

## Magellan Healthcare of Idaho

# Outcomes and Assessments System – Updating the users for a member/individual

#### **Overview**

In Magellan's outcomes and assessments system (accessed via Availity Essentials), users can only see members ("Individuals") to whom they have been assigned. At times, supervisors and organization administrators will need to update an individual's users list to ensure all the appropriate people have access to the individual's profile in the system. This step-by-step guide will provide the steps necessary for updating the users for a member/individual so the individual will display in the user's caseload.

#### Locate the member

There are three ways to access a member in the outcomes and assessments system:

- 1. Using the Search Bar at the top of the page
- 2. Using the Individuals module on the left navigation ribbon
- 3. Using the Individuals table on the P-CIS Dashboard

If you need additional assistance with locating members within the system, please reference the Searching for a Member Step-by-Step Guide on the <u>Outcomes and Assessments Training</u> <u>page</u> for guidance.

### **Update the User**

- 1. From the member's profile, scroll down to the Users section.
- 2. Click the **caret** ► to expand the *Users* section.
- 3. Is the current user for this member correct?
  - A. If yes, then no further action is needed.
  - B. If no, then proceed to the next step to add the User.
- 4. Click the Edit Individual button.

**NOTE**: No information should be changed for the member in the outcomes and assessments system. The only items that can be edited are phone number and email information to be able to contact the member. Any incorrect member information must be updated by contacting Magellan.

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HEALTHCARE.	Dashboard > Individuals > Big Bird		
Dashboard	Big Bird		
🐣 Individuals	DOB: Mar 3, 2013		
Assessment Templates	Profile Assessment Templates Notifications Reports		
C Insights			
Settings	Contact Info		•
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	Natural Supports		•
	Users		2 🔽
	Current Users		
	3 User Name Start Date Daffy Duck Jan 2, 2024	End Date   Facilitator / Coordinator	
	Collaboration		
	All Collaborations		
	Past Users		
		4	
	Wraparound Facilitator or Primary Coordinator History	Delete Individual	Cancel

- 5. Click the (+) Add New hyperlink to add a new user.
- 6. Fill in the user fields as required and applicable.

**NOTE:** Required fields are indicated by a red asterisk.\*

- A. **User Name** This is a drop down menu of the users in the system for your organization/agency/program.
- B. **Start Date** This is the date the user started working with the member.
- C. **End Date** This is only if this user will be working with the member for a limited time.
- D. Collaboration Do not edit this field. This field should be left as is.
- 7. Click Save.



Bird						
Profile Assessment Templates	Notifications	Reports				
Contact Info						
Personal Info						
Natural Supports						
Users						
Current Users						5 + Add N
User Name * Daffy Horatio Tiberius Duck	Ŧ	Start Date * 1/2/2024	ē	End Date	Ē	
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User Name *	<u> </u>	Start Date *	B	End Date	C 🖻	
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8. You will be redirected back to the member's profile. A "**Successfully updated**" status will display.

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Mar 3, 2013		
rofile Assessment Templates	Notifications Reports	
Contact Info		•
First Name Big	Middle Name	Last Name Bird
Suffix	Address 1	Address 2
Country United States of America	City	State/Province/Region
Zip/Postal Code	Phone 1	Phone 2
	Texting Permitted	
Email		
Email Permitted		
Personal Info		· · · · · · · · · · · · · · · · · · ·
Date Of Birth Mar 3, 2013	Identified Gender Example Gender	Sex
Sexual Orientation	Primary Language	Delete Individual     Edit In     Concentration

9. The user will now be assigned to the member/individual, who will display in the user's caseload.

