OSHPD

Patient Level Data Quick Guide Series

USER ACCOUNT ADMINISTRATOR (UAA) Part 3: Change Assigned Contacts

Patient-Level Data							
Home Request Extensions	User Administration - 2	[
Ноте	My Profile	1. L	Log in to SIERA.				
	Change My Password	t	he top banner.				
OSHPD ID Facility Name	Facility Users 3	3. (Choose <i>Facility Users</i> from the drop-down list.				
	Add a User						
Facility Users Select one of your facilities to view all currently associat financial, or utilization reporting, or a UAA for patient lev roles by adjusting the settings in their row and then click their User Profile page to view or change their profile int Select Facility:	red users. If you are a primary contact for drug prici rel data reporting, then you can change a user's fac ing Update. Also, you can click a user's name to g formation.	ing, sility 4	 If you are the UAA for multiple facilities, choose the applicable facility from the displayed drop- down list. If you are assigning a Facility Administrator, go to step 9. 				

6. Find the user on the Active Users list and use the check boxes at the right of the screen if you want to designate a user as Primary Contact or Secondary Contact.

Associated Users					New Use
Name		Email	UAA	Primary	Secondary
George Smith		G.Smith@oshpd.ca.gov	🔵 Yes 💿 No		<
Lupe Cortez		L.Cortez@oshpd.ca.gov	🔿 Yes 💿 No		
Primary	Add New User Secondary	7 7 7. If the can b <i>User</i> more	user is not on th be added using th link. See <u>Add a</u> information.	ne list, the he <i>Add N</i> <u>User</u> gu	ey <i>lew</i> ide for

8. Once you've made the contact changes, click Update.

Your contact reassignment is complete.

Facility Administrator

- 9. To add or change the Facility Administrator, complete the steps below. This will assign the person as Administrator but does not give them access to the system. If the person needs access, you will need to also add them as a user in addition to completing the steps below. Please refer to the <u>Add a User</u> guide for more information.
- 10. Once you've completed steps 1-4 above, you will be on the Facility Users page. Complete the Facility Administrator fields to either add or change the administrator for your facility. The system will use the address on the facility license for mail.

Facility	Users								
Select one of reporting, or a clicking Updat	your facilities to vie UAA for patient lev e. Also, you can cli	w all currently ass vel data reporting, ck a user's name	ociated then yc to go to	users. If you are a ou can change a use their <i>User Profile</i> p	primary co er's facility age to viev	ontact for drug roles by adju w or change t	g pricing, fin Isting the se heir profile i	ancial, or utili: ettings in their information.	zation row and then
Select Facility:			•			~			
	* First Name	* Last Name		Title		* Email Addre	ess		
Facility Administrator	[٦,			
(CEO or									10
equivalent):									
Associated Us	ers							Add New User	
Name			Email		JAA Primary		Secondary		
George Smith			G.Sm	ith@oshpd.ca.gov	O Yes	No		<	
Lupe Cortez			L.Co	tez@oshpd.ca.gov) Yes	No			
		11	Upda	te Cancel					

11. Once the fields are completed, click Update. Update. Your Facility Administrator assignment is complete. The name should now appear in the fields.