



Admin User Guide

Updated: November 2022

Welcome to Cohere!

Cohere Health simplifies healthcare by enabling patients, physicians, and health plans to collaborate on getting the right care, at the right time, at the right place, and at the right cost. Our focus is to enable an efficient, transparent patient journey where patient goals and achieving optimal clinical outcomes are central to decision-making.

We recognize the importance of our provider partners and look forward to partnering with you on the journey to better care.

Please use this document to learn more about the tasks required of an admin at your organization.

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Register for an Account

Cohere is focused on empowering our provider partners. To that end, our portal allows admin users to control user access.

Admin users are responsible for adding new users, as well as removing access, when appropriate. **Please ensure that these processes are managed according to your organization's policies.**

Registration Overview

Step 1: Complete registration

- Visit coherehealth.com/provider/register and complete the registration form.

Step 2: Activate account

- You will receive an email prompting you to activate your account. This email will include your username. Click 'Activate my account' to continue.

**Don't forget to check your spam folder.*

Step 3: Login

- Create a password and choose your security question and image.
- When logging in, your username will always be your email.

**For those creating new accounts, logging in will activate your provider organization and allow other members to request access.*

Account verification options

Cohere requires account verification to ensure the security of sensitive patient information. After completing the screening questions, you will be asked to verify your account.

Option 1: Existing Accounts Only

Email Domain

- Users are granted full access to start submitting authorizations immediately.
- Users must have the same email domain as the admin.



Users will not be able to utilize this method unless the organization's admin enabled this feature when the organization was created. If this option is not enabled, the admin must manually add all new users.

Would you like to make it faster for other people at your organization to set up accounts by enabling auto-verification based on email domain?

email@orthotennessee.com

Yes No

Important information

By selecting yes, you are confirming that other members from your organization using the same email domain (email@orthotennessee.com) can join your account. Anyone who requests an account with this email domain will be able to automatically join your organization.

Option 2: New Accounts Only

Verify by member info

- Must have x5 member IDs and DOBs to verify by patient info.

1 2 3

Verify by member info

Please enter information for 5 Humana patients to verify that you have access to your organization's protected health information.

Cohere already has access to this information, and entering it here does not violate HIPAA.

Member IDs should not include any dashes or special characters. Use letters and numbers only.

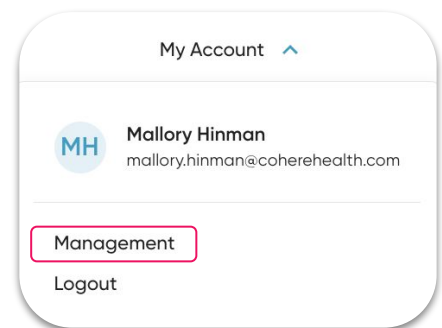
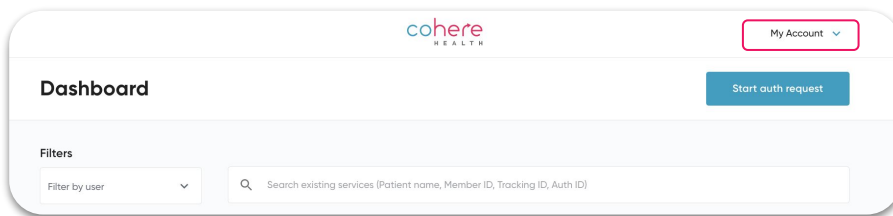
Member ID H12345678	Member date of birth 02/20/1990
Member ID H12345678	Member date of birth 02/20/1990
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User Management

Adding Users

If auto-verification based on email domain was selected during registration, users will be automatically added to your organization. If this option was not enabled, each user must be manually verified by the admin ([see page 5](#)). In the cases where users must be created manually, you will receive an email from Cohere when someone at your organization registers. Please be sure to check your junk folder for this email.

- 1 Enter your username and password to sign in to next.coherehealth.com
- 2 Click the **'My Account'** option in the top right corner of your screen, and select **'Management'**.



- 3 The next screen will list users that are associated with your organization who already have active accounts.
- 4 Press **'+ Add Member'**.
- 5 Enter the new user's information in the pop-up window.
- 6 Click **'Create'** to complete the process of adding the user.
- 7 The user will then receive an email with instructions on completing the activation process*.

Fill in the new member information

First Name
Brandon

Last Name
Miller

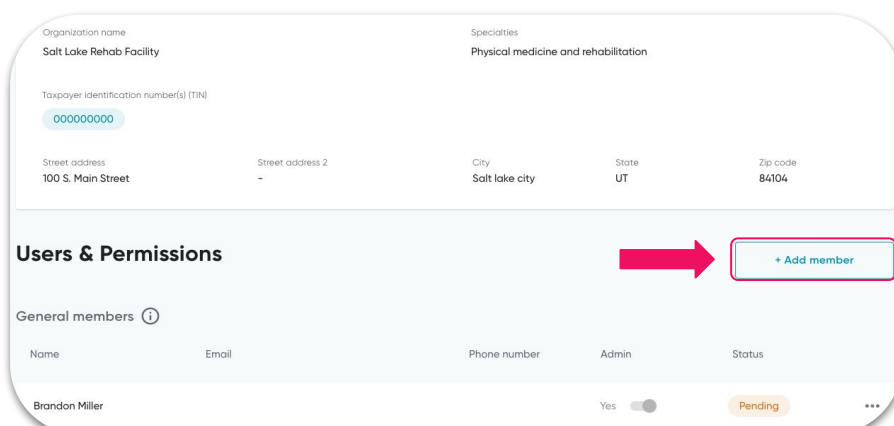
Phone Number
(555) 555-5555 Ext.

Email Address
brandon.walter.miller@coherehealth.com

Title (e.g. Pre-cert manager)
Authorization Specialist

User specialties (for any vendor, not just Cohere) (1 selected)
Physical medicine and rehabilitation

Organization admin Yes



If you get a message that this user already exists, but they aren't connected to your organization, the user will need to join the organization when they log in.

User Management

Verifying New Users

In cases where auto-verification based on email domain is **not** enabled, each user that goes through the registration process will need to verify their account by entering 5 member IDs and date of birth information. In these cases, the **admin** will need to manually verify the user following the steps below.

- 1 There are 2 ways that an admin can verify new users:
 - a. Within the notification email, click **'Review request'** for each new user, or
 - b. Within the portal, click the **'My Account'** option in the top right corner of your screen, and select **'Management'**.
- 2 Go to the "unverified members" section of the page, and click **'Review'** next to any unverified members that should be approved.
- 3 Verify that *all* fields are filled out and that the user's information is correct then click, **'Verify account'**.
 - o Please only reject access for a user if you are sure that they are requesting access inappropriately. Some users may work in different parts of your organization and may be approved by other admins.

The screenshot displays the 'Users & Permissions' management interface. At the top right, there is a '+ Add member' button. Below the header, there are two sections: 'Unverified members' (with 2 items) and 'General members' (with 7 items). The 'Unverified members' section contains a table with columns for Name, Email, and Phone number. The first row shows 'Brandon Miller' with a 'New' tag, email 'brandon.walter.miller@coherehealth.com', and phone '(555) 555-5555'. To the right of this row are three 'Review' buttons. A modal window is open over the 'Brandon Miller' row, titled 'Brandon Miller' with the subtitle 'Review member information'. The modal contains several input fields: 'First Name' (Brandon), 'Last Name' (Miller), 'Phone Number' ((555) 555-5555), 'Ext.' (empty), 'Email Address' (brandon.walter.miller@coherehealth.com), 'Title (e.g. Pre-cert manager)' (Auth Specialist), 'User specialties (for any vendor, not just Cohere) (1 selected)' (Physical medicine and rehabilitation), and 'Organization admin' (Yes, with a toggle switch). At the bottom of the modal are two buttons: 'Verify account' and 'Reject access'.

Deleting Users

- 1 Once you have logged in to the Cohere portal, click the **'My Account'** option in the top right corner of your screen, and select **'Management'**.
- 2 Find the correct user on the next screen.
- 3 Click the three dots to the right of the user to view more options. Select **'Delete Account'**. A pop-up window will appear. Press **'Delete'** to confirm. **This process cannot be undone.**

The screenshot shows a user management table with columns: Name, Email, Phone Number, Admin, and Status. Two users are listed: Brandon Miller and Walter Miller. Both have a status of 'Pending'. A three-dot menu is visible next to Walter Miller, with a 'Delete Account' option highlighted. A confirmation dialog box is overlaid on the screen, asking 'Are you sure?' and 'Do you really want to delete this account? This process cannot be undone.' with 'Cancel' and 'Delete' buttons.

Name	Email	Phone Number	Admin	Status
Brandon Miller	Brandon.Walter.Miller@coherehealth.com	5555555555	Yes <input checked="" type="checkbox"/>	Pending
Walter Miller	Walter.Miller@coherehealth.com	5555555555	No <input type="checkbox"/>	Pending

Editing Users

Your ability to make updates to certain information within existing user accounts, is dependent on the user's status (active or pending).



Email address

You are only able to change a user's email address when they are in a **"Pending"** status*.

1. Deactivate the account with the incorrect email.
2. Add this user again, with the correct email address.



Name or phone number

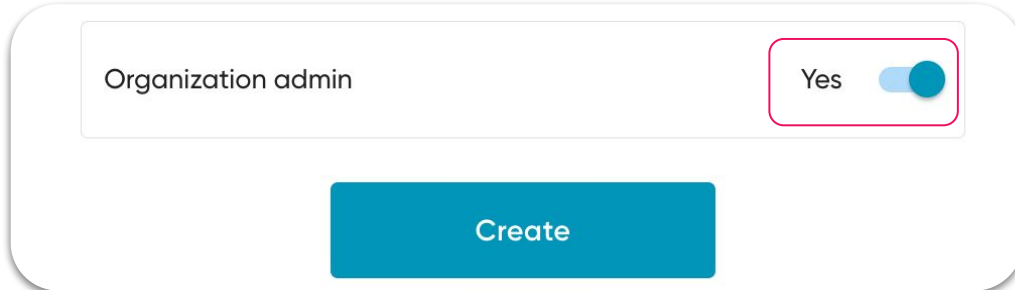
You may make changes to these fields at any time, regardless of user status within the portal.

1. Find the intended user.
2. Select **'Edit'**.
3. Edit details as necessary.
4. Press **'Save'**.

**If changes are made to the email address while a user is in a "Pending" status, a new activation link will automatically be sent to the user.*

Assigning Other Admins

As an admin, you have the ability to create additional admin users while on the account management page. First, add the user following the [“Adding Users”](#) steps, and then press the “Admin” slider in the box where you enter their information. You can also toggle this slider for verified members of the organization.



The image shows a user interface element for assigning an organization admin. It consists of a white rounded rectangle containing a text input field with the placeholder text "Organization admin". To the right of the input field is a toggle switch labeled "Yes" with a blue slider. Below these elements is a blue button with the text "Create".

If you believe you should not be an administrative user at your organization, please follow the steps below to assign another admin **before** removing the previous admin access.

Step 1: Add a new admin user.

- Please ensure that the correct user who will be added as an administrator has access to Cohere, if not, review how to add users on [page 4](#) of this guide.
- If their user account is active, find their name & switch toggle under ‘Admin’ to “Yes”. They are now an admin user.

Step 2: New admin removes the previous admin.

- The new administrative user will then log in, go to ‘My Account’, select ‘Management’ and then untoggle the “Admin” option for the previous administrator to “no”.

Additional Resources

We’re here to help! Our [Learning Center](#) is a great resource available to all Cohere users. We offer FAQs, tip sheets, webinars, and much more!

We highly recommend that all new users attend one of our webinars to learn more about Cohere. If you are interested in registering, please visit www.coherehealth.com/webinars.



Did you know? Users that attend webinars submit authorizations in the Cohere portal, on average, about **1 minute faster** than those who do not attend a webinar.