Intro

Hello everyone. Welcome to the second video in our SIERA training series. In this video we'll cover the log-in process and how to add users.

Login

You are currently looking at the Login Page for the SIERA system. I want to note that what I'm about to show you is a test environment that is still in development. Some of the features are subject to change when we move to production.

To log in to SIERA, you will use your business email address and password that you created for your SIERA account. Your password will need to be at least 12 characters in length, and include at least one special character, one capital letter, one lower case letter, and one number. If you forgot your password, you can click on the forgot password link and follow the prompts.

Let's login.

Announcements

When we have important announcements that we want you to see, there will be an announcement page that shows up first right after you log in. As you can see, you'll be able to read the announcement and then click next to be taken to your home page.

Home

Now we are at the home page for patient level data. You can also switch to the financial and utilization section of the platform by clicking the drop down at the top left, but only if you have access to those functions. For patient-level data, you will see all the facilities that are associated with your profile. For each facility, you'll be able to view the data type - whether it's ambulatory surgery, emergency department, or inpatient – the report period, status – whether it's approved, pending, or delinquent – the report due date, and the report history. You can request a No Data to Report. In addition, you can see your assigned analyst for each facility.

On the right-hand side, you will see a box for resources, which will contain links to tools and guides such as our Reporting Manual. You will also see a box for announcements, where we'll provide important updates regarding OSHPD patient data reporting.

Now that you've seen the home page, let's add a new user. I am going to go to the drop down for User Administration and click on "Add a User."

Add User

Here is our Add a User page where User Account Administrators (UAAs) can add users to facilities. UAAs have the unique role of maintaining user information on behalf of facilities and are the only ones who can add a user.

UAAs have the option to either enter the minimum information required for a user or fill out all the fields. The minimum information required is shown with an asterisk and includes the email address and first and last name. Additionally, the UAA must associate the user to one or more facilities. The other fields include information relating to the user's contact information and position. We've included some help icons to provide additional guidance and insight on some of the fields.

If a UAA only completes the minimum required fields, the user will be required to complete the rest of the information during their initial log in.

As you can see below, the UAA will have the ability to associate a user to any of the facilities that are affiliated with the UAA's profile by clicking on the box next to the facility. You can also assign the user the role of primary contact or secondary contact. If this user will not be either of these contacts, these fields are not required.

Once you are done filling out the user information and have associated a facility, then you will click on "Add User." A pop up will then appear asking you to confirm that the information is correct. Once you confirm, an email will be sent to the user with a link to the login page along with a temporary password. The user will then be directed to the My Profile page where they must complete any remaining information before being given access to the rest of SIERA. On the My Profile page, users will see all their profile information that the UAA completed. To view the My Profile page, you will go back to the User Administration drop down and click on "My Profile."

My Profile

In addition to filling out any incomplete fields, the user can also update their password on this page. The user is the only individual who can update their email address if it needs to be changed. Once finished, the user clicks the "Update" button. Then they'll be asked to confirm their information on the Confirm My Profile page.

Facility Users Page

Now I will show you how to search for users by facility. Only UAAs can access this feature. You will go to the User Administration tab and click on "Facility Users." This capability allows you to select one of your facilities and view all users that are associated with that facility.

To demonstrate, I will click the drop down and select a facility. I'll select Adventist Health Reedley.

The first item you will see is the facility administrator. This person should be the CEO or equivalent at your facility. It also shows their title and email address. If any of this information is incorrect, you may change it as the UAA. Be sure to click the update button when finished. I want to point out that not all facility administrators are active users for the facility. If your facility wants the facility administrator to be active, please add them as a user if they're not already listed as such.

Next you can see all the users that are associated with this facility and are able to modify their user roles. We also include a quick link to add a new user.

Lastly, you can see any users that are disassociated from the facility.

By clicking on the name of a current user, you will be taken to the User Profile page where you can reset the password or make certain changes. By clicking on the reset password button, an email will be sent to the user allowing them to reset their password. A change may be made to the profile if the user has access to the patient level data only, and the UAA and user are associated with the same facilities. Once the changes are finalized, you will click "Update." Then you will be taken to a page to confirm the changes to the user profile.

Conclusion

To recap, I have taken you through the log in process, shown you the home page, and walked you through the process of adding a new user. This concludes the training video. You can find more information in our online Quick Guides. If you have any questions, please feel free to reach out to your UAA or your assigned analyst. Thank you again for attending this presentation.