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:

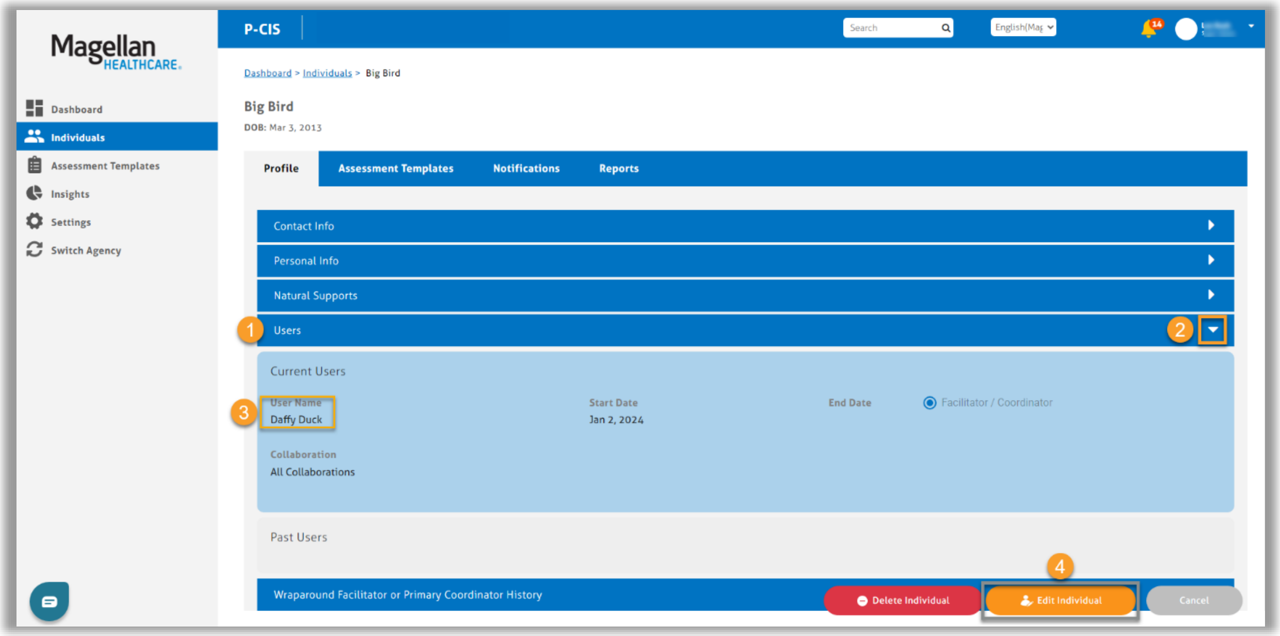
1. Using the Search Bar at the top of the page
2. Using the Individuals module on the left navigation ribbon
3. Using the Individuals table on the P-CIS Dashboard

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

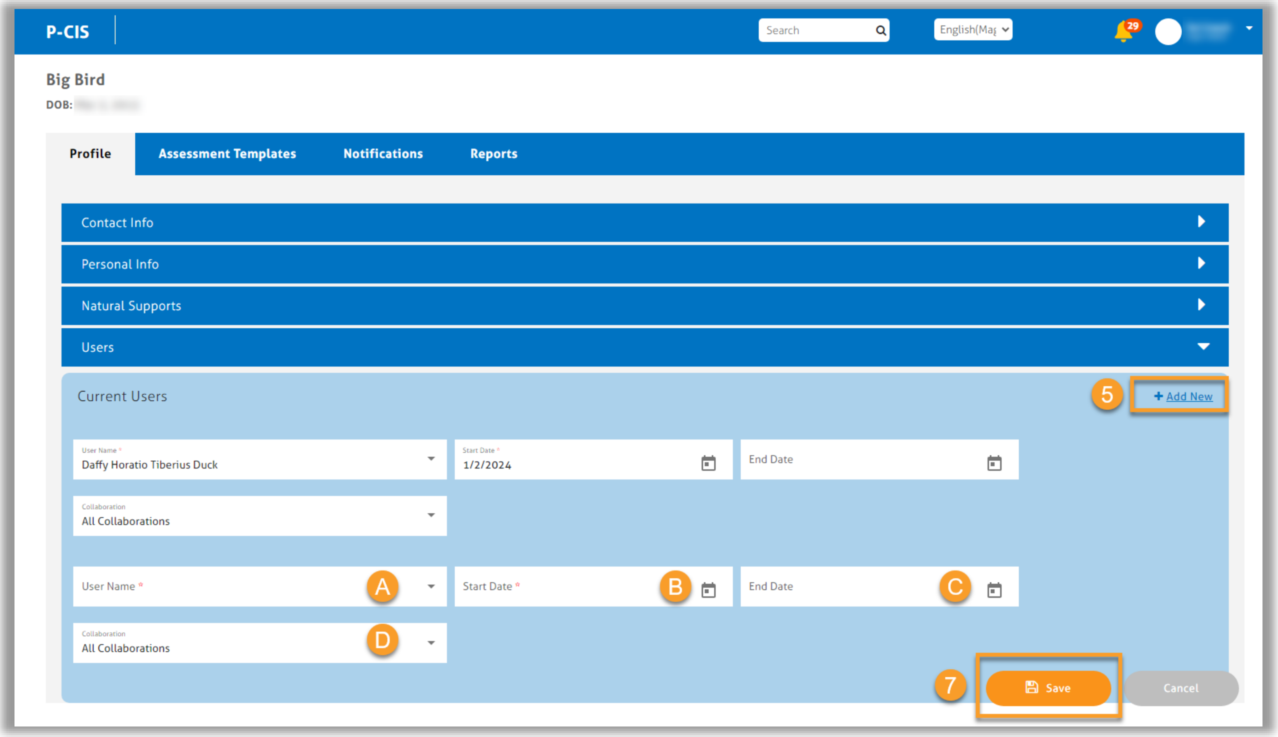
Update the User

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.

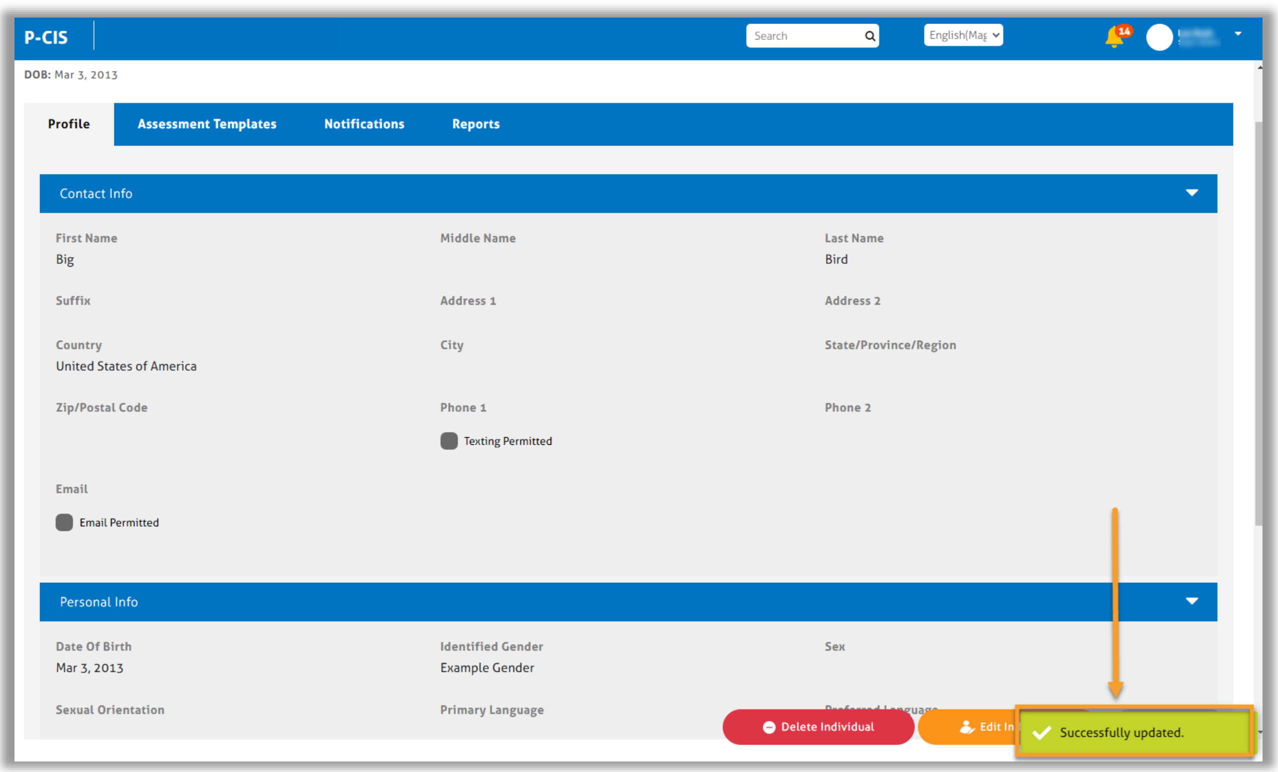
NOTE: No information should be changed for the member in the outcomes and assessments system. The only items that can be edited are phone number and email information to be able to contact the member. Any incorrect member information must be updated by contacting Magellan.



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**.



8. You will be redirected back to the member's profile. A "**Successfully updated**" status will display.



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