

Updates for Org Admins

What's changing for org admin users with the new CentralReach login experience.


Clients & Generics


What admin accounts will see and control when looking at a client or generic contact.





PROFILE


SETTINGS


 Basics
Edit basic user information, including name and email


 Profile Picture
Add/update contact profile picture


 Login & Access
Add/Update login information


 History
Review recent activity and history


 Activity/Call Log
Review or record activity and call notes


 Principals
Add/update contact principals and managers


 Payors
View, add, or update insurance and other payment methods

 Health Record
View and record vital health statistics and readings

 Additional Contacts
View, add, or edit additional/emergency contacts

 Meta Data
Add or update custom meta data

 Notes & Forms
View the latest notes and forms added

 Provider Network
See other providers in network with this contact

Username & Password

Username

Username


Password

Password

Confirm Password

Confirm Password

Two-Factor Authentication

 Two-Factor Authentication Disabled

Pincode

[Reset pin code](#)

Last Login

Not Available


Update Login Information


Current View:


Org admins can access the Login and Access page of a client or generic contact, where they can set usernames and passwords to manage access to CentralReach.


PROFILE


SETTINGS


 Basics
Edit basic user information, including name and email


 Profile Picture
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 Meta Data
Add or update custom meta data

 Notes & Forms
View the latest notes and forms added

 Provider Network
See other providers in network with this contact

After SSO:

Org admins can no longer access the Login and Access settings for contacts as this is now powered by CentralReach SSO and owned by the individual user for enhanced security purposes. To revoke user access, see the new “convert to user” option in the Basics section of the contact profile.

aaron is a client and currently active 

BASICS	ADDRESS
<div>Status Active Make In-active</div>	
<div>Title <div>Title</div></div>	
<div>First Name <div>aaron</div></div>	
<div>MI <div>Middle Initial</div></div>	
<div>Last Name <div>Jones</div></div>	
<div>Primary Email <div>ajones@gmail.com</div></div>	
<div>Additional Email <div>Additional Email</div></div>	
<div>Marital Status <div>Choose marital status...</div></div>	
<div>Gender <div>Choose gender...</div></div>	
<div>DOB <div>mm</div> <div>dd</div> <div>yyyy</div></div>	

Current View:

Org admins can make a contact active or inactive on the profile basics page.

Additionally, org admins can modify the primary email address, first name, and last name in the basics section of the profile at any time.

aaron is a client and currently active 

BASICS

ADDRESS

Contact Type Contact | [Convert to User](#)

Status Active | [Make In-active](#)

Title

First Name

MI

Last Name

Primary Email

Additional E-mail

Marital Status

Gender

DOB

After SSO:

Org admins can still make a contact active or inactive, but will also have the ability to control access to CR through the “contact type” selections. A “contact” can remain active (e.g. for payroll purposes) but will have their access to the account revoked when in the “contact” status.

Org admins can also modify the primary email address field when a contact is in “contact” status.

BASICS

ADDRESS

SSO Connection

[Pending Migration](#)

[Remove Access](#)

Status Active | [Make In-active](#)

Title

First Name

MI

Last Name

Primary Email

Additional E-mail

Marital Status

Gender

DOB

When clicking “convert to user” this changes to “SSO Connection” in the user interface (UI) and will show whether the user has completed the validation process or if they are still pending.













Once the SSO connection status switches to pending or migrated, the org admin will no longer be able to modify the primary email address field.

To revert back to “contact” the org admin can click “remove access” which will change the view and remove access from CR.

Providers












What admin accounts will see and control when looking at a provider contact.



PROFILE	SETTINGS
 Basics Edit basic user information, including name and email	
 Profile Picture Add/update contact profile picture	
 Login & Access Add/Update login information	
 History Review recent activity and history	
 Activity/Call Log Review or record activity and call notes	
 Principals Add/update contact principals and managers	
 Payors View, add, or update insurance and other payment methods	
 Health Record View and record vital health statistics and readings	
 Additional Contacts View, add, or edit additional/emergency contacts	
 Meta Data Add or update custom meta data	
 Notes & Forms View the latest notes and forms added	
 Provider Network See other providers in network with this contact	


Current View:

Org admins can access the Login and Access page of a client or generic contact, where they can set usernames and passwords to manage access to CentralReach.

PROFILE	SETTINGS
 Basics Edit basic user information, including name and email	
 Profile Picture Add/update contact profile picture	
 History Review recent activity and history	
 Activity/Call Log Review or record activity and call notes	
 Principals Add/update contact principals and managers	
 Payors View, add, or update insurance and other payment methods	
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 Meta Data Add or update custom meta data	
 Notes & Forms View the latest notes and forms added	
 Provider Network See other providers in network with this contact	

After SSO:

Org admins can no longer access the Login and Access settings for contacts as this is now powered by CentralReach SSO.


Adam is an employee and currently active 

BASICS		ADDRESS	
Status	Active Make In-active	Termination Date	<input type="text"/>
Type	Employee Make Generic		
Title	<input type="text" value="Title"/>		
First Name	<input type="text" value="Adam"/>		
MI	<input type="text" value="Middle Initial"/>		
Last Name	<input type="text" value="madison"/>		
Primary Email	<input type="text" value="adam@test.com"/>		
Additional Email	<input type="text" value="Additional Email"/>		
Marital Status	<input type="text" value="Choose marital status..."/>		
Gender	<input type="text" value="Choose gender..."/>		

Current View:

Org admins can make a contact active or inactive on the profile basics page, and revert access by changing the username and/or password of the contact.

Additionally, org admins can modify the primary email address in the basics section of the profile at any time.

Adam is an employee and currently active 

BASICS		ADDRESS	
Contact Type Contact Convert to User			
Status	Active Make In-active	Termination Date	<input type="text"/>
Type	Employee Make Generic		
Title	<input type="text" value="Title"/>		
First Name	<input type="text" value="Adam"/>		
MI	<input type="text" value="Middle Initial"/>		
Last Name	<input type="text" value="madison"/>		
Primary Email	<input type="text" value="adam@test.com"/>		
Additional E-mail	<input type="text" value="Additional E-mail"/>		
Marital Status	<input type="text" value="Choose marital status..."/>		

After SSO:

Org admins can still make a contact active or inactive, but will also have the ability to control access to CR through the "contact type" selections. A "contact" can remain active (e.g. for payroll purposes) but will have their access to the account revoked.

Org admins can also modify the primary email address field when a contact is in "contact" status.

Adam is an employee and currently active 

BASICS		ADDRESS	
SSO Connection Pending Migration Remove Access			
Status	Active Make In-active	Termination Date	<input type="text"/>
Type	Employee Make Generic		
Title	<input type="text" value="Title"/>		
First Name	<input type="text" value="Adam"/>		
MI	<input type="text" value="Middle Initial"/>		
Last Name	<input type="text" value="madison"/>		
Primary Email	<input type="text" value="adam@test.com"/>		
Additional E-mail	<input type="text" value="Additional E-mail"/>		

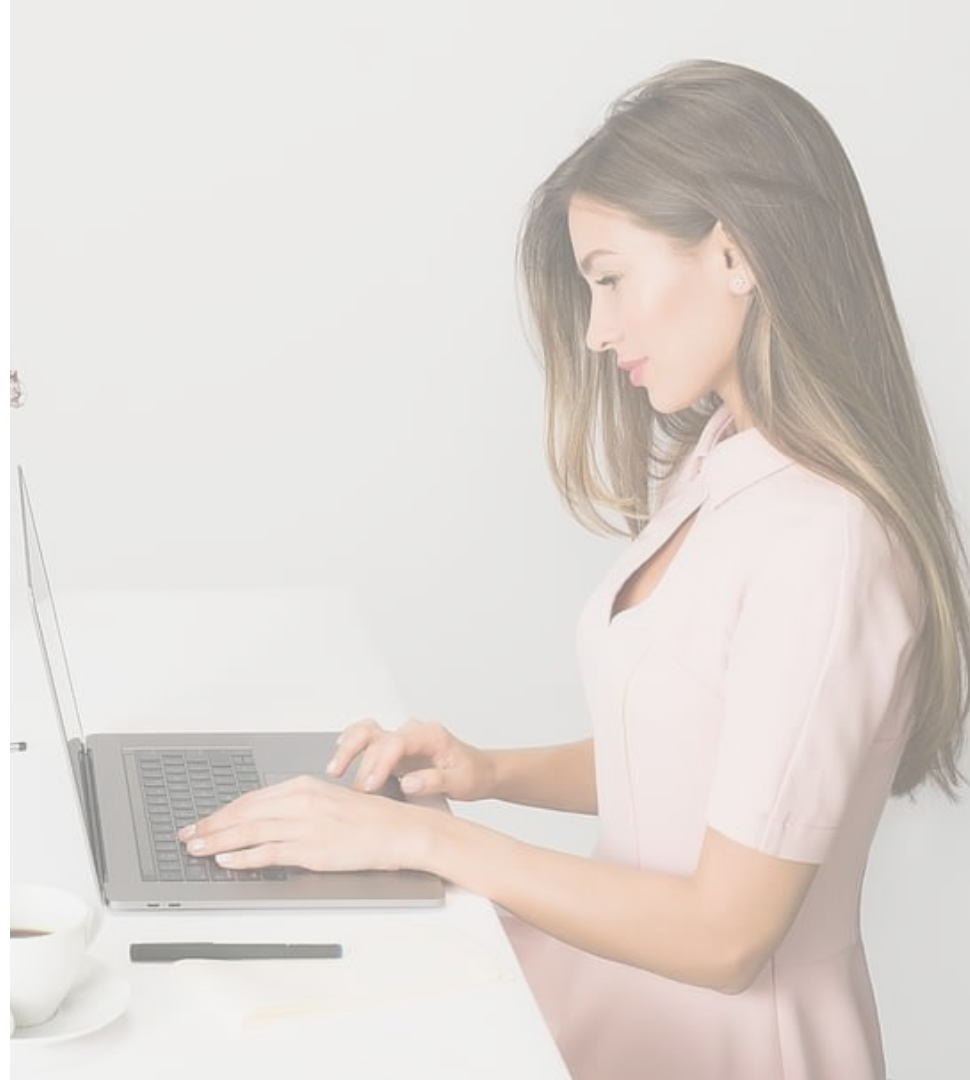
When clicking "convert to user" this changes to "SSO Connection" and will show whether the user has completed the validation process or if they are still pending.










Once the SSO connection status switches to pending or migrated, the org admin will no longer be able to modify the primary email address field.

To revert back to "contact" the org admin can click "remove access" which will remove access to CentralReach and make the primary email address editable.

Org Admin Settings

What admin accounts will see when looking at their admin account and where they can adjust account-level security settings.



PROFILE	EXT. PROFILE	SETTINGS
 Basics Edit basic user information, including name and email		
 Profile Picture Add/update contact profile picture		
 Login & Access Add/Update login information		
 History Review recent activity and history		
 Activity/Call Log Review or record activity and call notes		
 Principals Add/update contact principals and managers		
 Additional Contacts View, add, or edit additional/emergency contacts		
 Meta Data Add or update custom meta data		
 Notes & Forms View the latest notes and forms added		

Username & Password

Username

qualityinc

Password

Password

Confirm Password

Confirm Password

Two-Factor Authentication

 Set Up Two-Factor Authentication

Pincode

D6E5V6 [Reset pin code](#)

Last Login

06/30/2021 11:41:48

Update Login Information

Current View:

Org admins can control their login and access settings via the Login & Access option from the profile menu. This includes managing username, password, 2FA, pincodes, and security questions.

Security Questions

Question #1

In what city were you living at age 16

Answer to #1

Pompano Beach

Question #2

What was the name of the first school you attended?

Answer to #2

Central

Question #3

What is your oldest sibling's middle name?

Answer to #3

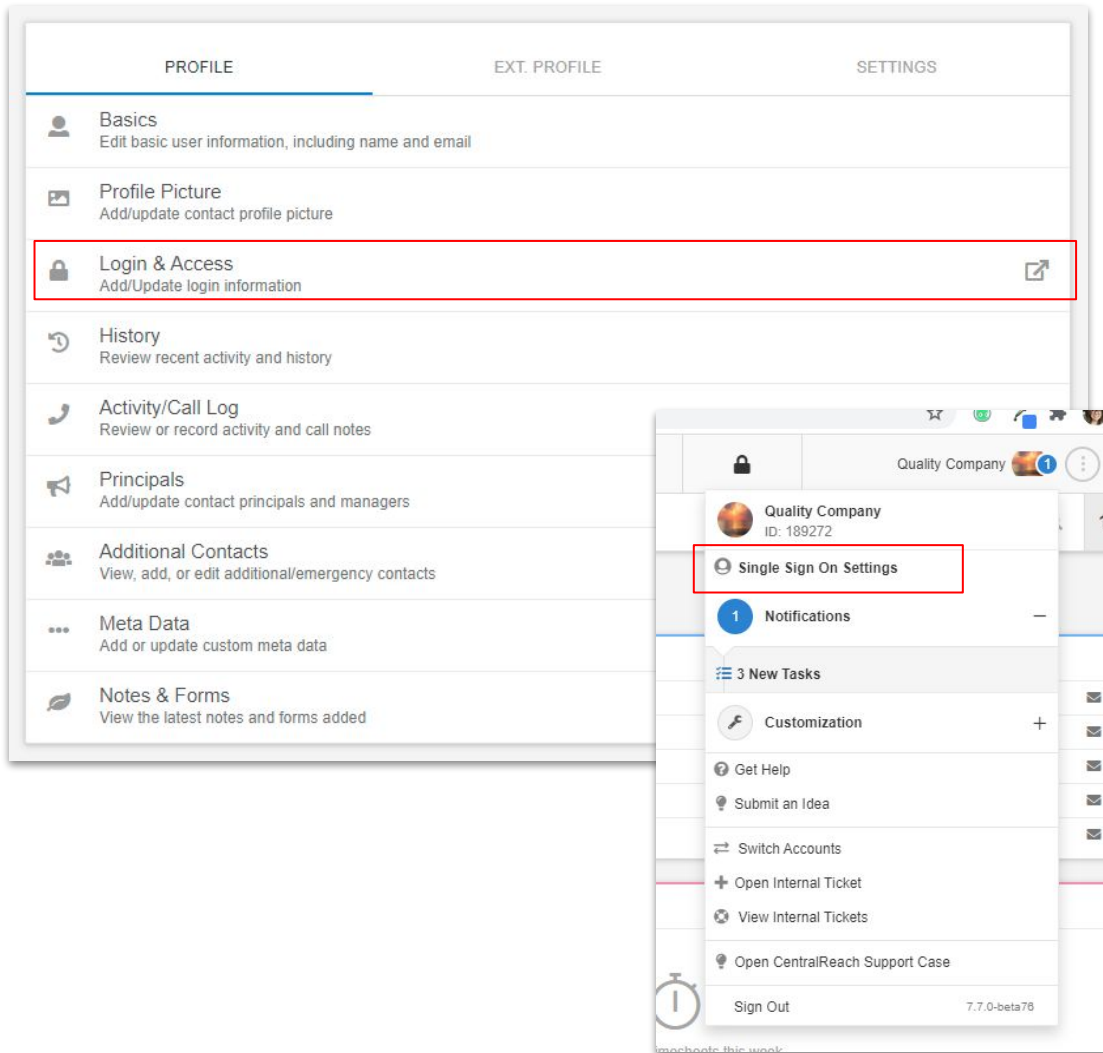
John

After SSO:

All Login & Access settings are now managed within the new SSO Settings page.

The Login & Access option from the profile menu or the Single Sign On Settings option from the settings menu will redirect you to the SSO settings page.

Under the Basic Information section you can modify the security settings for the org account including password updates and MFA set up (for the org account user only).



User Profile

Basic Information

Security

Quality Company

Email

emailtest+qualityinc@centralreach.com

[CHANGE EMAIL](#)

Display Name

Quality Company

First Name

Quality

Last Name

Company

Time Zone

(UTC -04:00) New York

Locale

English (United States)

DISCARD CHANGES

SAVE

User Profile

Basic Information

Security

Organization Profile

Company Information

Security Settings

Manage Users

Change Password

Current Password

Password

Confirm Password

CHANGE PASSWORD

Multi-Factor Authentication

SET UP AUTHENTICATION

After SSO:

Under the Basic Information section you can modify the org email address, email address, time zone, and language/locale. The organization name is synced from CentralReach.

Note that at this time, these fields do not update or impact the CentralReach environment, and are only on record within the SSO environment.

Under the Security section, you can change the password for the org account as well as set up multi-factor authentication for the org account.

This screenshot shows the SSO settings for 'Quality Company'. The left sidebar has two main sections: 'User Profile' (with 'Basic Information' and 'Security' links) and 'Organization Profile' (with 'Company Information', 'Security Settings', and 'Manage Users' links). The 'Company Information' link is highlighted with a red box. The main content area shows the company name 'Quality Company' in a large font, with a text input field below it containing the same name. The input field is labeled 'Name'.

After SSO:

Under the Organization Profile settings, org admins can control the following items:

Company Information: The name of the company is synced from CentralReach and cannot be changed in the SSO Setting page.

Security Settings: The *password expiration* and *session timeout* settings can now be controlled here.

Organizations who did not have a password expiration set up will default to 90 days.

Organizations with a legacy session timeout (90 minutes and 180 minutes) will default to 15 minutes.

All other settings in place prior to go-live will remain the same after go-live.

Multi-factor authentication for the entire organization (including the client portal) can also be toggled on and off here. No organizations will be automatically opted into MFA, so any current 2FA users can opt back in en-masse using this toggle.

This screenshot shows the 'Login and Browser Settings' section of the SSO settings for 'Quality Company'. The left sidebar is the same as the previous screenshot, but the 'Security Settings' link under 'Organization Profile' is highlighted with a red box. The main content area has a heading 'Login and Browser Settings' and two dropdown menus. The first dropdown is 'Password Expiration' with the value 'CentralReach default (90 days)'. The second dropdown is 'Session Timeout' with the value 'CentralReach default (15 minutes)'. Below these is a section for 'Multi-Factor Authentication' with a toggle switch and the text 'Require Multi-Factor Authentication'. At the bottom right, there are two buttons: 'DISCARD CHANGES' and 'SAVE'.

User Profile

Basic Information
Security

Organization Profile

Company Information
Security Settings
Manage Users

Manage Users

Sam Bee

Sam Bee

Basic Information

Display Name
Sam Bee

First Name
Sam

Last Name
Bee

Multi-Factor Authentication

User has multi-factor authentication enabled.

DISABLE MULTI-FACTOR
AUTHENTICATION

After SSO:

Org admins can opt users in or out of MFA on this page. They cannot edit or modify any of the information here such as first or last name. These elements are synced from the CentralReach Platform.


To find a user, search for a migrated user in the “Find Users...” search bar.

Once the user has been found, the org admin can see if they have opted into MFA. An org admin can enforce or remove MFA from any user account. Please note that the user can opt themselves back in to MFA at any time through their own SSO settings.

BASICS	ADDRESS	BILLING
Title	<input type="text" value="Mr."/>	
First Name	<input type="text" value="Quality"/>	
MI	<input type="text" value="Middle Initial"/>	
Last Name	<input type="text" value="Company"/>	
Primary Email	<input type="text" value="emailtest@centralreach.com"/>	
Additional Email	<input type="text" value="Additional Email"/>	
Marital Status	<input type="text" value="Single"/>	
Gender	<input type="text" value="Female"/>	
DOB	<input type="text" value="04"/>	<input type="text" value="29"/>
	<input type="text" value="1991"/>	

Current View:

Org admins can control their primary email address on the org account via the basics section of the org account profile. Additionally, this email can be the same as an active employee contact within the CentralReach account.

BASICS	ADDRESS	BILLING
<div>Linked to emailtest+qualityinc@centralreach.com</div> <div>SSO Connection Verified</div>		
Title	<div>Mr.</div>	
First Name	<div>Quality Inc</div>	
MI	<div>Middle Initial</div>	
Last Name	<div>Company</div>	
Primary Email	<div>emailtest+qualityinc@centralreach.com</div> <div>Change email address </div>	
Additional E-mail	<div>Additional E-mail</div>	
Marital Status	<div>Single</div>	
Gender	<div>Female</div>	
DOB	<div>04</div>	<div>29</div> <div>1991</div>

After SSO:

Org admins will see their linked email address and confirmation that their SSO connection is verified. The email address should match what is listed in the primary email address field

The primary email address field is now greyed out. The primary email address can be changed by clicking the hyperlink to “Change email address.” This link will bring you to the external SSO settings page (as indicated by the box and arrow icon).

Lastly, this email address must be a unique, individual email address and cannot match an active user within the CentralReach account.

Permission Update

There will be a slight modification to the way the Manage Own Profile Info Permission behaves with Release 7.7 (SSO).



Contacts > Manage Own Basic Info

Allows contact to manage his/her own basic information / profile



Current Behavior:

Only users with the Contact > Manage Own Basic Info permission turned on have the ability to modify their primary email address.

After SSO:

Users will be able to modify their primary email addresses. This is intentional for the SSO release in order to ensure users will be able to login and access CentralReach on go live, as there are many users who still do not have valid email addresses in the primary email address field.

Future Release (TBA):

In a future release, this permission will revert back to its original intended functionality and will prevent users from modifying their email addresses unless this permission is granted.

Questions?

Contact your CentralReach
Customer Success Lead for any
questions.

