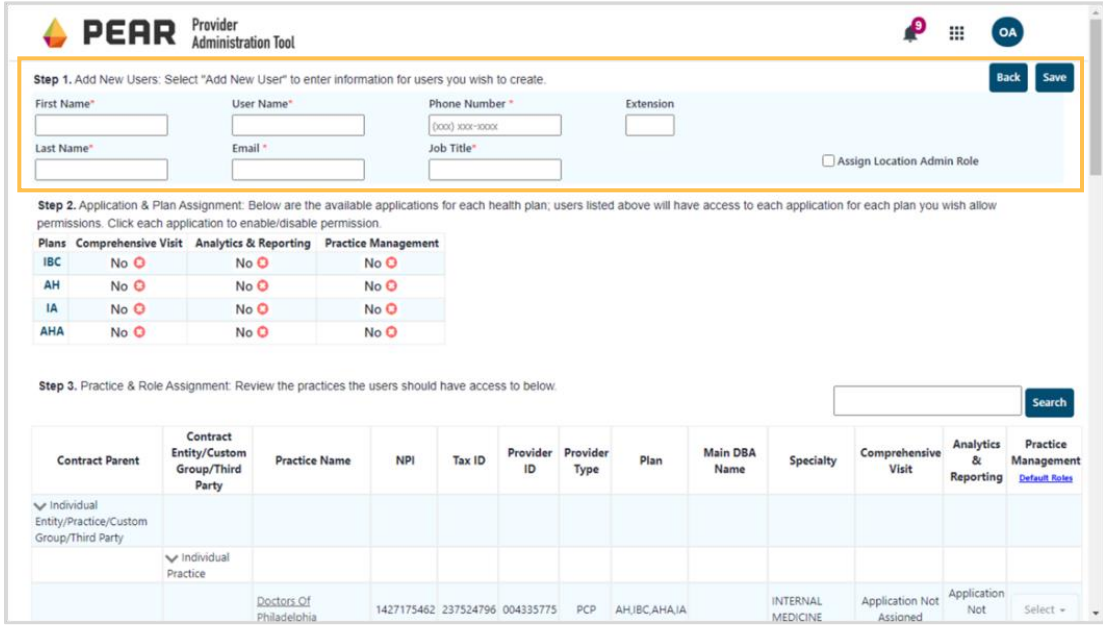
Only employees of your practice or facility should be added through this function. Non employees should be managed through the third-party organization workflow.

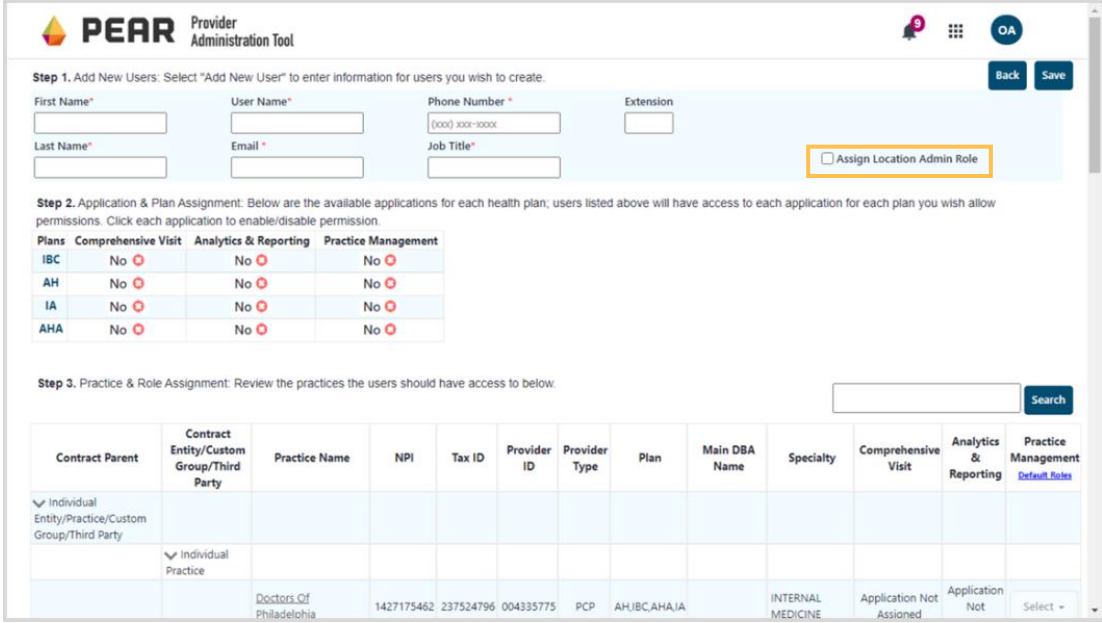
Perform the following steps to add a new user in PAT:

Step #	Action
1.	Click the <i>Add User</i> button.

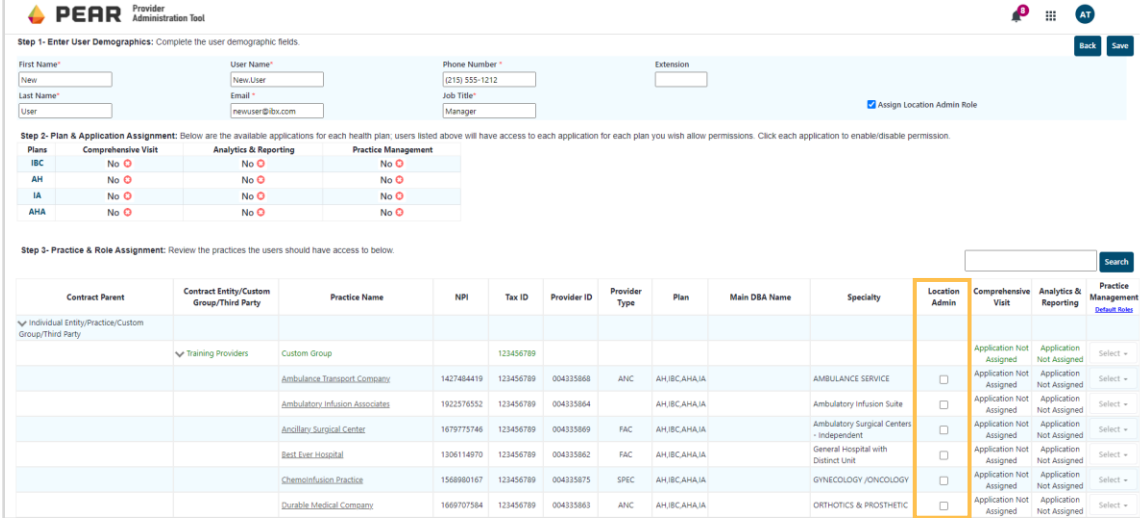
The screenshot shows the PEAR Provider Administration Tool interface. The 'USERS' tab is selected, and the 'Add User' button is highlighted with a red box. Below the button is a search section with a 'Search Option' dropdown set to 'First Name' and a 'Search Text' input field. Below the search section is a table of users with columns: First Name, Last Name, User Name, Email, User Role, Phone Number (Extn), Job Title, and Last Login.

First Name	Last Name	User Name	Email	User Role	Phone Number (Extn)	Job Title	Last Login
Democloneuser1014	Democloneuser1014	democloneuser1014	democloneuser1014@test.com	Portal User	(111) 111-1111	Portal user	
Democloneuser31014	Democloneuser31014	democloneuser31014	democloneuser31014@test.com	Portal User	(111) 111-1111	Portal user	
Test	user	testuser345clone4	testuser345clone4@ibx.com	Portal User	(232) 323-2323	Portal User	
clone	user	clone.user2	clone.user2@test.com	Portal User	(111) 111-1111 x 12345	User	11/18/2021
clone	user	clone.user	clone.user@test.com	Portal User	(111) 111-1111	User	11/19/2021
editedtestcloneuser21014	editedtestcloneuser21014	editedtestcloneuser21014	editedtestcloneuser21014@test.com	Portal User	(111) 111-1111	Portal user	
test	user	nontpportaluser0930114	nontpportaluser0930114@ibx.com	Portal User	(232) 323-2323	Portal User	

Step #	Action
2.	<p>The <i>Add New User</i> page is displayed. Enter the user’s personal details, including:</p> <ul style="list-style-type: none"> <li>• first name</li> <li>• last name</li> <li>• email</li> <li>• phone number with extension, if applicable</li> <li>• job title</li> </ul> <p>Enter a unique username.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• Once an email address is used to provision access to PEAR, it cannot be used again in association with another PEAR portal account.</li> <li>• A user’s email address and username cannot be edited once a user is created as these fields support the individual's log on credentials.</li> <li>• Recommended username format is FirstName.LastName. You can add a number after the last name in case the username has been taken.</li> </ul> 
3.	<p>Select the <i>Assign Location Admin Role</i> check box to designate the new user as a Location Administrator, if required. The <i>Assign Location Admin Role</i> check box is only visible to Organization Administrators.</p>

Step #	Action																																														
	 <p><b>Step 1. Add New Users:</b> Select "Add New User" to enter information for users you wish to create.</p> <p>Fields: First Name, User Name, Phone Number, Extension, Last Name, Email, Job Title. <input type="checkbox"/> Assign Location Admin Role</p> <p><b>Step 2. Application &amp; Plan Assignment:</b> Below are the available applications for each health plan; users listed above will have access to each application for each plan you wish allow permissions. Click each application to enable/disable permission.</p> <table border="1"> <thead> <tr> <th>Plans</th> <th>Comprehensive Visit</th> <th>Analytics &amp; Reporting</th> <th>Practice Management</th> </tr> </thead> <tbody> <tr> <td>IBC</td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> </tr> <tr> <td>AH</td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> </tr> <tr> <td>IA</td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> </tr> <tr> <td>AHA</td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> </tr> </tbody> </table> <p><b>Step 3. Practice &amp; Role Assignment:</b> Review the practices the users should have access to below.</p> <table border="1"> <thead> <tr> <th>Contract Parent</th> <th>Contract Entity/Custom Group/Third Party</th> <th>Practice Name</th> <th>NPI</th> <th>Tax ID</th> <th>Provider ID</th> <th>Provider Type</th> <th>Plan</th> <th>Main DBA Name</th> <th>Specialty</th> <th>Comprehensive Visit</th> <th>Analytics &amp; Reporting</th> <th>Practice Management</th> </tr> </thead> <tbody> <tr> <td>Individual Entity/Practice/Custom Group/Third Party</td> <td>Individual Practice</td> <td>Doctors Of Philadelphia</td> <td>1427175462</td> <td>237524796</td> <td>004335775</td> <td>PCP</td> <td>AH, IBC, AHA, IA</td> <td></td> <td>INTERNAL MEDICINE</td> <td>Application Not Assigned</td> <td>Application Not</td> <td>Select -</td> </tr> </tbody> </table>	Plans	Comprehensive Visit	Analytics & Reporting	Practice Management	IBC	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>	AH	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>	IA	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>	AHA	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>	Contract Parent	Contract Entity/Custom Group/Third Party	Practice Name	NPI	Tax ID	Provider ID	Provider Type	Plan	Main DBA Name	Specialty	Comprehensive Visit	Analytics & Reporting	Practice Management	Individual Entity/Practice/Custom Group/Third Party	Individual Practice	Doctors Of Philadelphia	1427175462	237524796	004335775	PCP	AH, IBC, AHA, IA		INTERNAL MEDICINE	Application Not Assigned	Application Not	Select -
Plans	Comprehensive Visit	Analytics & Reporting	Practice Management																																												
IBC	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>																																												
AH	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>																																												
IA	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>																																												
AHA	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>																																												
Contract Parent	Contract Entity/Custom Group/Third Party	Practice Name	NPI	Tax ID	Provider ID	Provider Type	Plan	Main DBA Name	Specialty	Comprehensive Visit	Analytics & Reporting	Practice Management																																			
Individual Entity/Practice/Custom Group/Third Party	Individual Practice	Doctors Of Philadelphia	1427175462	237524796	004335775	PCP	AH, IBC, AHA, IA		INTERNAL MEDICINE	Application Not Assigned	Application Not	Select -																																			
4.	Click the Save button.																																														

When the *Assign Location Admin Role* check box is selected, a new column titled *Location Admin* is displayed in the table. You can decide which practices/facilities to designate for the Location Administrator by selecting the appropriate check box next to the practice/facility. The alignment of practice/application access is independent of Location Administrator designation.



**Step 1 - Enter User Demographics:** Complete the user demographic fields.

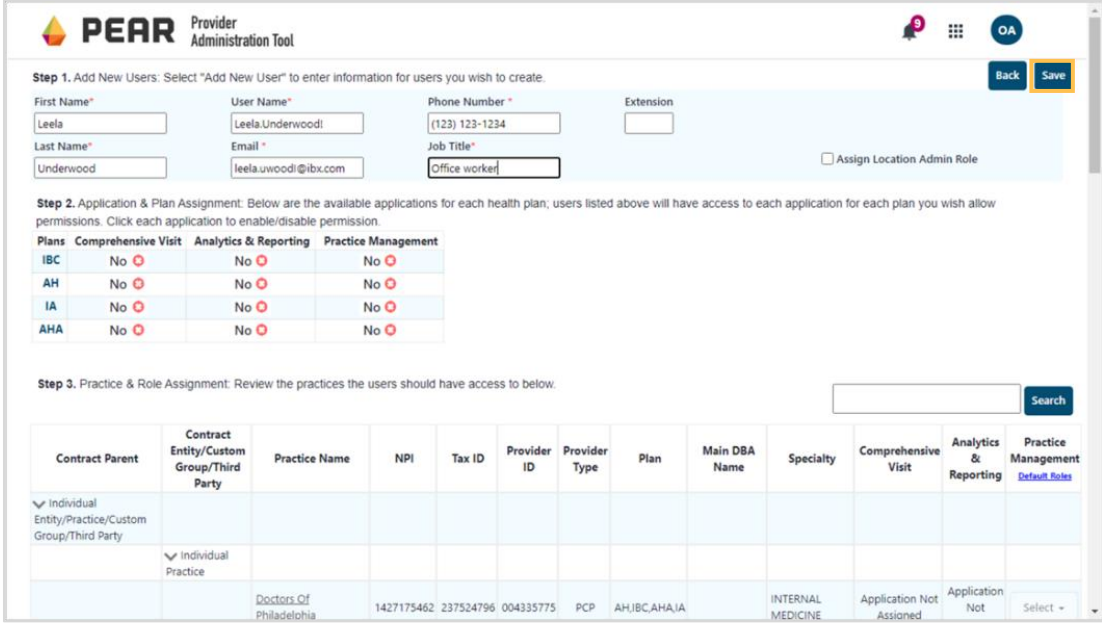
Fields: First Name, User Name, Phone Number, Extension, Last Name, Email, Job Title.  Assign Location Admin Role

**Step 2 - Plan & Application Assignment:** Below are the available applications for each health plan; users listed above will have access to each application for each plan you wish allow permissions. Click each application to enable/disable permission.

Plans	Comprehensive Visit	Analytics & Reporting	Practice Management
IBC	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>
AH	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>
IA	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>
AHA	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>

**Step 3 - Practice & Role Assignment:** Review the practices the users should have access to below.

Contract Parent	Contract Entity/Custom Group/Third Party	Practice Name	NPI	Tax ID	Provider ID	Provider Type	Plan	Main DBA Name	Specialty	Location Admin	Comprehensive Visit	Analytics & Reporting	Practice Management
Individual Entity/Practice/Custom Group/Third Party	Training Providers	Custom Group		123456789						<input type="checkbox"/>	Application Not Assigned	Application Not Assigned	Select -
		Ambulance Transport Company	1427484419	123456789	004335868	ANC	AH, IBC, AHA, IA		AMBULANCE SERVICE	<input type="checkbox"/>	Application Not Assigned	Application Not Assigned	Select -
		Ambulatory Infusion Associates	1922576552	123456789	004335864		AH, IBC, AHA, IA		Ambulatory Infusion Suite	<input type="checkbox"/>	Application Not Assigned	Application Not Assigned	Select -
		Outpatient Surgical Center	1679775746	123456789	004335869	FAC	AH, IBC, AHA, IA		Ambulatory Surgical Centers - Independent	<input type="checkbox"/>	Application Not Assigned	Application Not Assigned	Select -
		Best Ever Hospital	1306114970	123456789	004335862	FAC	AH, IBC, AHA, IA		General Hospital with Distinct Unit	<input type="checkbox"/>	Application Not Assigned	Application Not Assigned	Select -
		Chemofusion Practice	1568980167	123456789	004335875	SPEC	AH, IBC, AHA, IA		GYNECOLOGY / ONCOLOGY	<input type="checkbox"/>	Application Not Assigned	Application Not Assigned	Select -
		Durable Medical Company	1669707584	123456789	004335863	ANC	AH, IBC, AHA, IA		ORTHOTICS & PROSTHETIC	<input type="checkbox"/>	Application Not Assigned	Application Not Assigned	Select -

Step #	Action
	 <p>The screenshot shows the PEAR Provider Administration Tool interface. It is divided into three steps:</p> <ul style="list-style-type: none"> <li><b>Step 1. Add New Users:</b> Includes form fields for First Name (Leela), Last Name (Underwood), User Name (Leela.Underwood), Email (leela.uwood@ibx.com), Phone Number (123) 123-1234, and Job Title (Office worker). There is a checkbox for "Assign Location Admin Role".</li> <li><b>Step 2. Application &amp; Plan Assignment:</b> A table showing permissions for different plans (IBC, AH, IA, AHA) across four application categories: Comprehensive Visit, Analytics &amp; Reporting, and Practice Management. All permissions are currently set to "No".</li> <li><b>Step 3. Practice &amp; Role Assignment:</b> A table listing various practices. One practice is visible: "Doctors Of Philadelphia" with NPI 1427175462, Tax ID 237524796, Provider ID 004335775, PCP, and Plan AH,IBC,AHA,IA. It shows "Application Not Assigned" for Comprehensive Visit and "Application Not" for Analytics &amp; Reporting.</li> </ul>
<p>5.</p>	<p>Next, set the permissions for the new user based on their access needs. The <i>Plans</i> column lists the specific plans in which your organization participates. The applications noted across the top represent the PEAR applications available to your organization.</p> <p>To provision a new user to a selected plan and application, click the specific application tile. For example, to provision a new user to Practice Management for Independence Blue Cross only, click the tile in the IBC row under the Practice Management column. The value in the tile will change to Yes.</p> <p>To provision a new user to all applications for all plans, click each tile to change the value to Yes.</p> <p><b>Note:</b> Not all applications are relevant for all provider organizations.</p>

**Step #** **Action**

**Step 1. Add New Users:** Select "Add New User" to enter information for users you wish to create.

First Name\* Leela User Name\* Leela.Underwood Phone Number\* (123) 123-1234 Extension  
 Last Name\* Underwood Email\* leela.uwood@ibx.com Job Title\* Office worker  Assign Location Admin Role

**Step 2. Application & Plan Assignment:** Below are the available applications for each health plan; users listed above will have access to each application for each plan you wish allow permissions. Click each application to enable/disable permission.

Plans	Comprehensive Visit	Analytics & Reporting	Practice Management
IBC	No <input type="radio"/>	No <input type="radio"/>	Yes <input checked="" type="radio"/>
AH	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>
IA	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>
AHA	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>

**Step 3. Practice & Role Assignment:** Review the practices the users should have access to below.

Contract Parent	Contract Entity/Custom Group/Third Party	Practice Name	NPI	Tax ID	Provider ID	Provider Type	Plan	Main DBA Name	Specialty	Comprehensive Visit	Analytics & Reporting	Practice Management
Individual Entity/Practice/Custom Group/Third Party	Individual Practice	Doctors Of Philadelphia	1427175462	237524796	004335775	PCP	AH,IBC,AHA,IA	INTERNAL MEDICINE		Application Not Assigned	Application Not	Select

Once you select the plan and applications that the user needs to access, the drop-down list under each assigned application will automatically display the role(s) associated with the application.

**Step 1 - Enter User Demographics:** Complete the user demographic fields.

First Name\* Lee User Name\* Lee.uwood Phone Number\* (123) 123-1234 Extension  
 Last Name\* Uwood Email\* lee.uwood@ibx.com Job Title\* Office worker

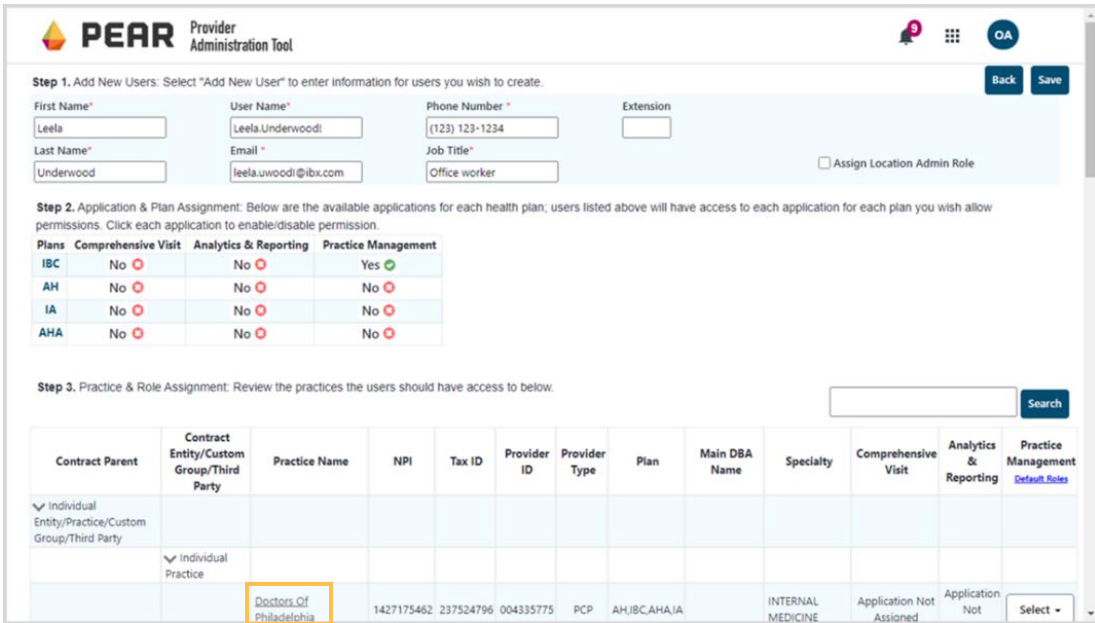
**Step 2 - Plan & Application Assignment:** Below are the available applications for each health plan; users listed above will have access to each application for each plan you wish allow permissions. Click each application to enable/disable permission.

Plans	Comprehensive Visit	Analytics & Reporting	Practice Management
IBC	No <input type="radio"/>	No <input type="radio"/>	Yes <input checked="" type="radio"/>
AH	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>
IA	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>
AHA	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>

**Step 3 - Practice & Role Assignment:** Review the practices the users should have access to below.

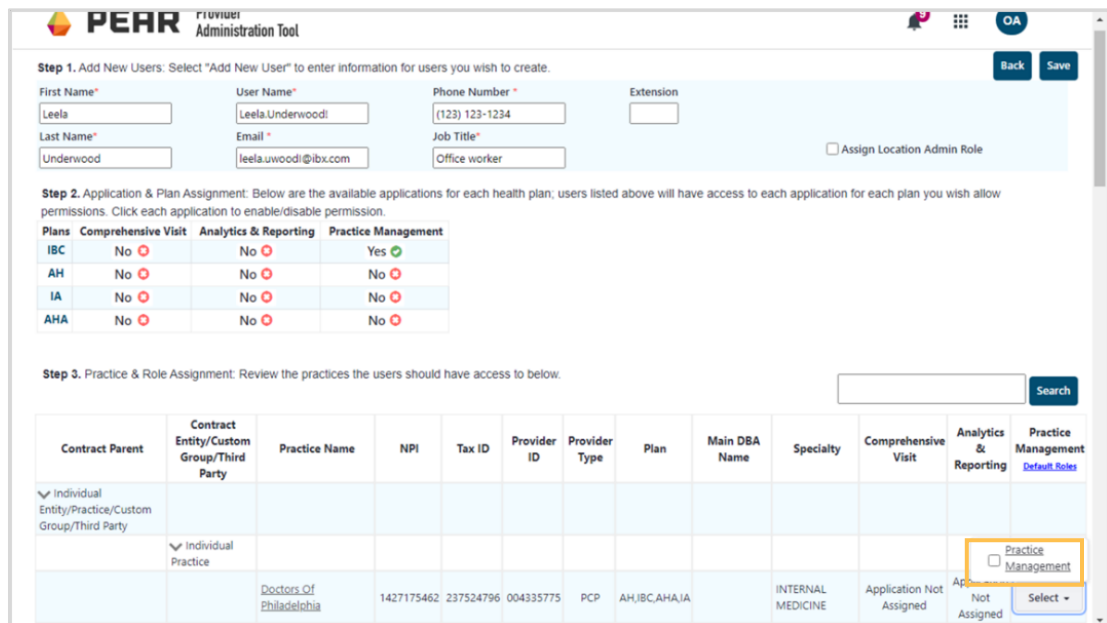
Contract Parent	Contract Entity/Custom Group/Third Party	Practice Name	NPI	Tax ID	Provider ID	Provider Type	Plan	Main DBA Name	Specialty	Comprehensive Visit	Analytics & Reporting	Practice Management
Individual Entity/Practice/Custom Group/Third Party	Individual Practice	Every Day Doctors Associates	1720422454	238425378	004335777	SPEC	AH,IBC,AHA,IA	FAMILY PRACTICE		Select	Select	Select

6. After selecting the plan and the applications, you need to select the practices or facilities to be made available to the end user. You can click the practice or facility name hyperlink for additional demographic details that will help you decide whether the new user should have access to that practice or facility.

Step #	Action																																																																								
	<div style="border: 1px solid #ccc; padding: 10px;">  <p><b>PEAR</b> Provider Administration Tool</p> <p><b>Step 1. Add New Users:</b> Select "Add New User" to enter information for users you wish to create. <span style="float: right;">Back Save</span></p> <p>First Name* <input type="text" value="Leela"/> User Name* <input type="text" value="Leela.Underwood@ibx.com"/> Phone Number* <input type="text" value="(123) 123-1234"/> Extension <input type="text"/></p> <p>Last Name* <input type="text" value="Underwood"/> Email* <input type="text" value="leela.uwood@ibx.com"/> Job Title* <input type="text" value="Office worker"/> <input type="checkbox"/> Assign Location Admin Role</p> <p><b>Step 2. Application &amp; Plan Assignment:</b> Below are the available applications for each health plan; users listed above will have access to each application for each plan you wish allow permissions. Click each application to enable/disable permission.</p> <table border="1"> <thead> <tr> <th>Plans</th> <th>Comprehensive Visit</th> <th>Analytics &amp; Reporting</th> <th>Practice Management</th> </tr> </thead> <tbody> <tr> <td>IBC</td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> <td>Yes <input checked="" type="radio"/></td> </tr> <tr> <td>AH</td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> </tr> <tr> <td>IA</td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> </tr> <tr> <td>AHA</td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> </tr> </tbody> </table> <p><b>Step 3. Practice &amp; Role Assignment:</b> Review the practices the users should have access to below. <input type="text"/> <span style="float: right;">Search</span></p> <table border="1"> <thead> <tr> <th>Contract Parent</th> <th>Contract Entity/Custom Group/Third Party</th> <th>Practice Name</th> <th>NPI</th> <th>Tax ID</th> <th>Provider ID</th> <th>Provider Type</th> <th>Plan</th> <th>Main DBA Name</th> <th>Specialty</th> <th>Comprehensive Visit</th> <th>Analytics &amp; Reporting</th> <th>Practice Management</th> </tr> </thead> <tbody> <tr> <td colspan="13">                     Individual Entity/Practice/Custom Group/Third Party                 </td> </tr> <tr> <td colspan="13">                     Individual Practice                 </td> </tr> <tr> <td></td> <td></td> <td>Doctors Of Philadelphia</td> <td>1427175462</td> <td>237524796</td> <td>004335775</td> <td>PCP</td> <td>AH,IBC,AHA,IA</td> <td></td> <td>INTERNAL MEDICINE</td> <td>Application Not Assigned</td> <td>Application Not</td> <td>Select -</td> </tr> </tbody> </table> </div> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>As an Organization Administrator, you can provision end users at the Entity level or by individual practice or facility.</li> <li>Location Administrators will only be able to select from the practices or facilities for which they are provisioned.</li> </ul>	Plans	Comprehensive Visit	Analytics & Reporting	Practice Management	IBC	No <input type="radio"/>	No <input type="radio"/>	Yes <input checked="" type="radio"/>	AH	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>	IA	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>	AHA	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>	Contract Parent	Contract Entity/Custom Group/Third Party	Practice Name	NPI	Tax ID	Provider ID	Provider Type	Plan	Main DBA Name	Specialty	Comprehensive Visit	Analytics & Reporting	Practice Management	Individual Entity/Practice/Custom Group/Third Party													Individual Practice															Doctors Of Philadelphia	1427175462	237524796	004335775	PCP	AH,IBC,AHA,IA		INTERNAL MEDICINE	Application Not Assigned	Application Not	Select -
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7.	When you click the practice or facility name hyperlink, you will be able to view demographic information about that practice or facility. Click the <i>Close</i> button to go back to the <i>Add New Users</i> page after reviewing the details.																																																																								

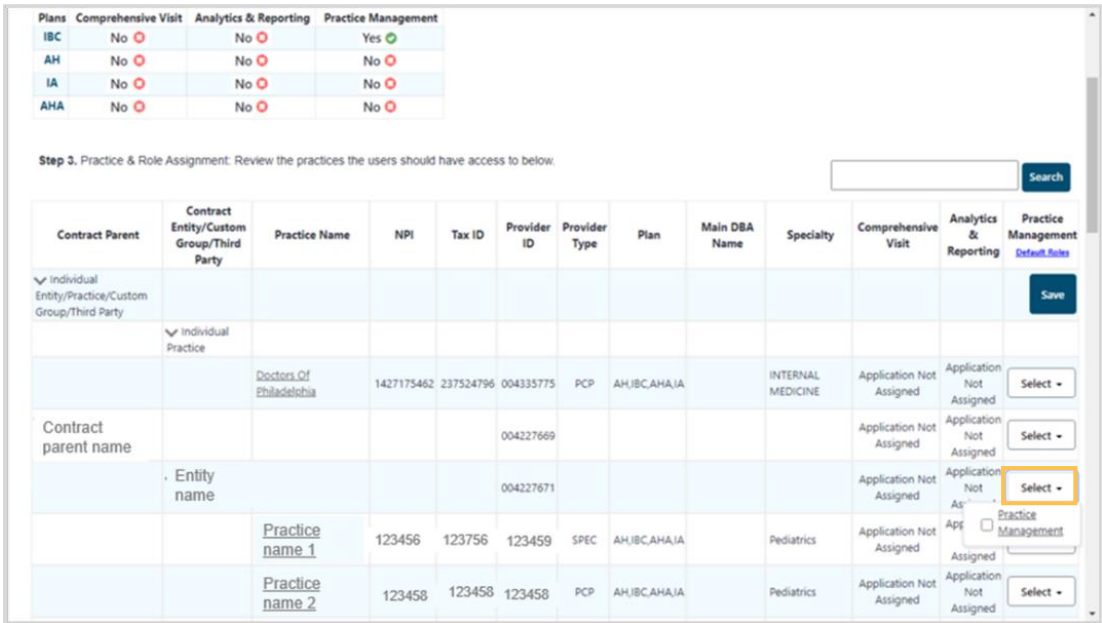
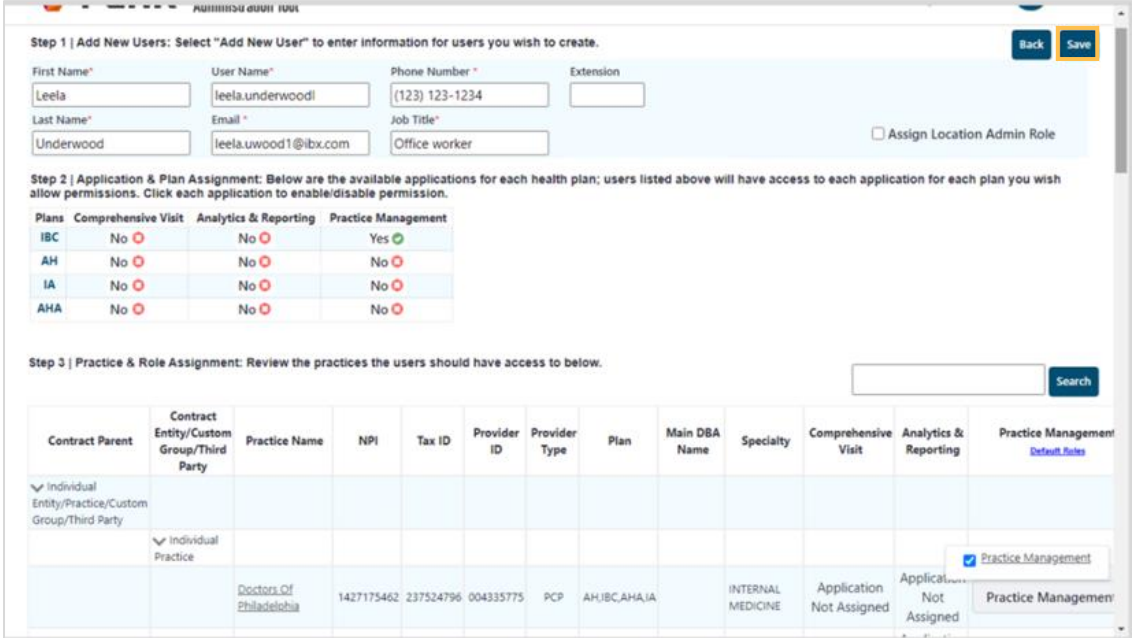
Step #	Action
	<p>The screenshot shows the 'Add New Users' process. In Step 2, a table lists applications for various health plans (IBC, AH, IA, AHA). A modal window for 'Doctors Of Philadelphia' is open, displaying details like 'Contract Parent', 'Contract Entity', 'Primary DBA Name', 'Practice Specialty', and 'Address(es)'. A 'Close' button is highlighted in the modal.</p>

- Once you have identified the practice(s) to which you want to assign the new user, click the drop-down menu under an application to select the application-specific role for the new user at the selected practice.



**Note:** Keep these guidelines in mind while assigning application-specific roles:

Step #	Action
	<ul style="list-style-type: none"> <li>• If the user needs access to multiple practices, you can assign a different role for each practice.</li> <li>• If the user needs access to multiple applications, you must select application-specific roles from the drop-down menu for each assigned application.</li> <li>• You must assign at least one role for access to the selected application.</li> <li>• For a user provisioned access to PEAR PM, the only role available is the Practice Management role.</li> <li>• For a user provisioned access to PEAR CV, the only role available is the Comprehensive Visit role:               <ul style="list-style-type: none"> <li>○ For a user provisioned access to PEAR CV, credentialed providers attesting forms are required to indicate their practitioner NPI.</li> <li>○ You can also designate the new user as a Location Administrator for any of the selected practices by checking the <i>Assign Location Admin role</i> check box on the <i>USERS</i> tab.</li> <li>○ If you associate PEAR CV with at least one practice, you will be prompted to enter the practitioner’s individual NPI. Although this field is optional, all credentialed providers responsible for attestation in PEAR CV are required to note their individual NPI. If no NPI is entered, the new user will not be permitted to attest in PEAR CV. Once entered, the NPI will display in the end user account. Only Organization and Location Administrators are permitted to enter or modify an NPI. NPI validation occurs upon end user creation in PAT.</li> <li>○ You cannot link a practitioner’s individual NPI to multiple end users.</li> </ul> </li> <li>• For a PEAR AR user, you can assign a clinical, financial, or specialist role:               <ul style="list-style-type: none"> <li>○ The clinical role has access to the Population Health dashboard, Population Health reports, and Attributed Member Snapshot for Primary Care Physicians (PCPs).</li> <li>○ The financial role has access to the Financial dashboard and any financial or incentive reports published through PEAR AR.</li> <li>○ The specialist role has access to reports and dashboards designed for offices and groups with specialties other than Family Practice, Internal Medicine, and PCPs.</li> <li>○ If an end user needs to access capitation rosters, you should assign the Clinical or Specialist role.</li> </ul> </li> </ul>
9.	<p>To assign the same role to a user for all practices under an Entity record to which the user is provisioned, select the role from the application drop-down menus at the top of the list. The role(s) selected will cascade to all practices within the contract.</p>

Step #	Action
	 <p><b>Note:</b> Cascading roles is only available when provisioning at the Entity level, that is, for larger health systems. For smaller organizations, Organization and Location Administrators will need to indicate role assignment for each practice or facility.</p>
10.	<p>Click the Save button.</p> 

Step #	Action
	<b>Note:</b> If you click the <i>Back</i> button without saving, you will return to the <i>USERS</i> tab and your request to add a new user will be cancelled.

11. After you click *Save*, you will be asked to confirm the selections. Click the *OK* button.

The screenshot shows the PEAR Provider Administration Tool interface. It is on 'Step 1 | Add New Users'. The form contains the following information:

- First Name:** Leela
- User Name:** leela.underwood1
- Phone Number:** (123) 123-1234
- Extension:** (empty)
- Last Name:** Underwood
- Email:** leela.uwood1@ibx.com
- Job Title:** office worker
- Assign Location Admin Role

**Step 2 | Application & Plan Assignment:** Below are the available applications for each health plan; users listed above will have access to each application for each plan you wish allow permissions. Click each application to enable/disable permission.

Plans	Comprehensive Visit	Analytics & Reporting	Practice Management
IBC	No <input type="radio"/>	No <input type="radio"/>	Yes <input checked="" type="radio"/>
AH	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>
IA	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>
AHA	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>

A confirmation dialog box is displayed in the center: "Are you sure about user association?" with "CANCEL" and "OK" buttons.

**Step 3 | Practice & Role Assignment:** Review the practices the users should have access to below.

Contract Parent	Contract Entity/Custom Group/Third Party	Practice Name	NPI	Tax ID	Provider ID	Provider Type	Plan	Main DBA Name	Specialty	Comprehensive Visit	Analytics & Reporting	Practice Management
Individual Entity/Practice/Custom Group/Third Party	Individual Practice	Doctors Of	1427175462	237524706	004335775	PCP	AH IBC AHA IA	INTERNAL	Application	Application	Not	Practice Management

12. Once you save the user information, a confirmation message is displayed at the bottom of the screen indicating that the user has been created. The new user will receive two automated emails once successfully provisioned — one with username and the other with their temporary password.

The screenshot shows the same PEAR Provider Administration Tool interface as in step 11. The form fields are now empty. A green success message is displayed at the bottom left of the form area: "Success: User has been created successfully!" with a close button (X).

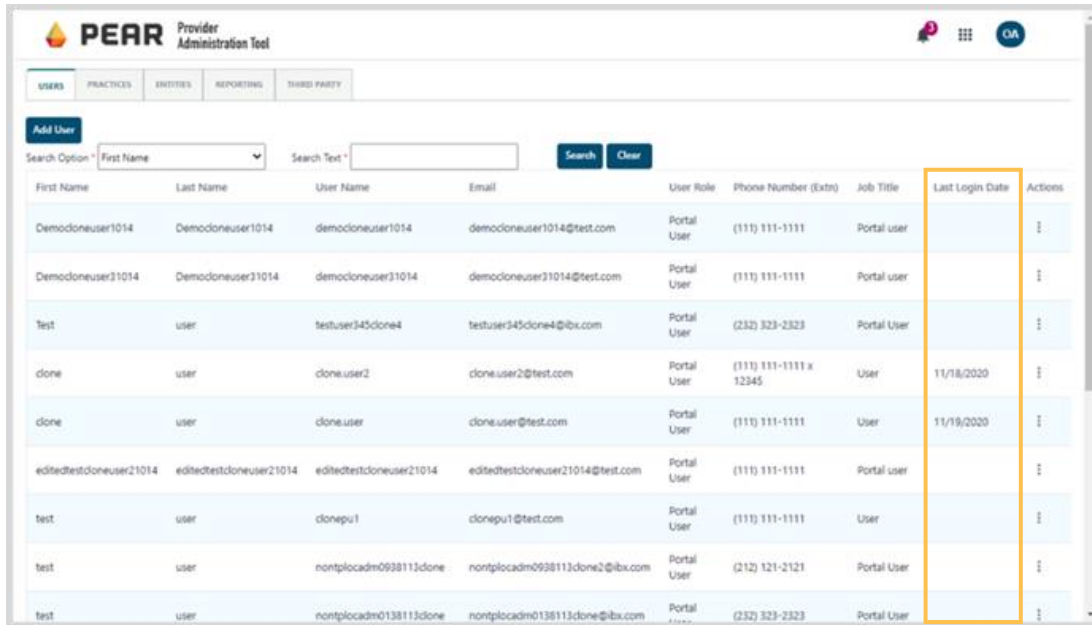
## Viewing user log

After you have added new users, these users will appear on the master list of all users you manage on the *USERS* tab. You can view the following details about your users on this tab:

- first name
- last name
- username
- email
- user role
- phone number
- job title
- last login date

First Name	Last Name	User Name	Email	User Role	Phone Number (Extn)	Job Title	Last Login Date	Actions
Democloneuser1014	Democloneuser1014	democloneuser1014	democloneuser1014@test.com	Portal User	(111) 111-1111	Portal user		
Democloneuser31014	Democloneuser31014	democloneuser31014	democloneuser31014@test.com	Portal User	(111) 111-1111	Portal user		
Test	user	testuser345clone4	testuser345clone4@ibx.com	Portal User	(232) 323-2323	Portal User		
clone	user	clone.user2	clone.user2@test.com	Portal User	(111) 111-1111 x 12345	User	11/18/2020	
clone	user	clone.user	clone.user@test.com	Portal User	(111) 111-1111	User	11/19/2020	
editedtestcloneuser21014	editedtestcloneuser21014	editedtestcloneuser21014	editedtestcloneuser21014@test.com	Portal User	(111) 111-1111	Portal user		
test	user	clonepu1	clonepu1@test.com	Portal User	(111) 111-1111	User		
test	user	nontplocadm0938113clone	nontplocadm0938113clone2@ibx.com	Portal User	(212) 121-2121	Portal User		
test	user	nontplocadm0138113clone	nontplocadm0138113clone@ibx.com	Portal User	(232) 323-2323	Portal User		

The *Last Login Date* field displays the date of the last login attempt and not the date of the last successful login.

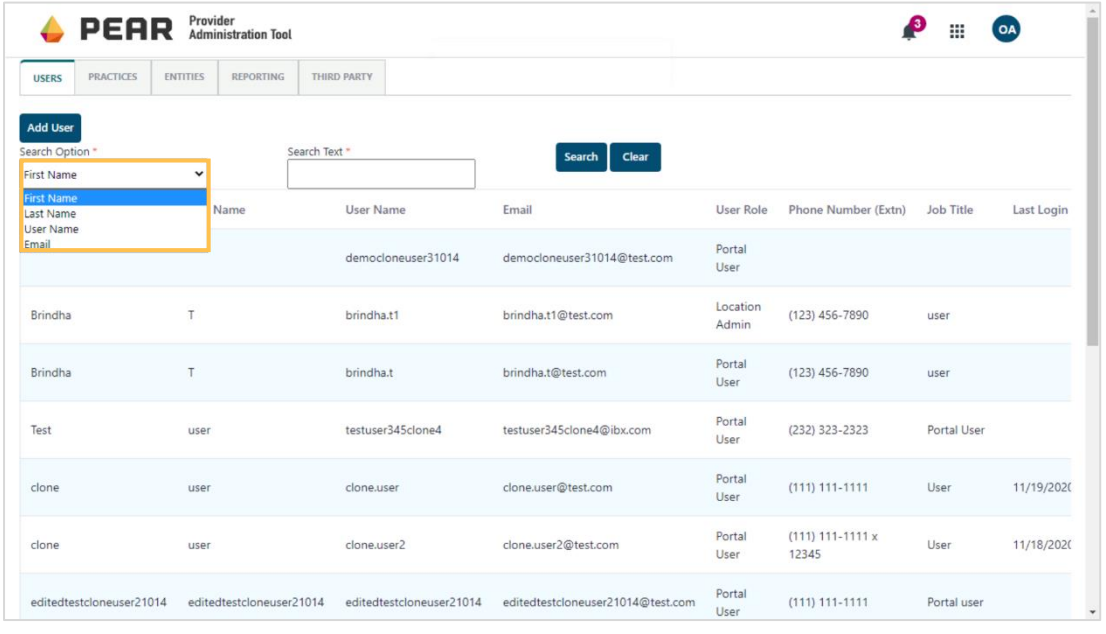
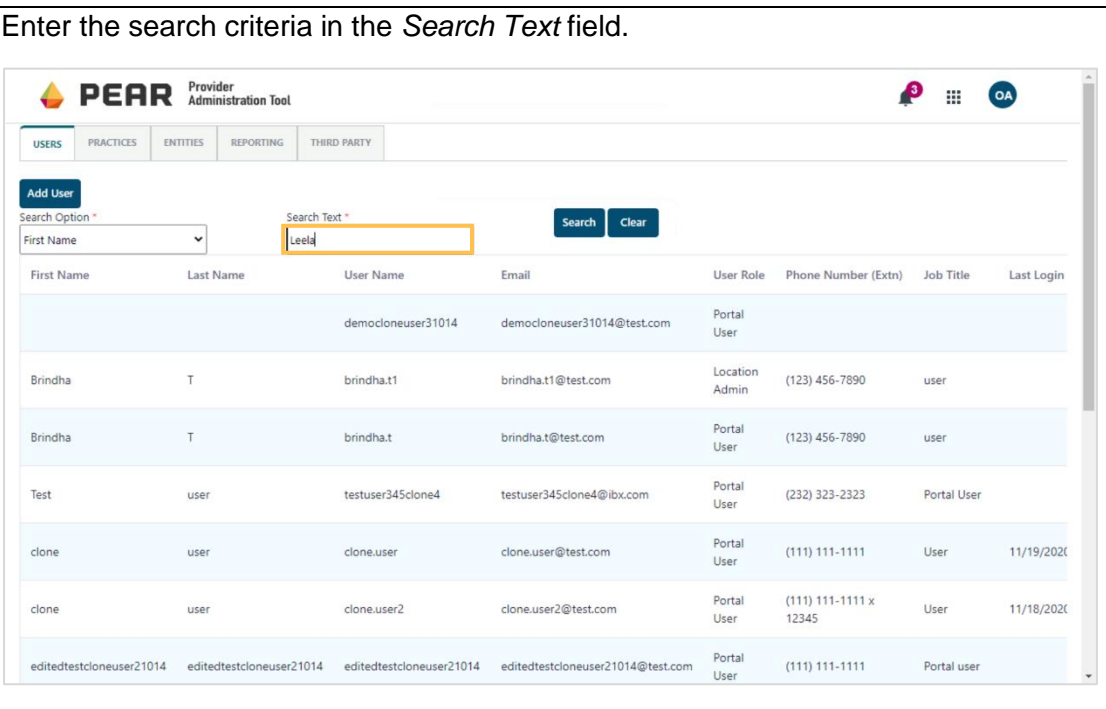


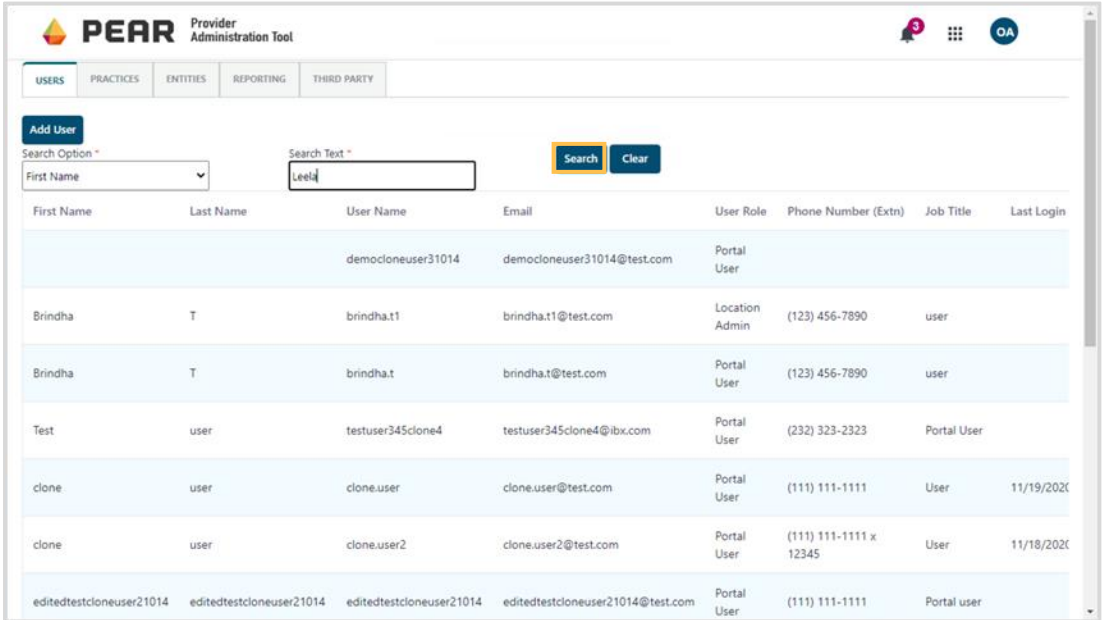
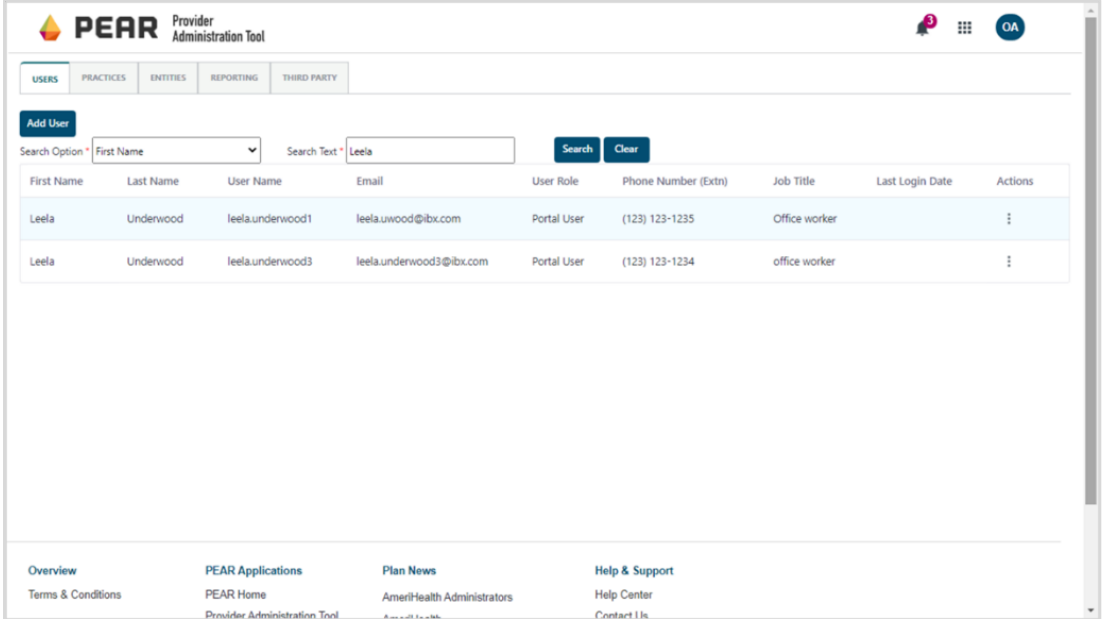
**Note:** You can view the total number of users at the bottom of the page and navigate through the multiple pages using the arrow buttons on the right-hand side.

### Searching for an existing user in PAT

You can search for an existing user on the *USERS* tab. Perform the following steps to search for an existing user:

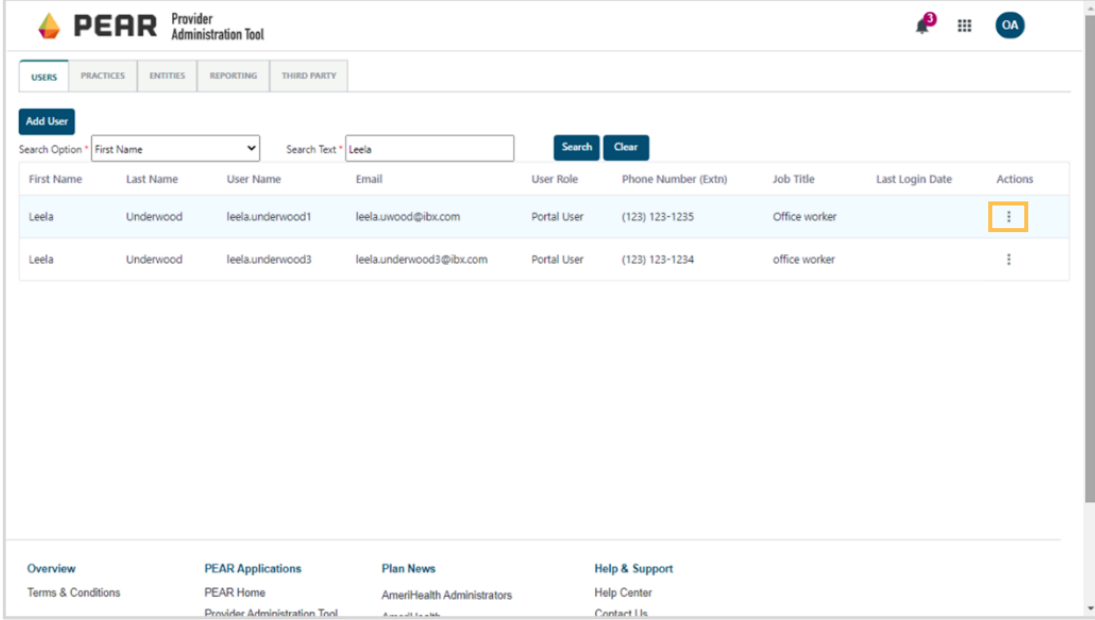
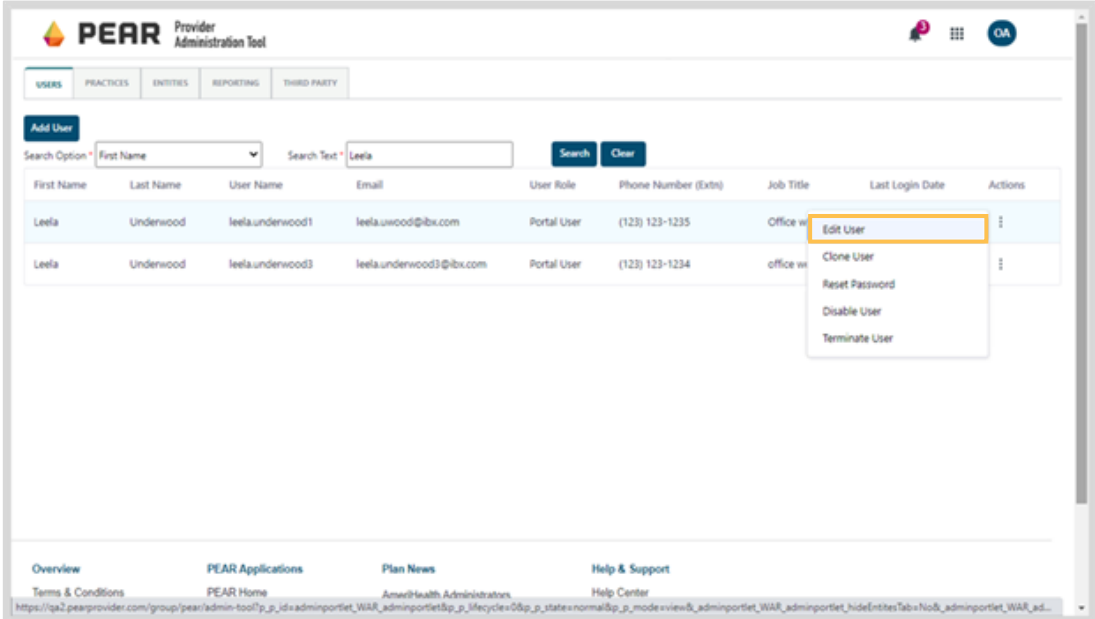
Step #	Action
1.	From the <i>Search Option</i> drop-down menu on the <i>USERS</i> tab, select the attribute to use for your search. The available options are: <ul style="list-style-type: none"> <li>• First Name</li> <li>• Last Name</li> <li>• Username</li> <li>• Email</li> </ul>

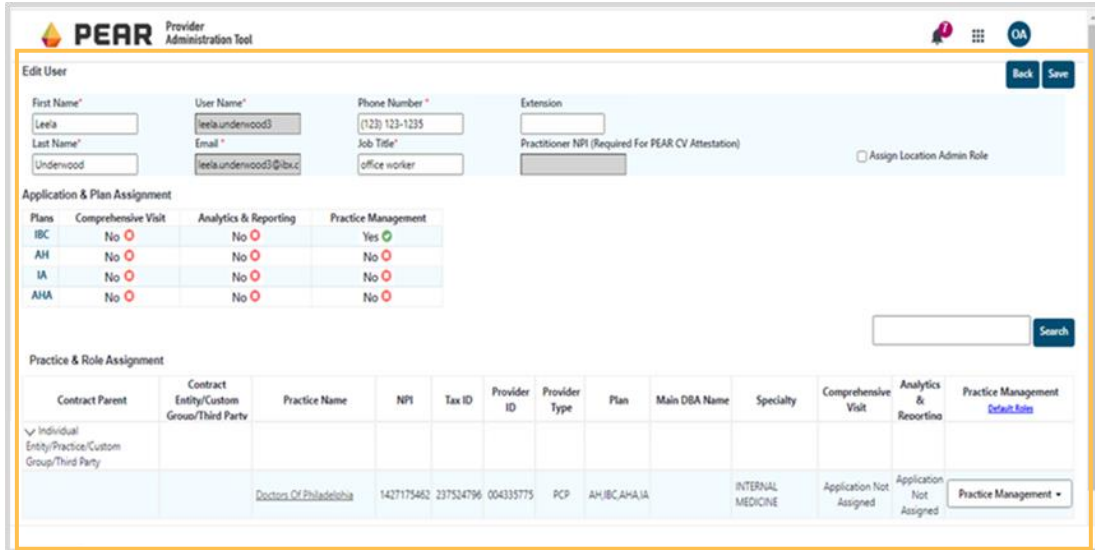
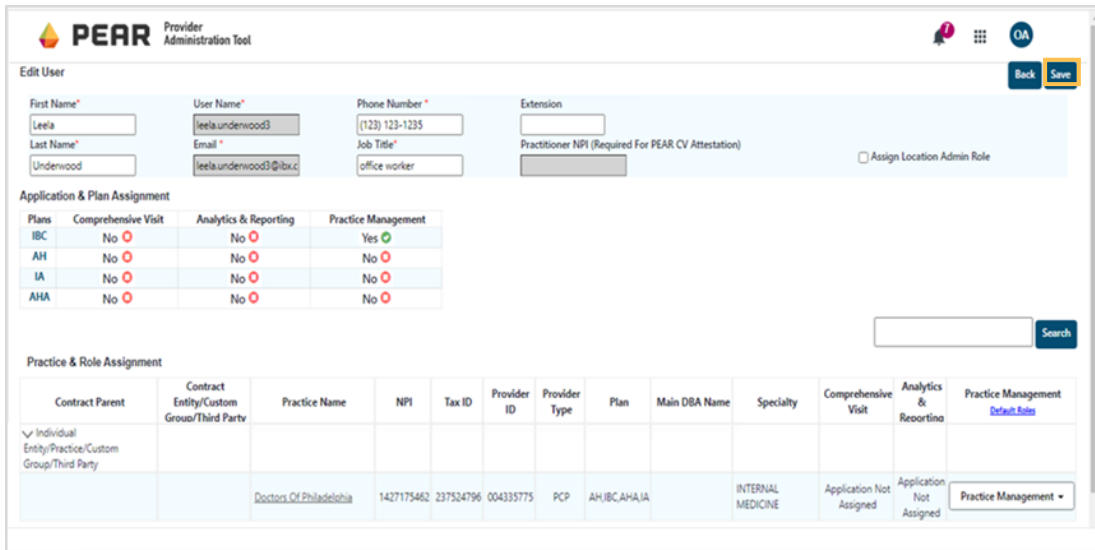
Step #	Action																																																																
	 <p>PEAR Provider Administration Tool</p> <p>USERS PRACTICES ENTITIES REPORTING THIRD PARTY</p> <p>Add User</p> <p>Search Option *              First Name              Last Name              User Name              Email</p> <p>Search Text *  <input type="text"/></p> <p>Search Clear</p> <table border="1"> <thead> <tr> <th>Name</th> <th>User Name</th> <th>Email</th> <th>User Role</th> <th>Phone Number (Extn)</th> <th>Job Title</th> <th>Last Login</th> </tr> </thead> <tbody> <tr> <td></td> <td>democloneuser31014</td> <td>democloneuser31014@test.com</td> <td>Portal User</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Brindha</td> <td>T</td> <td>brindha.t1</td> <td>brindha.t1@test.com</td> <td>Location Admin</td> <td>(123) 456-7890</td> <td>user</td> </tr> <tr> <td>Brindha</td> <td>T</td> <td>brindha.t</td> <td>brindha.t@test.com</td> <td>Portal User</td> <td>(123) 456-7890</td> <td>user</td> </tr> <tr> <td>Test</td> <td>user</td> <td>testuser345clone4</td> <td>testuser345clone4@ibx.com</td> <td>Portal User</td> <td>(232) 323-2323</td> <td>Portal User</td> </tr> <tr> <td>clone</td> <td>user</td> <td>clone.user</td> <td>clone.user@test.com</td> <td>Portal User</td> <td>(111) 111-1111</td> <td>User 11/19/2020</td> </tr> <tr> <td>clone</td> <td>user</td> <td>clone.user2</td> <td>clone.user2@test.com</td> <td>Portal User</td> <td>(111) 111-1111 x 12345</td> <td>User 11/18/2020</td> </tr> <tr> <td>editedtestcloneuser21014</td> <td>editedtestcloneuser21014</td> <td>editedtestcloneuser21014</td> <td>editedtestcloneuser21014@test.com</td> <td>Portal User</td> <td>(111) 111-1111</td> <td>Portal user</td> </tr> </tbody> </table>	Name	User Name	Email	User Role	Phone Number (Extn)	Job Title	Last Login		democloneuser31014	democloneuser31014@test.com	Portal User				Brindha	T	brindha.t1	brindha.t1@test.com	Location Admin	(123) 456-7890	user	Brindha	T	brindha.t	brindha.t@test.com	Portal User	(123) 456-7890	user	Test	user	testuser345clone4	testuser345clone4@ibx.com	Portal User	(232) 323-2323	Portal User	clone	user	clone.user	clone.user@test.com	Portal User	(111) 111-1111	User 11/19/2020	clone	user	clone.user2	clone.user2@test.com	Portal User	(111) 111-1111 x 12345	User 11/18/2020	editedtestcloneuser21014	editedtestcloneuser21014	editedtestcloneuser21014	editedtestcloneuser21014@test.com	Portal User	(111) 111-1111	Portal user								
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	democloneuser31014	democloneuser31014@test.com	Portal User																																																														
Brindha	T	brindha.t1	brindha.t1@test.com	Location Admin	(123) 456-7890	user																																																											
Brindha	T	brindha.t	brindha.t@test.com	Portal User	(123) 456-7890	user																																																											
Test	user	testuser345clone4	testuser345clone4@ibx.com	Portal User	(232) 323-2323	Portal User																																																											
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clone	user	clone.user2	clone.user2@test.com	Portal User	(111) 111-1111 x 12345	User 11/18/2020																																																											
editedtestcloneuser21014	editedtestcloneuser21014	editedtestcloneuser21014	editedtestcloneuser21014@test.com	Portal User	(111) 111-1111	Portal user																																																											
2.	<p>Enter the search criteria in the <i>Search Text</i> field.</p>  <p>PEAR Provider Administration Tool</p> <p>USERS PRACTICES ENTITIES REPORTING THIRD PARTY</p> <p>Add User</p> <p>Search Option *              First Name</p> <p>Search Text *  <input type="text" value="Leela"/></p> <p>Search Clear</p> <table border="1"> <thead> <tr> <th>First Name</th> <th>Last Name</th> <th>User Name</th> <th>Email</th> <th>User Role</th> <th>Phone Number (Extn)</th> <th>Job Title</th> <th>Last Login</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>democloneuser31014</td> <td>democloneuser31014@test.com</td> <td>Portal User</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Brindha</td> <td>T</td> <td>brindha.t1</td> <td>brindha.t1@test.com</td> <td>Location Admin</td> <td>(123) 456-7890</td> <td>user</td> <td></td> </tr> <tr> <td>Brindha</td> <td>T</td> <td>brindha.t</td> <td>brindha.t@test.com</td> <td>Portal User</td> <td>(123) 456-7890</td> <td>user</td> <td></td> </tr> <tr> <td>Test</td> <td>user</td> <td>testuser345clone4</td> <td>testuser345clone4@ibx.com</td> <td>Portal User</td> <td>(232) 323-2323</td> <td>Portal User</td> <td></td> </tr> <tr> <td>clone</td> <td>user</td> <td>clone.user</td> <td>clone.user@test.com</td> <td>Portal User</td> <td>(111) 111-1111</td> <td>User</td> <td>11/19/2020</td> </tr> <tr> <td>clone</td> <td>user</td> <td>clone.user2</td> <td>clone.user2@test.com</td> <td>Portal User</td> <td>(111) 111-1111 x 12345</td> <td>User</td> <td>11/18/2020</td> </tr> <tr> <td>editedtestcloneuser21014</td> <td>editedtestcloneuser21014</td> <td>editedtestcloneuser21014</td> <td>editedtestcloneuser21014@test.com</td> <td>Portal User</td> <td>(111) 111-1111</td> <td>Portal user</td> <td></td> </tr> </tbody> </table>	First Name	Last Name	User Name	Email	User Role	Phone Number (Extn)	Job Title	Last Login			democloneuser31014	democloneuser31014@test.com	Portal User				Brindha	T	brindha.t1	brindha.t1@test.com	Location Admin	(123) 456-7890	user		Brindha	T	brindha.t	brindha.t@test.com	Portal User	(123) 456-7890	user		Test	user	testuser345clone4	testuser345clone4@ibx.com	Portal User	(232) 323-2323	Portal User		clone	user	clone.user	clone.user@test.com	Portal User	(111) 111-1111	User	11/19/2020	clone	user	clone.user2	clone.user2@test.com	Portal User	(111) 111-1111 x 12345	User	11/18/2020	editedtestcloneuser21014	editedtestcloneuser21014	editedtestcloneuser21014	editedtestcloneuser21014@test.com	Portal User	(111) 111-1111	Portal user	
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3.	<p>Click <i>Search</i>.</p>																																																																

Step #	Action
	 <p><b>Note:</b> You can click the <i>Clear</i> button to remove the search criteria.</p>
4.	<p>After clicking the <i>Search</i> button, the search results are displayed on the <i>USERS</i> tab.</p> 

## Editing an existing user

As a PEAR portal administrator, you will often need to edit the access of an existing user. Perform the following steps to edit the access of an existing user:

Step #	Action
1.	<p>Search for the user you want to edit. Then, click the <i>Actions</i> button for the selected user.</p>  <p>The screenshot shows the PEAR Provider Administration Tool interface. At the top, there are navigation tabs for 'USERS', 'PRACTICES', 'ENTITIES', 'REPORTING', and 'THIRD PARTY'. Below these is an 'Add User' button and a search section with a dropdown for 'Search Option' (set to 'First Name') and a 'Search Text' input field containing 'Leela'. There are 'Search' and 'Clear' buttons. Below the search is a table with columns: First Name, Last Name, User Name, Email, User Role, Phone Number (Extn), Job Title, Last Login Date, and Actions. Two rows are visible, both for 'Leela Underwood'. The 'Actions' column for the first row is highlighted with a yellow box.</p>
2.	<p>Select the <i>Edit User</i> option from the drop-down list that is displayed.</p>  <p>This screenshot is similar to the previous one, but the 'Actions' dropdown menu for the first user is open. The menu items are: Edit User, Clone User, Reset Password, Disable User, and Terminate User. The 'Edit User' option is highlighted with a yellow box.</p>
3.	<p>The <i>Edit User</i> page is displayed. Edit the user details by following the same rules as the rules to add new users covered in <a href="#">Adding a New User</a>. Recall that you will not be</p>

Step #	Action
	<p>able to edit the username and email address as these support the user's logon credentials.</p> 
4.	<p>Click the <b>Save</b> button.</p> 
5.	<p>A pop-up window is displayed asking you to confirm the updates you just made. Click the <b>OK</b> button.</p>

Step #	Action
--------	--------

**PEAR** Provider Administration Tool

**Edit User**

First Name: Leela  
Last Name: Underwood  
User Name: leela.underwood3  
Email: leela.underwood3@ibx.com  
Phone Number: (123) 123-1235  
Extension:   
Job Title: office worker  
Practitioner NPI (Required For PEAR CV Attestation):   
 Assign Location Admin Role

**Application & Plan Assignment**

Plans	Comprehensive Visit	Analytics & Reporting	Practice Management
IBC	No <input type="radio"/>	No <input type="radio"/>	Yes <input checked="" type="radio"/>
AH	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>
IA	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>
AHA	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>

**Practice & Role Assignment**

Contract Parent	Contract Entity/Custom Group/Third Party	Practice Name	NPI	ID	Type	JA Name	Specialty	Comprehensive Visit	Analytics & Reporting	Practice Management	
Individual Entity/Practice/Custom Group/Third Party		Doctors Of Philadelphia	1427175462	237524796	004335775	PCP	AH,IBC,AHA,JA	INTERNAL MEDICINE	Application Not Assigned	Application Not Assigned	Practice Management - <a href="#">Default Settings</a>

Overview: PEAR Applications, Plan News, Help & Support  
Terms & Conditions: PEAR Home, AmeriHealth Administrators, Help Center, Contact Us

**Note:** Click the *CANCEL* button if you need to continue editing and do not want to confirm the updates you just made.

Once you confirm the updates, a confirmation message is displayed at the bottom-left corner of the screen indicating that the user has been updated successfully.

**PEAR** Provider Administration Tool

USERS | PRACTICES | ENTITIES | REPORTING | THIRD PARTY

**Add User**

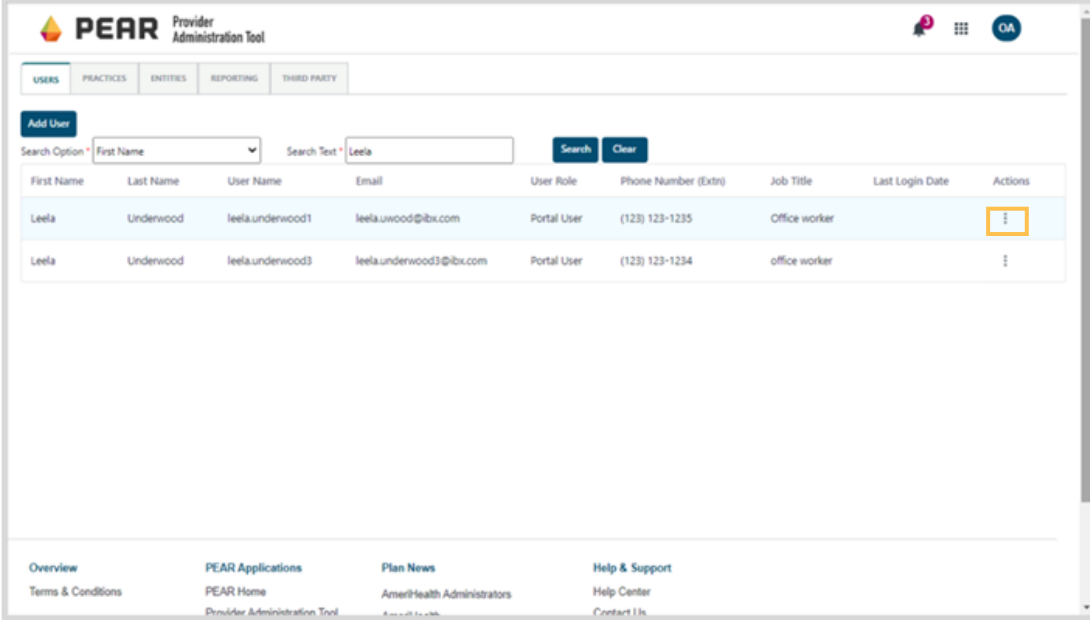
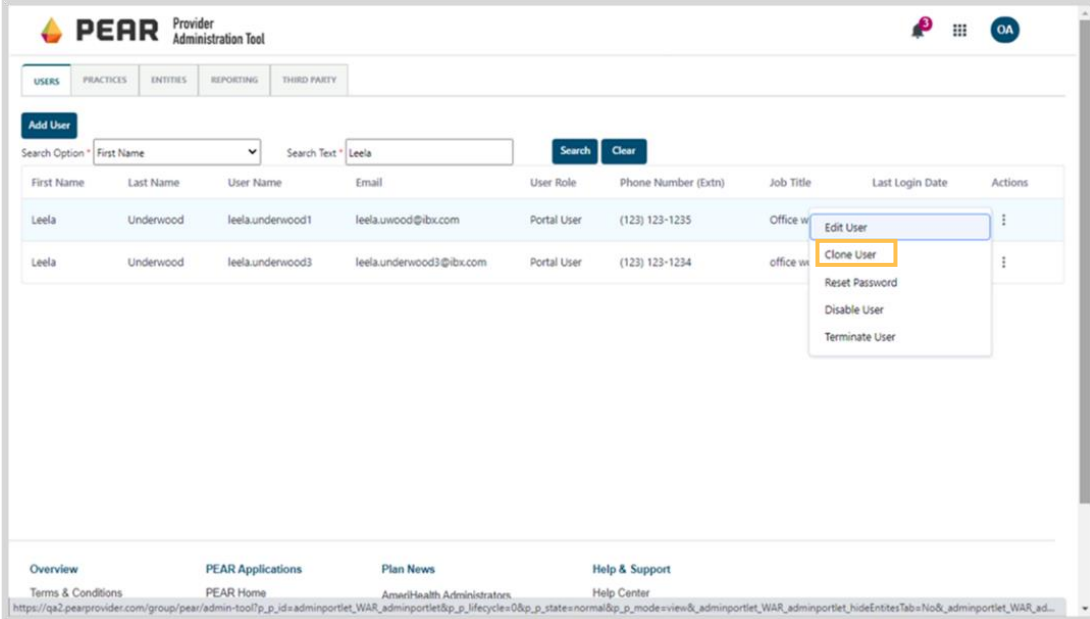
Search Option: First Name | Search Text: | Search | Clear

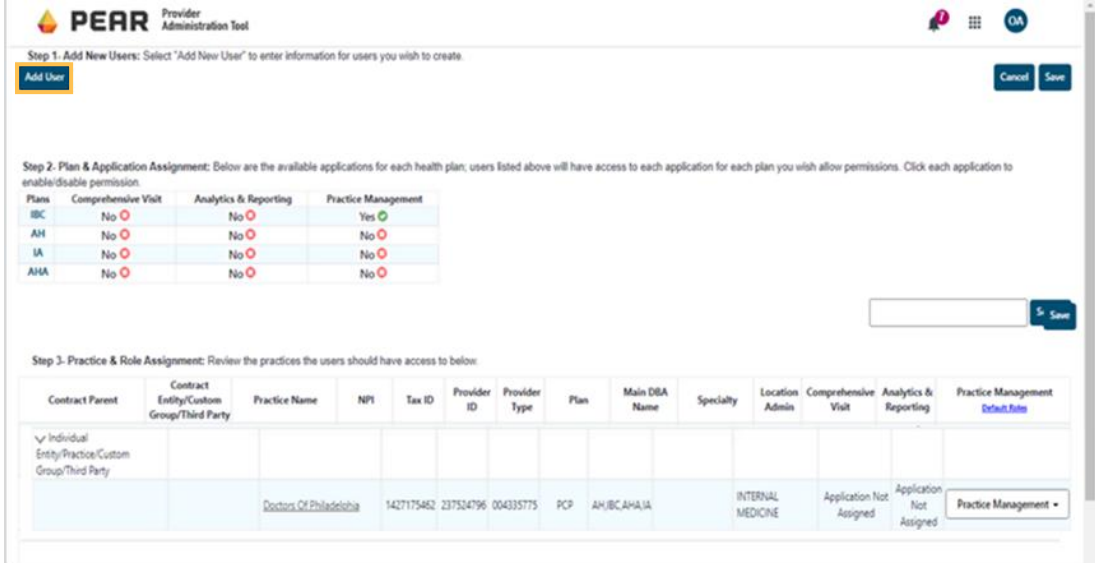
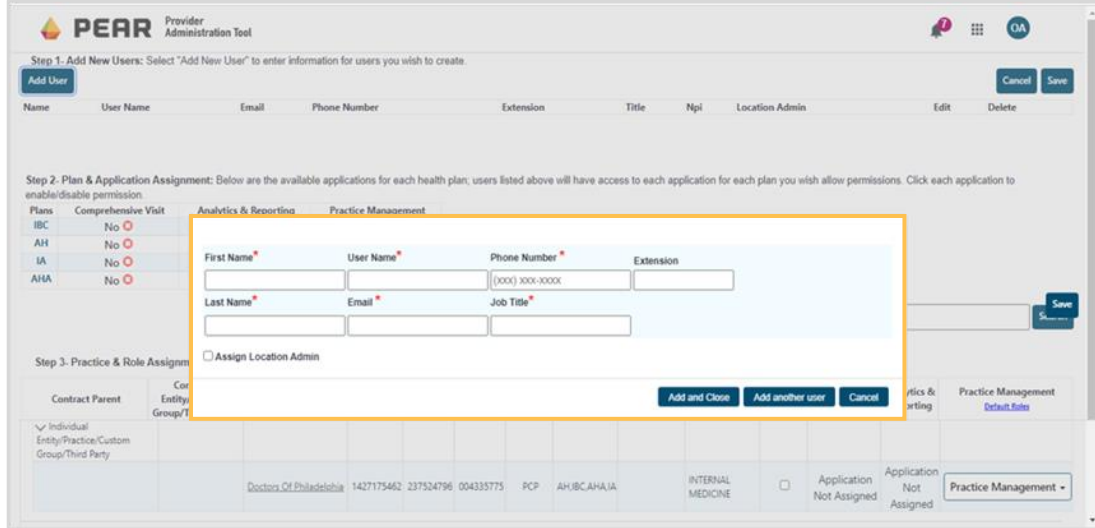
First Name	Last Name	User Name	Email	User Role	Phone Number (Extn)	Job Title	Last Login Date	Actions
Democloneuser1014	Democloneuser1014	democloneuser1014	democloneuser1014@test.com	Portal User	(111) 111-1111	Portal user		
Democloneuser31014	Democloneuser31014	democloneuser31014	democloneuser31014@test.com	Portal User	(111) 111-1111	Portal user		
Test	user	testuser345clone4	testuser345clone4@ibx.com	Portal User	(232) 323-2323	Portal User		
clone	user	clone.user	clone.user@test.com	Portal User	(111) 111-1111	User	11/19/2020	
clone	user	clone.user2	clone.user2@test.com	Portal User	(111) 111-1111 x 12345	User	11/18/2020	
editedtestcloneuser21014	editedtestcloneuser21014	editedtestcloneuser21014	editedtestcloneuser21014@test.com	Portal User	(111) 111-1111	Portal user		
test	user	nontportaluser0930114	nontportaluser0930114@ibx.com	Portal User	(232) 323-2323	Portal User		
		nontportaluser093015	nontportaluser093015@ibx.com	Portal User	(232) 323-2323	Portal User		
test	user	nontploadm09301clone1	nontploadm09301clone1@ibx.com	Location Admin	(232) 323-2323	Portal User		

Success: User has been updated successfully

## Cloning an existing user

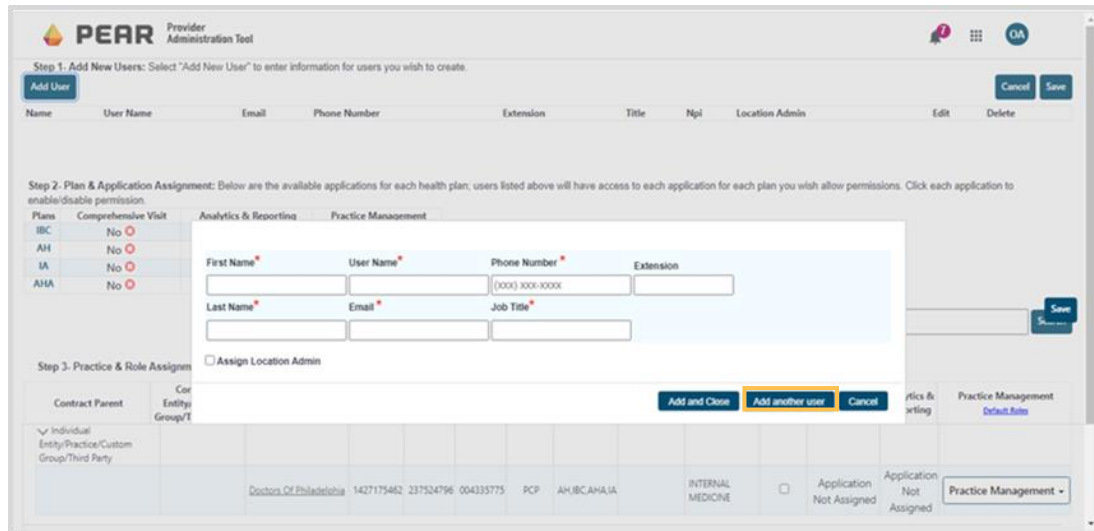
Using the *Clone User* feature, you can create a batch of up to 20 new users at one time with the exact same roles and permissions of a current user. Perform the following steps to clone an existing user:

Step #	Action
1.	<p>Search for the user you want to clone. Then, click the <i>Actions</i> button.</p>  <p>The screenshot shows the PEAR Provider Administration Tool interface. At the top, there are navigation tabs: USERS, PRACTICES, ENTITIES, REPORTING, and THIRD PARTY. Below these is an 'Add User' button and a search section with a dropdown for 'Search Option' set to 'First Name' and a text input for 'Search Text' containing 'Leela'. There are 'Search' and 'Clear' buttons. Below the search is a table with columns: First Name, Last Name, User Name, Email, User Role, Phone Number (Extn), Job Title, Last Login Date, and Actions. Two rows are visible, both for 'Leela Underwood'. The 'Actions' column for the first row has a dropdown menu icon highlighted with a yellow box.</p>
2.	<p>Select the <i>Clone User</i> option from the drop-down list that is displayed.</p>  <p>This screenshot is similar to the first one, but the dropdown menu for the 'Actions' column of the first user is open. The menu items are: Edit User, Clone User (highlighted with a yellow box), Reset Password, Disable User, and Terminate User.</p>

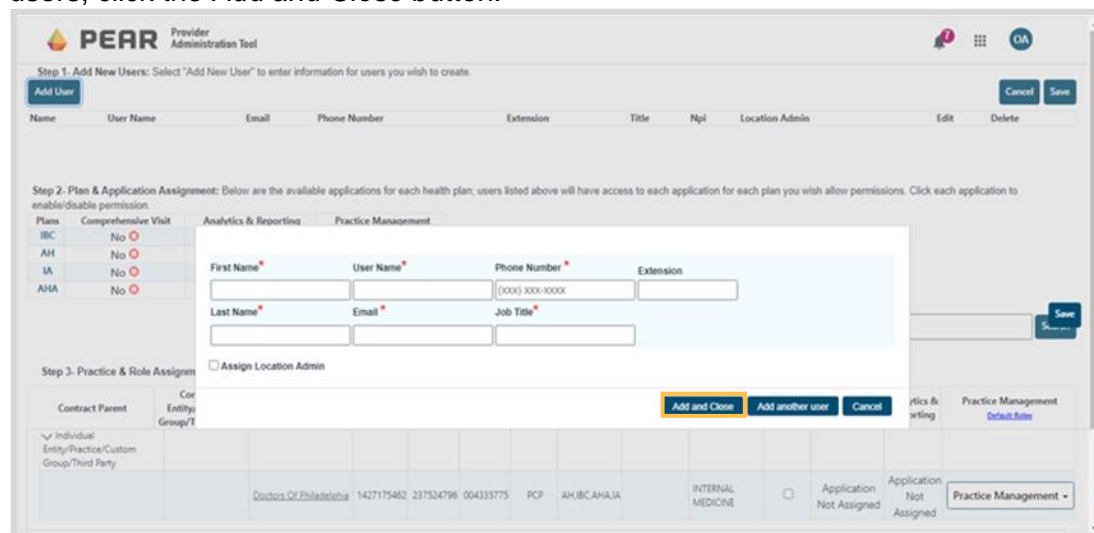
Step #	Action
3.	<p>Upon selecting the <i>Clone User</i> option, the details and permissions of the user to be cloned are displayed. Click the <i>Add User</i> button.</p> 
4.	<p>The <i>Create new user</i> pop-up window is displayed. Enter new user details, including:</p> <ul style="list-style-type: none"> <li>• first name</li> <li>• last name</li> <li>• email</li> <li>• phone number (with extension)</li> <li>• job title</li> <li>• Practitioner NPI (optional field, to be updated if you want to allow the credentialed provider to attest PEAR CV forms)</li> </ul> <p>Enter a unique username.</p> <p><b>Note:</b> Recommended username format is <code>FirstName.LastName</code>. You can add a number after the last name in case the username has been taken.</p> 

Step #	Action
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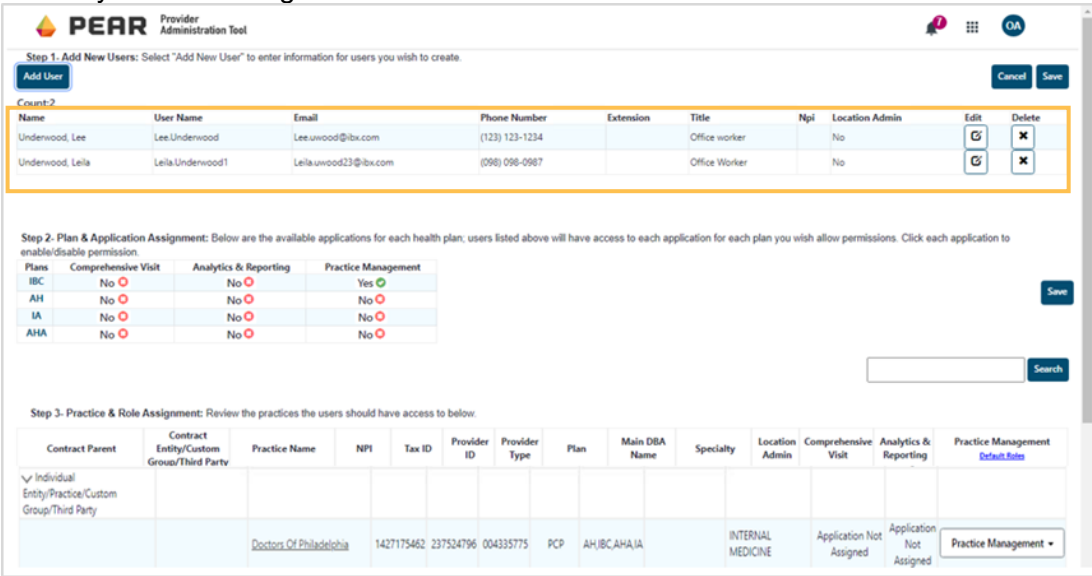
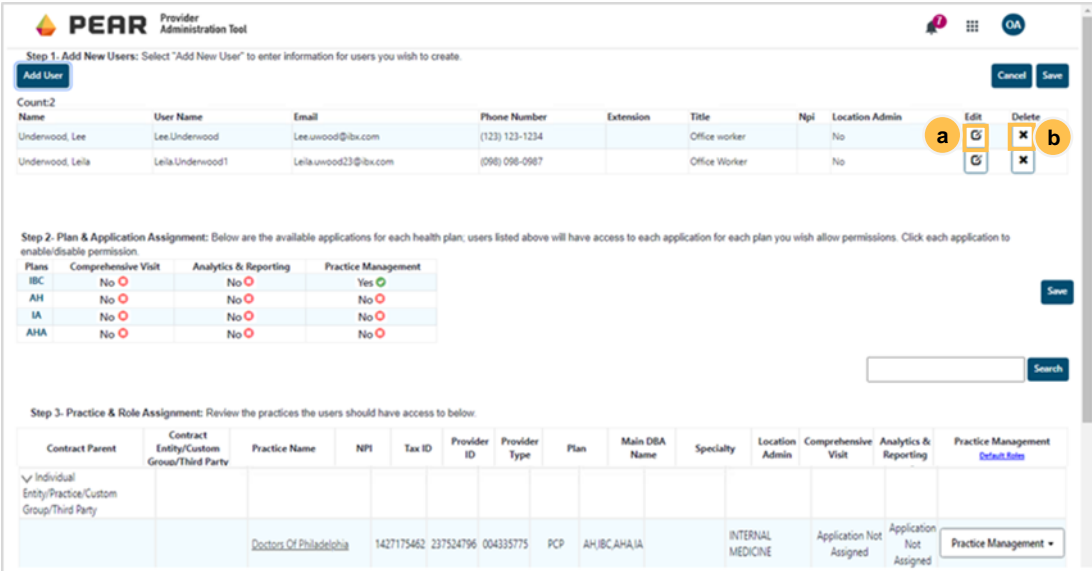
- Click the *Add another user* button to add another user using this same pop-up window. When you click the *Add Another User* button, the first user details will be saved. If you click *CANCEL*, the user details just added will be deleted.



- Once you have entered all the users you wish to add or reached the maximum of 20 users, click the *Add and Close* button.



Upon clicking the *Add and Close* button, the table at the top of the user details page lists all the users to be created as clones of the existing user. Review the list

Step #	Action
	<p>carefully before saving.</p>  <p><b>Note:</b> To clone more than 20 users, you will need to repeat this process.</p>
7.	<p>From this page, you can edit the details of the user you created via cloning and customize access for each individual (additional applications, roles, or plans).</p> <ol style="list-style-type: none"> <li>Before saving the list of newly cloned users, you have the option to edit permissions for any individual cloned user by selecting the <i>Edit</i> button.</li> <li>You can delete a user from the list by selecting the <i>Delete</i> button.</li> </ol> 
8.	<p>When editing, indicate your changes for the applications and plans for the selected new user as needed. To revoke permission, click the specific tile to update the value to <i>No</i>. To grant permission, click a tile to update the value to <i>Yes</i>.</p>

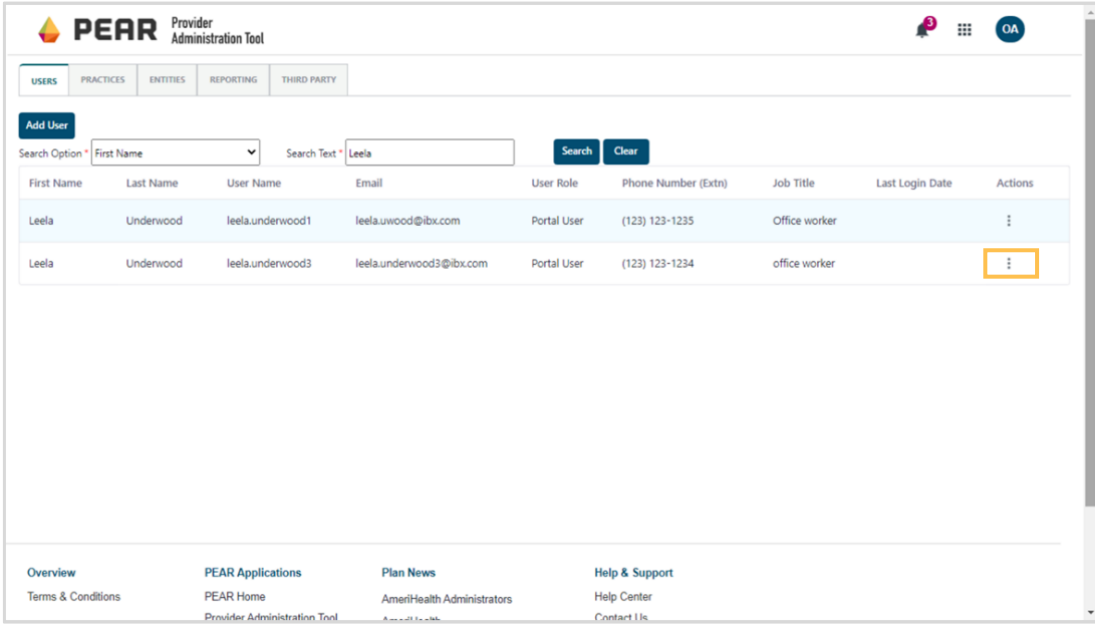
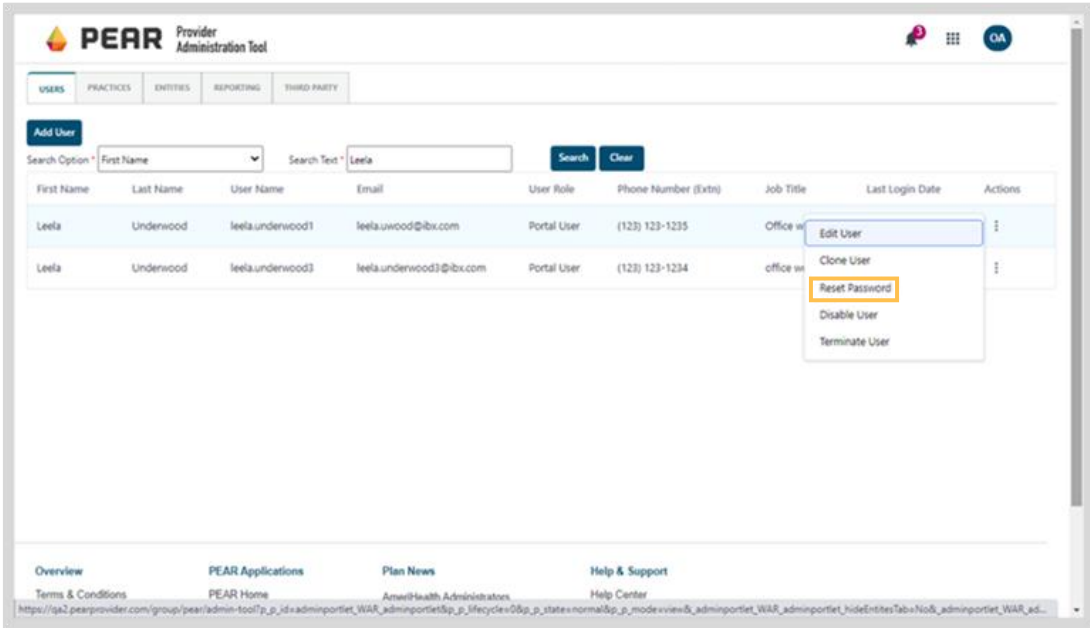
Step #	Action
	<p>The screenshot shows the PEAR Provider Administration Tool interface. It is divided into three main steps:</p> <ul style="list-style-type: none"> <li><b>Step 1: Add New Users:</b> A table lists two users: Lee Underwood and Leila Underwood. Each user has an 'Add User' button and a 'Delete' button.</li> <li><b>Step 2: Plan &amp; Application Assignment:</b> A table shows application permissions for various health plans (IBC, AH, IA, AHA). The 'Practice Management' column for the IBC plan is highlighted with a yellow box, indicating it is selected.</li> <li><b>Step 3: Practice &amp; Role Assignment:</b> A table lists various medical practices. The 'Practice Management' column for the 'Doctors Of Philadelphia' practice is highlighted with a yellow box, and a dropdown menu is open showing 'Practice Management' as the selected option.</li> </ul>
9.	<p>Click the drop-down menu for the selected application to edit roles for the new user.</p> <p>This screenshot is similar to the previous one but focuses on the dropdown menu in Step 3. The dropdown menu for the 'Practice Management' application is open, showing a 'Select -' button and the 'Practice Management' option, which is highlighted with a yellow box.</p>
10.	<p>Click the Save button to update user details. Once complete, you will return to the original master list of cloned users on the <i>USERS</i> tab. Remember to save the list of all newly cloned users.</p>

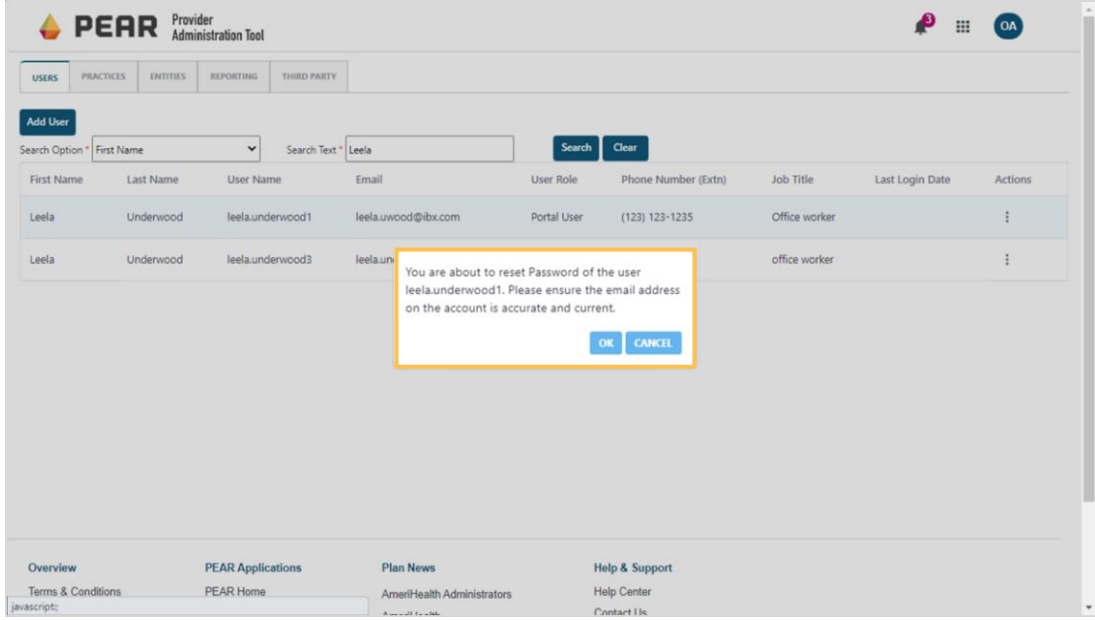
Step #	Action																																																																																																										
	<div style="border: 1px solid #ccc; padding: 10px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span><b>PEAR</b> Provider Administration Tool</span> <span style="float: right;"> </span> </div> <p style="font-size: 0.9em; margin-top: 5px;">Step 1 - Add New Users: Select "Add New User" to enter information for users you wish to create.</p> <div style="display: flex; justify-content: space-between; align-items: center; margin-bottom: 10px;"> <span style="background-color: #0056b3; color: white; padding: 2px 5px; border-radius: 3px;">Add User</span> <span style="float: right;"> <span style="background-color: #ccc; padding: 2px 5px; border-radius: 3px;">Cancel</span> <span style="background-color: #0056b3; color: white; padding: 2px 5px; border-radius: 3px;">Save</span> </span> </div> <p>Count: 2</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 0.8em;"> <thead> <tr> <th>Name</th> <th>User Name</th> <th>Email</th> <th>Phone Number</th> <th>Extension</th> <th>Title</th> <th>Npi</th> <th>Location Admin</th> <th>Edit</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>Underwood, Lee</td> <td>Lee.Underwood</td> <td>Lee.uwood@ibx.com</td> <td>(123) 123-1234</td> <td></td> <td>Office worker</td> <td>No</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Underwood, Leila</td> <td>Leila.Underwood1</td> <td>Leila.uwood23@ibx.com</td> <td>(098) 098-0987</td> <td></td> <td>Office Worker</td> <td>No</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p style="font-size: 0.8em; margin-top: 10px;">Step 2 - Plan &amp; Application Assignment: Below are the available applications for each health plan, users listed above will have access to each application for each plan you wish allow permissions. Click each application to enable/disable permission.</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 0.8em;"> <thead> <tr> <th>Plans</th> <th>Comprehensive Visit</th> <th>Analytics &amp; Reporting</th> <th>Practice Management</th> </tr> </thead> <tbody> <tr> <td>IBC</td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> <td>Yes <input checked="" type="radio"/></td> </tr> <tr> <td>AH</td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> </tr> <tr> <td>IA</td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> </tr> <tr> <td>AHA</td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> <td>No <input type="radio"/></td> </tr> </tbody> </table> <div style="text-align: right; margin-top: 5px;"> <span style="background-color: #0056b3; color: white; padding: 2px 5px; border-radius: 3px;">Save</span> </div> <div style="margin-top: 10px; display: flex; justify-content: flex-end;"> <input style="width: 80px; border: 1px solid #ccc;" type="text"/> <span style="background-color: #0056b3; color: white; padding: 2px 5px; border-radius: 3px; margin-left: 5px;">Search</span> </div> <p style="font-size: 0.8em; margin-top: 10px;">Step 3 - Practice &amp; Role Assignment: Review the practices the users should have access to below.</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 0.8em;"> <thead> <tr> <th>Contract Parent</th> <th>Contract Entity/Custom Group/Third Party</th> <th>Practice Name</th> <th>NPI</th> <th>Tax ID</th> <th>Provider ID</th> <th>Provider Type</th> <th>Plan</th> <th>Main DBA Name</th> <th>Specialty</th> <th>Location Admin</th> <th>Comprehensive Visit</th> <th>Analytics &amp; Reporting</th> <th>Practice Management <a href="#" style="font-size: 0.7em;">Default Roles</a></th> </tr> </thead> <tbody> <tr> <td> <input checked="" type="checkbox"/>                     Rowan University School of Osteopathic Medicine                 </td> <td></td> <td></td> <td></td> <td></td> <td>004227669</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Application Not Assigned</td> <td>Application Not Assigned</td> <td>Practice Management -</td> </tr> <tr> <td></td> <td>&gt; Rowan - Entity</td> <td></td> <td></td> <td></td> <td>004227671</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Application Not Assigned</td> <td>Application Not Assigned</td> <td>Practice Management -</td> </tr> <tr> <td> <input checked="" type="checkbox"/>                     Individual Entity/Practice/Custom Group/Third Party                 </td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> </div>	Name	User Name	Email	Phone Number	Extension	Title	Npi	Location Admin	Edit	Delete	Underwood, Lee	Lee.Underwood	Lee.uwood@ibx.com	(123) 123-1234		Office worker	No				Underwood, Leila	Leila.Underwood1	Leila.uwood23@ibx.com	(098) 098-0987		Office Worker	No				Plans	Comprehensive Visit	Analytics & Reporting	Practice Management	IBC	No <input type="radio"/>	No <input type="radio"/>	Yes <input checked="" type="radio"/>	AH	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>	IA	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>	AHA	No <input type="radio"/>	No <input type="radio"/>	No <input type="radio"/>	Contract Parent	Contract Entity/Custom Group/Third Party	Practice Name	NPI	Tax ID	Provider ID	Provider Type	Plan	Main DBA Name	Specialty	Location Admin	Comprehensive Visit	Analytics & Reporting	Practice Management <a href="#" style="font-size: 0.7em;">Default Roles</a>	<input checked="" type="checkbox"/> Rowan University School of Osteopathic Medicine					004227669						Application Not Assigned	Application Not Assigned	Practice Management -		> Rowan - Entity				004227671						Application Not Assigned	Application Not Assigned	Practice Management -	<input checked="" type="checkbox"/> Individual Entity/Practice/Custom Group/Third Party													
Name	User Name	Email	Phone Number	Extension	Title	Npi	Location Admin	Edit	Delete																																																																																																		
Underwood, Lee	Lee.Underwood	Lee.uwood@ibx.com	(123) 123-1234		Office worker	No																																																																																																					
Underwood, Leila	Leila.Underwood1	Leila.uwood23@ibx.com	(098) 098-0987		Office Worker	No																																																																																																					
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	> Rowan - Entity				004227671						Application Not Assigned	Application Not Assigned	Practice Management -																																																																																														
<input checked="" type="checkbox"/> Individual Entity/Practice/Custom Group/Third Party																																																																																																											

## Resetting a user's password

You can easily help end users with a lost or forgotten password. Locate the user in need of a password reset either by user search or by selecting from the user table and perform the following steps to reset the password:

Step #	Action
1.	Click the <i>Actions</i> button.

Step #	Action																											
	 <p>The screenshot shows the PEAR Provider Administration Tool interface. At the top, there are navigation tabs: USERS, PRACTICES, ENTITIES, REPORTING, and THIRD PARTY. Below these is an 'Add User' button and a search section with a dropdown menu set to 'First Name' and a search text box containing 'Leela'. Below the search is a table of users:</p> <table border="1"> <thead> <tr> <th>First Name</th> <th>Last Name</th> <th>User Name</th> <th>Email</th> <th>User Role</th> <th>Phone Number (Extn)</th> <th>Job Title</th> <th>Last Login Date</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Leela</td> <td>Underwood</td> <td>leela.underwood1</td> <td>leela.uwood@ibx.com</td> <td>Portal User</td> <td>(123) 123-1235</td> <td>Office worker</td> <td></td> <td>⋮</td> </tr> <tr> <td>Leela</td> <td>Underwood</td> <td>leela.underwood3</td> <td>leela.underwood3@ibx.com</td> <td>Portal User</td> <td>(123) 123-1234</td> <td>office worker</td> <td></td> <td>⋮</td> </tr> </tbody> </table> <p>The 'Reset Password' option in the actions menu for the second user is highlighted with an orange box.</p>	First Name	Last Name	User Name	Email	User Role	Phone Number (Extn)	Job Title	Last Login Date	Actions	Leela	Underwood	leela.underwood1	leela.uwood@ibx.com	Portal User	(123) 123-1235	Office worker		⋮	Leela	Underwood	leela.underwood3	leela.underwood3@ibx.com	Portal User	(123) 123-1234	office worker		⋮
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<p>2.</p>	<p>Select the <i>Reset Password</i> option from the drop-down list that is displayed.</p>  <p>This screenshot is similar to the previous one but shows the actions menu for the second user expanded. The menu items are: Edit User, Clone User, Reset Password (highlighted with an orange box), Disable User, and Terminate User.</p>																											

Step #	Action
3.	<p>When you click <i>Reset Password</i>, a pop-up window is displayed asking you to confirm accuracy of the email address of the user for whom you are resetting the password.</p> <p>Click <i>OK</i> to confirm the email address is accurate and to proceed with the password reset. Once the password is reset, the end user will receive an automated email with the new, temporary password.</p> <p>Click <i>CANCEL</i> if you want to cancel resetting the password.</p>  <p>The screenshot shows the PEAR Provider Administration Tool interface. At the top, there are navigation tabs: USERS, PRACTICES, ENTITIES, REPORTING, and THIRD PARTY. Below these is an 'Add User' section with a search option set to 'First Name' and a search text field containing 'Leela'. A table lists users with columns for First Name, Last Name, User Name, Email, User Role, Phone Number (Extn), Job Title, Last Login Date, and Actions. A pop-up window is overlaid on the table, containing the text: 'You are about to reset Password of the user leela.underwood1. Please ensure the email address on the account is accurate and current.' with 'OK' and 'CANCEL' buttons.</p> <p>A confirmation message is displayed at the bottom of the screen indicating that the password has been reset.</p>

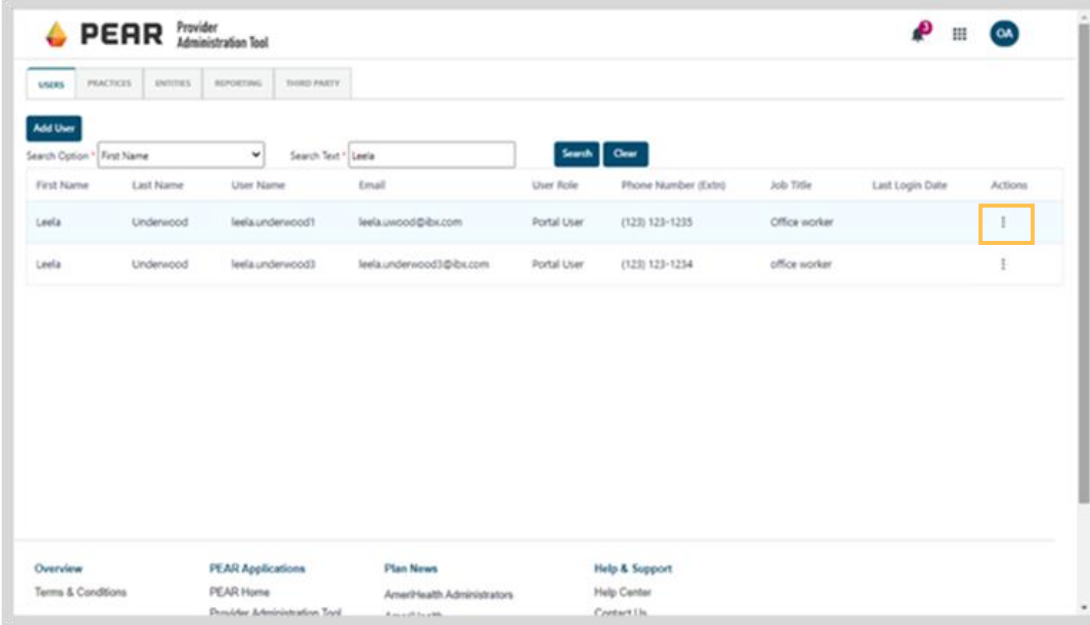
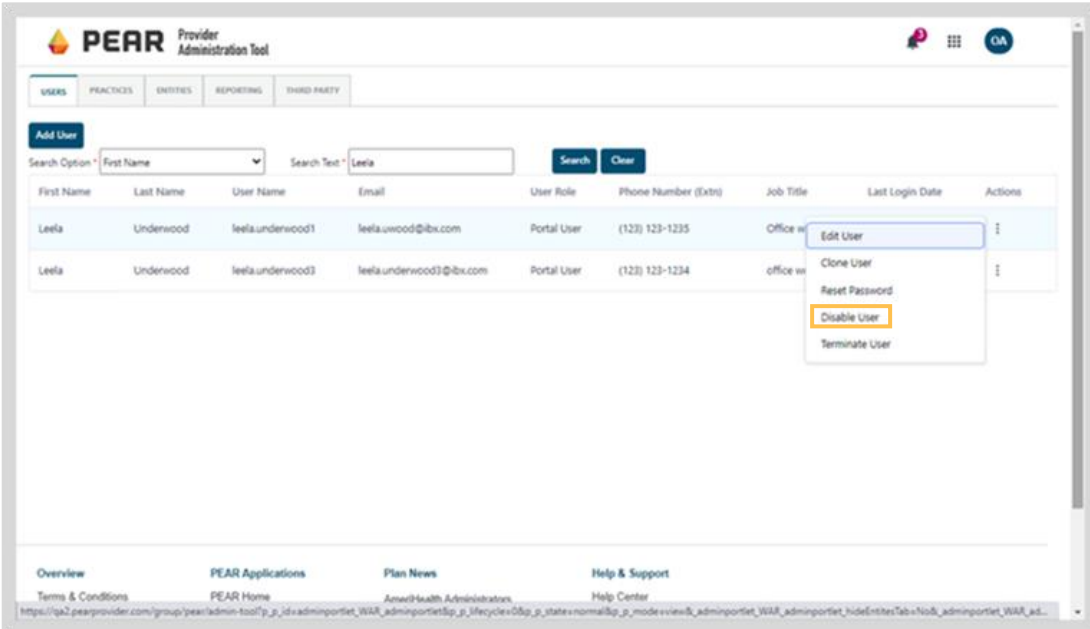
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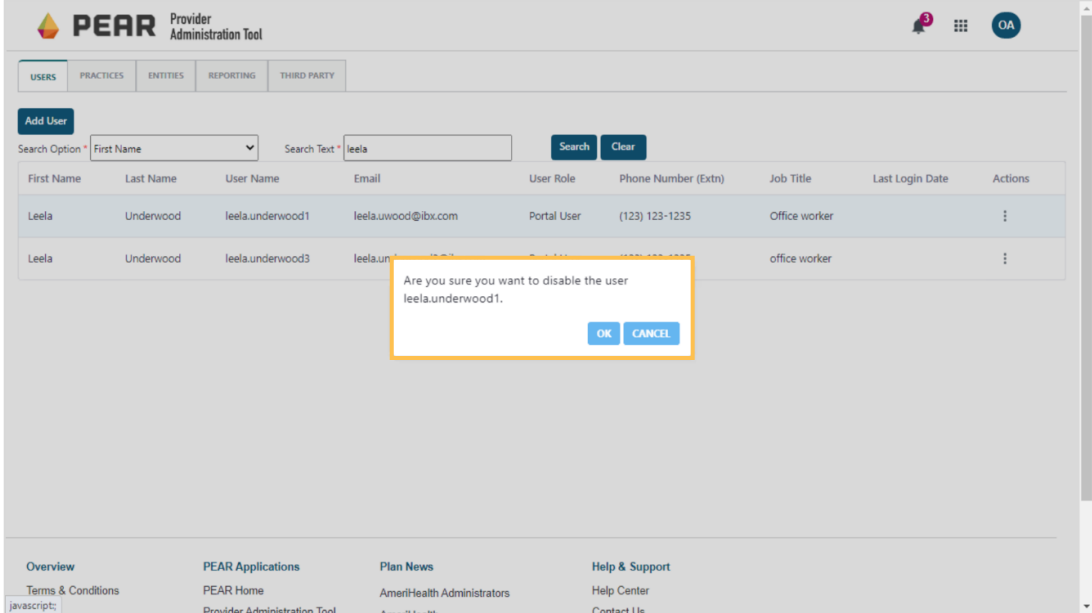
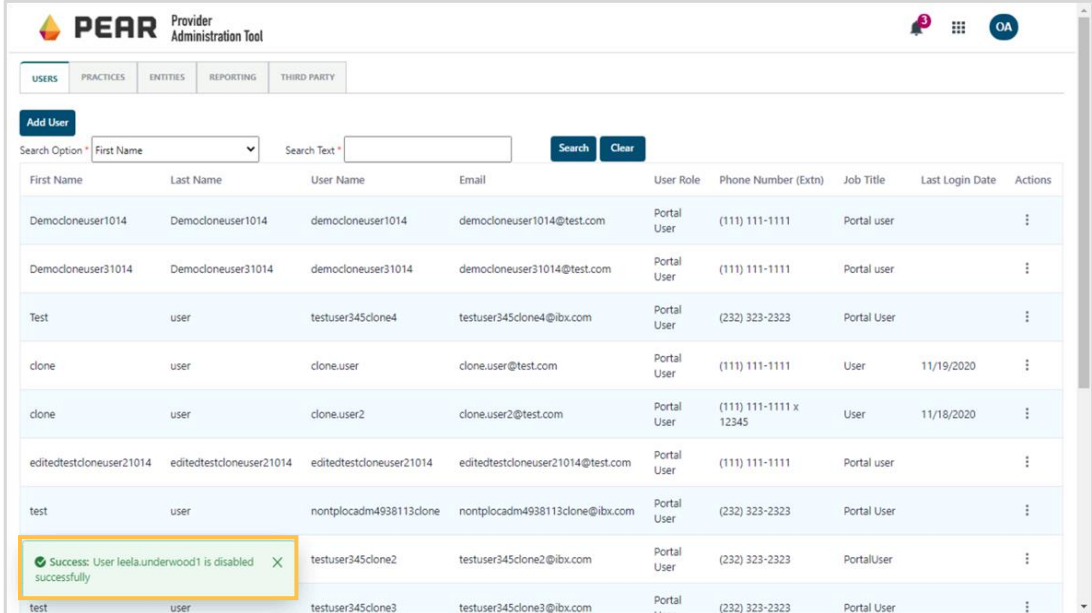
## Disabling an existing user

If a user is going on an extended leave, you may need to temporarily disable the user’s PEAR portal access. The *Disable User* function will remove PEAR portal access until you or another PEAR administrator re-enables the user in PAT. Locate the user that needs to be disabled either by user search or by selecting from the user table and perform the following steps to disable PEAR access.

**Note:** If a user does not log in for 90 days, PEAR portal access is automatically disabled. The end user receives an automated email 15 days before the access is disabled.

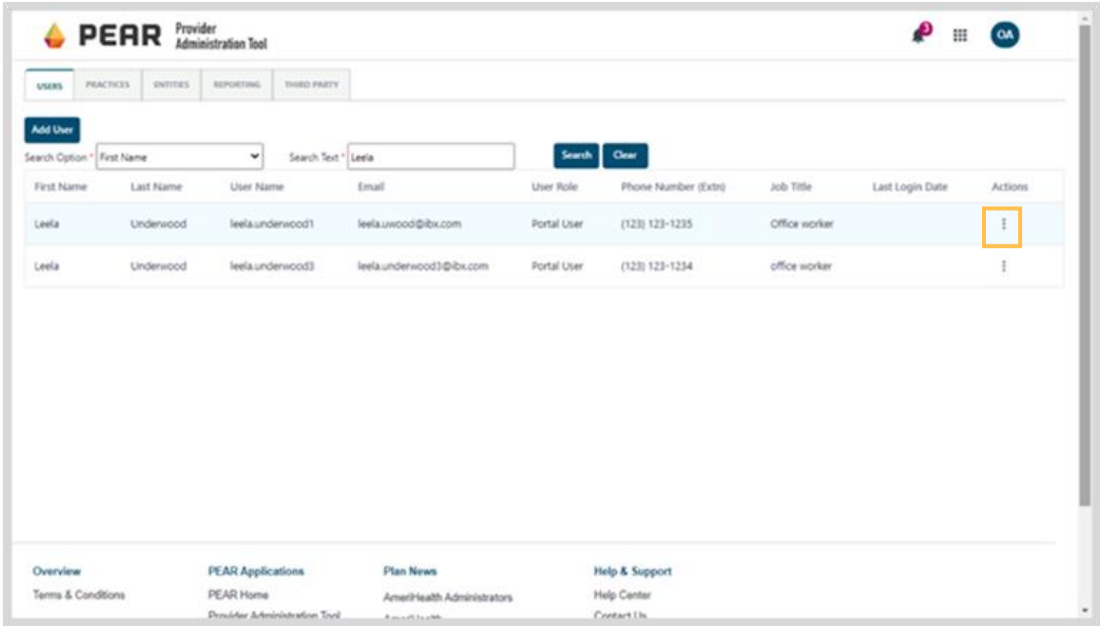
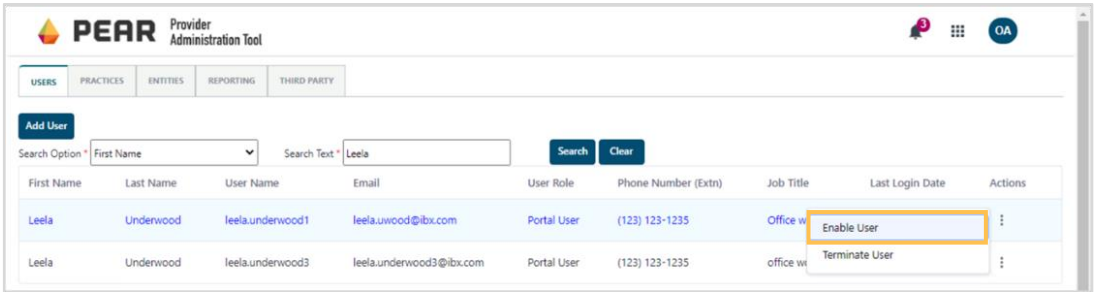
Step #	Action
1.	Click the <i>Actions</i> button for the user you wish to disable.

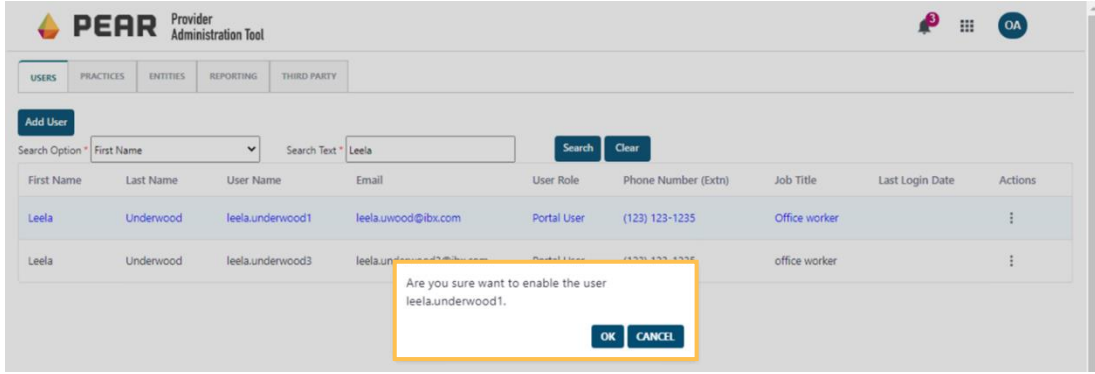
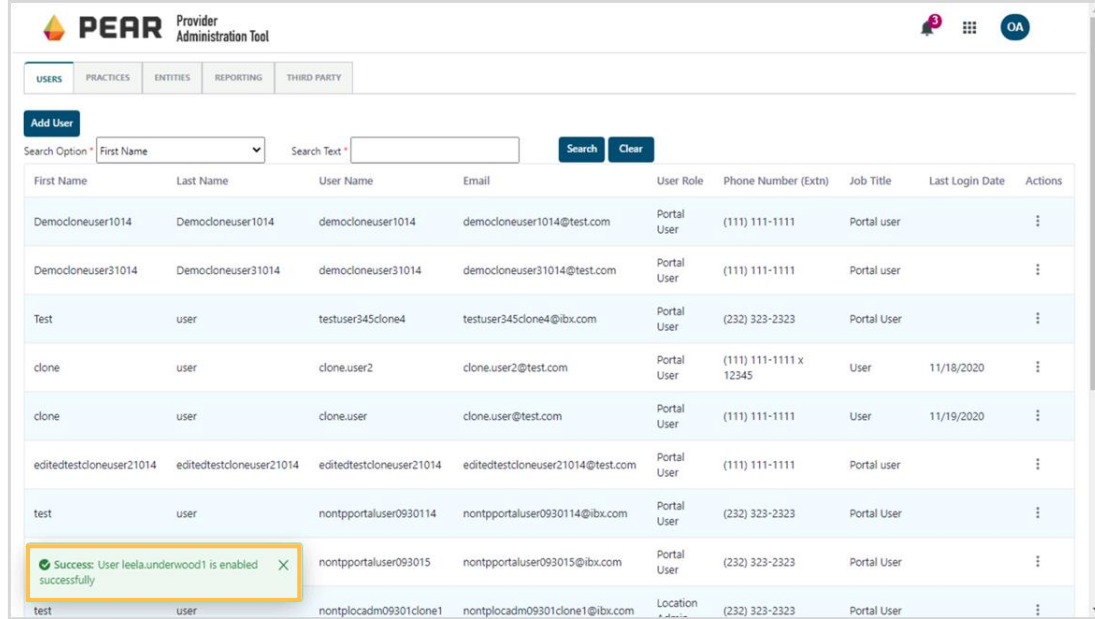
Step #	Action
	 <p>The screenshot shows the PEAR Provider Administration Tool interface. At the top, there are navigation tabs for USERS, PRACTICES, ENTITIES, REPORTING, and THIRD PARTY. Below these is an 'Add User' button and a search section with a dropdown for 'Search Option' (set to 'First Name') and a 'Search Text' input field containing 'Leela'. A table lists users with columns for First Name, Last Name, User Name, Email, User Role, Phone Number (Extn), Job Title, Last Login Date, and Actions. The first user, Leela Underwood, has a vertical ellipsis icon in the Actions column highlighted with a yellow box.</p>
2.	<p>Select the <i>Disable User</i> option from the drop-down list that is displayed.</p>  <p>This screenshot shows the same interface as the previous one, but the dropdown menu for the first user is open. The menu items are: Edit User, Clone User, Reset Password, Disable User (highlighted with a yellow box), and Terminate User.</p>
3.	<p>Once you select <i>Disable User</i>, you will be asked to confirm your decision to disable the user.</p>

Step #	Action
	 <p>The screenshot shows the PEAR Provider Administration Tool interface. At the top, there are navigation tabs: USERS, PRACTICES, ENTITIES, REPORTING, and THIRD PARTY. Below these is an 'Add User' section with a search dropdown set to 'First Name' and a search text field containing 'leela'. A table lists users with columns for First Name, Last Name, User Name, Email, User Role, Phone Number (Extn), Job Title, Last Login Date, and Actions. A modal dialog box is displayed in the center, asking 'Are you sure you want to disable the user leela.underwood1.' with 'OK' and 'CANCEL' buttons.</p>
4.	<p>A confirmation message is displayed at the bottom of the screen indicating that the user has been disabled.</p>  <p>The screenshot shows the same PEAR Provider Administration Tool interface. The search text field is now empty. The table below shows a list of users. At the bottom of the table, a green success message is displayed: 'Success: User leela.underwood1 is disabled successfully'. The message includes a green checkmark icon and a close button (X).</p>

## Enabling a disabled user

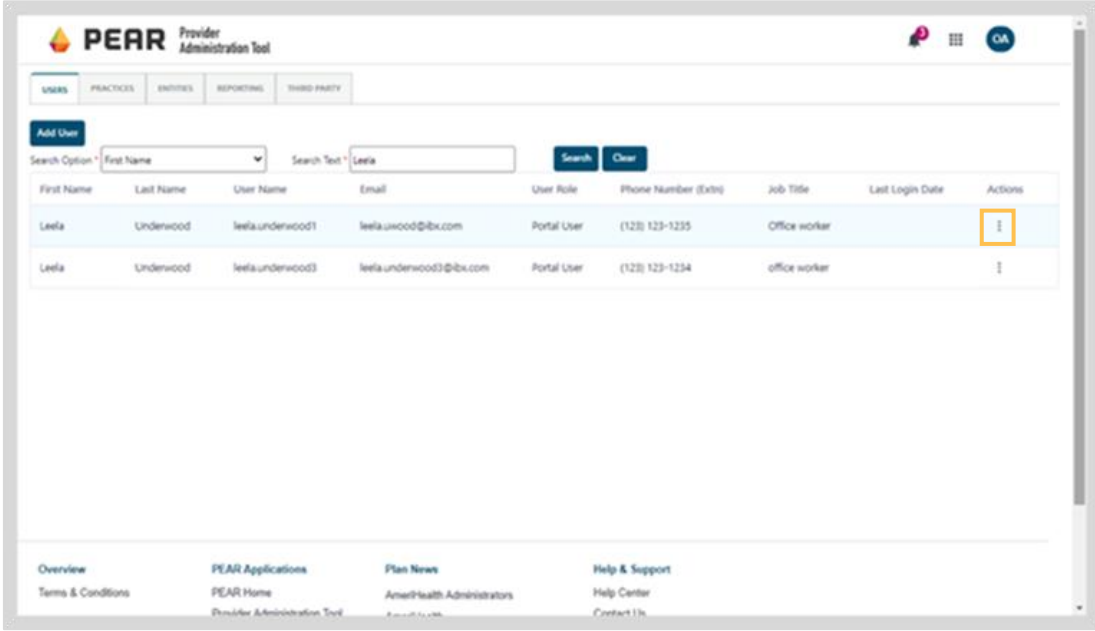
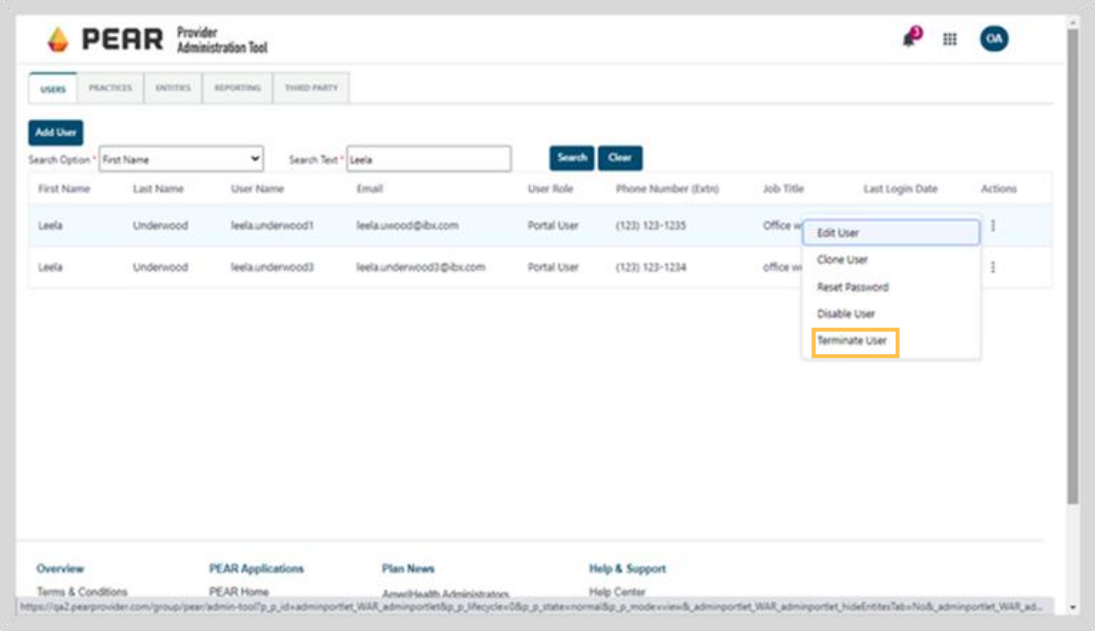
Locate the user that needs to be enabled either by user search or by selecting from the user table. Note that disabled users' records will appear in blue font on the *USERS* tab. Perform the following steps to enable a disabled user:

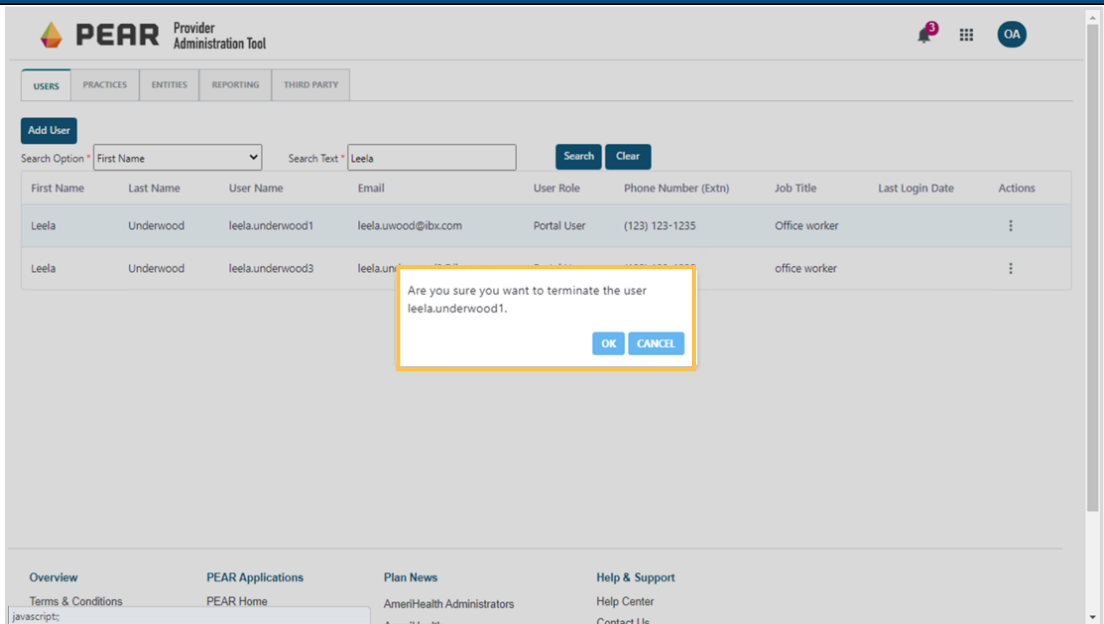
Step #	Action
1.	<p>Click the <i>Actions</i> button.</p>  <p>The screenshot shows the PEAR Provider Administration Tool interface. At the top, there are navigation tabs: USERS, PRACTICES, ENTITIES, REPORTING, and THIRD PARTY. Below these is a search section with 'Add User' button, 'Search Option' dropdown set to 'First Name', and 'Search Text' input containing 'Leela'. There are 'Search' and 'Clear' buttons. Below the search is a table with columns: First Name, Last Name, User Name, Email, User Role, Phone Number (Extn), Job Title, Last Login Date, and Actions. Two rows are visible, both in blue font. The first row has 'Leela Underwood' and 'leela.underwood1'. The 'Actions' column for this row has a vertical ellipsis icon highlighted with a yellow box.</p>
2.	<p>Select the <i>Enable User</i> option from the drop-down list that is displayed.</p>  <p>This screenshot is similar to the previous one, but the drop-down menu for the 'Actions' column of the first row is open. The menu contains two options: 'Enable User' and 'Terminate User'. The 'Enable User' option is highlighted with a yellow box.</p>

Step #	Action
3.	<p>A pop-up window is displayed asking you to confirm whether you want to enable the user. Click <i>OK</i> to enable the user or click <i>CANCEL</i> to leave the user disabled.</p>  <p>A confirmation message is displayed indicating that the user has been enabled successfully. The end user will receive an automated email with their logon credentials.</p> 

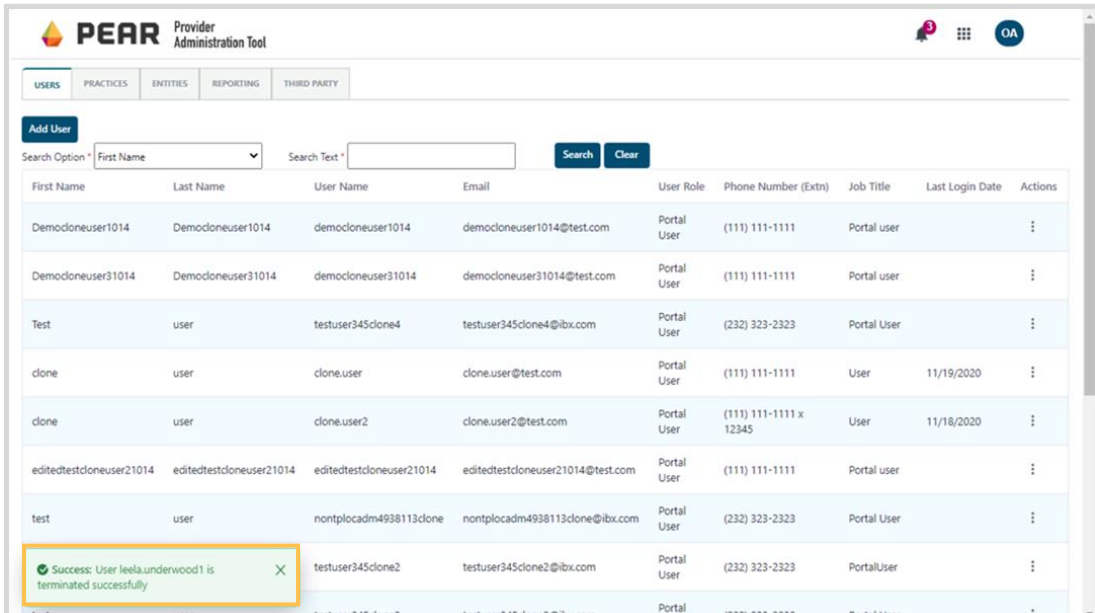
### Terminating an existing user

Terminating a user will permanently remove the user’s access to the PEAR portal. Terminated users cannot be reinstated through PAT. Locate the user to be terminated either by user search or by selecting from the User Log and perform the following steps to terminate access.

Step #	Action
1.	<p>Click the <i>Actions</i> button.</p>  <p>The screenshot shows the PEAR Provider Administration Tool interface. At the top, there are navigation tabs for USERS, PRACTICES, ENTITIES, REPORTING, and THIRD PARTY. Below these is a search section with a dropdown menu set to 'First Name' and a search box containing 'Leela'. A table lists users with columns for First Name, Last Name, User Name, Email, User Role, Phone Number (Extn), Job Title, Last Login Date, and Actions. The first user, Leela Underwood, has a vertical ellipsis icon in the Actions column highlighted with a yellow box.</p>
2.	<p>Select the <i>Terminate User</i> option from the drop-down list that is displayed.</p>  <p>This screenshot is similar to the previous one, but the Actions dropdown menu for the first user is open. The menu items are Edit User, Clone User, Reset Password, Disable User, and Terminate User. The 'Terminate User' option is highlighted with a yellow box.</p>
3.	<p>A pop-up window is displayed asking you to confirm the termination of the selected user. Click <i>OK</i> to terminate the user or click <i>CANCEL</i> to cancel terminating the user.</p>

Step #	Action
	 <p>The screenshot shows the PEAR Provider Administration Tool interface. At the top, there are navigation tabs: USERS, PRACTICES, ENTITIES, REPORTING, and THIRD PARTY. Below these is an 'Add User' button and a search section with a dropdown for 'Search Option' (set to 'First Name') and a text input for 'Search Text' containing 'Leela'. There are 'Search' and 'Clear' buttons. A table lists users with columns: First Name, Last Name, User Name, Email, User Role, Phone Number (Extn), Job Title, Last Login Date, and Actions. Two rows are visible, both for 'Leela Underwood'. A yellow-bordered dialog box is overlaid on the table, containing the text: 'Are you sure you want to terminate the user leela.underwood1.' with 'OK' and 'CANCEL' buttons.</p>

A confirmation message is displayed indicating that the user has been terminated successfully.



The screenshot shows the PEAR Provider Administration Tool interface after the user termination. The search section now has an empty 'Search Text' field. The table of users is visible, and a green success message is displayed at the bottom: 'Success: User leela.underwood1 is terminated successfully'. The table contains several rows of user records with columns: First Name, Last Name, User Name, Email, User Role, Phone Number (Extn), Job Title, Last Login Date, and Actions.

**Note:**

- The terminated user’s record will be removed from the *USERS* tab.
- If you or anyone else accidentally terminates a user, submit a request using the PEAR Inquiry form available through the Provider News Center to reinstate the user.

## Section 3: Managing practices in PAT

You can perform various practice-level administrative tasks using the *PRACTICES* tab. These tasks include viewing practice details, viewing active user count, viewing active Location Administrator account, viewing active Organization Administrator account, and searching for a practice.

### Viewing practice details

The *PRACTICES* tab allows you to view a list of all the practices you can access. Review the information provided through the tab to ensure practice and facility details remain accurate and active users are associated to each location.

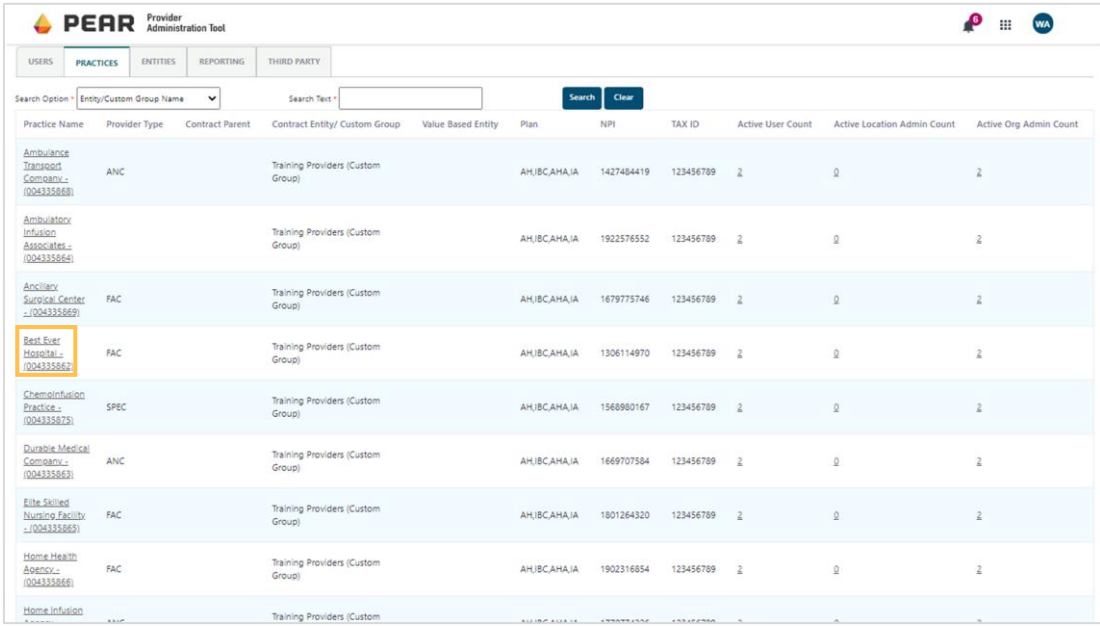
Each row on the *PRACTICES* tab represents a single practice or provider. Each column represents a practice attribute. The following practice attributes are displayed:

- *Provider Name*
- *Provider Type*
- *Contract Parent*
- *Contract Entity/Custom Group*
- *Value Based Entity*
- *Plan*
- *NPI*
- *TAX ID*
- *Active User Count*
- *Active Location Admin Count*
- *Active Org Admin Count*

The screenshot shows the PEAR Provider Administration Tool interface. The 'PRACTICES' tab is selected. A search bar at the top allows filtering by 'Entity/Custom Group Name'. Below the search bar is a table with the following columns: Practice Name, Provider Type, Contract Parent, Contract Entity/ Custom Group, Value Based Entity, Plan, NPI, TAX ID, Active User Count, Active Location Admin Count, and Active Org Admin Count. The table contains seven rows of practice data.

Practice Name	Provider Type	Contract Parent	Contract Entity/ Custom Group	Value Based Entity	Plan	NPI	TAX ID	Active User Count	Active Location Admin Count	Active Org Admin Count
<a href="#">Ambulance Transport Company - (004335868)</a>	ANC		Training Providers (Custom Group)		AH,IBCAHA,IA	1427484419	123456789	2	0	2
<a href="#">Ambulatory Infusion Associates - (004335864)</a>			Training Providers (Custom Group)		AH,IBCAHA,IA	1922576552	123456789	2	0	2
<a href="#">Ancillary Surgical Center - (004335869)</a>	FAC		Training Providers (Custom Group)		AH,IBCAHA,IA	1679775746	123456789	2	0	2
<a href="#">Best Ever Hospital - (004335862)</a>	FAC		Training Providers (Custom Group)		AH,IBCAHA,IA	1306114970	123456789	2	0	2
<a href="#">Chemoinfusion Practice - (004335875)</a>	SPEC		Training Providers (Custom Group)		AH,IBCAHA,IA	1568980167	123456789	2	0	2
<a href="#">Durable Medical Company - (004335863)</a>	ANC		Training Providers (Custom Group)		AH,IBCAHA,IA	1669707584	123456789	2	0	2
<a href="#">Elite Skilled Nursing Facility - (004335865)</a>	FAC		Training Providers (Custom Group)		AH,IBCAHA,IA	1801264320	123456789	2	0	2

Perform the following steps to view additional details about a practice:

Step #	Action
1.	<p>Click the practice name hyperlink for that practice in the <i>Practice Name</i> column.</p>  <p>The screenshot shows the PEAR Provider Administration Tool interface. At the top, there are navigation tabs for 'USERS', 'PRACTICES', 'ENTITIES', 'REPORTING', and 'THIRD PARTY'. Below these is a search bar with a dropdown menu set to 'Entity/Custom Group Name' and a search button. The main area displays a table with columns: Practice Name, Provider Type, Contract Parent, Contract Entity/Custom Group, Value Based Entity, Plan, NPI, TAX ID, Active User Count, Active Location Admin Count, and Active Org Admin Count. The 'Practice Name' column contains hyperlinks. The row for 'Best Eye Hospital - (004335867)' is highlighted with a yellow box.</p>
2.	<p>Additional details about the practice are displayed in a pop-up window. The pop-up window provides information such as:</p> <ul style="list-style-type: none"> <li>• <i>Contract Parent</i></li> <li>• <i>Contract Entity</i></li> <li>• <i>Primary DBA Name</i></li> <li>• <i>Practice Specialty</i></li> <li>• <i>Address</i> associated with the practice and</li> <li>• <i>Tandigm Indicator</i> (an indication of whether the practice is associated with Tandigm).</li> </ul> <p>Click the <i>Close</i> button after reviewing the details.</p>

Step #	Action

## Viewing active user count

You can view the number of active PEAR users associated with each practice from the *Active User Count* column on the *PRACTICES* tab.

To view a list of the active PEAR users for a practice, click the active user count hyperlink in the *Active User Count* column for that practice. This will redirect you to the *USERS* tab where the user list for that practice will be displayed.

Practice Name	Provider Type	Contract Parent	Contract Entity/ Custom Group	Value Based Entity	Plan	NPI	TAX ID	Active User Count	Active Location Admin Count	Active Org Admin Count
Ambulance Transport Company - (004335868)	ANC		Training Providers (Custom Group)		AH,BC,AHA,JA	1427484419	123456789	<a href="#">2</a>	0	2
Ambulatory Infusion Associates - (004335864)			Training Providers (Custom Group)		AH,BC,AHA,JA	1922576552	123456789	2	0	2
Ancillary Surgical Center - (004335869)	FAC		Training Providers (Custom Group)		AH,BC,AHA,JA	1679775746	123456789	2	0	2
Best Ever Hospital - (004335862)	FAC		Training Providers (Custom Group)		AH,BC,AHA,JA	1306114970	123456789	2	0	2
Chemoinfusion Practice - (004335875)	SPEC		Training Providers (Custom Group)		AH,BC,AHA,JA	156880167	123456789	2	0	2
Durable Medical Company - (004335863)	ANC		Training Providers (Custom Group)		AH,BC,AHA,JA	1669707584	123456789	2	0	2
Elite Skilled Nursing Facility - (004335865)	FAC		Training Providers (Custom Group)		AH,BC,AHA,JA	1801264320	123456789	2	0	2
Home Health Agency - (004335866)	FAC		Training Providers (Custom Group)		AH,BC,AHA,JA	1902316854	123456789	2	0	2

## Viewing active Location Administrator count

You can view the number of active Location Administrators associated with each practice from the *Active Location Admin Count* column on the *PRACTICES* tab.

To view a list of the active Location Administrators, click the active location admin count hyperlink in the *Active Location Admin Count* column. Clicking the hyperlink will redirect you to the *USERS* tab where the list of Location Administrators at the practice will be displayed.

Practice Name	Provider Type	Contract Parent	Contract Entity/ Custom Group	Value Based Entity	Plan	NPI	TAX ID	Active User Count	Active Location Admin Count	Active Org Admin Count
<a href="#">Ambulance Transport Company - (004335868)</a>	ANC		Training Providers (Custom Group)		AH,IBC,AHA,JA	1427484419	123456789	2	<a href="#">0</a>	2
<a href="#">Ambulatory Infusion Associates - (004335864)</a>			Training Providers (Custom Group)		AH,IBC,AHA,JA	1922576552	123456789	2	<a href="#">0</a>	2
<a href="#">Ancillary Surgical Center - (004335869)</a>	FAC		Training Providers (Custom Group)		AH,IBC,AHA,JA	1679775746	123456789	2	<a href="#">0</a>	2
<a href="#">Best Ever Hospital - (004335862)</a>	FAC		Training Providers (Custom Group)		AH,IBC,AHA,JA	1306114970	123456789	2	<a href="#">0</a>	2
<a href="#">Chemoinfusion Practice - (004335875)</a>	SPEC		Training Providers (Custom Group)		AH,IBC,AHA,JA	1566980167	123456789	2	<a href="#">0</a>	2
<a href="#">Durable Medical Company - (004335863)</a>	ANC		Training Providers (Custom Group)		AH,IBC,AHA,JA	1669707584	123456789	2	<a href="#">0</a>	2
<a href="#">Elite Skilled Nursing Facility - (004335865)</a>	FAC		Training Providers (Custom Group)		AH,IBC,AHA,JA	1801264320	123456789	2	<a href="#">0</a>	2
<a href="#">Home Health Agency - (004335866)</a>	FAC		Training Providers (Custom Group)		AH,IBC,AHA,JA	1902316854	123456789	2	<a href="#">0</a>	2
<a href="#">Home Infusion Assoc...</a>	ANC		Training Providers (Custom Group)		AH,IBC,AHA,JA	1330374336	123456789	2	<a href="#">0</a>	2

## Viewing active Organization Administrator count

You can view the number of active Organization Administrators associated with each practice from the *Active Org Administrator Count* column on the *PRACTICES* tab.

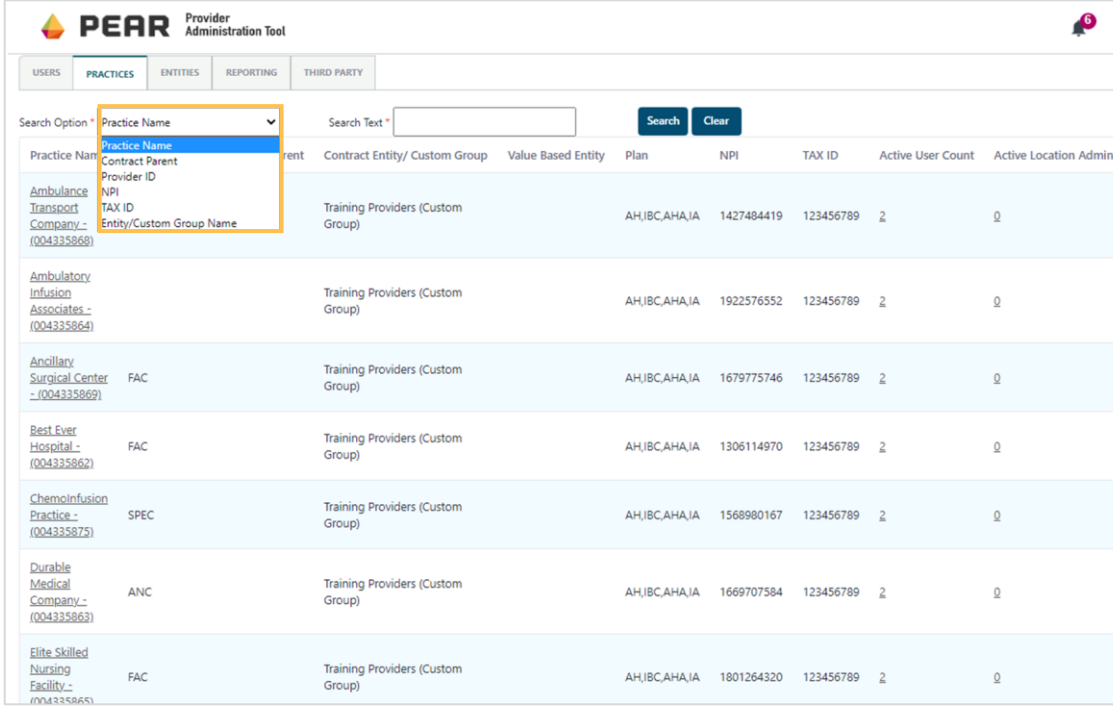
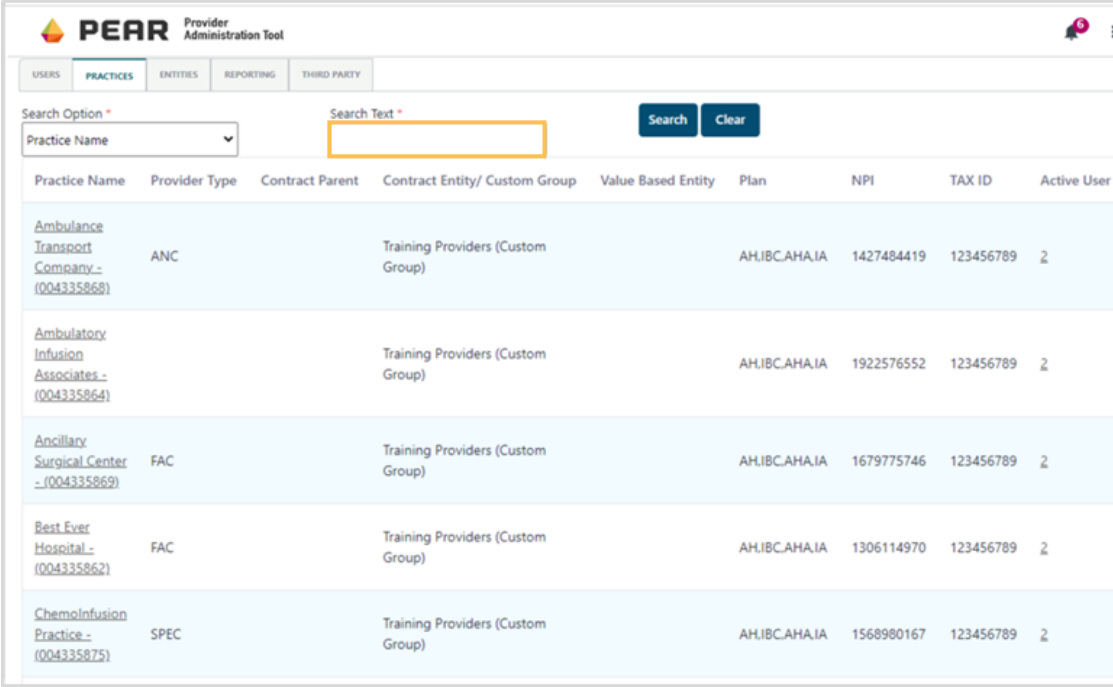
To view a list of the active Organization Administrators, click the active Organization Admin count hyperlink in the *Active Org Admin Count* column. Clicking the hyperlink will redirect you to the *USERS* tab where the list of Organization Administrators will be displayed.

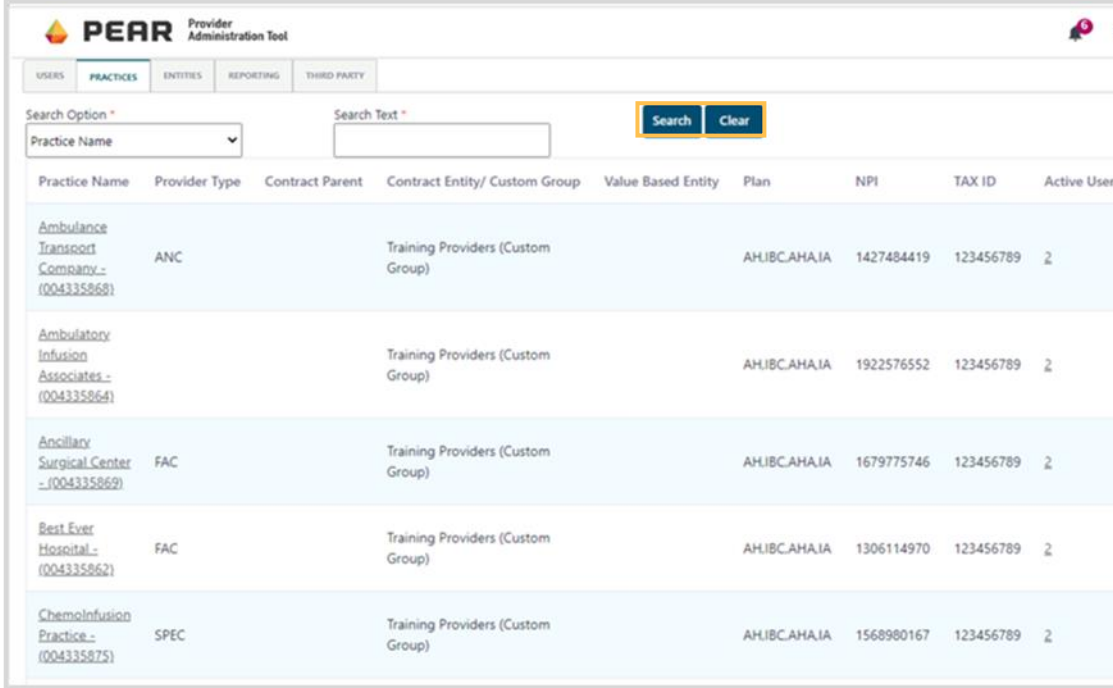
Practice Name	Provider Type	Contract Parent	Contract Entity/ Custom Group	Value Based Entity	Plan	NPI	TAX ID	Active User Count	Active Location Admin Count	Active Org Admin Count
Ambulance Transport Company - (004335868)	ANC		Training Providers (Custom Group)		AH,IBC,AHA,JA	1427484419	123456789	2	0	2
Ambulatory Infusion Associates - (004335864)			Training Providers (Custom Group)		AH,IBC,AHA,JA	1922576552	123456789	2	0	2
Ancillary Surgical Center - (004335869)	FAC		Training Providers (Custom Group)		AH,IBC,AHA,JA	1679775746	123456789	2	0	2
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Durable Medical Company - (004335863)	ANC		Training Providers (Custom Group)		AH,IBC,AHA,JA	1669707584	123456789	2	0	2
Elite Skilled Nursing Facility - (004335865)	FAC		Training Providers (Custom Group)		AH,IBC,AHA,JA	1801264320	123456789	2	0	2
Home Health Agency - (004335866)	FAC		Training Providers (Custom Group)		AH,IBC,AHA,JA	1902316854	123456789	2	0	2
Home Infusion			Training Providers (Custom Group)		AH,IBC,AHA,JA	1300741306	123456789	2	0	2

## Searching for a practice

You can search for a practice using the *Search Option* drop-down menu and the *Search Text* field on the *PRACTICES* tab. Perform the following steps to search for a practice:

Step #	Action
1.	<p>From the <i>Search Option</i> drop-down menu, select the attribute to use for your search. The available options are:</p> <ul style="list-style-type: none"> <li>• <i>Practice Name</i></li> <li>• <i>Contract Parent</i></li> <li>• <i>Provider ID</i></li> <li>• <i>NPI</i></li> <li>• <i>Tax ID</i></li> <li>• <i>Entity/Customer Group</i></li> </ul>

Step #	Action																																																																								
	 <p><b>PEAR</b> Provider Administration Tool</p> <p>USERS <b>PRACTICES</b> ENTITIES REPORTING THIRD PARTY</p> <p>Search Option * <span style="border: 1px solid orange; padding: 2px;">Practice Name</span> Search Text * <input type="text"/> <span style="background-color: #0056b3; color: white; padding: 2px 5px;">Search</span> <span style="background-color: #0056b3; color: white; padding: 2px 5px;">Clear</span></p> <table border="1"> <thead> <tr> <th>Practice Name</th> <th>Contract Parent</th> <th>Contract Entity/ Custom Group</th> <th>Value Based Entity</th> <th>Plan</th> <th>NPI</th> <th>TAX ID</th> <th>Active User Count</th> <th>Active Location Admin</th> </tr> </thead> <tbody> <tr> <td>Ambulance Transport Company - (004335868)</td> <td></td> <td>Training Providers (Custom Group)</td> <td></td> <td>AH,IBC,AHA,IA</td> <td>1427484419</td> <td>123456789</td> <td>2</td> <td>0</td> </tr> <tr> <td>Ambulatory Infusion Associates - (004335864)</td> <td></td> <td>Training Providers (Custom Group)</td> <td></td> <td>AH,IBC,AHA,IA</td> <td>1922576552</td> <td>123456789</td> <td>2</td> <td>0</td> </tr> <tr> <td>Ancillary Surgical Center - (004335869)</td> <td>FAC</td> <td>Training Providers (Custom Group)</td> <td></td> <td>AH,IBC,AHA,IA</td> <td>1679775746</td> <td>123456789</td> <td>2</td> <td>0</td> </tr> <tr> <td>Best Ever Hospital - (004335862)</td> <td>FAC</td> <td>Training Providers (Custom Group)</td> <td></td> <td>AH,IBC,AHA,IA</td> <td>1306114970</td> <td>123456789</td> <td>2</td> <td>0</td> </tr> <tr> <td>ChemoInfusion Practice - (004335875)</td> <td>SPEC</td> <td>Training Providers (Custom Group)</td> <td></td> <td>AH,IBC,AHA,IA</td> <td>1568980167</td> <td>123456789</td> <td>2</td> <td>0</td> </tr> <tr> <td>Durable Medical Company - (004335863)</td> <td>ANC</td> <td>Training Providers (Custom Group)</td> <td></td> <td>AH,IBC,AHA,IA</td> <td>1669707584</td> <td>123456789</td> <td>2</td> <td>0</td> </tr> <tr> <td>Elite Skilled Nursing Facility - (004335865)</td> <td>FAC</td> <td>Training Providers (Custom Group)</td> <td></td> <td>AH,IBC,AHA,IA</td> <td>1801264320</td> <td>123456789</td> <td>2</td> <td>0</td> </tr> </tbody> </table>	Practice Name	Contract Parent	Contract Entity/ Custom Group	Value Based Entity	Plan	NPI	TAX ID	Active User Count	Active Location Admin	Ambulance Transport Company - (004335868)		Training Providers (Custom Group)		AH,IBC,AHA,IA	1427484419	123456789	2	0	Ambulatory Infusion Associates - (004335864)		Training Providers (Custom Group)		AH,IBC,AHA,IA	1922576552	123456789	2	0	Ancillary Surgical Center - (004335869)	FAC	Training Providers (Custom Group)		AH,IBC,AHA,IA	1679775746	123456789	2	0	Best Ever Hospital - (004335862)	FAC	Training Providers (Custom Group)		AH,IBC,AHA,IA	1306114970	123456789	2	0	ChemoInfusion Practice - (004335875)	SPEC	Training Providers (Custom Group)		AH,IBC,AHA,IA	1568980167	123456789	2	0	Durable Medical Company - (004335863)	ANC	Training Providers (Custom Group)		AH,IBC,AHA,IA	1669707584	123456789	2	0	Elite Skilled Nursing Facility - (004335865)	FAC	Training Providers (Custom Group)		AH,IBC,AHA,IA	1801264320	123456789	2	0
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## Section 4: Managing entities in PAT (Only for large health systems with multiple Tax IDs)

You can use the *ENTITIES* tab to view and search for entities associated with your organization. This tab is only available to larger health systems tied to multiple Tax IDs. Independent practices, or provider organizations not tied to multiple Tax IDs will not have access to this tab.

The *ENTITIES* tab allows you to view a list of all the entities associated with your organization that you have been provisioned for. Each row on the *ENTITIES* tab represents a single entity. Each column represents the following specific attributes about the entity:

- *Contract Entity*
- *Contract Parent*
- *Practice Count*
- *Active User Count*
- *Active Location Admin Count*
- *Active Org Admin Count*

Contract Entity / Value Based Entity	Contract Parent	Practice Count	Active User Count	Active Location Admin Count	Active Org Admin Count
Training Providers (Custom Group)		25	361	0	11

You can perform the entities-level administrative tasks using the *ENTITIES* tab such as viewing practice count, viewing active user count, viewing active Location Administrator count, viewing active Organization Administrator count, and searching for an entity.

### Viewing practice count

You can view the number of practices associated with each entity from the *Practice Count* column on the *ENTITIES* tab. To view a list of the practices, click the practice count hyperlink in the *Practice Count* column for an entity. Clicking the hyperlink will redirect you to the *PRACTICES* tab where the list of practices will be displayed.

PEAR Provider Administration Tool

USERS PRACTICES ENTITIES REPORTING THIRD PARTY

Search Option \* Contract Parent Search Text \* Search Clear

Contract Entity / Value Based Entity	Contract Parent	Practice Count	Active User Count	Active Location Admin Count	Active Org Admin Count
Training Providers (Custom Group)		25	361	0	11

### Viewing active user count

You can view the number of active users associated with an entity by clicking the active user count hyperlink in the *Active User Count* column for that entity. Clicking the hyperlink will redirect you to the *USERS* tab where the list will be displayed.

PEAR Provider Administration Tool

USERS PRACTICES ENTITIES REPORTING THIRD PARTY

Search Option \* Contract Parent Search Text \* Search Clear

Contract Entity / Value Based Entity	Contract Parent	Practice Count	Active User Count	Active Location Admin Count	Active Org Admin Count
Training Providers (Custom Group)		25	361	0	11

### Viewing active Location Administrator count

You can view the number of active Location Administrators associated with an entity by clicking the active Location Administrator count hyperlink in the *Active Location Admin Count* column for

that entity. Clicking the hyperlink will redirect you to the *USERS* tab where the list will be displayed.

Contract Entity / Value Based Entity	Contract Parent	Practice Count	Active User Count	Active Location Admin Count	Active Org Admin Count
Training Providers (Custom Group)		25	361	0	11

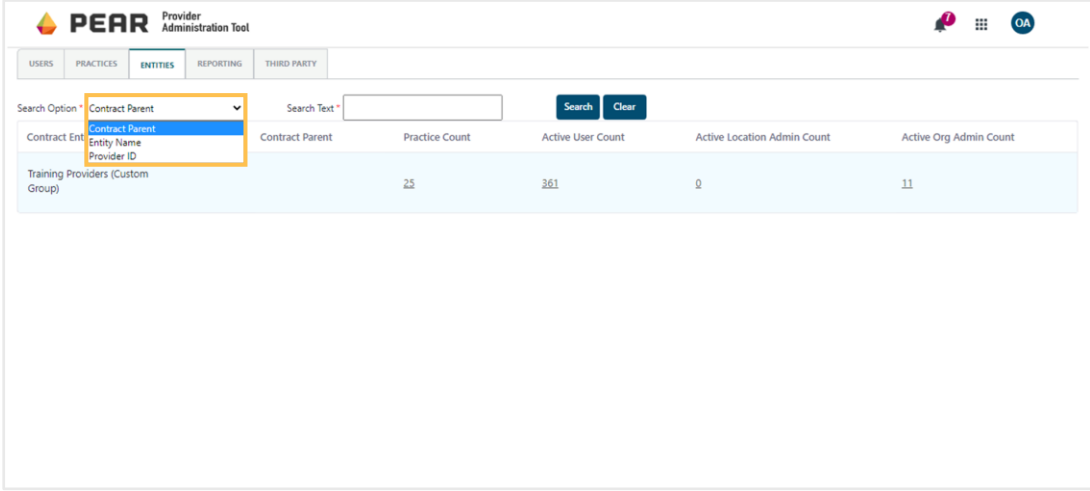
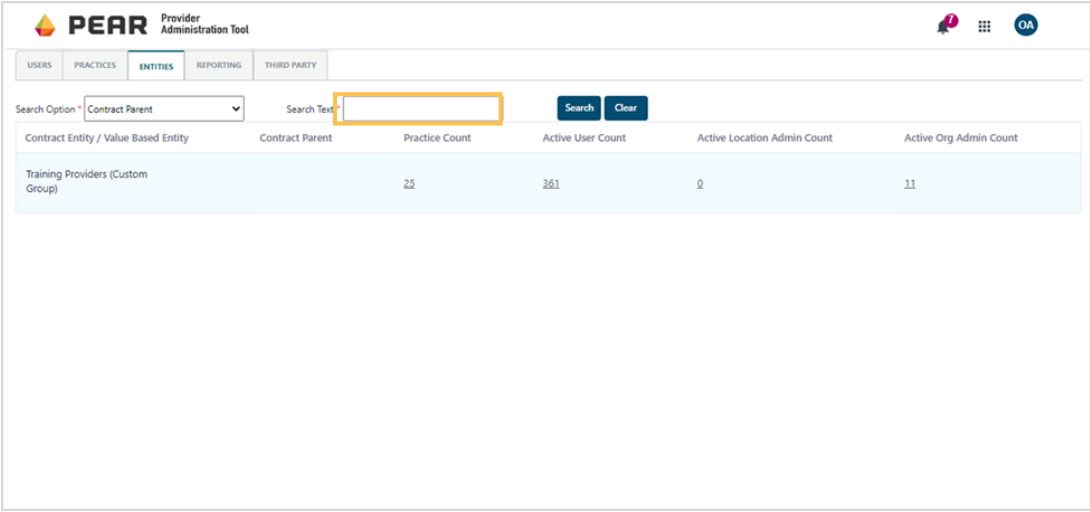
### Viewing active Organization Administrator count

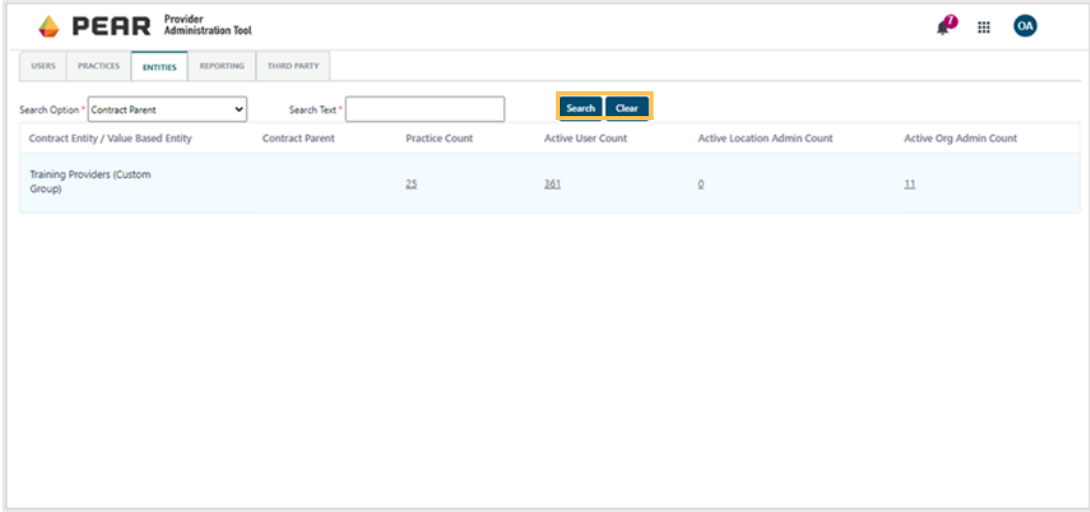
You can view the number of active Organization Administrators associated with an entity by clicking the active Organization Administrator count hyperlink in the *Active Org Admin Count* column for that entity. Clicking the hyperlink will redirect you to the *USERS* tab where the list will be displayed.

Contract Entity / Value Based Entity	Contract Parent	Practice Count	Active User Count	Active Location Admin Count	Active Org Admin Count
Training Providers (Custom Group)		25	361	0	11

## Searching for an entity

You can search for an entity using the *Search Option* drop-down menu and the *Search Text* field on the *ENTITIES* tab. Perform the following steps to search for an entity:

Step #	Action
1.	<p>From the <i>Search Option</i> drop-down menu, select the attribute to use for your search. The available options are:</p> <ul style="list-style-type: none"> <li>• <i>Contract Parent</i></li> <li>• <i>Entity Name</i></li> <li>• <i>Provider ID</i></li> </ul> 
2.	<p>Enter the value for the selected search option in the <i>Search Text</i> field.</p> 
3.	<p>Click the <i>Search</i> button. You can click the <i>Clear</i> button to clear the search criteria.</p>

Step #	Action												
	 <p>The screenshot displays the PEAR Provider Administration Tool interface. At the top, there is a navigation bar with tabs for USERS, PRACTICES, ENTITIES (selected), REPORTING, and THIRD PARTY. Below the navigation bar, there is a search section with a dropdown menu for 'Search Option' set to 'Contract Parent' and a text input for 'Search Text'. To the right of the search text are 'Search' and 'Clear' buttons. Below the search section is a table with the following columns: Contract Entity / Value Based Entity, Contract Parent, Practice Count, Active User Count, Active Location Admin Count, and Active Org Admin Count. The table contains one data row for 'Training Providers (Custom Group)' with values 25, 261, 0, and 11.</p> <table border="1"><thead><tr><th>Contract Entity / Value Based Entity</th><th>Contract Parent</th><th>Practice Count</th><th>Active User Count</th><th>Active Location Admin Count</th><th>Active Org Admin Count</th></tr></thead><tbody><tr><td>Training Providers (Custom Group)</td><td></td><td>25</td><td>261</td><td>0</td><td>11</td></tr></tbody></table>	Contract Entity / Value Based Entity	Contract Parent	Practice Count	Active User Count	Active Location Admin Count	Active Org Admin Count	Training Providers (Custom Group)		25	261	0	11
Contract Entity / Value Based Entity	Contract Parent	Practice Count	Active User Count	Active Location Admin Count	Active Org Admin Count								
Training Providers (Custom Group)		25	261	0	11								

## Section 5: Reporting in PAT

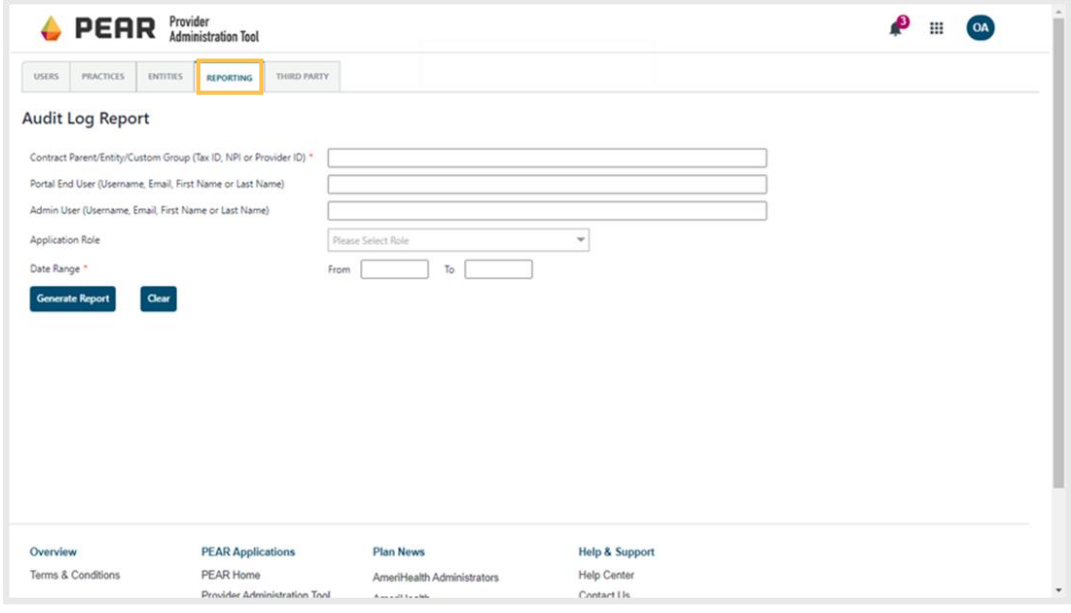
The *REPORTING* tab allows you to generate a comprehensive report known as the *Audit Log Report*. This report is generated to view the various administrative actions performed when managing users of different practices and entities during a selected period of time. The report displays:

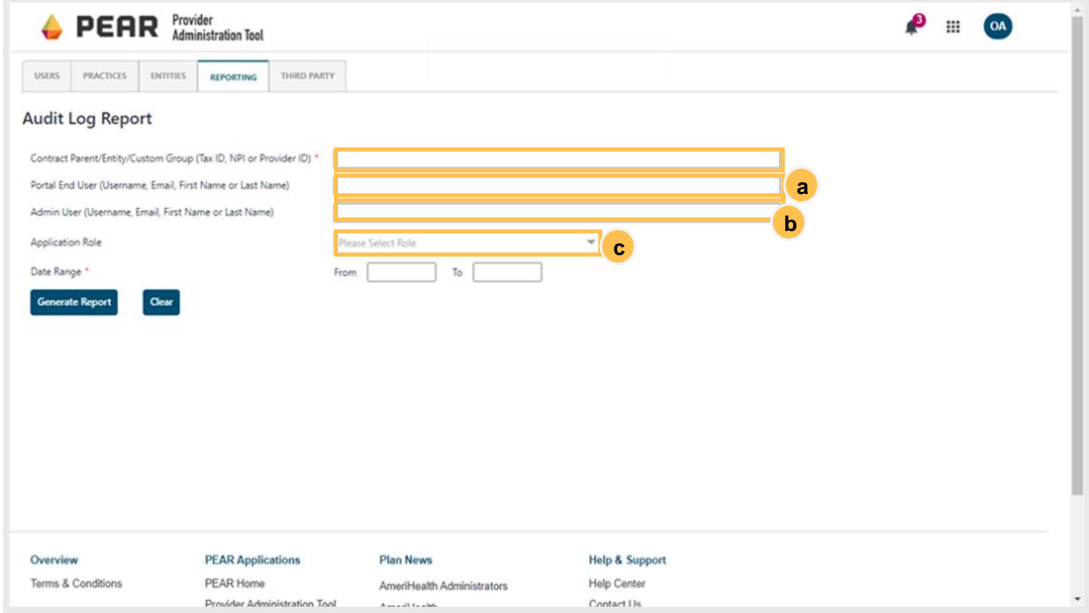
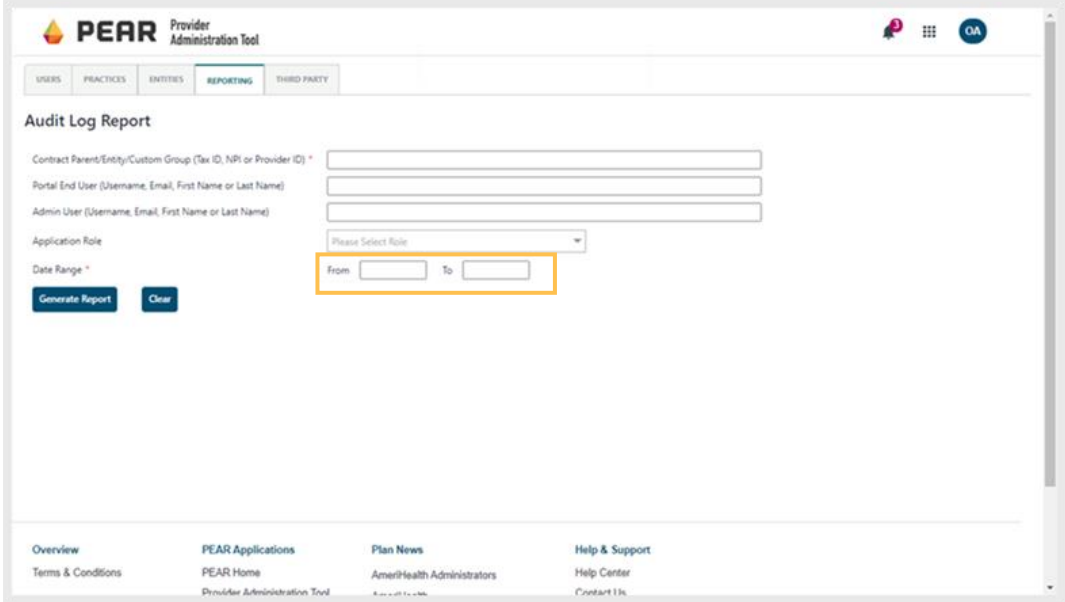
- the date a user(s) was created
- when and who created user access;
- when and who altered or removed user access; and
- what roles the user was assigned.

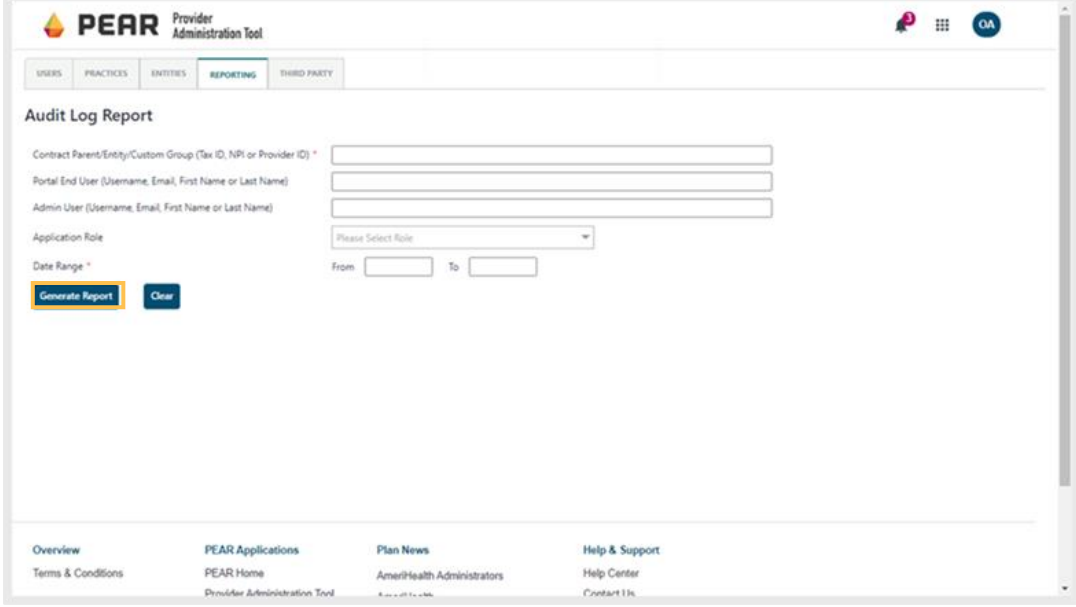
The screenshot shows the PEAR Provider Administration Tool interface. At the top, there is a navigation bar with tabs for 'USERS', 'PRACTICES', 'ENTITIES', 'REPORTING' (which is selected), and 'THIRD PARTY'. Below the navigation bar, the 'Audit Log Report' form is displayed. The form includes several input fields: 'Contract Parent/Entity/Custom Group (Tax ID, NPI or Provider ID)', 'Portal End User (Username, Email, First Name or Last Name)', 'Admin User (Username, Email, First Name or Last Name)', and 'Application Role' (a dropdown menu with the text 'Please Select Role'). There is also a 'Date Range' section with 'From' and 'To' input boxes. At the bottom of the form, there are two buttons: 'Generate Report' and 'Clear'. The footer of the page contains a grid of links for 'Overview', 'PEAR Applications', 'Plan News', and 'Help & Support'.

Perform the following steps to generate the *Audit Log Report*:

Step #	Action
1.	Click the <i>REPORTING</i> tab. The Audit Log Report input fields are displayed by default on the <i>REPORTING</i> tab.

Step #	Action
	
<p>2.</p>	<p>To begin defining report criteria, enter the Tax ID, NPI or Provider ID in the <i>Contract Parent/Entity/Custom Group</i> field. This is a mandatory step.</p> <ol style="list-style-type: none"> <li>You have the option to further refine report criteria by noting a portal end user's username, email, or first or last name in the <i>End User Name, User Name, or Email</i> field if you want to generate the log for a specific user.</li> <li>You also have the option to limit your report to audit activity for an Organization or Location Administrator by entering their username, email or first/last name in the <i>Admin name</i> field.</li> <li>If you wish to limit the report results to a specific application role, select the role from the <i>Application Role</i> drop-down list.</li> </ol>

Step #	Action
	 <p><b>Note:</b> All fields denoted with a red asterisk are required.</p>
3.	<p>Enter the date range you would like to see in the report in the <i>Date Range</i> field. This is a mandatory step.</p> 
4.	<p>Click the <i>Generate Report</i> button.</p>

Step #	Action
	 <p>Once you click the <i>Generate</i> button, the <i>Audit Log Report</i> is displayed. The report shows details about the created users, including:</p> <ul style="list-style-type: none"> <li>• first name</li> <li>• last name</li> <li>• username</li> <li>• user type</li> <li>• user status</li> <li>• job title</li> <li>• user telephone</li> <li>• contract parent (contract parent id)</li> <li>• contract entity (contract entity id)/custom group (custom group id)</li> <li>• practice name (practice id)</li> <li>• practice tax id</li> <li>• practice NPI</li> <li>• application</li> <li>• role</li> <li>• action</li> <li>• admin user (performed by)</li> <li>• action date</li> </ul>

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<p><b>Note:</b> You can export and save reports in a variety of formats including Microsoft Word, Microsoft Excel, Microsoft PowerPoint, PDF, TIFF, MHTML, CSV, and EML.</p>																																																																																																																																																																																																																																																																																																																																																																		

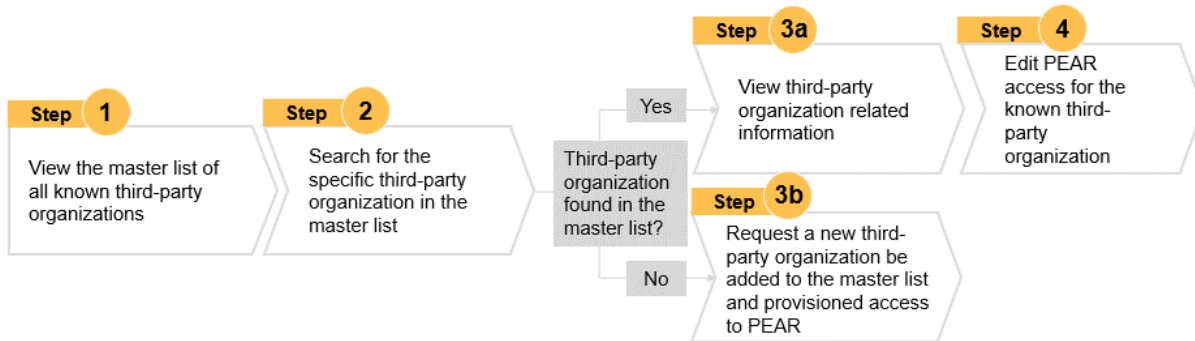
## Section 6: Managing third-party organizations in PAT

Third-party organizations such as billing companies or health care clearinghouses supporting your organization can be provisioned access to select PEAR portal applications. Much like your organization, third-party organizations will have designated PEAR Organization Administrators to manage access across their organization.

As an Organization Administrator, you have the exclusive responsibility of granting a known third-party organization access to your organization’s information via the PEAR portal. Known third-party organizations appear on a master list within PAT, and you may select and provide access to your organization as required. If there is a third-party organization you work with that is not already registered in PEAR and therefore does not appear on the master list, you may submit a request to register the third-party organization. Once registered, the third-party organization will appear on the master list and you may proceed with provisioning the third-party with the necessary access to your provider organization.

The *THIRD PARTY* tab in PAT is where you can manage all third-party organizations supporting your provider organization. From this tab, you can view the master list of all known third-party organizations, search for and view a specific known third-party organization, initiate PEAR access for a known third-party organization, or request a new third-party organization be added to the master list and provisioned access for PEAR.

The third-party access management process includes the following steps:

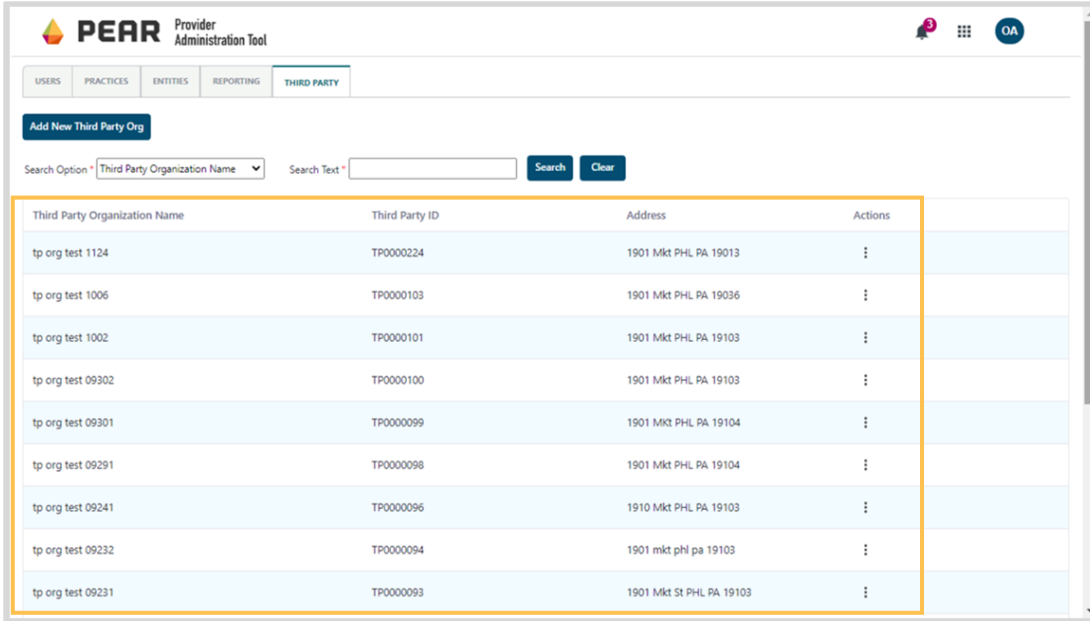


### Viewing all known third-party organizations

On the *THIRD PARTY* tab, you can view a master list of all known third-party organizations.

Each row on the *THIRD PARTY* tab represents a single third-party organization. Each column represents an attribute of the third-party organization. The attributes displayed on the tab are:

- *Third Party Organization Name*
- *Third Party ID*
- *Address*

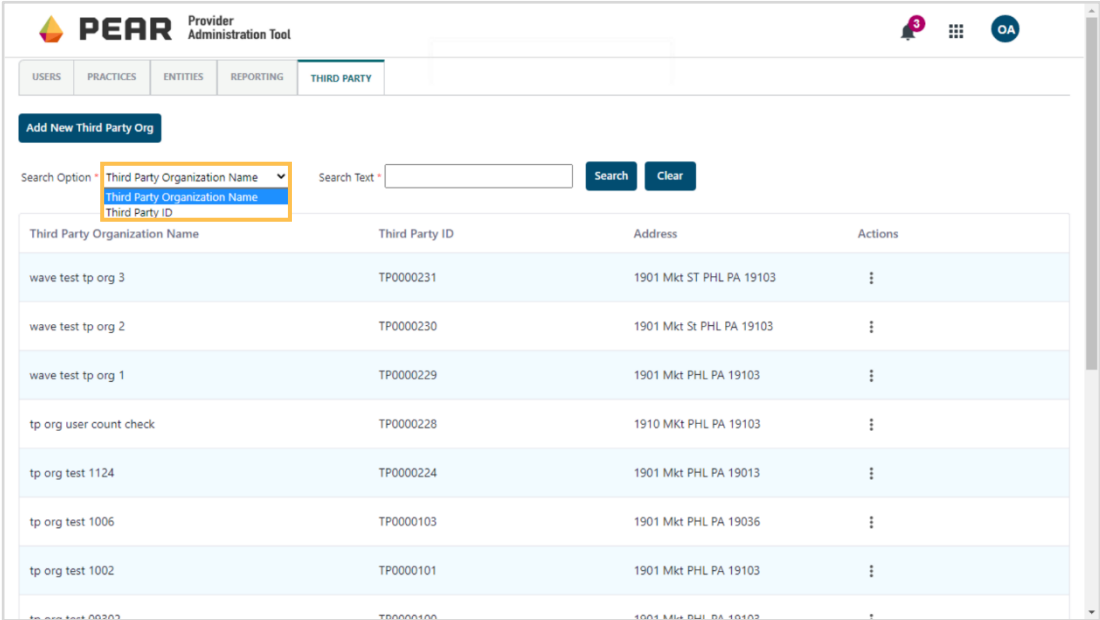
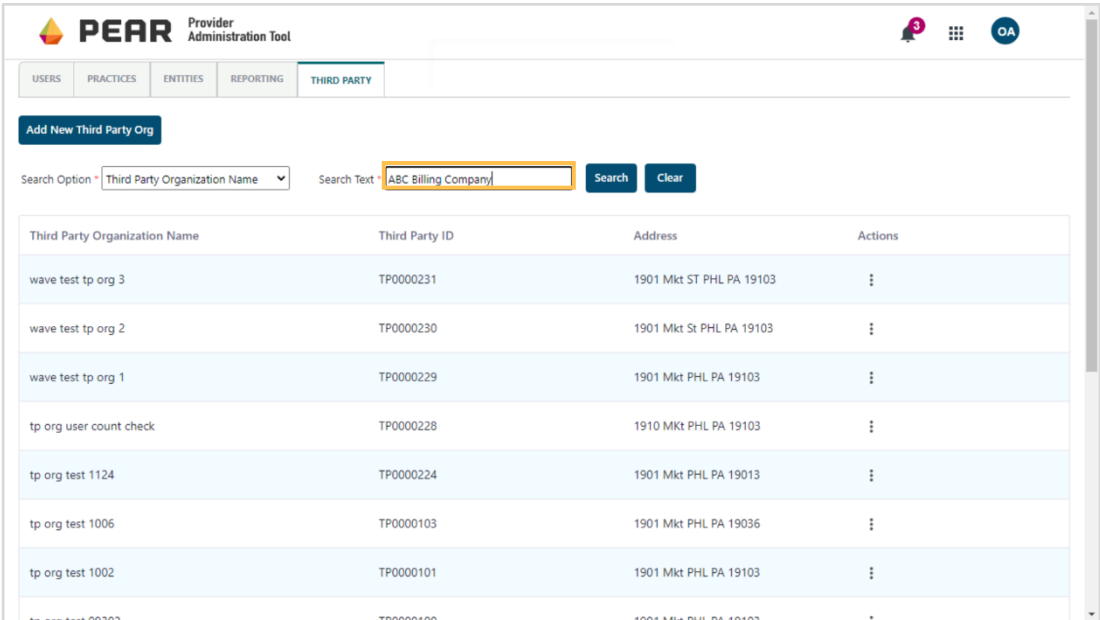


**Note:** You can scroll down this page to view the total number of third-party organizations.

## Searching for a specific third-party organization

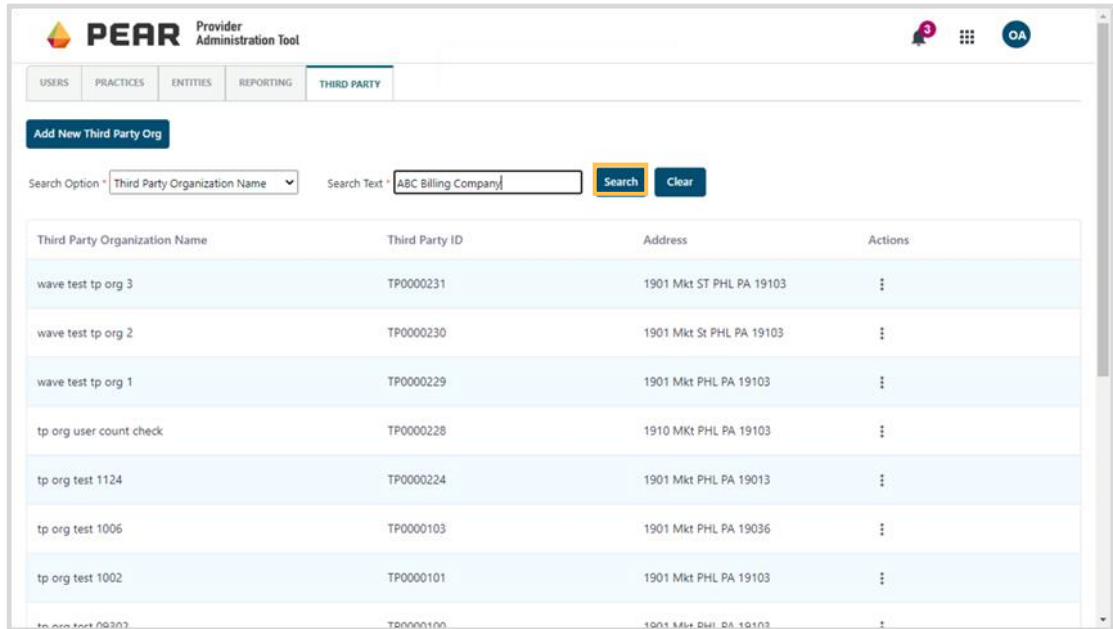
Perform the following steps to search for a specific, known third-party organization:

Step #	Action
1.	<p>From the <i>Search Option</i> drop-down menu on the <i>THIRD PARTY</i> tab, select the attribute to use for your search. The available options are:</p> <ul style="list-style-type: none"> <li>• <i>Third Party Organization Name</i></li> <li>• <i>Third Party ID</i></li> </ul>

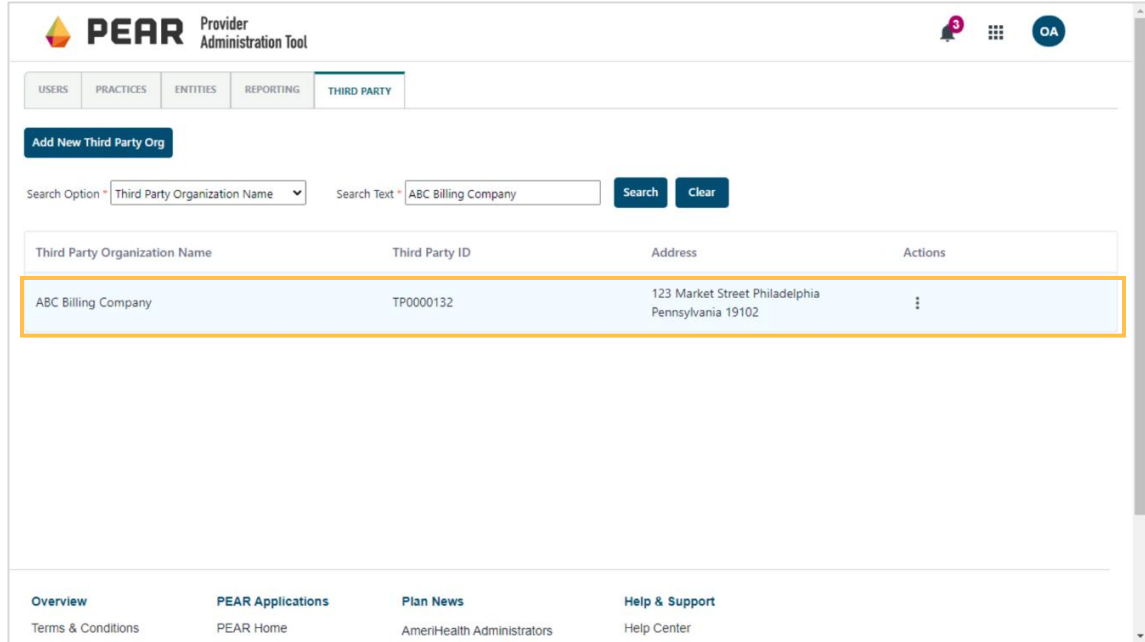
Step #	Action																																
	 <p>The screenshot shows the PEAR Provider Administration Tool interface. The 'THIRD PARTY' tab is selected. A dropdown menu for 'Search Option' is open, with 'Third Party Organization Name' highlighted. The 'Search Text' field is empty. Below the search area is a table with columns: Third Party Organization Name, Third Party ID, Address, and Actions.</p> <table border="1"><thead><tr><th>Third Party Organization Name</th><th>Third Party ID</th><th>Address</th><th>Actions</th></tr></thead><tbody><tr><td>wave test tp org 3</td><td>TP0000231</td><td>1901 Mkt ST PHL PA 19103</td><td>⋮</td></tr><tr><td>wave test tp org 2</td><td>TP0000230</td><td>1901 Mkt St PHL PA 19103</td><td>⋮</td></tr><tr><td>wave test tp org 1</td><td>TP0000229</td><td>1901 Mkt PHL PA 19103</td><td>⋮</td></tr><tr><td>tp org user count check</td><td>TP0000228</td><td>1910 MKT PHL PA 19103</td><td>⋮</td></tr><tr><td>tp org test 1124</td><td>TP0000224</td><td>1901 Mkt PHL PA 19013</td><td>⋮</td></tr><tr><td>tp org test 1006</td><td>TP0000103</td><td>1901 Mkt PHL PA 19036</td><td>⋮</td></tr><tr><td>tp org test 1002</td><td>TP0000101</td><td>1901 Mkt PHL PA 19103</td><td>⋮</td></tr></tbody></table>	Third Party Organization Name	Third Party ID	Address	Actions	wave test tp org 3	TP0000231	1901 Mkt ST PHL PA 19103	⋮	wave test tp org 2	TP0000230	1901 Mkt St PHL PA 19103	⋮	wave test tp org 1	TP0000229	1901 Mkt PHL PA 19103	⋮	tp org user count check	TP0000228	1910 MKT PHL PA 19103	⋮	tp org test 1124	TP0000224	1901 Mkt PHL PA 19013	⋮	tp org test 1006	TP0000103	1901 Mkt PHL PA 19036	⋮	tp org test 1002	TP0000101	1901 Mkt PHL PA 19103	⋮
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tp org test 1006	TP0000103	1901 Mkt PHL PA 19036	⋮																														
tp org test 1002	TP0000101	1901 Mkt PHL PA 19103	⋮																														
2.	<p>Enter the value for the selected search option in the <i>Search Text</i> field.</p>  <p>The screenshot shows the PEAR Provider Administration Tool interface. The 'THIRD PARTY' tab is selected. The 'Search Option' dropdown is set to 'Third Party Organization Name'. The 'Search Text' field contains the text 'ABC Billing Company'. Below the search area is a table with columns: Third Party Organization Name, Third Party ID, Address, and Actions.</p> <table border="1"><thead><tr><th>Third Party Organization Name</th><th>Third Party ID</th><th>Address</th><th>Actions</th></tr></thead><tbody><tr><td>wave test tp org 3</td><td>TP0000231</td><td>1901 Mkt ST PHL PA 19103</td><td>⋮</td></tr><tr><td>wave test tp org 2</td><td>TP0000230</td><td>1901 Mkt St PHL PA 19103</td><td>⋮</td></tr><tr><td>wave test tp org 1</td><td>TP0000229</td><td>1901 Mkt PHL PA 19103</td><td>⋮</td></tr><tr><td>tp org user count check</td><td>TP0000228</td><td>1910 MKT PHL PA 19103</td><td>⋮</td></tr><tr><td>tp org test 1124</td><td>TP0000224</td><td>1901 Mkt PHL PA 19013</td><td>⋮</td></tr><tr><td>tp org test 1006</td><td>TP0000103</td><td>1901 Mkt PHL PA 19036</td><td>⋮</td></tr><tr><td>tp org test 1002</td><td>TP0000101</td><td>1901 Mkt PHL PA 19103</td><td>⋮</td></tr></tbody></table>	Third Party Organization Name	Third Party ID	Address	Actions	wave test tp org 3	TP0000231	1901 Mkt ST PHL PA 19103	⋮	wave test tp org 2	TP0000230	1901 Mkt St PHL PA 19103	⋮	wave test tp org 1	TP0000229	1901 Mkt PHL PA 19103	⋮	tp org user count check	TP0000228	1910 MKT PHL PA 19103	⋮	tp org test 1124	TP0000224	1901 Mkt PHL PA 19013	⋮	tp org test 1006	TP0000103	1901 Mkt PHL PA 19036	⋮	tp org test 1002	TP0000101	1901 Mkt PHL PA 19103	⋮
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tp org test 1002	TP0000101	1901 Mkt PHL PA 19103	⋮																														

Step #	Action
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3. Click the *Search* button.



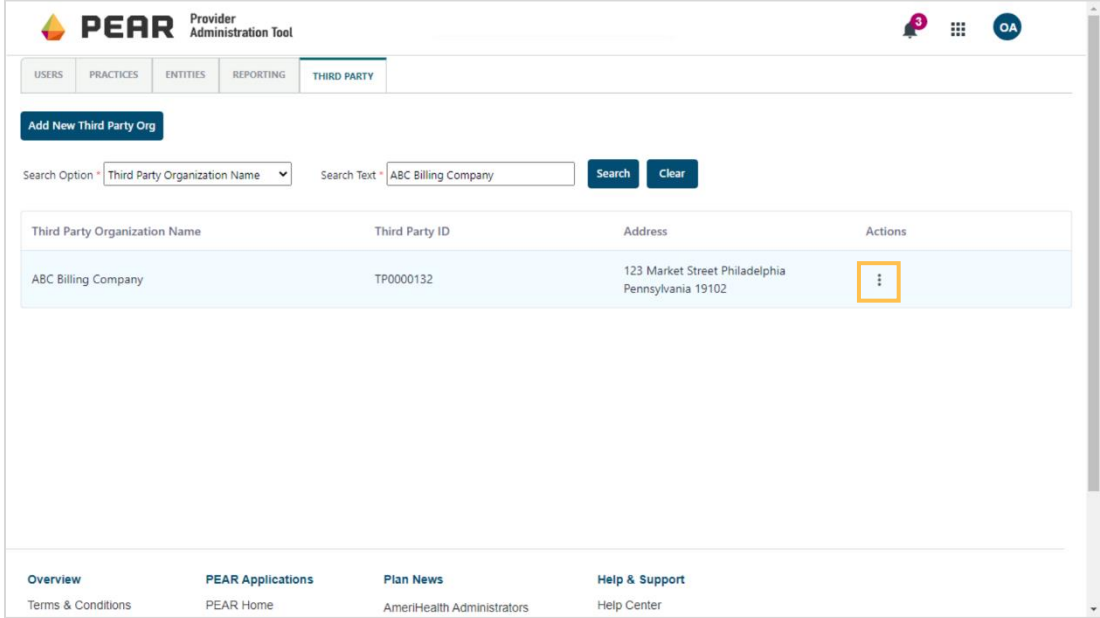
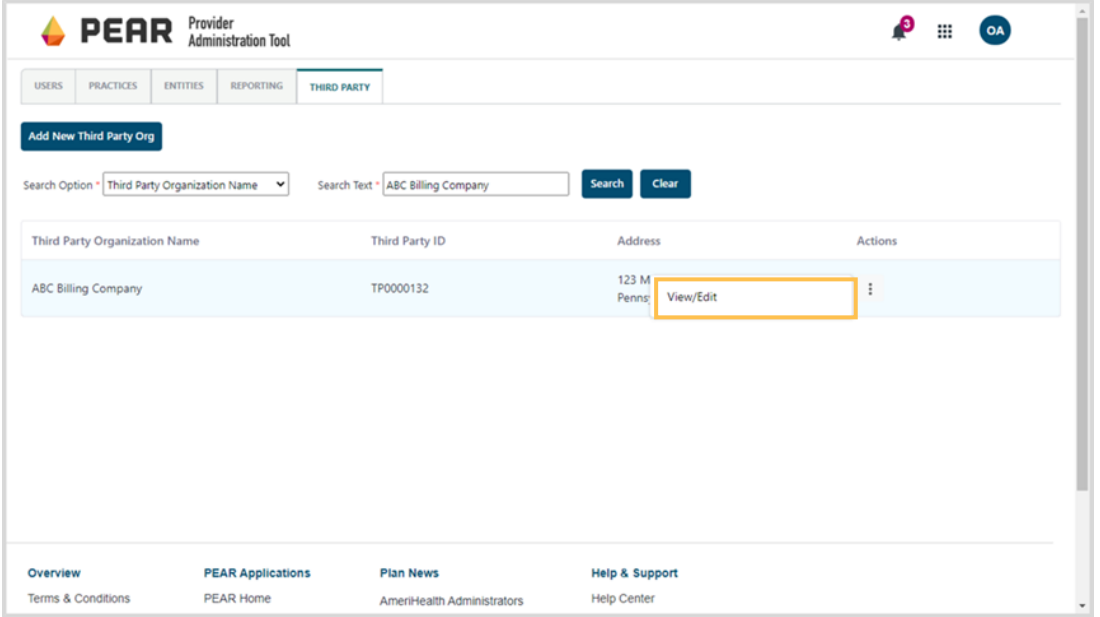
The search results are displayed. Review this list of known third-party organizations before submitting a request for a new third-party organization to avoid possible duplication.

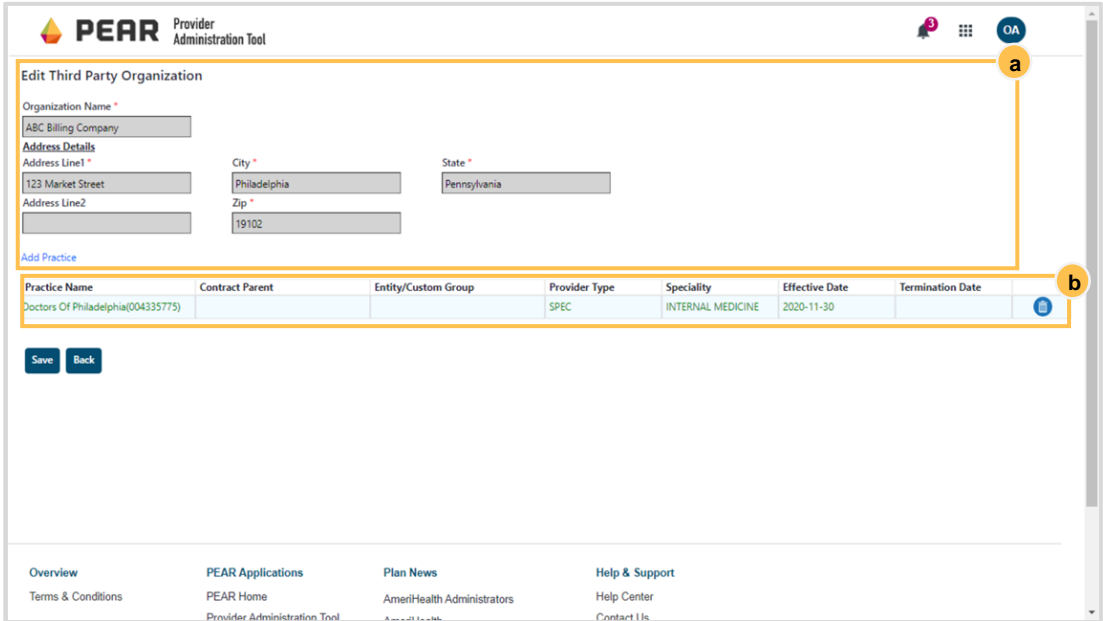


If you are able to find the third-party organization, you can take steps to provision the third-party to your provider organization. Let's look at the steps to view and edit a specific, known third-party organization.

## Viewing a specific third-party organization

Once you have located the third-party organization of your choice from the master list, perform the following steps to view the third-party's information:

Step #	Action
1.	<p>Click the <i>Actions</i> button.</p>  <p>The screenshot shows the PEAR Provider Administration Tool interface. At the top, there are navigation tabs: USERS, PRACTICES, ENTITIES, REPORTING, and THIRD PARTY. Below the tabs is a search section with a dropdown menu set to 'Third Party Organization Name' and a search text field containing 'ABC Billing Company'. A table below the search results has columns for 'Third Party Organization Name', 'Third Party ID', 'Address', and 'Actions'. The first row contains 'ABC Billing Company', 'TP0000132', and '123 Market Street Philadelphia Pennsylvania 19102'. The 'Actions' column for this row contains a three-dot menu icon, which is highlighted with a yellow box.</p>
2.	<p>Select <i>View/Edit</i> from the drop-down list that is displayed.</p>  <p>This screenshot is identical to the previous one, but the three-dot menu in the 'Actions' column has been expanded. The 'View/Edit' option is now visible and is highlighted with a yellow box.</p>

Step #	Action
3.	<p>The <i>Edit Third Party Organization</i> page is displayed. On this page, you can view the practices or facilities previously associated with the designated third-party organizations and add or delete a new practice or facility.</p> <ul style="list-style-type: none"> <li>a) You can view demographic information such as:                             <ul style="list-style-type: none"> <li>• organization name</li> <li>• address details</li> </ul> </li> <li>b) You can view the following details about the practices that the third-party organizations can access on this page:                             <ul style="list-style-type: none"> <li>• practice name</li> <li>• contract parent</li> <li>• entity/custom group</li> <li>• provider type</li> <li>• specialty</li> <li>• effective date</li> <li>• termination date</li> </ul> </li> </ul> 

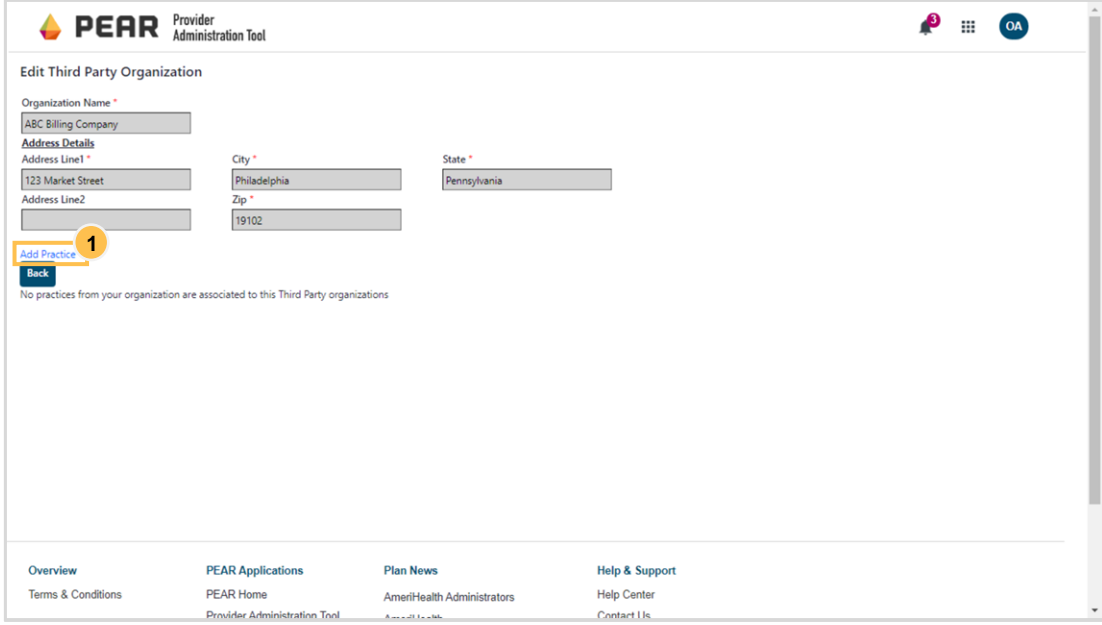
## Editing PEAR access for a known third-party organization

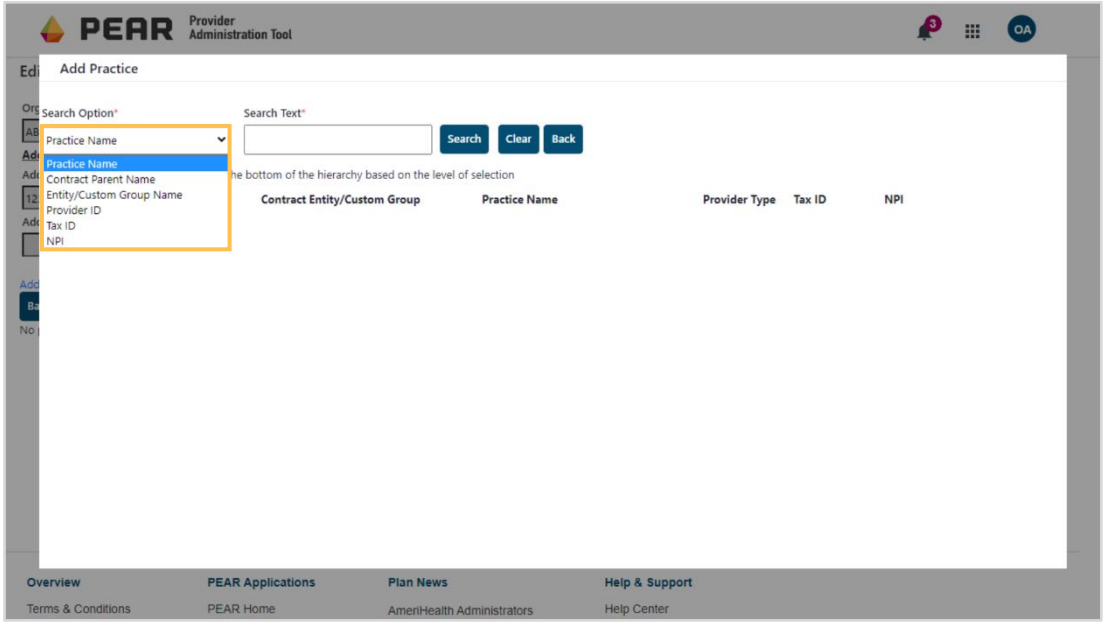
From the *Edit Third Party Organization* page, you can easily add or delete third-party organization’s practice access for your provider organization.

### Adding PEAR access for a known third-party organization

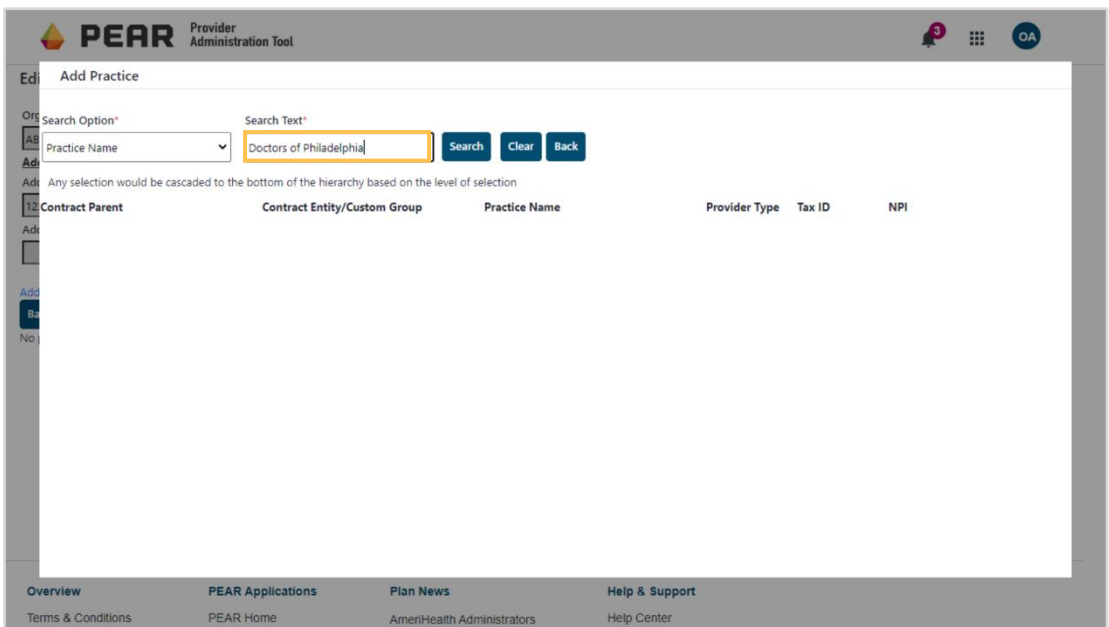
Locate the third party organization you want to edit and perform steps 1-2 under [Viewing a specific third-party organization](#) to navigate to the *Edit Third Party Organization* page and then,

perform the following steps to provision a known third-party organization with access to your provider organization:

Step #	Action
1.	<p>Click the <i>Add Practice</i> link.</p> 
2.	<p>Next, the <i>Add Practice</i> pop-up window is displayed. Click the <i>Search Options</i> drop-down menu and select the practice attribute by which you want to search. The options are:</p> <ul style="list-style-type: none"> <li>• <i>Practice Name</i></li> <li>• <i>Contract Parent Name</i></li> <li>• <i>Entity/Custom Group Name</i></li> <li>• <i>Provider ID</i></li> <li>• <i>Tax ID</i></li> <li>• <i>NPI</i></li> </ul>

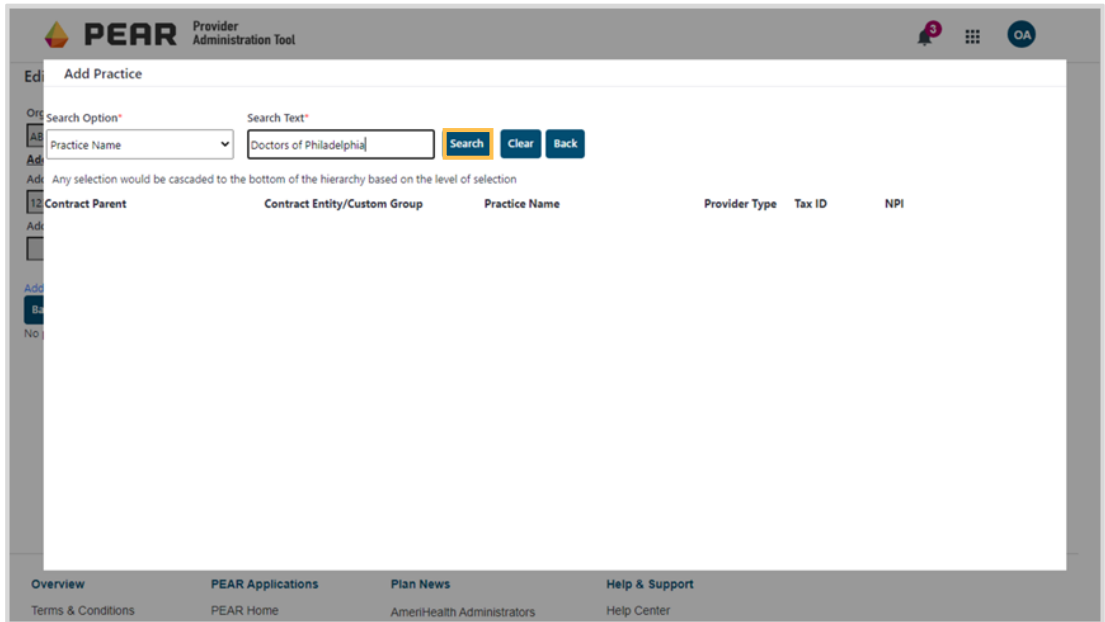
Step #	Action
	

3. Based on the selected search option, enter the search criteria for the practice in the *Search Text* field.



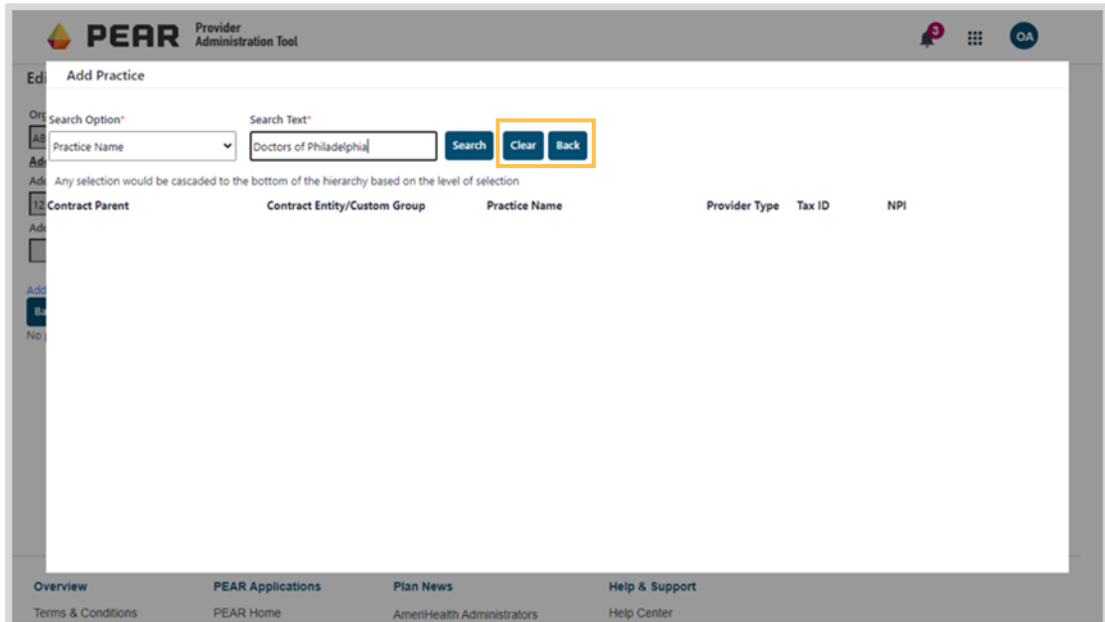
Step #	Action
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4. Click the *Search* button.



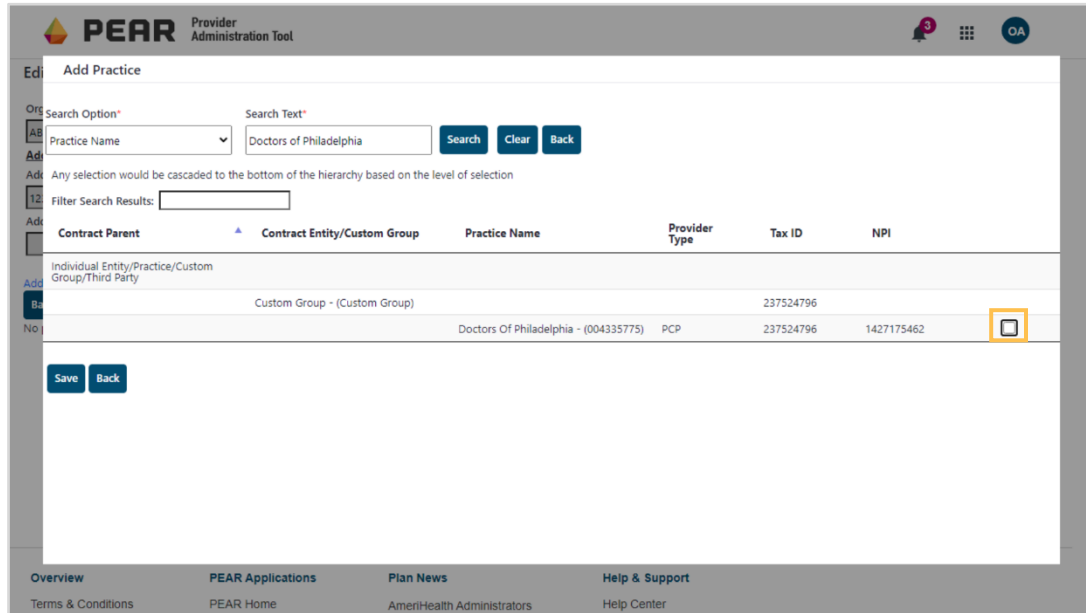
**Note:**

- You can only search for practices and facilities associated with your provider organization.
- You can click the *Clear* button to clear the search criteria.
- You can click the *Back* button to close the pop-up window.

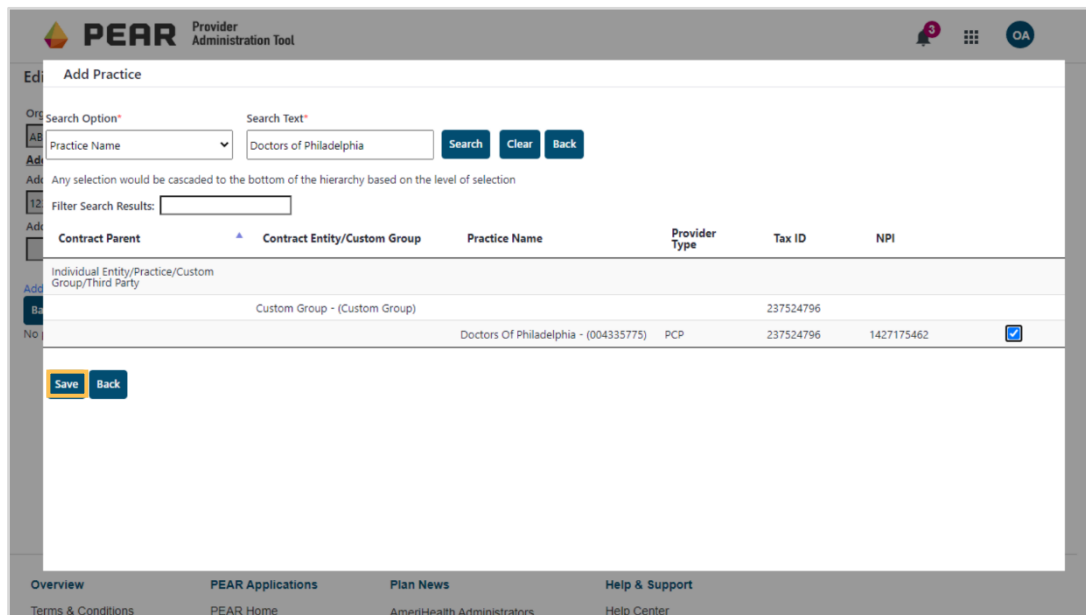


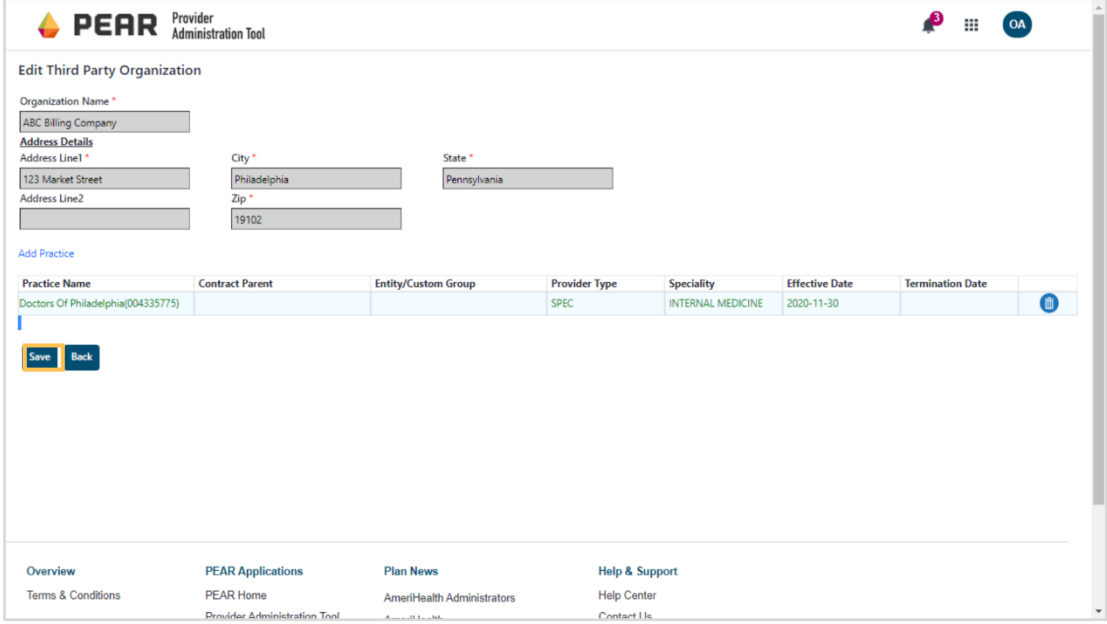
Step #	Action
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- |    |  |
|----|--|
| 5. | The list of practices and facilities associated with your organization is displayed. Select the check boxes next to the practices for which you want to add the third-party organization access. |
|----|--|



- |    |                        |
|----|------------------------|
| 6. | Click the Save button. |
|----|------------------------|



Step #	Action
7.	<p>The selected practices are now displayed in the table on the <i>Edit Third Party Organization</i> page. Click <i>Save</i> to add the practices to the third-party organization's access.</p>  <p>The screenshot shows the 'Edit Third Party Organization' page in the PEAR Provider Administration Tool. The page includes a header with the PEAR logo and 'Provider Administration Tool'. Below the header, there is a form for organization details. The 'Organization Name' field contains 'ABC Billing Company'. The 'Address Details' section includes 'Address Line 1' (123 Market Street), 'City' (Philadelphia), 'State' (Pennsylvania), and 'Zip' (19102). Below the form, there is an 'Add Practice' section with a table of practices. The table has columns for Practice Name, Contract Parent, Entity/Custom Group, Provider Type, Speciality, Effective Date, and Termination Date. One practice is listed: 'Doctors Of Philadelphia(004335775)' with 'SPEC' as the Provider Type and 'INTERNAL MEDICINE' as the Speciality. The Effective Date is '2020-11-30'. Below the table, there are 'Save' and 'Back' buttons. At the bottom of the page, there is a navigation menu with links for Overview, PEAR Applications, Plan News, and Help &amp; Support.</p>
8.	<p>Upon clicking the <i>Save</i> button, a pop-up window is displayed asking you to attest that you are authorized to add the practice. As an Organization Administrator, you will be required to attest that you are authorized to initiate, edit or terminate access for your supporting third-party organizations whenever you add, edit, or delete access for a third-party organization.</p> <p>Click the <i>OK</i> button to attest.</p>

Step #	Action


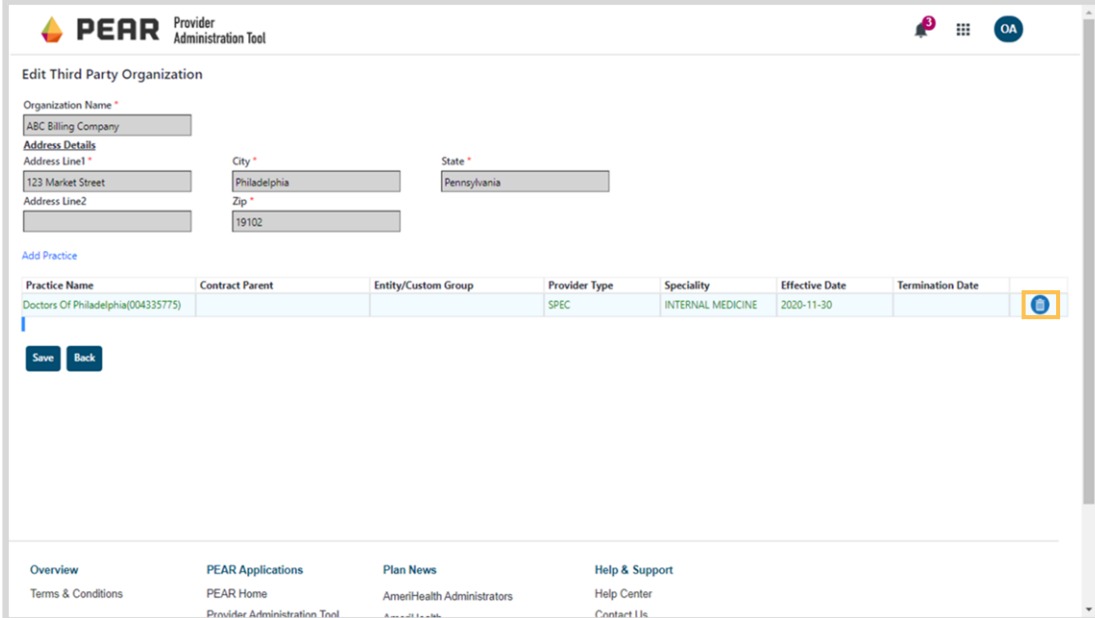
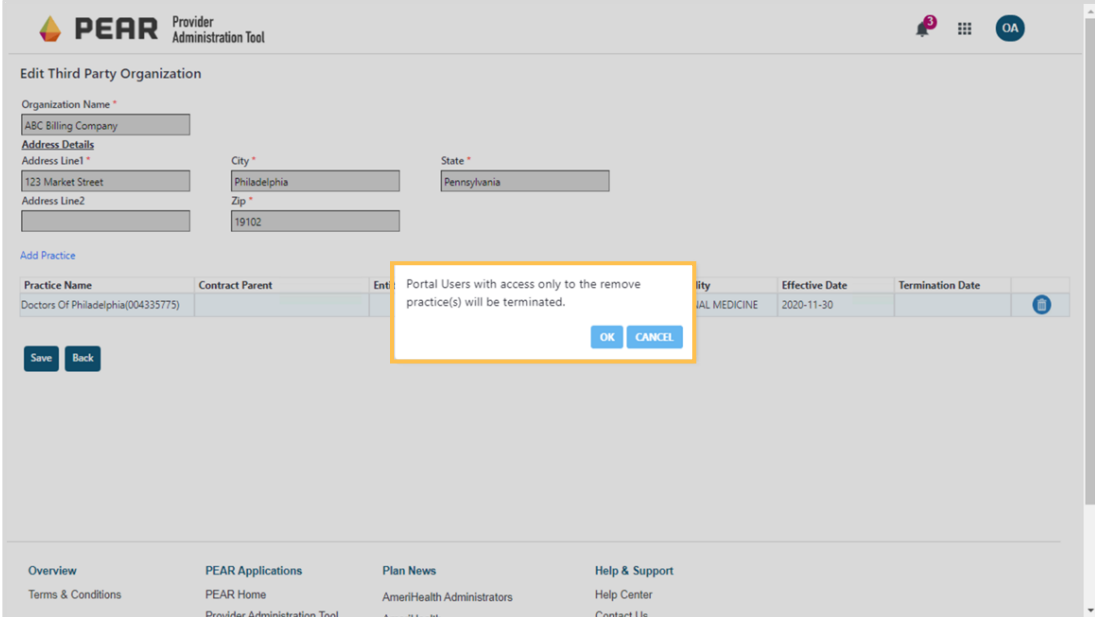
**Note:** You can click the *CANCEL* button to cancel the attestation.

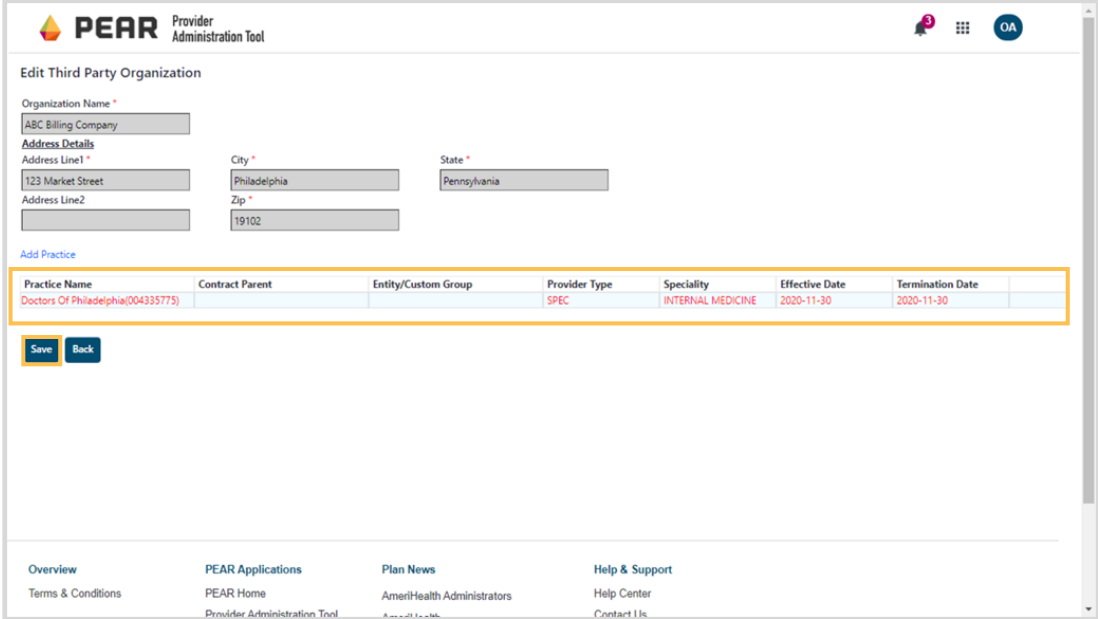
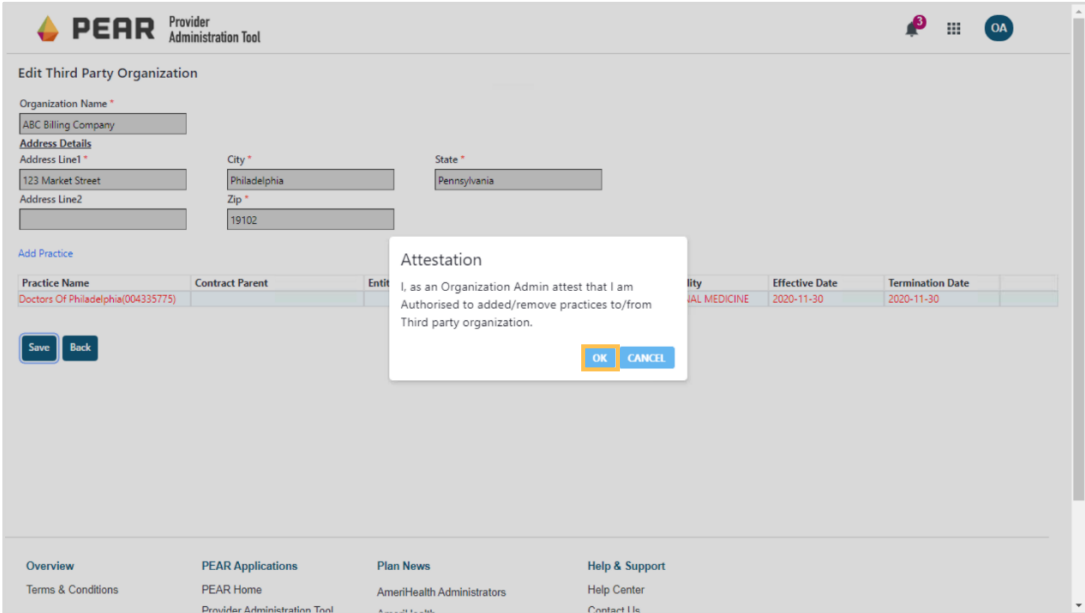
Upon clicking the *OK* button, a confirmation message is displayed confirming that the third-party organization details have been updated. The Organization Administrators of third-party organizations will receive an email notification of the change.

Third Party Organization Name	Third Party ID	Address	Actions
tp org test 1124	TP0000224	1901 Mkt PHL PA 19013	⋮
tp org test 1006	TP0000103	1901 Mkt PHL PA 19036	⋮
tp org test 1002	TP0000101	1901 Mkt PHL PA 19103	⋮
tp org test 09302	TP0000100	1901 Mkt PHL PA 19103	⋮
tp org test 09301	TP0000099	1901 Mkt PHL PA 19104	⋮
tp org test 09291	TP0000098	1901 Mkt PHL PA 19104	⋮
tp org test 09241	TP0000096	1910 Mkt PHL PA 19103	⋮
	TP0000094	1901 mkt phl pa 19103	⋮
	TP0000093	1901 Mkt St PHL PA 19103	⋮

### Removing third-party access

Locate the third party organization you want to edit and perform steps 1-2 under [Viewing a specific third-party organization](#) to navigate to the *Edit Third Party Organization* page and then, perform the following steps to remove third-party access to a practice in your provider organization :

Step #	Action
1.	<p>Click the  button next to remove the practice or facility from the third-party’s PEAR profile.</p> 
2.	<p>The confirmation pop-up box is displayed. Click the <i>OK</i> button to confirm the deletion.</p> 

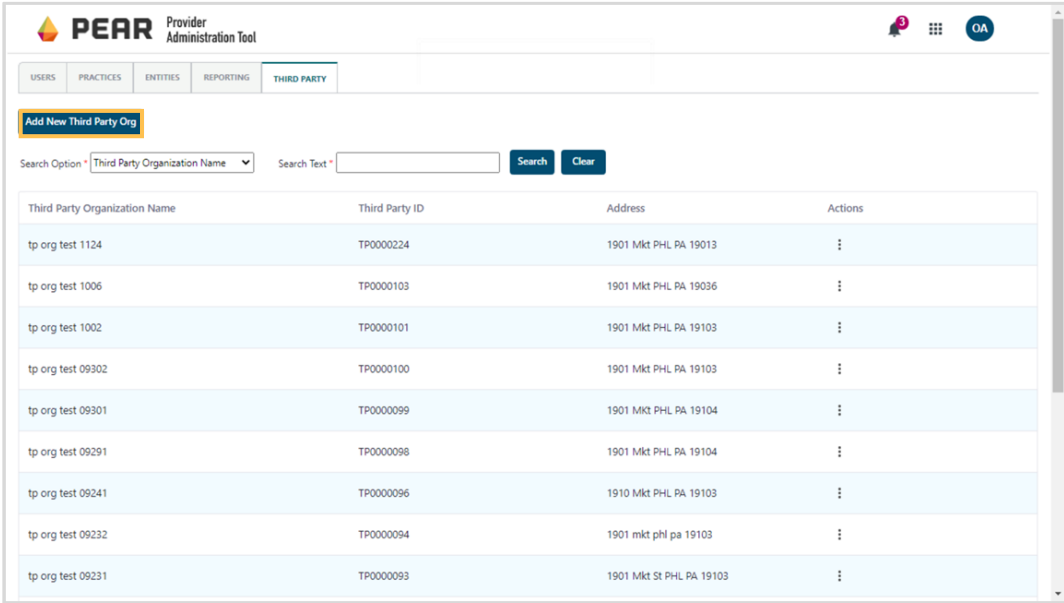
Step #	Action
3.	<p>The deleted practice is removed from the third-party organization’s access and appears in red text, along with a termination date listed in the table on the <i>Edit Third-party organization</i> page. Click the <i>Save</i> button.</p> <p><b>Note:</b> The deleted practice will not disappear from the table. You can track the history of the access granted to the third-party organization from this page.</p> 
4.	<p>On clicking the <i>Save</i> button, a pop-up window is displayed asking you to attest that you are authorized to delete the practice.</p> <p>Click the <i>OK</i> button to complete the attestation.</p> 

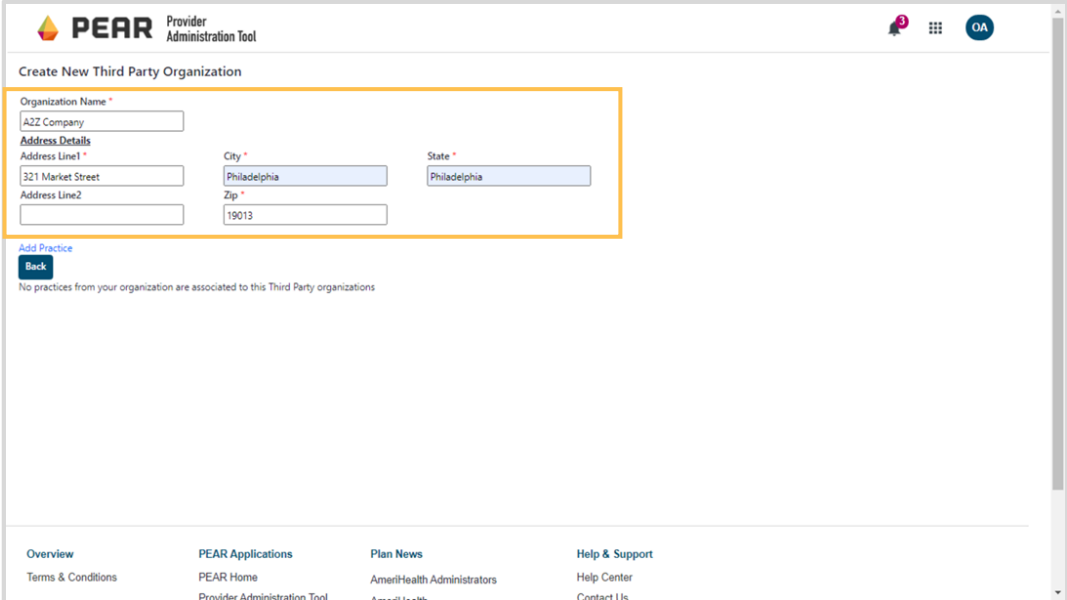
Step #	Action
	<p><b>Note:</b> Click the <i>CANCEL</i> button to cancel the attestation. If you click the <i>CANCEL</i> button at this stage and/or does not successfully save, the third-party organization's access to this practice will remain intact.</p>

## Adding a new third-party organization

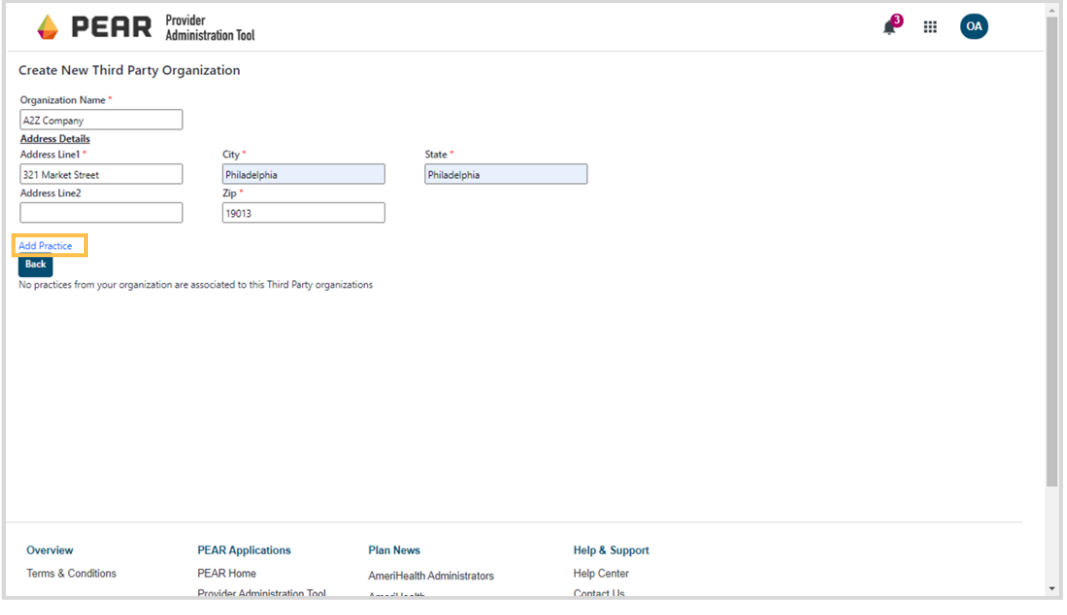
Now that we've looked at the steps to view and edit a specific, known third-party organization's details, let's review what to do in the event you are not able to find the third-party you want to add to your provider organization on the master third-party list.

Perform the following steps to request a new third-party organization be added to the master list on the *THIRD PARTY* tab and provisioned access to PEAR:

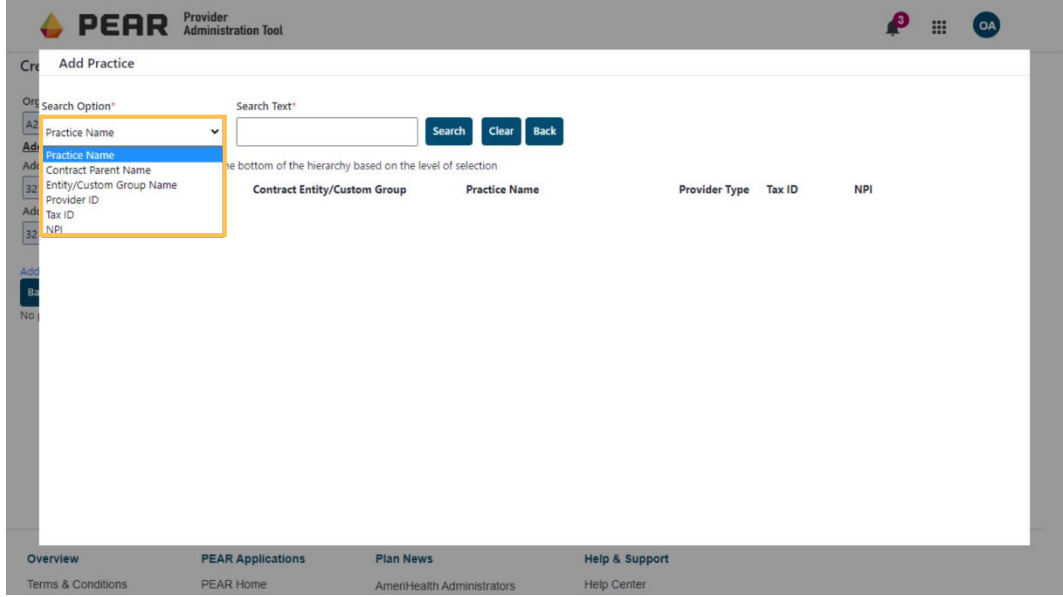
Step #	Action																																								
1.	<p>Click the <i>Add New Third Party Org</i> button.</p>  <table border="1" data-bbox="354 1020 1365 1423"> <thead> <tr> <th>Third Party Organization Name</th> <th>Third Party ID</th> <th>Address</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>tp org test 1124</td> <td>TP0000224</td> <td>1901 Mkt PHL PA 19013</td> <td>⋮</td> </tr> <tr> <td>tp org test 1006</td> <td>TP0000103</td> <td>1901 Mkt PHL PA 19036</td> <td>⋮</td> </tr> <tr> <td>tp org test 1002</td> <td>TP0000101</td> <td>1901 Mkt PHL PA 19103</td> <td>⋮</td> </tr> <tr> <td>tp org test 09302</td> <td>TP0000100</td> <td>1901 Mkt PHL PA 19103</td> <td>⋮</td> </tr> <tr> <td>tp org test 09301</td> <td>TP0000099</td> <td>1901 Mkt PHL PA 19104</td> <td>⋮</td> </tr> <tr> <td>tp org test 09291</td> <td>TP0000098</td> <td>1901 Mkt PHL PA 19104</td> <td>⋮</td> </tr> <tr> <td>tp org test 09241</td> <td>TP0000096</td> <td>1910 Mkt PHL PA 19103</td> <td>⋮</td> </tr> <tr> <td>tp org test 09232</td> <td>TP0000094</td> <td>1901 mkt phl pa 19103</td> <td>⋮</td> </tr> <tr> <td>tp org test 09231</td> <td>TP0000093</td> <td>1901 Mkt St PHL PA 19103</td> <td>⋮</td> </tr> </tbody> </table>	Third Party Organization Name	Third Party ID	Address	Actions	tp org test 1124	TP0000224	1901 Mkt PHL PA 19013	⋮	tp org test 1006	TP0000103	1901 Mkt PHL PA 19036	⋮	tp org test 1002	TP0000101	1901 Mkt PHL PA 19103	⋮	tp org test 09302	TP0000100	1901 Mkt PHL PA 19103	⋮	tp org test 09301	TP0000099	1901 Mkt PHL PA 19104	⋮	tp org test 09291	TP0000098	1901 Mkt PHL PA 19104	⋮	tp org test 09241	TP0000096	1910 Mkt PHL PA 19103	⋮	tp org test 09232	TP0000094	1901 mkt phl pa 19103	⋮	tp org test 09231	TP0000093	1901 Mkt St PHL PA 19103	⋮
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tp org test 09231	TP0000093	1901 Mkt St PHL PA 19103	⋮																																						
2.	<p>The <i>Create New Third-party organization</i> page is displayed. Enter third party details including:</p> <ul style="list-style-type: none"> <li>• organization name</li> <li>• address details</li> </ul>																																								

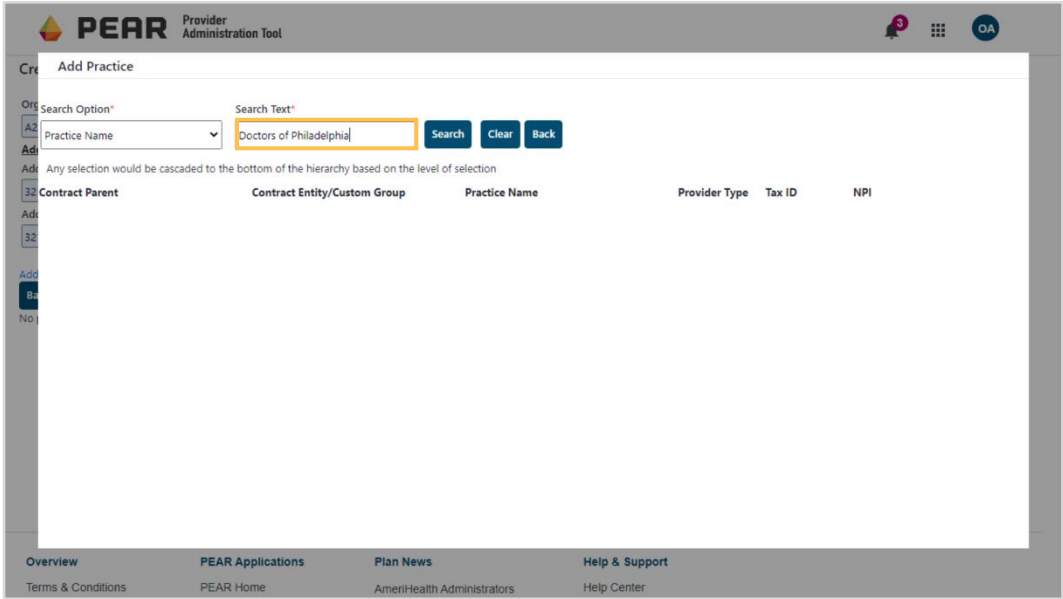
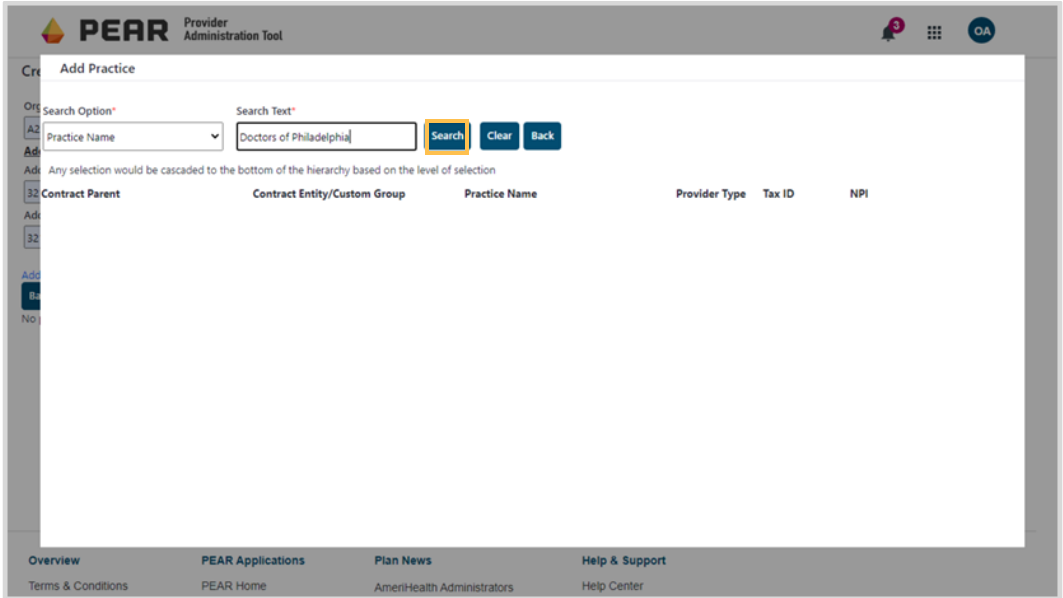
Step #	Action
	

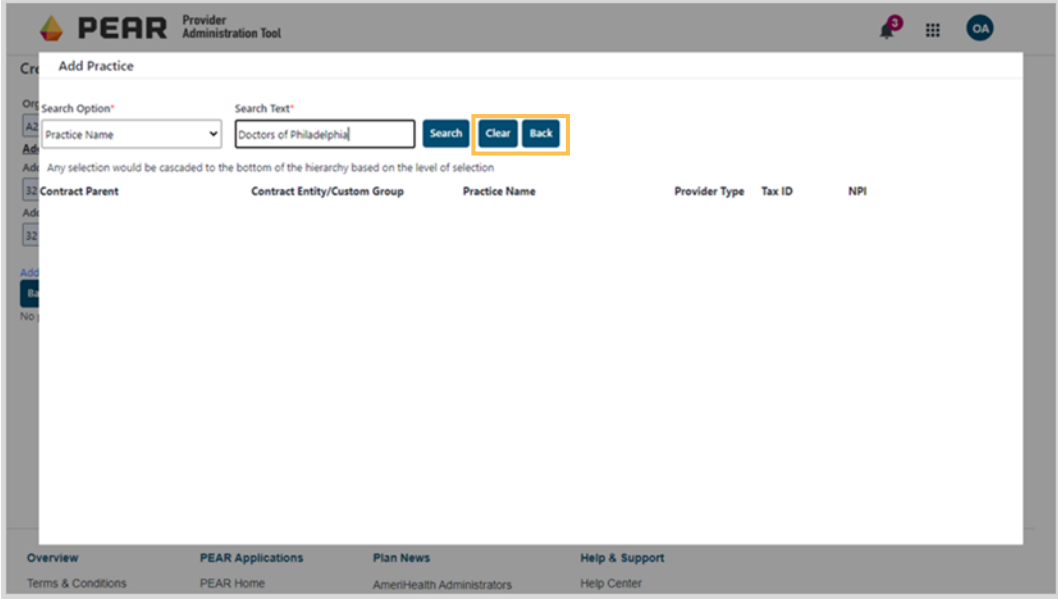
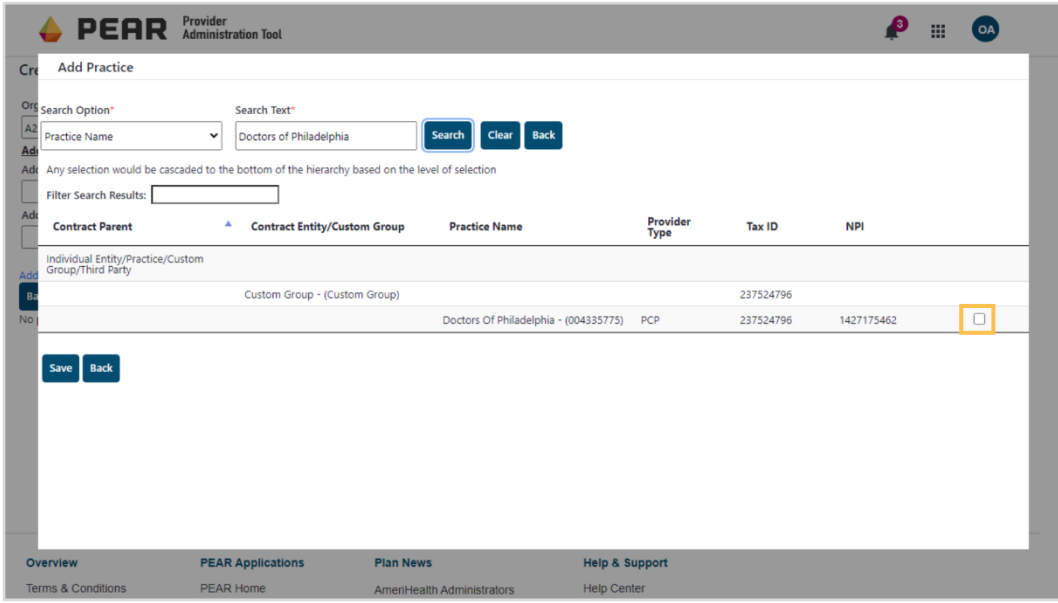
**Note:** You can click the *Back* button to return to the *THIRD PARTY* tab.

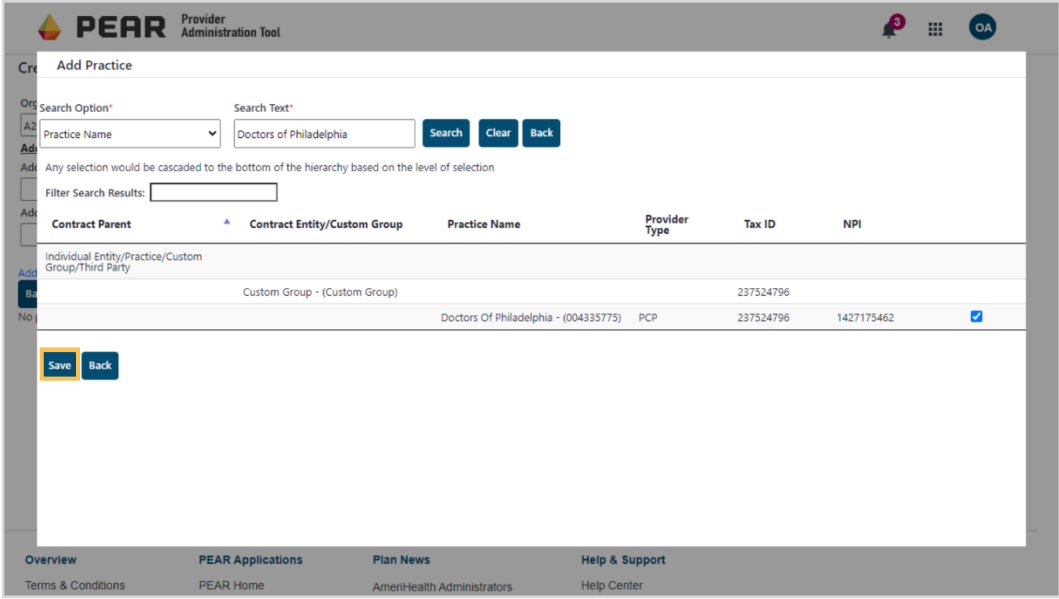
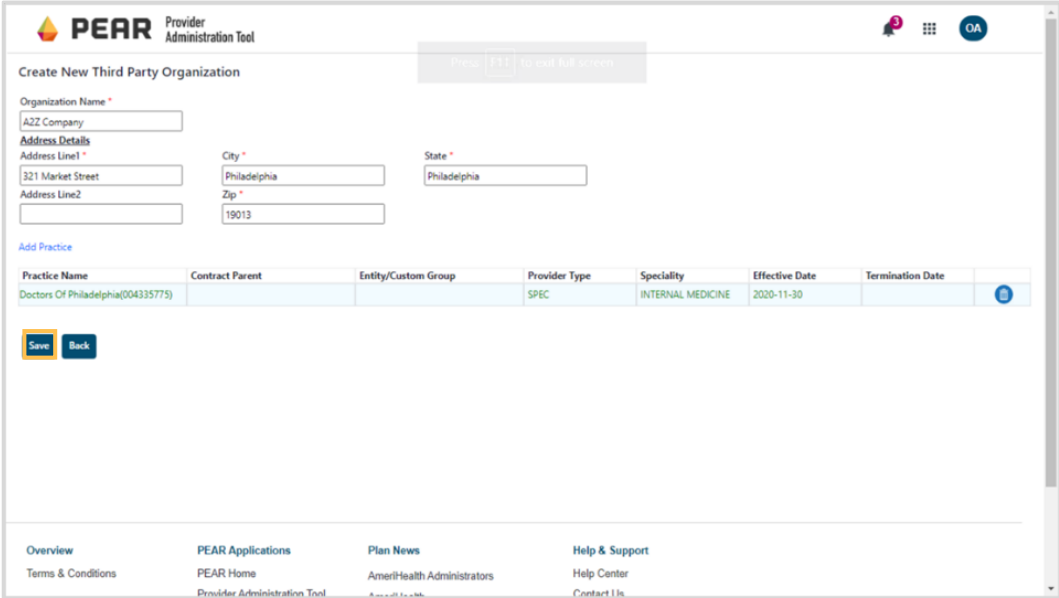
<p>3.</p>	<p>Click the <i>Add Practice</i> link.</p> 
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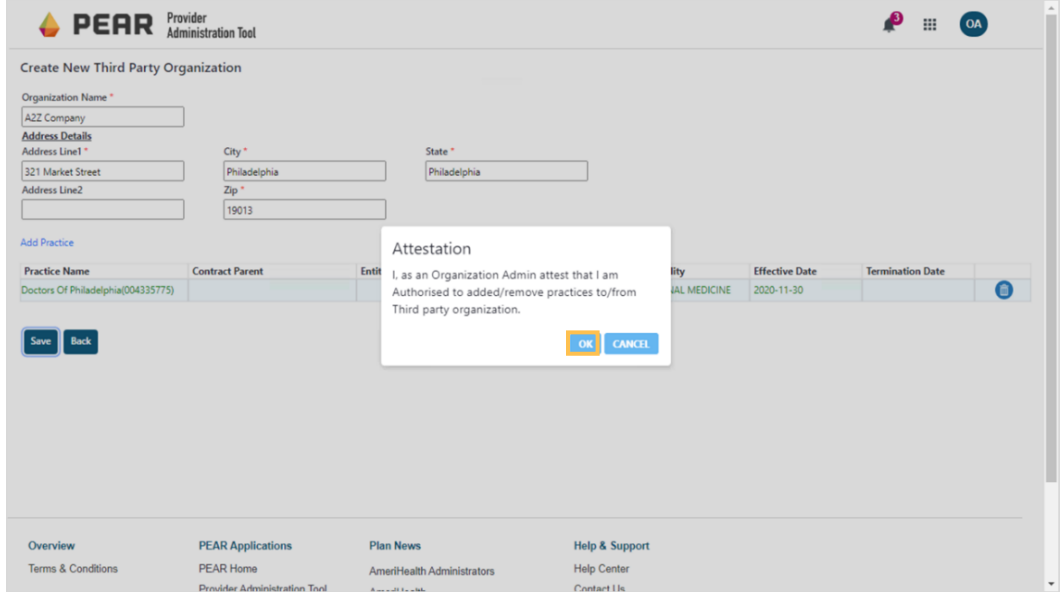
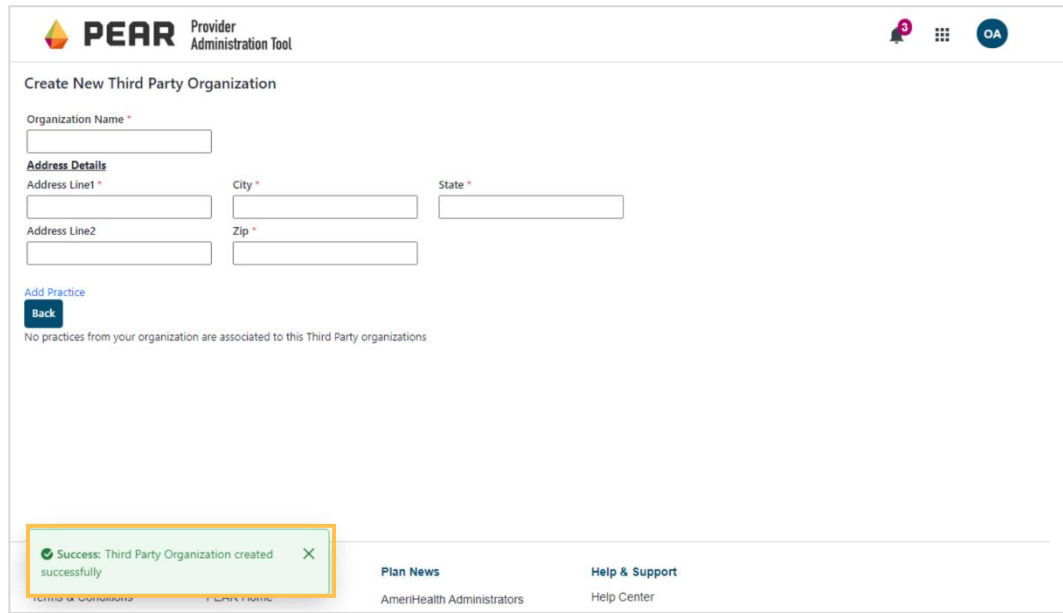
<p>4.</p>	<p>The <i>Add Practice</i> pop-up window is displayed. From this window, identify the practices or facilities to be supported by the new third-party organization. You can search for your organization’s practices or facilities using any of the offered criteria.</p> <p>Click the <i>Search Options</i> drop-down menu and select the attribute to search for a practice. The options in the drop-down list are:</p> <ul style="list-style-type: none"> <li>• <i>Practice Name</i></li> </ul>
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Step #	Action
	<ul style="list-style-type: none"> <li>• <i>Contract Parent Name</i></li> <li>• <i>Entity/Custom Group Name</i></li> <li>• <i>Provider ID</i></li> <li>• <i>Tax ID</i></li> <li>• <i>NPI</i></li> </ul>  <p><b>Note:</b> The <i>Search Option</i> drop-down list on this page allows you to identify which practices or facilities are to be supported by the new third-party organization. You may search for practices or facilities using any of the offered criteria.</p>
5.	Based on the selected search option, enter the search criteria in the <i>Search Text</i> field.

Step #	Action
	 <p>The screenshot shows the 'Add Practice' form in the PEAR Administration Tool. At the top, there's a search section with a 'Search Option*' dropdown set to 'Practice Name' and a 'Search Text*' input field containing 'Doctors of Philadelphia'. Below the input field are three buttons: 'Search', 'Clear', and 'Back'. The 'Search' button is highlighted with a yellow box. Below the search section is a table with columns: 'Contract Parent', 'Contract Entity/Custom Group', 'Practice Name', 'Provider Type', 'Tax ID', and 'NPI'. The table is currently empty. At the bottom of the form, there are navigation links: 'Overview', 'PEAR Applications', 'Plan News', and 'Help &amp; Support', along with their respective sub-links.</p>
<p>6.</p>	<p>Click the <i>Search</i> button.</p>  <p>This screenshot is identical to the one above, but the 'Search' button is highlighted with a yellow box, indicating the action to be performed.</p> <p><b>Note:</b> You can click the <i>Clear</i> button to clear the search criteria or click the <i>Back</i> button to close the pop-up window.</p>

Step #	Action
	 <p>The screenshot shows the 'Add Practice' form in the PEAR Administration Tool. The search criteria are set to 'Practice Name' with the text 'Doctors of Philadelphia'. The 'Search' button is highlighted. Below the search bar, a table displays search results with columns for Contract Parent, Contract Entity/Custom Group, Practice Name, Provider Type, Tax ID, and NPI. The table contains two rows: 'Custom Group - (Custom Group)' and 'Doctors Of Philadelphia - (004335775)'. The 'Save' button is highlighted at the bottom of the form.</p>
<p>7.</p>	<p>The practices and facilities associated with your organization that meet the selected search criteria are displayed. Select the check boxes next to the practices or facilities that you want the third-party organization to support.</p>  <p>This screenshot is similar to the previous one but shows the search results table with a checkbox highlighted in the rightmost column of the second row, indicating selection of the practice for support.</p>
<p>8.</p>	<p>Click the Save button.</p>

Step #	Action
	 <p>The screenshot shows the 'Add Practice' page in the PEAR Provider Administration Tool. At the top, there's a search bar with 'Doctors of Philadelphia' entered. Below it, a table lists search results. The table has columns for Contract Parent, Contract Entity/Custom Group, Practice Name, Provider Type, Tax ID, and NPI. One row is highlighted in green, indicating it's the selected practice. The row contains: Individual Entity/Practice/Custom Group/Third Party, Custom Group - (Custom Group), Doctors Of Philadelphia - (004335775), PCP, 237524796, and 1427175462. There are 'Save' and 'Back' buttons at the bottom of the table.</p>
<p>9.</p>	<p>The selected practices are displayed in green on the <i>Create New Third Party Organization</i> page. Click the <i>Save</i> button to provide access to the selected practices to the third-party organization.</p>  <p>The screenshot shows the 'Create New Third Party Organization' page. It features a form for organization details, including Organization Name (A2Z Company), Address Line1 (321 Market Street), City (Philadelphia), State (Philadelphia), and Zip (19013). Below the form is a table with columns: Practice Name, Contract Parent, Entity/Custom Group, Provider Type, Speciality, Effective Date, and Termination Date. One row is highlighted in green, representing the selected practice. The row contains: Doctors Of Philadelphia(004335775), [blank], [blank], SPEC, INTERNAL MEDICINE, 2020-11-30, and [blank]. There are 'Save' and 'Back' buttons at the bottom of the table.</p>
<p>10.</p>	<p>Once you click the <i>Save</i> button, a pop-up window is displayed asking you to attest that you are authorized to add or remove practices to or from the created third-party organization.</p>

Step #	Action
	<p data-bbox="332 247 1055 283">Click the <i>OK</i> button to complete the attestation process.</p> <div data-bbox="332 304 1388 892"></div> <p data-bbox="332 913 1177 955"><b>Note:</b> Click the <i>CANCEL</i> button to cancel the attestation process.</p> <p data-bbox="332 976 1388 1081">Once you have clicked the <i>OK</i> button, you will return to a blank <i>Create New Third Party Organization</i> page and a success message will be displayed at the bottom-left side of your screen.</p> <div data-bbox="332 1102 1388 1711"></div>

When adding a new third-party organization, the provider's request is forwarded to the plan so the new third-party organization can be reviewed, added, and provisioned.

## Summary

The key points to remember from this user guide are:

- PAT is an access management application that allows Organization and Location Administrators within a practice or group to manage end users' access to the PEAR portal.
- The tabs within PAT allow you to perform many functions:
  - The *USERS* tab allows you to view all users of the PEAR portal and their details, search for a user, create a single new user, assign a Location Administrator, and assign access rights to a group of users.
  - The *PRACTICES* tab allows you to view all practices that you have access to within the PEAR portal.
  - The *ENTITIES* tab allows administrators of larger health systems associated to multiple Tax IDs to view all the entities that you have access to within the PEAR portal.
  - The *REPORTING* tab allows you to generate and view a comprehensive audit log of all users who have access to the PEAR portal within your provider organization.
  - The *THIRD PARTY* tab allows you to create and manage third-party organizations.
- As an Organization Administrator, you will receive requests to access the PEAR portal from potential end users. Together, Organization and Location Administrators are responsible for granting PEAR access to all end users at the provider organization. End users do not need to contact the plan to get access to the PEAR portal.