

# USERS GUIDE

[PORTAL.SMARTDATASTREAM.US](https://portal.smartdatastream.us)

SDS Provider Support

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# USERS

The person who's contact information was entered into the register form is automatically designated as an admin. They are then responsible for adding additional users and granting others admin access as necessary.

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## ADDING ADDITIONAL USERS



New users can be added using the +Add New User button on the top right of the Users page.

To create a new user, you will need:

- First Name
- Last Name
- Phone
- Email

The person creating the new user will be responsible for creating a user ID for them and giving them the login information.

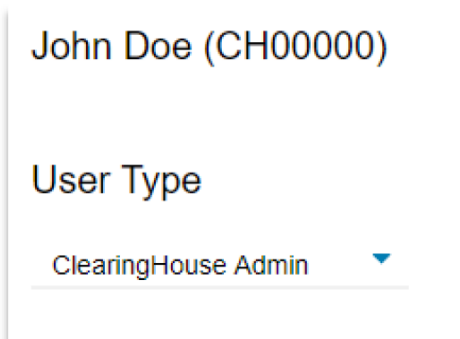
The system does NOT send an email to them with their login information after a user has been created.

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## EDITING USERS

After a user has been created, you can edit their role and permissions within the account.

*User Roles:*



- Clearinghouse Admin
  - Can Add/Edit Users
  - Can Remove Users
  - Can Adjust User Permissions
- Clearinghouse User
  - Cannot View Users
  - Can perform any other function on the site as designated by their account admin

Permissions:

### Special Permissions

John Doe has the following special permissions globally.

- ERA Enrollment
- Upload File

Manage Permissions Restrictions

This user can view and edit all documents and enrollments.

In addition to allowing users to edit the ERA Enrollments or Upload Files, you can click on Add Permissions to restrict based on transaction type and TIN and NPI.

### Add Permissions Restriction 1 close

John Doe can only view documents associated with these ID numbers:

TIN

All

111111111 edit close

222222222 edit close

New TIN

NPI

All

Example 1

John Doe is allowed to view documents associated with TINs 111111111 and 222222222, as well as any NPIs associated with those two TINs. They are not allowed to view a document that comes in with TIN 333333333.

Example 2

John Doe is allowed to access the Claims and Eligibility pages. He cannot see any ERAs from this account.

He is allowed all claim submission tools.

That are of these types:

DOCUMENT TYPES

All

Claim

ERA

Eligibility

Within these documents, John Doe has these additional permissions:

ADDITIONAL PERMISSIONS

All

WebKey

Reject Queue

Claim Enrollment

WebKey Templates

Copy Document