HOW:

PORTAL ADMINISTRATORS CAN MANAGE USERS, PROVIDERS, AND LOCATIONS
This portal guide takes you through steps to **add and remove users**, **manage providers**, and **manage locations**.

### How to add and remove users

1. Log in to your **provider** or **pharmacy** portal account and click on your name in the top right-hand corner of the screen.

2. Select “**My Account**” from the drop-down menu.

3. Click on the “**Manage Users**” tab to review the users affiliated with your organization.
Click “Deactivate,” next to any user who is no longer active. This deactivates the user’s account, and they will no longer have portal access. (If you wish to re-activate the account, click “Activate” for the desired user.)
To add a new user, click “Add New User” to open a new user account.

Please complete all the required fields and click “Create User Login” to create a new user account. An automated email notification with login details will be sent to the new user.
How to manage providers

1. Log in to your portal account and click on your name in the upper right-hand corner of the screen.

2. Select “My Account” from the drop-down menu.

3. Click on the “Manage Providers” tab to review the providers affiliated with your organizational account.

   a. Verify that the listed information is correct. If an update is needed, select “Edit,” next to affected organization. Click “Remove” for users who are no longer active.
To add a new provider, click the green “+ Add New Providers” button on the right. Enter all the required information, including name, NPI, and contact information. To save the new provider, click the green “Add Provider” button. To abandon your request, click “Cancel.”
Added providers will appear in the full list of providers on the “Manage Providers” tab.

![Account Information](image)

<table>
<thead>
<tr>
<th>Name</th>
<th>NPI</th>
<th>Email Address</th>
<th>Contact Phone</th>
<th>Physician Type</th>
<th>Edit</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Angela Williams</td>
<td>2212321215</td>
<td><a href="mailto:doctorfriendly@gmail.com">doctorfriendly@gmail.com</a></td>
<td>(861) 656-566</td>
<td>Physician</td>
<td>EdR</td>
<td>Remove</td>
</tr>
<tr>
<td>Bridgit Foster</td>
<td>4546320545</td>
<td><a href="mailto:doctorfriendly@gmail.com">doctorfriendly@gmail.com</a></td>
<td>(870) 665-496</td>
<td>Physician</td>
<td>EdR</td>
<td>Remove</td>
</tr>
<tr>
<td>Christopher Ross</td>
<td>8675555555</td>
<td><a href="mailto:doctorfriendly@gmail.com">doctorfriendly@gmail.com</a></td>
<td>(881) 599-607</td>
<td>Physician</td>
<td>EdR</td>
<td>Remove</td>
</tr>
<tr>
<td>Gale Jenkins</td>
<td>4567898765</td>
<td><a href="mailto:doctorfriendly@gmail.com">doctorfriendly@gmail.com</a></td>
<td>(466) 789-098</td>
<td>Physician</td>
<td>EdR</td>
<td>Remove</td>
</tr>
<tr>
<td>Karly Links</td>
<td>0000000092</td>
<td><a href="mailto:doctorfriendly@gmail.com">doctorfriendly@gmail.com</a></td>
<td>(555) 232-565</td>
<td>Physician</td>
<td>EdR</td>
<td>Remove</td>
</tr>
<tr>
<td>Rachel Quail</td>
<td>68768456518</td>
<td><a href="mailto:doctorfriendly@gmail.com">doctorfriendly@gmail.com</a></td>
<td>(456) 576-457</td>
<td>Physician</td>
<td>EdR</td>
<td>Remove</td>
</tr>
<tr>
<td>Owen Monk</td>
<td>8645320645</td>
<td><a href="mailto:doctorfriendly@gmail.com">doctorfriendly@gmail.com</a></td>
<td>(874) 214-512</td>
<td>Physician</td>
<td>EdR</td>
<td>Remove</td>
</tr>
<tr>
<td>Paul Trees</td>
<td>5469845594</td>
<td><a href="mailto:doctorfriendly@gmail.com">doctorfriendly@gmail.com</a></td>
<td>(887) 654-538</td>
<td>Physician</td>
<td>EdR</td>
<td>Remove</td>
</tr>
<tr>
<td>Rodger Reed</td>
<td>6546232154</td>
<td><a href="mailto:doctorfriendly@gmail.com">doctorfriendly@gmail.com</a></td>
<td>(887) 684-654</td>
<td>Nurse Practitioner</td>
<td>EdR</td>
<td>Remove</td>
</tr>
<tr>
<td>Gary Orange</td>
<td>1234323211</td>
<td><a href="mailto:doctorfriendly@gmail.com">doctorfriendly@gmail.com</a></td>
<td>(559) 550-505</td>
<td>Physician</td>
<td>EdR</td>
<td>Remove</td>
</tr>
</tbody>
</table>

Showing 1 to 10 of 11 entries

Physician Wilma Jean Williams has been successfully added to your organization.
How to manage locations

1. Log in to your portal account and click on your name in the upper right-hand corner of the screen.

2. Select “My Account” from the drop-down menu.

3. Click on the “Manage Locations” tab to review the locations affiliated with your organization.

   a. Verify that the primary location listed is correct. If an update is needed, select “Edit,” under the “Action” column.
Review the other locations associated with your account. If an update is needed, select “Edit” in the “Action” column on the right-hand side to make the changes. If a location is no longer needed, click “Remove”.

To add a new location, click the green “+ Add Location” button on the right.
Enter the required information, including the name, address, phone and fax numbers, NPI, and TIN. If necessary, check the “Make Primary Location” box.

a. To save the new location, click the green “Submit” button. To cancel your request, click “Cancel.”

For more information about how to manage your account or use the PAN portal refer to our webinar library, our other how-to guides, or review the pharmacy or provider FAQs.