

User Account Management

NOTE: Some links in this PDF file may access content on the Customer Exchange (CX) website. To view the content, you must log in with your CX account credentials.

User Account Management

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User account management is where you learn to sign in or sign up for a Developer Portal account and then manage it yourself. Two types of users can sign up for an account:

- Third-party developers
- Payer developers.

NOTE

These instructions apply to default (Out of Box) user account management.

User Account Registration

There are a couple of ways to complete your registration: Directly through the Developer Portal or client-initiated. Both third-party developers and payers can sign up.

Developer and Payer Registration

Follow these steps to sign up for a Developer Portal account for either a **third-party developer** for healthcare applications or a **payer** for payer-to-payer applications.

To complete the signup process for a Developer Portal account:

1. After launching the Developer Portal as described in [Start Here](#), click **Sign up** in the top menu.
2. The Sign Up page appears:

3. Provide the following information:
 - a. Select a **User Role** (3rd Party Developer or Payer).
 - b. Type in an **Email** address for the account.
 - c. Type a minimum eight-character **Password**. Type it again in the **Confirm password** field.
 - d. Type a **First** and **Last name**.
 - e. Enter the **Captcha** characters.
4. Click the Terms of Use **Show** link and read the Terms of Use, then click the **I agree to the Terms of Use** checkbox.
5. Click **SIGN UP**.
6. Wait for a confirmation email. When you receive the email, open it and click the link inside the email to confirm your registration.
7. Launch the Developer Portal again and click on the **Sign in** link as described in [Start Here](#).
8. At this point, your next step is to explore APIs and start developing your application.

Client-initiated Email Signup and Registration

There may be times when a health plan wants to invite a developer or development company to join the Developer Portal.

To complete the registration process from a client-initiated email:

1. Open the email sent to you from the client. It provides a link to use to sign into the Developer Portal.
2. Click the link in the email you received to open the **Sign up** page.
3. Complete the following information:
 - a. Type a **Password**, and then type it again in the **Confirm password** field.
 - b. Click the **RESET** button.
 - c. Sign in to the Developer portal.
4. At this point, your next step is to explore APIs and start developing your application.

Sign in to the Developer Portal

To sign in to the Developer Portal:

1. After launching the Developer Portal as described above, click **Sign in** in the top menu. The **Sign In** page appears.
2. Enter your credentials in the **Email** and **Password** fields.
3. Click **SIGN IN**.

You are taken to the Home page.

Sign out from the Developer Portal

To sign out from the Developer Portal:

1. In the **Top** navigation menu, click **Sign out**. The **Sign out Confirmation** page appears.
2. Click **SIGN OUT**.

You are taken to the Home page, but your session is no longer inactive.

Account Management

 The Account Management buttons are available only with default (Out of Box) user management.

If so configured, you will see a row of buttons below the Account Details section of the Profile page. The buttons are **CHANGE NAME**, **CHANGE PASSWORD**, and **CLOSE ACCOUNT**.

Changing the Name on the Account

To change the name on your account:

1. Click **CHANGE NAME**. The Account Details screen appears, showing the account's email address and providing fields to change the first and last names on the account.
2. Change your **First Name** or **Last Name** as needed.
3. Change your **First/Last Name**.
4. Click **SAVE**.

Changing Your Password

To change your password:

1. Click **CHANGE PASSWORD**. The Change Password screen appears, where you see fields for the old **Password**, the **New Password** and **Confirm Password** as well as a Captcha.
2. Type your existing **Password**.
3. Type a **New Password**, and then type it again to confirm.
4. Complete the Captcha.
5. Click the **CHANGE** button.

Closing Your Account

To close your account:

1. Click **CLOSE ACCOUNT**. The Close Account popup appears, where it explains what you are about to do and asks if you want to continue.
2. Click **OK** to close your Developer Portal account.

You will receive a "farewell" email on closing your account.