

Provider Portal

User Guide

Abstract

This guide describes the functionality of the Salucro Provider Portal, including posting payments, locating historical transactions and user management.

This page intentionally left blank

Table of Contents

Introduction	5
Provider Portal Login	5
Post Payments	6
Patient Info	6
Payment Types	8
POS – Point of Service.....	8
Key.....	8
ACH/e-Check	9
Check Scan	10
PayNearMe.....	11
Cash	11
Summary	12
Receipt	13
Transaction Result.....	14
Recurring Payment.....	15
Recurring Payment Receipt	16
Transaction Details.....	16
Filter Transactions.....	17
Transaction Record.....	18
Action Column	18
ACH/e-Check.....	19
Recurring Payments.....	19
Manage Users	21

Add User	21
Update User Permissions	22
User Account Actions.....	23
Resend Welcome Email	23
Reset Password.....	23
View Permissions.....	23
View Locations.....	23
Inactivate a User.....	23
Reactivate a User	23
Support	23

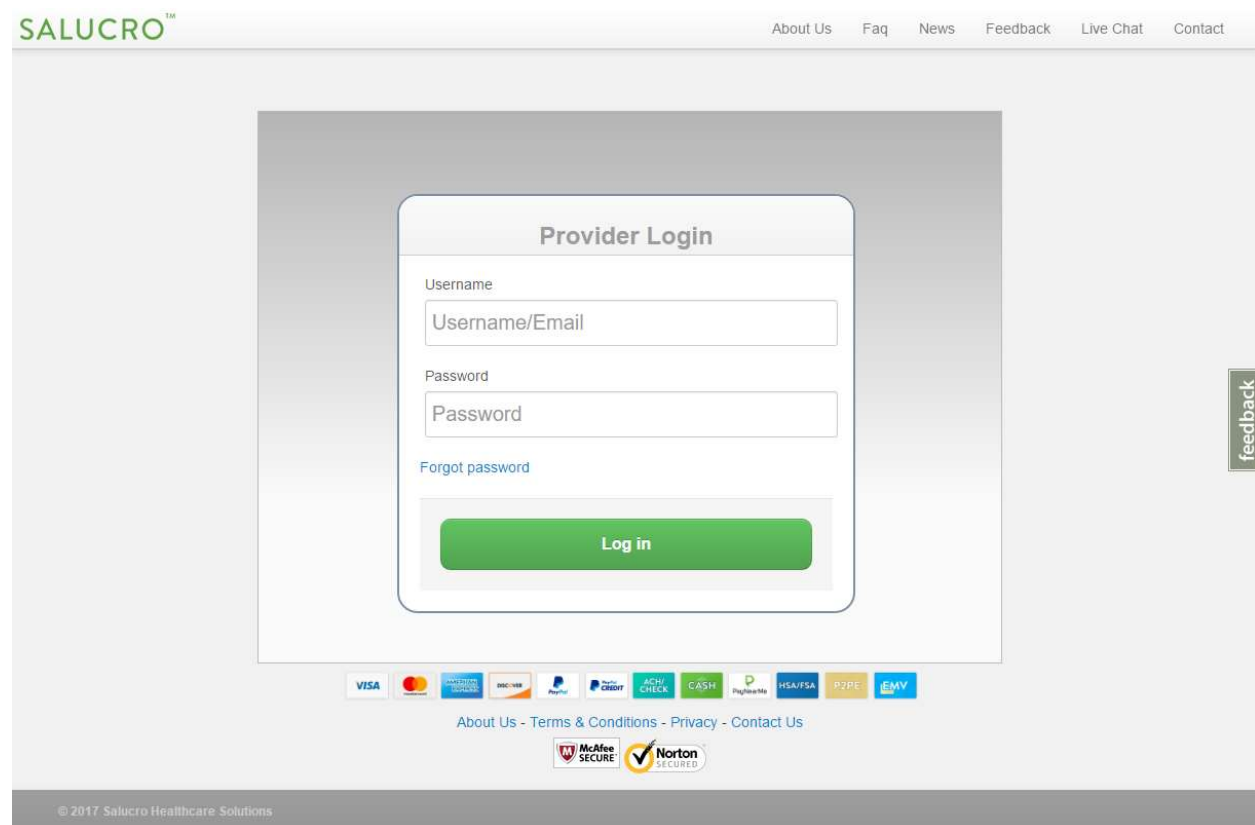
Introduction

This user guide walks through the features and functionality of the Salucro Provider Portal. Included in this guide are walkthroughs and screenshots of the platform, which will show you how to post payments, view transactions, create and update recurring payments, as well as create and manage user accounts.

Provider Portal Login

Login link: <https://www.salucro.com/v2.1/>

Save as a URL bookmark or create a desktop icon shortcut.



Salucro is available to assist the User with resetting their password. User can request assistance through Live Chat and Feedback which are visible on the Provider Login page. Users can also call Support at (866) 430-7333 or email support@salucro.com.

- Users that are added with an email address will receive a Welcome email containing the User Guide, the Username assigned by the Administrator, and a link to establish your access to Salucro. The link contained in the email will

expire in 7 calendar days. If the link expires the User will need to notify the Administrator to have another email generated that contains an active link or the User may contact Salucro Support.

- If you have forgotten your password, please click the link **Forgot your Password** to proceed with resetting your password. If you are unable to successfully reset your password using this feature, you may contact Salucro Support or your Administrator for assistance.

Post Payments

By default, the User is brought to the “Post Payments” tab of the platform. Once logged in, this page is used to process payments within your business office, at the point of sale, off-site locations, or your receivables management company.

The screenshot displays the SALUCRO Post Payments interface. At the top, there are navigation tabs for 'Post Payments', 'Transaction Details', and 'Cash Reconciliation'. The main content area is divided into three numbered sections:

- 1 Patient Info:** A search bar with the text 'Please enter Account, Guarantor or Patient Name, Address'. Below it is a dropdown menu showing 'Demo's Hospital'. There are three input fields: 'Patient Name', 'Account Number', and '\$ Total'. A 'Notes' field is also present. A '+ Add Accounts' button is at the bottom.
- 2 Payment Type:** A grid of buttons for payment methods: POS, Key, ACH, Check Scan, PayPal Credit, PayNearMe, and Cash. A yellow banner below the buttons says 'Click the Pay button to continue'.
- 3 Summary:** A red 'Clear All' button, a black 'Print' button, and a large green 'Pay \$0.00' button.

The bottom of the page features a footer with links for 'About Us', 'Terms & Conditions', 'Privacy', 'Contact Us', and 'Live Chat'.

Patient Info

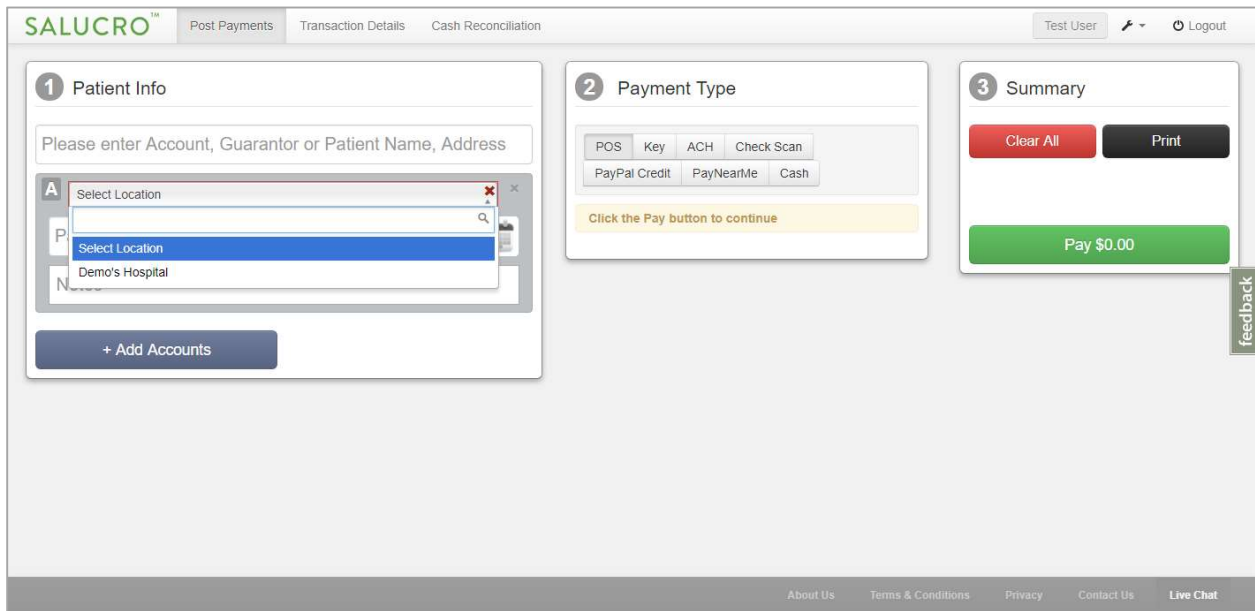
The “Patient Info” section in box 1, is used to capture the needed patient account information for processing a transaction.

Enter the patient name, account number or other information required in the Patient Info section to record who the payments are being processed for. A Department Level Dropdown can also be included should a User Admin request.

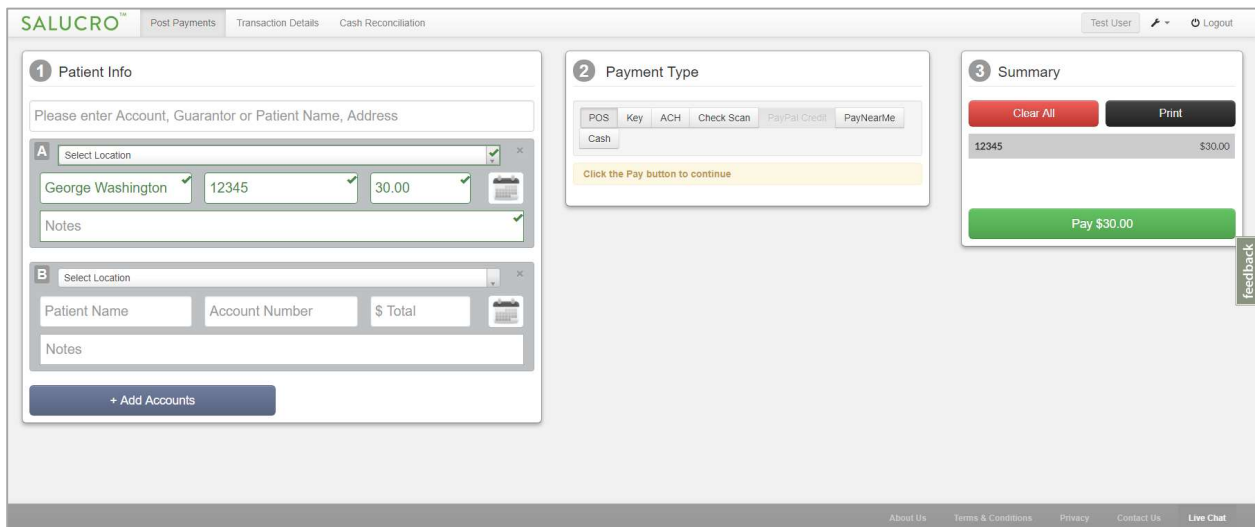
A decision should be made on how the Patient Name will be entered to maintain consistency within all locations/departments. Choose to enter Last Name first or Last Name last. Do not use a comma or other punctuation to separate the name.

An option to populate the Patient information can be configured. By providing Salucro with a data file of self-pay accounts with an open balance. This file can be sent daily or weekly and in a TXT File, CSV or 837 format. Many times it is the same file that you send to your statement vendor or your receivables management company. The file would also need to include current payments and adjustments. The User would have the ability to populate an open balance by entering the Account Number, Guarantor Number or Patient Name.

If the User has permissions assigned for multiple locations, they will select the appropriate location to post the payment to in the drop-down menu.



Click the "Add Accounts" button, and a second entry box "B" will appear to add any additional accounts for payment.



The number of additional accounts that can be added via the “Add Account” button is a preference that can be configured by the Administrator. The boxes will be labeled alphabetically A, B, C, D, and so on.

Payment Types

Once the “Patient Info” in section 1 is completed, the User would choose the “Payment Type” in section 2. There are multiple payment type options, and the available types are established by your Administrator.

POS – Point of Service

The “POS” Payment type is chosen to enter the payment information via a credit card reader. The User would click the green “Pay” button and a pop-up prompt appears to the User advising them to “swipe card now”, the receipt will then populate. See the “triPOS EMV User Guide” for details on processing and EMV transaction.

Payment Type POS may be the auto default chosen by the Administrator.

The screenshot shows the SALUCRO payment interface with three main sections: 1. Patient Info, 2. Payment Type, and 3. Summary. In the Patient Info section, a dropdown menu is open showing 'Demo's Hospital' selected. The Payment Type section has 'POS' selected and highlighted with a red box. The Summary section shows a green 'Pay \$0.00' button highlighted with a red box. The interface includes a top navigation bar with 'Post Payments', 'Transaction Details', and 'Cash Reconciliation', and a footer with 'About Us', 'Terms & Conditions', 'Privacy', 'Contact Us', and 'Live Chat'.

Key

A “Keyed” Payment, also referred to as a Virtual Terminal, is chosen when the patient is providing their credit card information via telephone or if the credit card payment was received via mail.

The screenshot shows the SALUCRO payment interface with three main sections: 1. Patient Info, 2. Payment Type, and 3. Summary. In the Payment Type section, 'Key' is selected and highlighted with a red box. Below the selection, a red box highlights the credit card information fields: 'Credit card number', 'CC Exp', 'CVV', 'Zip Code', and 'Card holder name'. The Summary section shows a green 'Pay \$0.00' button highlighted with a red box. The interface includes a top navigation bar with 'Post Payments', 'Transaction Details', and 'Cash Reconciliation', and a footer with 'About Us', 'Terms & Conditions', 'Privacy', 'Contact Us', and 'Live Chat'.

Enter the Credit Card Number, CC Exp (Expiration Date), CVV, Zip Code, and Cardholder name. The User would click the green “Pay” button, and the transaction would be submitted, and a receipt will then automatically populate.


- The CVV code (also known as the Security Code) is 3 numeric digits and can be located on the back of a Visa/MC/Discover Card or it is 4 numeric digits located on the front of an American Express Card.
- The Zip Code to be entered is the billing zip code of the Cardholder.
- The Cardholder Name is that of the person owning the credit card. The patient name and the Cardholder Name can often times be different.

ACH/e-Check

An “ACH” Payment Type is used when the patient is providing bank information via telephone to make a payment as an ACH/e-Check.

Enter the Account Holder Name, Routing Number, Bank Account Number, and then Re-enter the Account Number to confirm. The User would click the green “Pay” button, and the transaction would be submitted, and a receipt will then automatically populate.

The screenshot displays the SALUCRO payment interface. At the top, there are navigation tabs for 'Post Payments', 'Transaction Details', and 'Cash Reconciliation'. The user is logged in as 'Test User'. The interface is divided into three main sections: 1. Patient Info, 2. Payment Type, and 3. Summary. In the 'Payment Type' section, the 'ACH' option is selected and highlighted with a red box. Below this, a red box highlights the required fields: 'Account Holder Name', 'Routing Number', 'Bank Account Number', and 'Re-enter Account Number'. The 'Summary' section shows a green 'Pay \$0.00' button. A 'feedback' button is visible on the right side of the interface.

- The Account Holder Name is required and is that of the person owning the bank account. The patient name and the Account Holder Name can often times be different.
- The Check Number field is optional and not required.
- Routing Number is required.
- The Bank Account Number is required to be entered twice. The User should ask the Account Holder to repeat the bank account number in both instances to ensure the correct bank account number was entered.
- The User can click the Question icon  to the right of the Routing Number and Bank Account Number fields to view a sample check.



The “ACH” payment type should not be used if there is a physical check for processing, see the “Check Scan” & “Cash” payment types for details on processing a physical check.

Check Scan

The “Check Scan” Payment Type is used to scan a paper check for electronic processing. This feature requires installation of supported hardware, and must be enabled by the administrator.

This option has similar entry fields to the “ACH” payment type, however the transaction processes differently than an “ACH”, since the physical check or an electronic image of the check must be presented for processing. See the “Check Scan User Guide” for more details on processing this transaction type.

Enter the Patient Information, then click the “Scan Check” button to capture the check image using supported hardware. The Account Holder Name, Check Number, Routing Number, and Bank Account Number will be read from the check and entered into the corresponding fields. Confirm the entries are correct before clicking the green “Pay” button to submit the payment.

Background images, or the ink type used for printing the check may impact the ability of the reader software to capture the data correctly. In this case, correct or enter the data into the corresponding field(s) to complete the payment.

- The Account Holder Name is required and is that of the person owning the bank account. The patient name and the Account Holder Name can often times be different.

PayNearMe

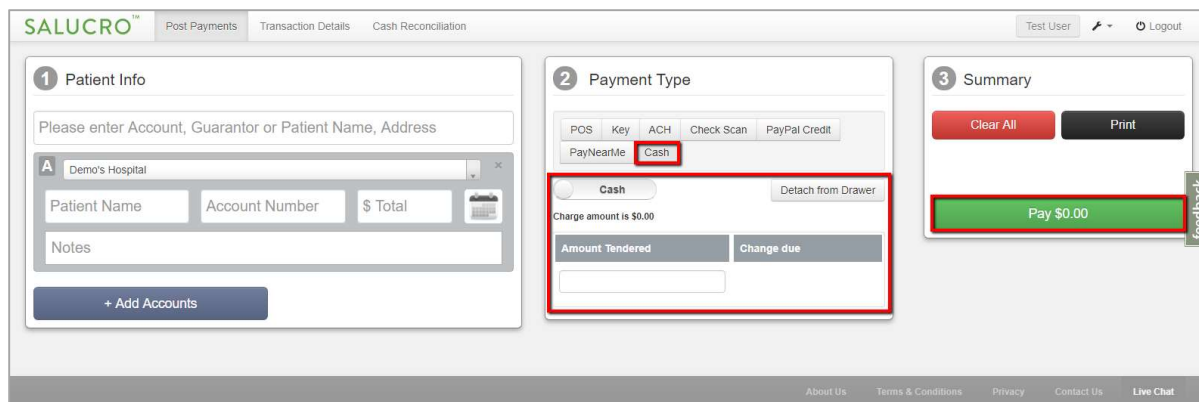
The “PayNearMe” Payment Type is used to create a pending PayNearMe transaction. The patient will receive an email/text message with the instructions on how to complete their payment. They must make the cash payment at a PayNearMe retail location within 7 days.

See the “PayNearMe User Guide” for more details on processing this transaction type. This feature must be enabled by the Administrator.

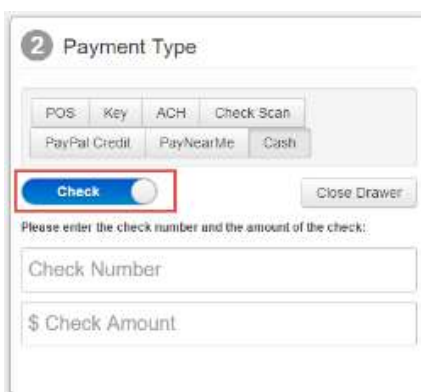
The screenshot displays the SALUCRO payment processing interface. It is divided into three main sections: 1. Patient Info, 2. Payment Type, and 3. Summary. In the Payment Type section, 'PayNearMe' is selected and highlighted with a red box. Below this, a section titled 'Information for PayNearMe instructions' is also highlighted with a red box, containing fields for 'Contact Email', 'Contact Phone', and 'Instructions language' (set to English). The Summary section shows a total amount of 'Pay \$0.00' and buttons for 'Clear All' and 'Print'. The interface includes a top navigation bar with 'Post Payments', 'Transaction Details', and 'Cash Reconciliation' tabs, and a footer with 'About Us', 'Terms & Conditions', 'Privacy', 'Contact Us', and 'Live Chat' links.

Cash

The “Cash” Payment Type is used to process cash transaction throughout the day. Money Orders, Cashier’s Checks, and Personal Checks received from a patient via mail or at point of service can also be managed and tracked through the Cash Reconciliation process. Collected cash and checks tracked through this transaction type will require manual bank deposit. See the “Cash Posting User Guide” for details on processing this payment type. This feature must be enabled by the Administrator.



To enter a payment for a Money Order, Cashier's Check, or Personal Check, click the slider to change the method of payment from "Cash" to "Check".



Summary

The "Summary" box 3, will display a summary of the payments that will be processed when the green "Pay" button is clicked. This section also contains a red button for "Clear All", that will remove the data entered in the "Patient Info" box 1, and "Payment Type" box 2. There is also a "Print" button that will allow the user to print/re-print the receipt.

The screenshot shows the SALUCRO payment processing interface. It is divided into three main sections:

- 1 Patient Info:** Contains a search bar for "Please enter Account, Guarantor or Patient Name, Address". Below it are two account selection boxes, A and B. Box A shows "George Washington" with a balance of 100.00. Box B shows "Mary Washington" with a balance of 75.00. There is an "Add Accounts" button at the bottom.
- 2 Payment Type:** Offers options for "POS", "Key", "ACH", "Check Scan", "PayPal Credit", "PayNearMe", and "Cash". It includes fields for "Credit card number", "CC Exp", "CVV", "Zip Code", and "Card holder name".
- 3 Summary:** Shows a table of payments:

1989	\$100.00
1989	\$75.00

 Below the table is a large green button labeled "Pay \$175.00". There are also "Clear All" and "Print" buttons at the top of this section.

Receipt

The receipt is presented in a pop-up windows and it is automatically populated for every transaction processed. The User should review the “Result” for a Success or a Failure on every transaction.

The User has the option to print the receipt or email the receipt for the patient. All receipts will reflect the specified logo. The User can click the “X” in the upper right-hand corner to close the window or click outside of the light box to close the window.

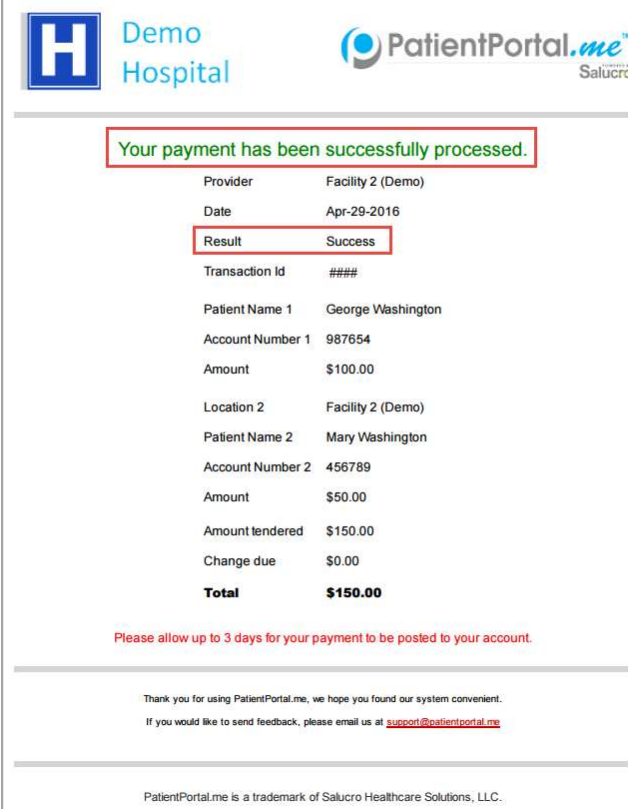
The screenshot shows a "Receipt" pop-up window with the following details:



Result	Success
Account 1	
Location	Facility 1 (Demo)
Patient Name	George Washington
Account Number	987654
Amount	\$100.00
Account 2	
Location	Facility 2 (Demo)
Patient Name	Mary Washington
Account Number	456789
Amount	\$50.00
Transaction Id	1157969
Today's Payment	\$150.00
Amount Tendered	\$150.00
Change Due	\$0.00

At the bottom right of the window are "Email" and "Print" buttons.

Transaction Result

The receipt will contain a transaction “Result” at the top to confirm if the transaction was successful or not.



	Demo Hospital	
Your payment has been successfully processed.		
Provider	Facility 2 (Demo)	
Date	Apr-29-2016	
Result	Success	
Transaction Id	###	
Patient Name 1	George Washington	
Account Number 1	987654	
Amount	\$100.00	
Location 2	Facility 2 (Demo)	
Patient Name 2	Mary Washington	
Account Number 2	456789	
Amount	\$50.00	
Amount tendered	\$150.00	
Change due	\$0.00	
Total	\$150.00	
<small>Please allow up to 3 days for your payment to be posted to your account.</small>		
<small>Thank you for using PatientPortal.me, we hope you found our system convenient. If you would like to send feedback, please email us at support@patientportal.me</small>		
<small>PatientPortal.me is a trademark of Salucro Healthcare Solutions, LLC.</small>		

Successful

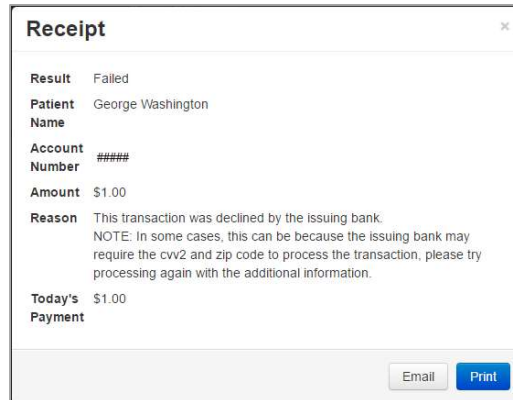
When the transaction has processed successfully, there will be a green confirmation message displayed on the top of the receipt indicating that “Your payment has been successfully processed.”

Failed

A failed transaction will display the entire failure description on the “Reason” line of the receipt. If the failure was due to an entry error by the User, correct the invalid data and reprocess the transaction.

If the failed transaction is valid, we advise the User to notify the patient the transaction failed, and attempt to obtain another form of payment. We recommend not providing the failure details to the patient, they should direct them to contact their issuing financial institution to obtain detail on why the transaction failed.

Common failure reasons are Insufficient Funds, Do Not Honor, or a generic failure reason.



Receipt

Result Failed

Patient Name George Washington

Account Number #####

Amount \$1.00

Reason This transaction was declined by the issuing bank.
NOTE: In some cases, this can be because the issuing bank may require the cvv2 and zip code to process the transaction, please try processing again with the additional information.

Today's Payment \$1.00

Email Print

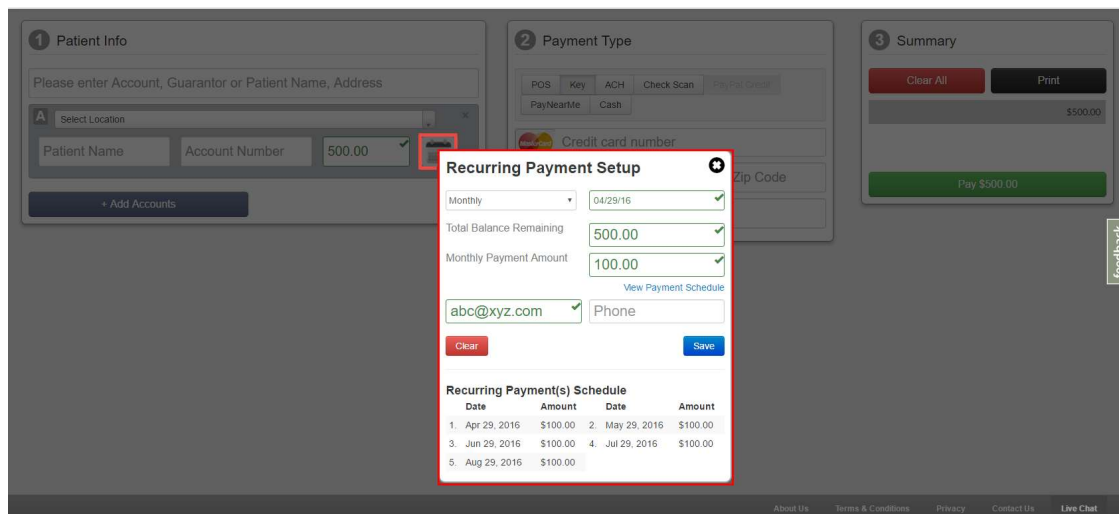
Recurring Payment

The User can establish a Recurring Payment plan with the patient's authorization by clicking on the "calendar". The Administrator will determine the recurring payment guidelines to set the minimum amount permitted and the maximum timeframe.

This option also includes the ability to schedule a delayed payment for a future date by choosing "One Payment" if enabled.

The "Email" field is required when establishing a Recurring Payment on an account including a future One Payment. The patient will receive an email 7 days prior to the payment being deducted from their account. This allows the patient time to contact your office to cancel or modifying the Recurring Payment.

Recurring Payment plans that are established by a User for a patient through the Provider Portal, can only be modified by a User and not the patient.



1 Patient Info

Please enter Account, Guarantor or Patient Name, Address

Select Location

Patient Name Account Number 500.00

+ Add Accounts

2 Payment Type

POS Key ACH Check Scan PayNearMe Cash

Credit card number Zip Code

3 Summary

Clear All Print

\$500.00

Pay \$500.00

Recurring Payment Setup

Monthly 04/29/16

Total Balance Remaining 500.00

Monthly Payment Amount 100.00

View Payment Schedule

abc@xyz.com Phone

Clear Save

Recurring Payment(s) Schedule

Date	Amount	Date	Amount
1. Apr 29, 2016	\$100.00	2. May 29, 2016	\$100.00
3. Jun 29, 2016	\$100.00	4. Jul 29, 2016	\$100.00
5. Aug 29, 2016	\$100.00		

About Us Terms & Conditions Privacy Contact Us Live Chat

The “View Payment Schedule” link can launch a help window that provides the guidelines set for minimum payment amounts, maximum recurring payments, etc.

Recurring Payment Receipt

Below is an example recurring payment receipt, which outlines the amount paid today and the Recurring Schedule for future payments.

Demio Hospital **PatientPortal.me™**
Salucro

Your payment has been successfully scheduled.

Provider: Facility 1 (Demo)
Date: Apr-29-2016
Result: Recurring Scheduled
Payment Type: MasterCard - ####
Patient Name: George Washington
Account Number: 98765
Amount: \$0.00

Recurring Schedule

#	Schedule Date	Amount	Status	#	Schedule Date	Amount	Status
1	2016-05-02	\$20.00	Pending	2	2016-06-02	\$20.00	Pending
3	2016-07-02	\$20.00	Pending	4	2016-08-02	\$20.00	Pending
5	2016-09-02	\$20.00	Pending				

Please allow up to 3 days for your payment to be posted to your account.

Thank you for using PatientPortal.me, we hope you found our system convenient.
If you would like to send feedback, please email us at support@patientportal.me

PatentPortal.me is a trademark of Salucro Healthcare Solutions, LLC.

Transaction Details

The Transaction Details tab of the platform is used for viewing any transactions that have been submitted. By default, it will show transactions processed on the current day and depending on user permissions they will see only their transactions, or all transactions if “View All User Payments” permission is set.

SALUCRO™ Post Payments Transaction Details Cash Reconciliation Test User Logout


July 31, 2017 - July 31, 2017 Summary Search transactions by Patient name, Account Number, Paid Amount, Drawer Number or Tr...

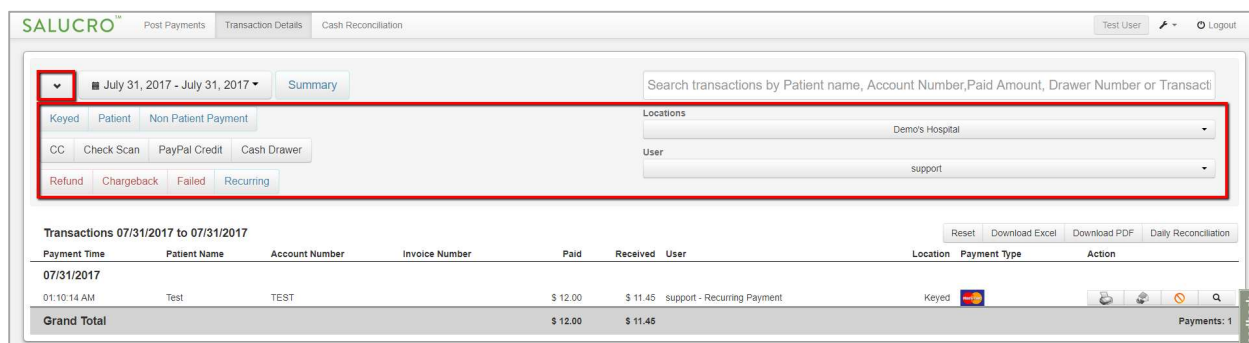
Transactions 07/31/2017 to 07/31/2017

Payment Time	Patient Name	Account Number	Paid	Received	User	Location	Payment Type	Action
07/31/2017								
01:10:14 AM	Test	TEST	\$ 12.00	\$ 11.45	support - Recurring Payment	Keyed	MasterCard	Print Cancel Refresh Search
Grand Total			\$ 12.00	\$ 11.45				Payments: 1

About Us Terms & Conditions Privacy Contact Us Live Chat

Filter Transactions

There are multiple options for filtering the view of the transactions records. Click on the arrow button  to expand the available filter options.

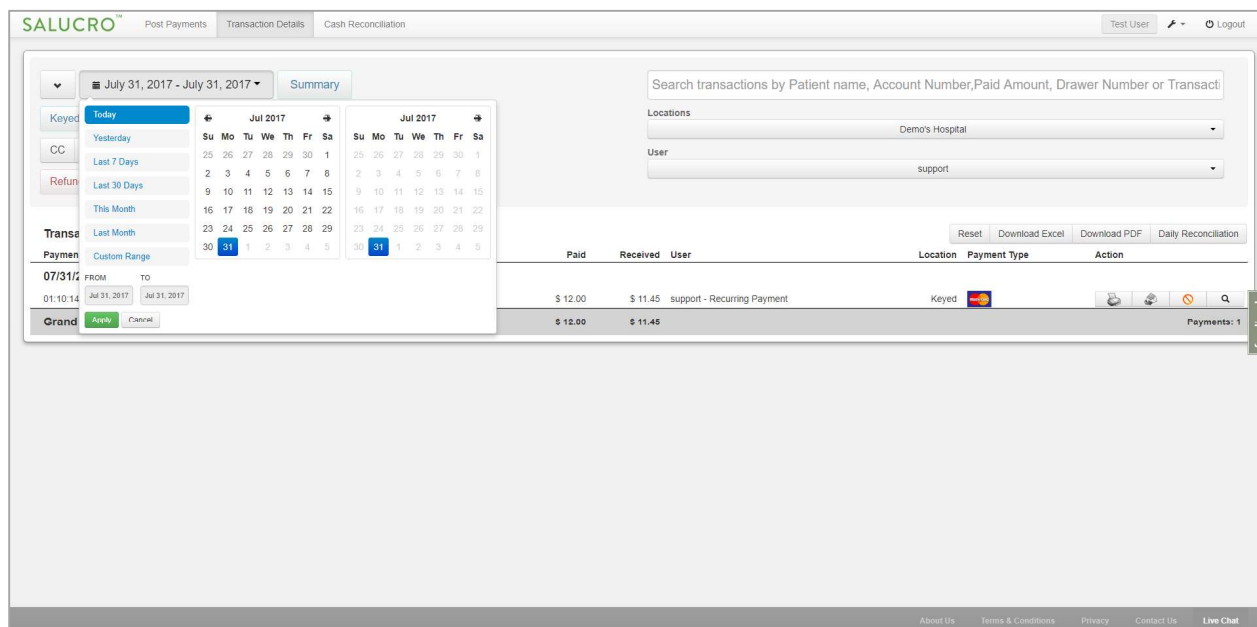


Any of the payment type filters can be chosen. The User can choose to review payments by “Location” or for a specific “User”.

For example, to view all Pending ACH transactions, click on “ACH” to view only ACH transactions, and then select “Pending” to filter the display to only reflect “Pending ACH” transactions.

The “Refund” or “Failed” filter must be chosen to review these types of transactions.

To locate transactions for a specific date or timeframe, click on the date field, a drop-down will populate which allows the User to choose the desired timeframe. Please note that to locate a transaction, the date range must be expanded to include the date the transaction was processed.



By entering criteria in the “Search” field the user can locate a specific transaction by Patient Name, Account Number, Paid Amount, or Transaction ID.

Click the “Reset” button to clear all applied filters, and reset to the default view.

Once all filters have been chosen the User also has the option to “Download Excel” or “Download PDF” which will include on the transactions displayed.

The available download options can be controlled by the Administrator.

Transaction Record

The Transaction Record will display all transactions that meet your selected filter criteria. The line item displays the following information for the transaction; Payment Time, Patient Name, Account Number, Paid Amount, Received Amount, User, Location, Payment Type, and Action.

Action Column

The “Action” column contains buttons for “Print”, “Email”, “Refund”, and “Details”. These buttons perform various actions for the transaction.

Payment Time	Patient Name	Account Number	Paid	Received	User	Location	Payment Type	Action
07/31/2017	Test	TEST	\$ 12.00	\$ 11.45	support - Recurring Payment	Keyed	MasterCard	
Grand Total			\$ 12.00	\$ 11.45				Payments: 1

Print

Clicking on the printer icon will allow the user to display and print the receipt if necessary. If the User wishes to print all receipts they will select the “Print All” option.

Email

Clicking on the envelop icon will allow the user to send the receipt via email to a recipient.

Refund

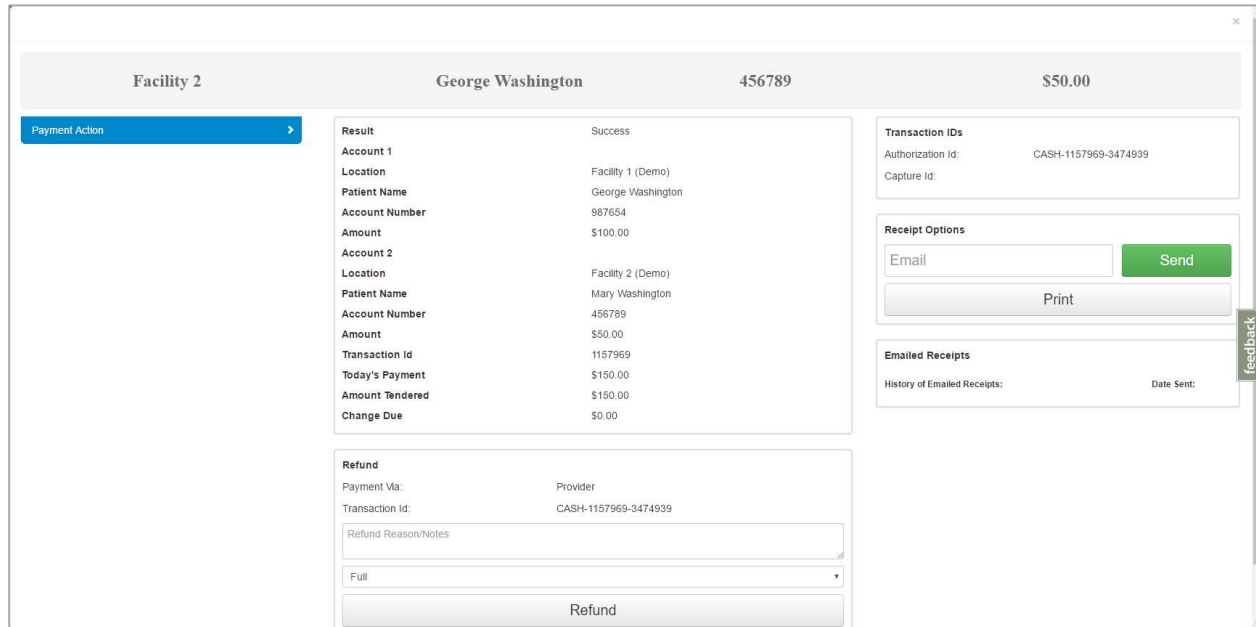
Clicking on the refund icon will allow the user to process a Full or Partial refund for the transaction depending on the transaction type. Refunds will be rejected if the card used for the payment has expired.

Void

Clicking on the void icon will allow the user to process a void for a transaction processed in the same day. If the void is not processed same day, a refund will need to be issued.

More Info

Clicking on the magnifying glass icon  will allow the user to view detailed information about the transaction.



The screenshot displays a transaction details page with the following sections:

- Header:** Facility 2, George Washington, 456789, \$50.00
- Payment Action:** A blue button with a right-pointing arrow.
- Result:** Success
- Account 1:** Location: Facility 1 (Demo), Patient Name: George Washington, Account Number: 987654, Amount: \$100.00
- Account 2:** Location: Facility 2 (Demo), Patient Name: Mary Washington, Account Number: 456789, Amount: \$50.00
- Transaction Id:** 1157969
- Today's Payment:** \$150.00
- Amount Tendered:** \$150.00
- Change Due:** \$0.00
- Transaction IDs:** Authorization Id: CASH-1157969-3474939, Capture Id:
- Receipt Options:** Email (input field), Send (green button), Print (button)
- Emailed Receipts:** History of Emailed Receipts, Date Sent:
- Refund:** Payment Via: Provider, Transaction Id: CASH-1157969-3474939, Refund Reason/Notes (input field), Full (dropdown menu), Refund (button)

ACH/e-Check

All ACH Transactions will initially display as “Pending” until it is Paid or Failed by the Processor. The average pending time frame is 7 business days. An ACH transaction that was entered within the last 10 days that cannot be located as Paid or Failed should be searched by selecting the Pending filter.

Once the ACH is “Paid”, it can be located by using either the transaction date that it was entered, or by choosing the ACH Paid filter by the date it was paid.

If the ACH failed it will be located within the Failed filter on the date it failed. There is a \$5.00 fee for all Failed ACH transactions. Immediate failures for an ACH are invalid Routing Number or invalid Account Holder Name if a character is entered. If the Failure reason is not present by clicking on the “More Info” icon, please click “Live Chat” to request the information from our Customer Support Representatives.

Recurring Payments

For a recurring payment plan entered in the Provider Portal, a User has the ability to Cancel, Complete, or Suspend the scheduled transaction. The user can also update the saved payment information or change the payment due date.

To view Recurring Payments, select “Recurring” from the filter options. The date range selected will determine if the recurring payment plan will be displayed in the search results. Enter search criteria into the “Search Transactions” field to locate a specific plan.

Choose the 1st of the previous month to current month for your initial search, and if the Recurring Payment does not appear, expand your date to include the month prior to the current selection.

The screenshot shows the SALUCRO interface with the following elements:


- Navigation tabs: Post Payments, Transaction Details, Cash Reconciliation.
- Search filters: Date range (July 31, 2017 - July 31, 2017), Summary button, Payment type (Koyed, Patient, Non Patient Payment), Transaction type (CC, Check Scan, PayPal Credit, Cash Drawer), Status (Refund, Chargeback, Failed, Recurring), and Filter (Active, Canceled, Completed).
- Search criteria: Washington (Location), User (dropdown).
- Table: Recurring(s) - 07/31/2017 to 07/31/2017. The table has columns: Date Set, Weekly/Monthly, Next Date to Run, Status, Patient Name, Account Number, Invoice Number, Net Amount, Pref. Pay, Total #pymts, Total #/Processed, User, and Action. A single row is shown for George Washington with an edit icon in the Action column.
- Buttons: Reset, Download Excel, Download PDF.
- Footer: About Us, Terms & Conditions, Privacy, Contact Us, Live Chat.

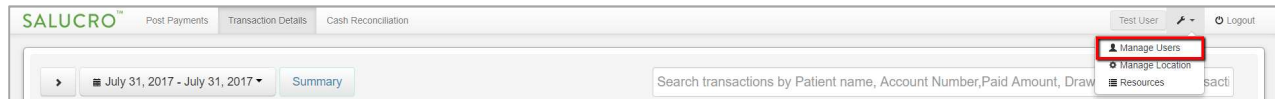
Date Set	Weekly/Monthly	Next Date to Run	Status	Patient Name	Account Number	Invoice Number	Net Amount	Pref. Pay	Total #pymts	Total #/Processed	User	Action
07/31/2017	Monthly	08/14/2017	Active	George Washington	1789	1789	100.00	\$10.00	10	0	test	
Grand Total												

Once the Recurring Payment is located, you will see an Edit icon displayed in the “Action” column. Click the “Edit” button to modify the recurring payment details. The “Edit Info” section allows modification of the payment amounts, type, next run date, patient email, and provides a field to indicate a “Reason for Update” When updating a canceled recurring payment plan to Active, users will be required to select the Next Date to Run.

The “Update Payment Info” section allows the User to update the stored payment information.

Manage Users

An Account Administrator can create new users, grant and edit user permissions. To access the account user settings, click on the Wrench icon  in the top right corner of the page and select “Manage Users”.



Add User

To add a new user, enter their information into the fields, to assign a User Name (Select Email from the dropdown menu to use the person’s email address as their User ID), Email, First Name, Last Name & Phone. The email entered will be used to send an initial Welcome Email to create their password, and it will also be used for password reset requests.

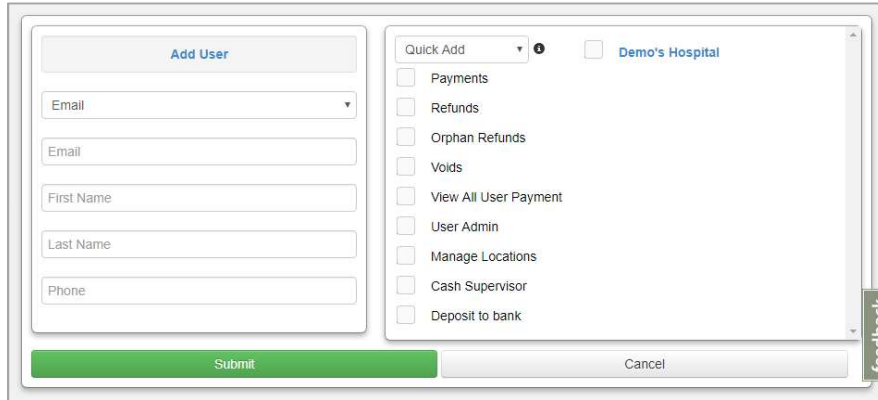
If using the “Username” option to create a custom username for the person, you will also create temporary password for the user, they will change this temporary password on first login.

Select the permissions in the column to the right to set the user’s permissions, and select the Locations the user will have access to.

A user must be given access to at least one location, and granted at least one permission in order to create the user account.


The first location in blue text, at the top of the location list is the primary “Root” location, and this is usually where patient payments from the Patient Portal are reported. Users

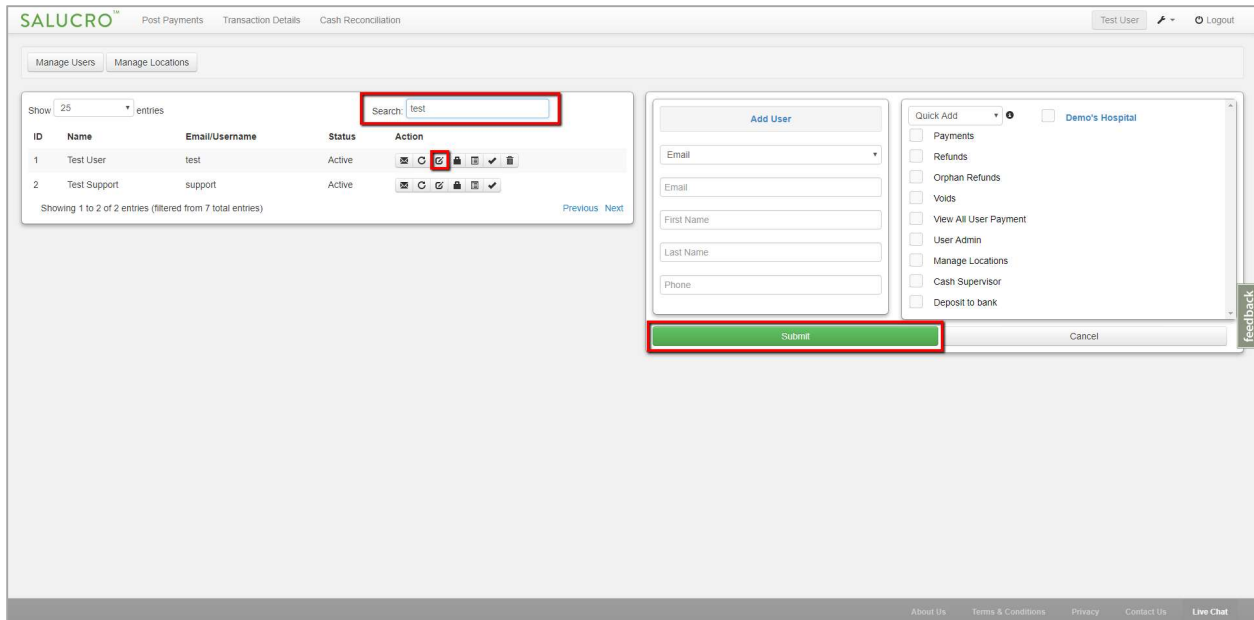
that need to view patient payments need to have this location checked. The secondary Sub Locations are in green text, and they are where the Provider Payments are reported. The tertiary Sub Locations in orange text typically represent different departments within the secondary Sub Location.



Update User Permissions

To update user permissions, use the “Search” box to filter the user list, you may use any part of their Name, Email, or Username for your search criteria.


Locate the user that is being updated, and click on the Edit icon  in the Action column, and the right users section will refresh to display the selected user’s current permissions. Once the permissions or locations have been updated, click the green “Update User” button to save the changes.




User Account Actions

The manage user list, displays all users including their Name, Email/Username, Status, and Action.


Resend Welcome Email

To resend the Welcome Email, use the “Search” to locate their account in the user grid, and click the Envelope icon  to send the user a new “Welcome Email.”


Reset Password

To reset the user’s password, use the “Search” to locate their account in the user grid, and then click the Cycle icon  to send them a “Reset Password” email.


View Permissions

To take a quick view of the user’s permissions, use the “Search” to locate their account in the user grid, then hover over the Padlock icon  to show a pop-up that displays their current user permissions.

View Locations

To take a quick view of the user’s locations, use the “Search” to locate their account in the user grid, then hover over the List icon  to show a pop-up that displays their currently enabled locations.

Inactivate a User

To inactivate a user, use the “Search” to locate their account in the user grid, then click on the Checkmark icon  to mark their account as inactive. Users who have not logged in for 90 days or greater are automatically marked as Inactive. Salucro can provide a list of all inactive Users upon request from a User Admin.

Reactivate a User

To reactivate the user’s account, click on the X icon  to mark their account as active.

Support

Salucro provides support to your Staff when they need assistance processing patient payments. Our Live Chat feature connects the User directly with one of our Customer Care Representatives.

The Feedback tab allows the User to send an email regarding any problems, suggestions or compliments.

You can also reach us by telephone at (866) 430-7333 during our normal business hours of 5:00am to 5:30pm Arizona (MST) time or by emailing support@salucro.com.