Iowa Behavioral Health Reporting System (IBHRS)

End User Guide

Date Submitted
July 1, 2021

Version 1

Table of Contents

Revision History

Version	Date	Author(s)	Revision Description
1	2/3/2021	Val Hewitt, Kory Schnoor	Initial draft
2	4/30/2021	Val Hewitt, Kory Schnoor	Updated UI
3	6/7/2021	Val Hewitt, Kory Schnoor	Updated Data Entry
4	6/30/21	FEI, IDPH	Finalize Draft

Acronym Table

The following table includes acronyms used within IBHRS, and specifically this Training Document.

Acronym	Meaning
IDPH	Iowa Department of Public Health
IBHRS	Iowa Behavioral Health Reporting System
MH	Mental Health
PHI	Protected Health Information
SUD	Substance Use Disorder
SSAS	SQL Server Analysis Services
SSRS	SQL Server Reporting Services
SE	A Submitting Entity is a provider organization (or "Agency" as used within I-SMART)
URL	Uniform Resource Locator
XML	Extensible Markup Language

1 Introduction

The Iowa Behavioral Health Reporting System (IBHRS) is the integrated data reporting system for substance use disorder (SUD) and problem gambling (PG) treatment data for licensed SUD and PG treatment providers. IBHRS completes the integration of SUD/PG treatment licensure standards and data reporting requirements set in motion by Senate File 2425 (2008) and House File 811 (2009), where the Iowa Legislature directed the Iowa Department of Public Health (IDPH) to align SUD and PG treatment systems. IBHRS replaces the Central Data Repository (CDR) and Iowa Service Management and Reporting Tool (I-SMART) data systems.

The IBHRS Training Documentation includes detailed step-by-step instructions on how to utilize each functional area of the system. This document is organized by functional area and is designed so that users may easily reference the sections important to their roles within the system.

This document is sectioned into the following IBHRS Modules:

- Integrated Treatment (SUD/PG) Reporting
- H837 Claim Submission (IPN Only)
- Staff Administration (for IBHRS Agency Administrators)

The document will be updated in a future version for:

- Grant Management
- OTP Registry
- Statewide Waitlist

2 Integrated Treatment (SUD/PG) Reporting

Purpose

IDPH collects treatment level data from licensed SUD/PG treatment providers to meet state and federal data (TEDS, etc.) reporting requirements. IDPH uses data to assist in decision making for system/network improvements, provider service delivery (access, engagement, retention, and completion of treatment), and linkages to associated services and support.

Providers may choose one of the two options for reporting each required Integrated Treatment (SUD/PG) data set as defined within the **IBHRS Submission Guide**, available at https://idph.iowa.gov/Bureau-of-Substance-Abuse/Substance-Use-and-Problem-Gambling-Data/Iowa-Behavioral-Health-Reporting-System/IBHRS-Documentation.

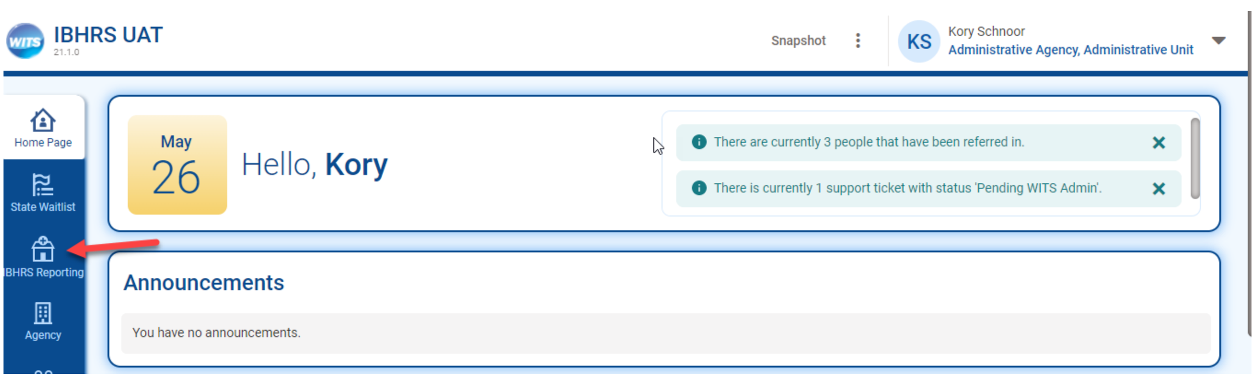
- A data entry option for those providers that either do not have an electronic health record or choose to report data manually via a data entry screen; or
- XML file upload for providers with electronic health records that support creation of XML files.

Providers are required to submit data and pass all IBHRS validation checks by the 15th of each month for the previous month's data. For example, data for April are due May 15th and data for May are due June 15th, and so on. Providers are encouraged to have a regular reporting and monitoring process. Some providers may find that submitting data more frequently than monthly may reduce the number of validation errors and improve the provider's data integrity. For providers submitting data via XML, it is recommended that data are submitted at least weekly to minimize errors and huge gaps in data submission.

2.1 Accessing IBHRS Reporting Module

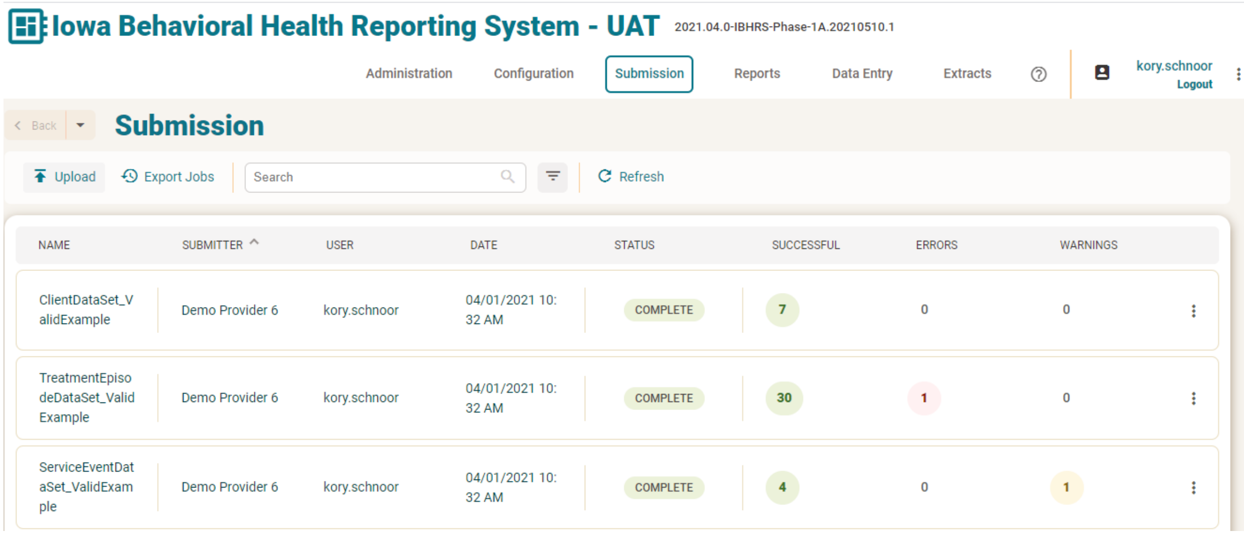
Providers (i.e., Submitting Entities) may login to the IBHRS web-based portal and, based on their assigned roles, may access the Submission and/or Data Entry tabs.

1. Users with access to the IBHRS Reporting module will see the **IBHRS Reporting** menu item when they log into IBHRS.



2. Clicking on IBHRS Reporting will open a new browser tab for this module.

   Important – Ensure your browser allows pop ups for this site.



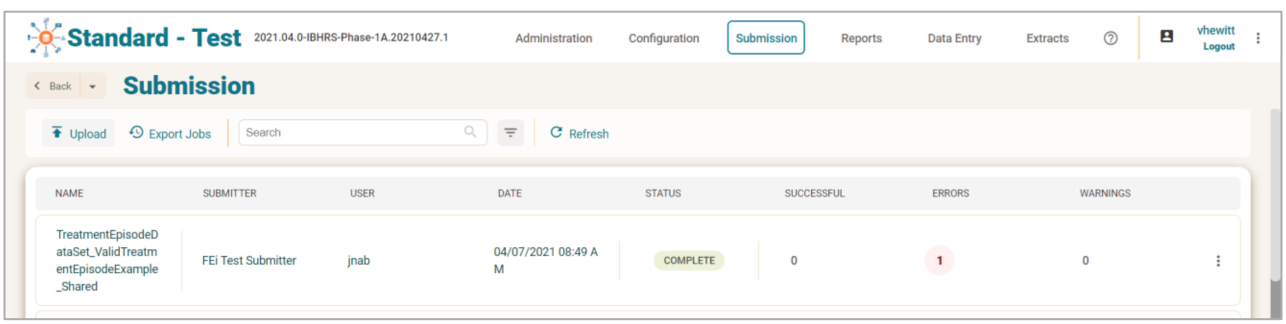
2.2 XML File Submissions

This section is for providers reporting via XML files.

IBHRS creates and processes jobs for each file uploaded through the IBHRS Reporting module. Files are processed according to a standard pipeline of events, such as verifying the submitter (Submitting Entity), validating the file, and then processing the file appropriately depending on the type of file.

The Submission screen displays a list of each job and users can view additional details for each job by downloading a report (available in PDF and Excel formats), or by clicking an individual job to open the Job Workspace screen within IBHRS.

Errors associated with each job are stored within the IBHRS database. Detailed error information and applicable messages are included in downloadable report files, and displayed on the Job Workspace screen.



2.2.1 Job Processing Steps and Error Types

Job processing steps may vary based on the data set type associated with each job. For more information, see the **IBHRS Submission Guide** at https://idph.iowa.gov/Bureau-of-Substance-Abuse/Substance-Use-and-Problem-Gambling-Data/Iowa-Behavioral-Health-Reporting-System/IBHRS-Documentation.

Types of Job Processing Steps:

- File Name Validation
- Data Set Access Check
- XML Schema Validation
- Business Rule Validation
- Data Type Validation
- Data Linking

Error Types:

- Business Rule
- Warning
- Data link
- Invalid Vocabulary Code
- Schema validation
- Type Validation
- Related Entity

2.2.2 XML File Naming and File Size

Although submitters have some flexibility in how files are to be named, all filenames submitted to IBHRS must adhere to the below 3 requirements:

1. The name of the data set must be the first word in the file, followed by an underscore.
2. The filename must be unique in the submitters set of currently uploaded and unprocessed files.
3. The file must end with ".xml". For current datasets, only .xml files will be accepted.

> **Note**: The required file name for each data set can be found in the respective section within the IBHRS Submission Guide.

To satisfy the naming requirement, it is suggested to append the date and time to each file after the underscore, using the **YYYYMMDDHHMMSS** format.

Some example acceptable filenames would be:

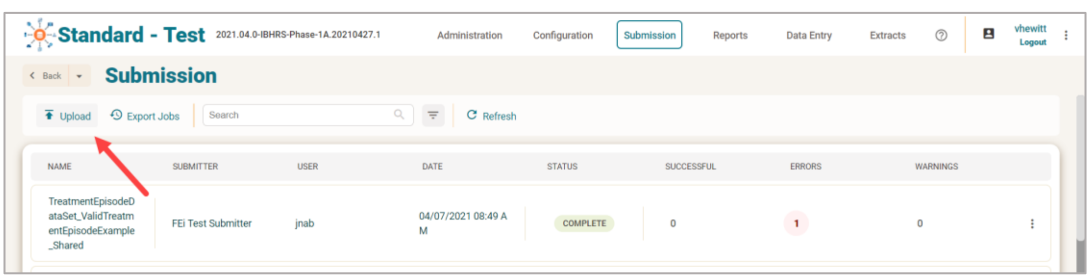
- ProviderDataSet_20180215083045.xml
- ClientDataSet_20180215083045.xml
- ClientDataSet_20180222091530.xml

Any filename that does not meet this requirement will not be processed into IBHRS.

IBHRS will accept any data file that is 50mb or less in size.

2.2.3 Submit XML Files via IBHRS Reporting Module

1. On the Submission screen, click **Upload**. This will open the Upload window.



2. On the Upload window, there are **two (2) options** available to upload data files. Choose either option and then continue to **Step 4**.

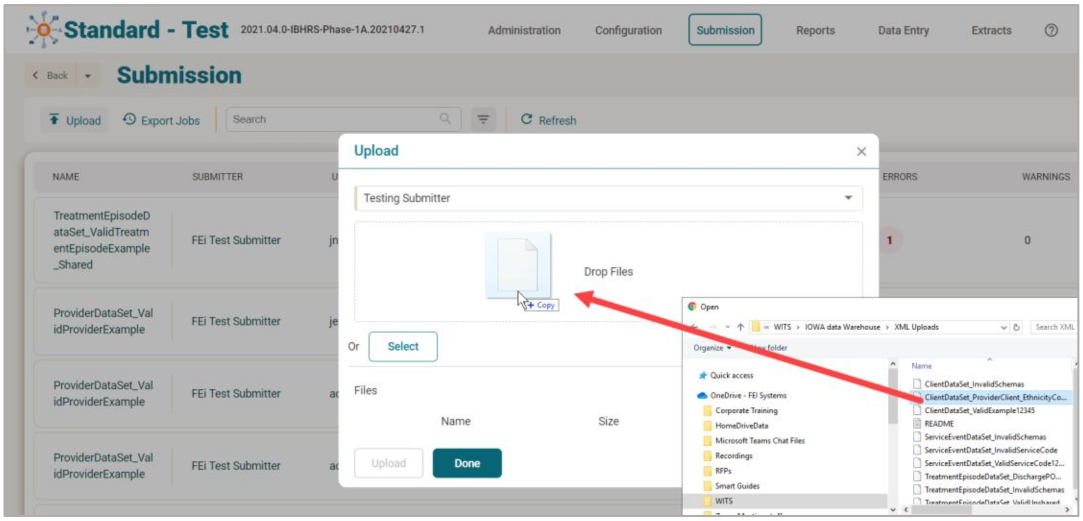
2.2.3.1 Option 1: Drop Files

a. Open your computer's file explorer, or other location where files are stored.

b. In your file explorer, or other location, select one or more files, and then drag the file(s) to the "Drop Files" section on the Upload window.

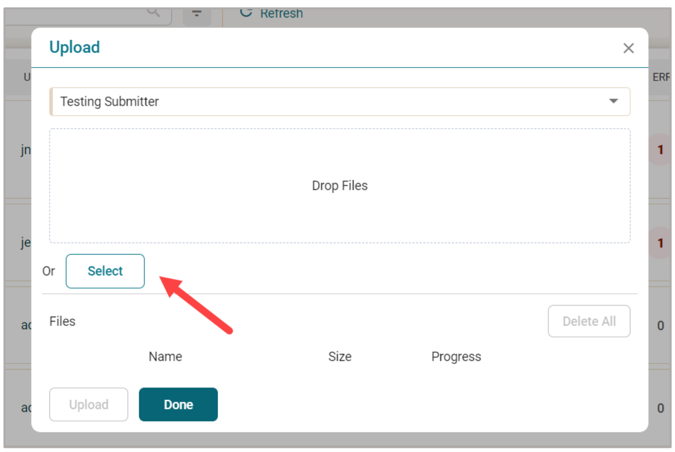
Tip: To select multiple files, press the **Ctrl** key and click each file.

c. Continue to **Step 4**.

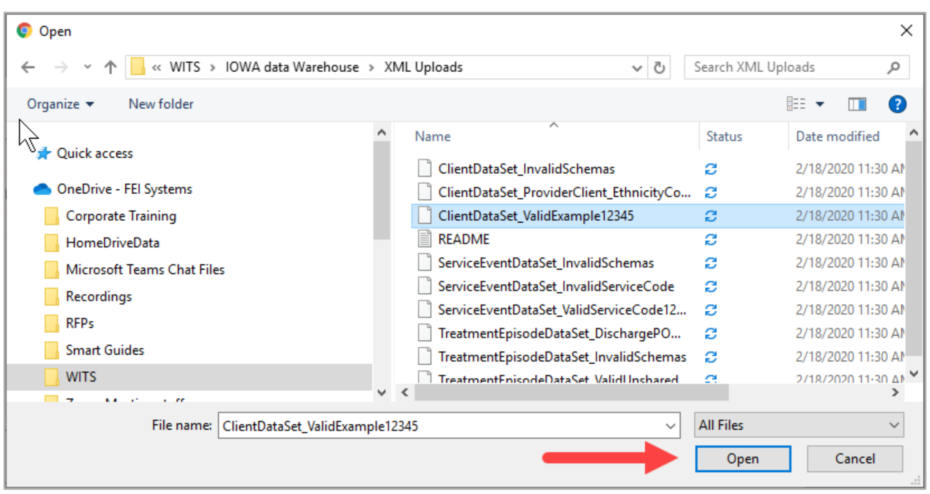


2.2.3.2 Option 2: Select Files

a. On the Upload window, click **Select** to open file explorer and search for your file(s).

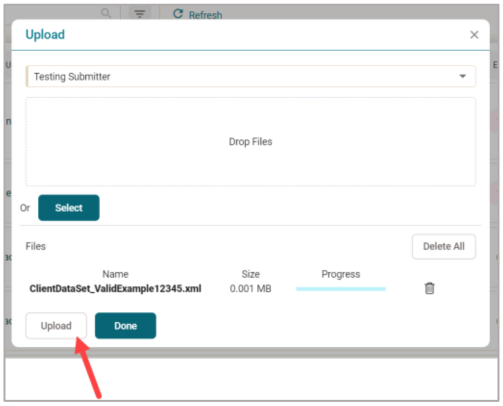


b. Select your file(s) and click **Open**.

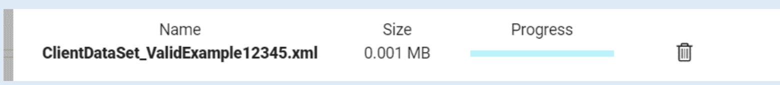


Tip: To select multiple files, press the **Ctrl** key and click each file.

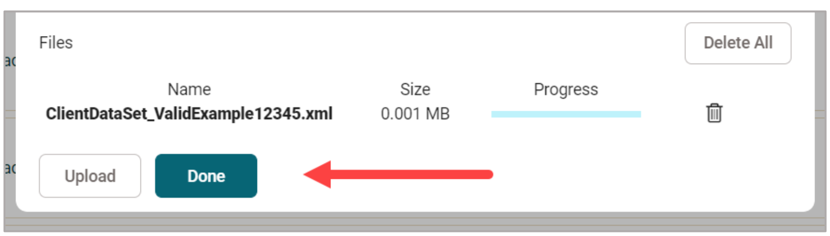
3. When your selected files are displayed in the Files section, click **Upload**. This will initiate the Job to begin processing the file(s).



Tip: The **Progress** bar indicates the file's upload progress.

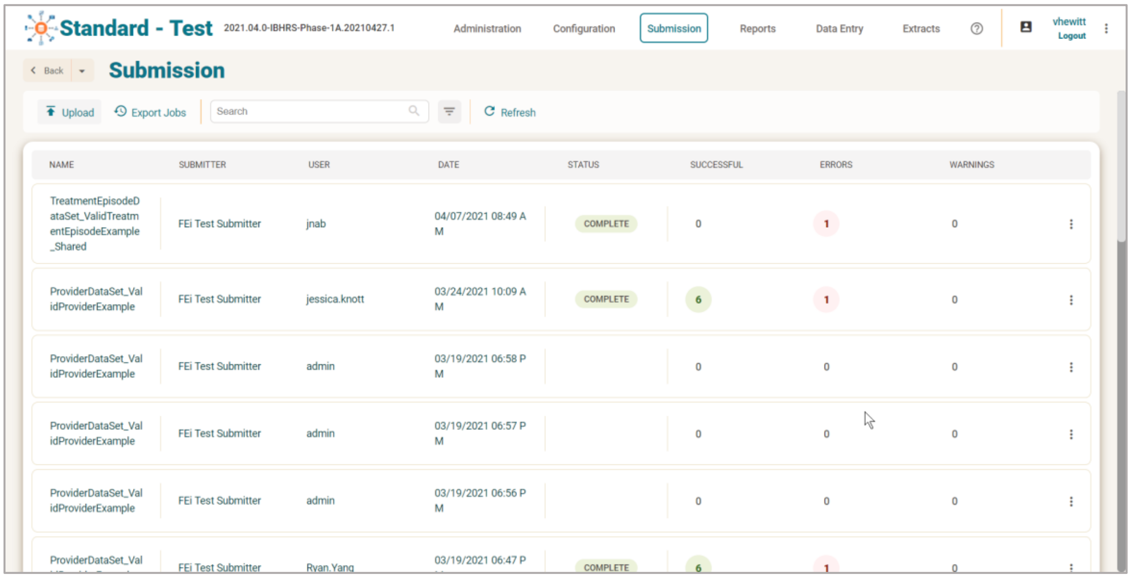


4. Once all submission files have been uploaded, click **Done**. This will close the Upload window.



2.2.4 Review Uploaded Files

1. After uploading your data file(s), review the **Jobs** list to make sure your file name(s) are displayed.

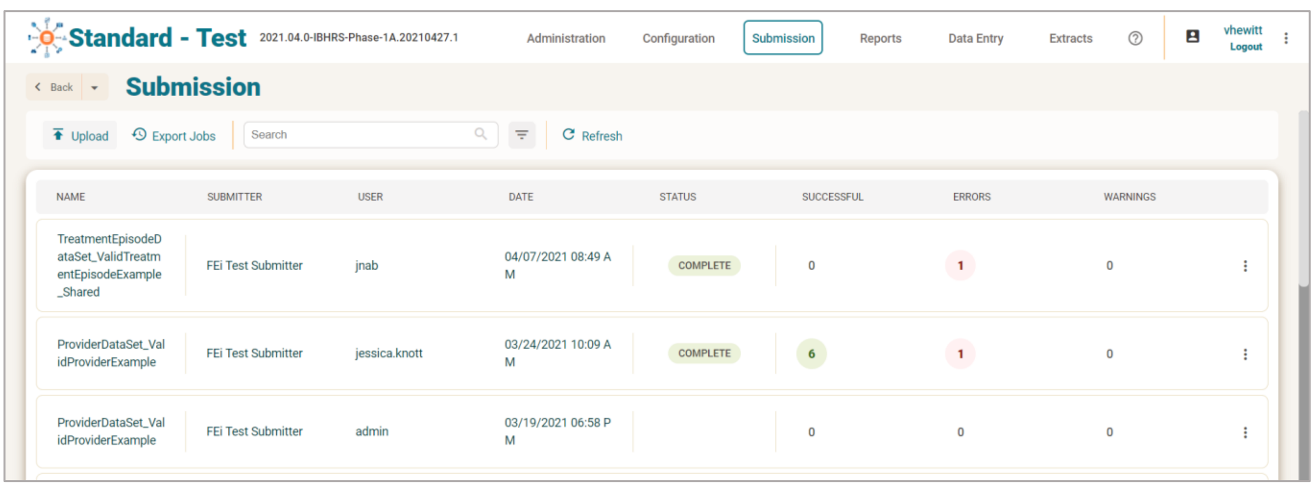


2. Continue to upload files as needed.
3. After all files are uploaded, check the Error statuses for each file submitted.

2.2.5 View Jobs via Portal

Once files have been uploaded to the IBHRS Portal, those jobs are displayed on the Submission screen.

On the Submission screen, users can sort the uploaded Jobs by clicking each column header: Name, Submitter, User, Date, Status, Successful, Errors and Warnings. Users can also use the search bar to locate a specific job and click the refresh button to view any newly processed jobs.



The following table provides a description of each column displayed in the Jobs tile.

Column	Description
Name	Displays the file name of the file uploaded.
Submitter	Displays the name of the Submitting Entity associated with the uploaded file.
User	Displays the name of the user who uploaded the file.

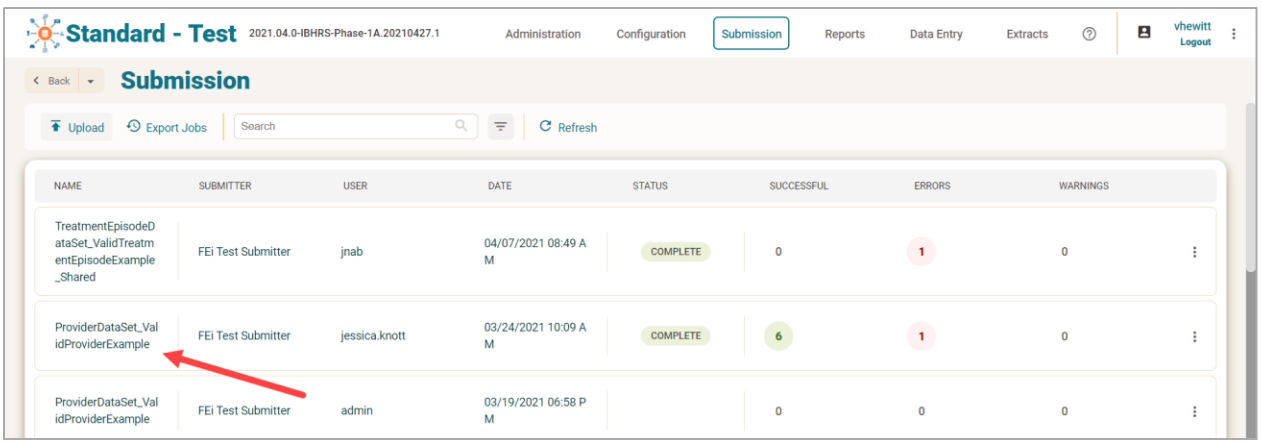
Column	Description
Date	Displays the date and time when the file was uploaded.
Status	Displays the status of the file uploaded. The status will change as the job is processing.
Successful	Displays the number of successful records within the Job.
Errors	Displays the number of errors associated within the Job. Errors will prevent data from entering IBHRS. The errors must be corrected and the file will need to be reprocessed.
Warnings	Displays the number of warnings associated with the Job.

The following Job Processing Statuses allow the user to know the status of all jobs:

- When a job begins processing, an "**Initialized**" status will display in the Portal.
- When a job is processing, a "**Running**" status will display in the Portal.
- When a job finishes processing, a "**Complete**" status will display in the Portal.

Follow the steps below to view detailed information about each Job:

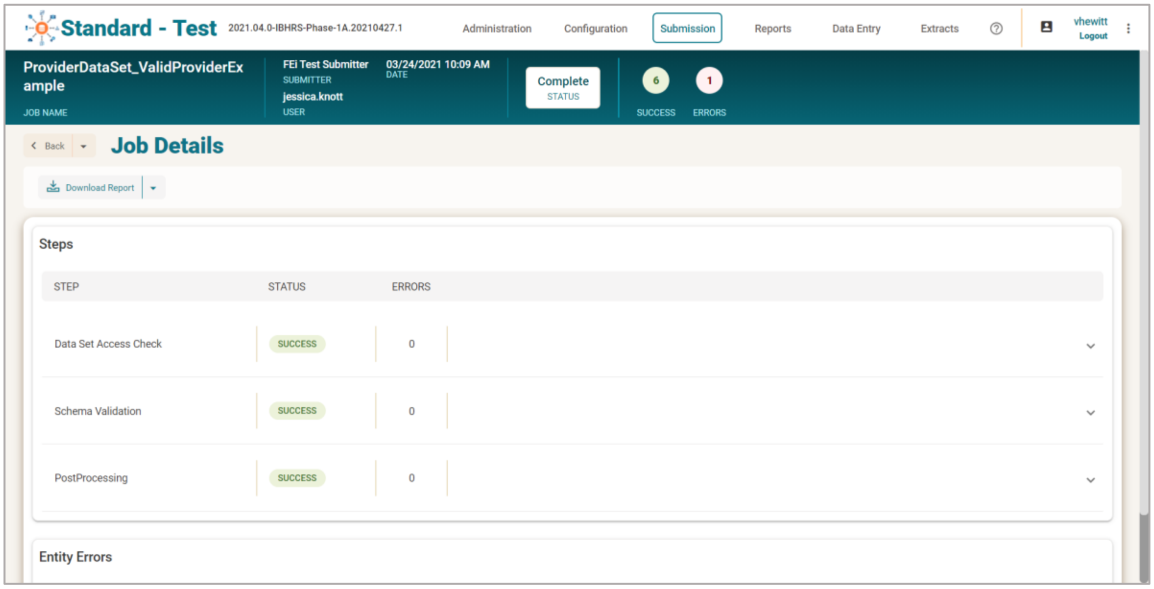
1. On the **Submission** screen, in the Jobs tile, locate the desired job from the list.
2. Click the **Name** of the job to access detailed information. This will open the Jobs Workspace screen.



2.2.6 Jobs Workspace

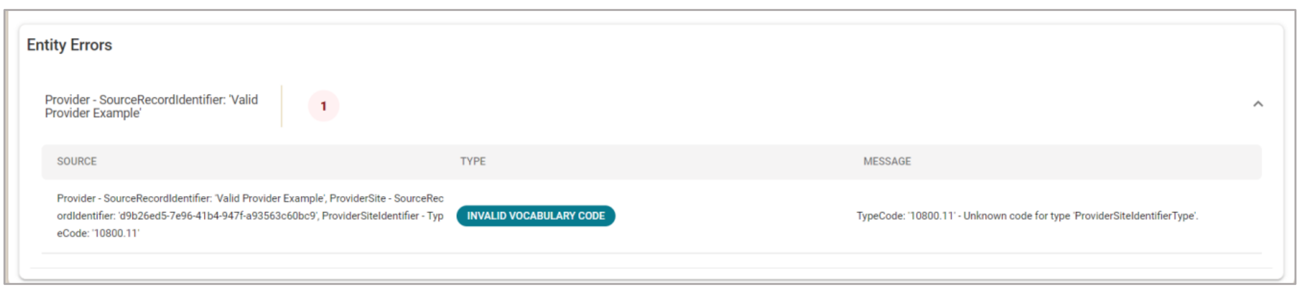
The Job Workspace displays detailed information about each job, including Job Name, Submitter (Submitting Entity), User, Date, Status, Successful (# of successful records), Errors (# of error records), Warnings (# of warning records), Job Steps (name, status, progress), and Job Errors (error type, error message, status, error reference information).

This detailed information can also be downloaded as a PDF or Excel file by clicking **Reports** on the Jobs Workspace.



Expand the entity errors/warning rows to view details for each error, including information about the entity involved. Errors are organized in a list with sortable columns displaying the **Source**, **Type**, and **Message**.

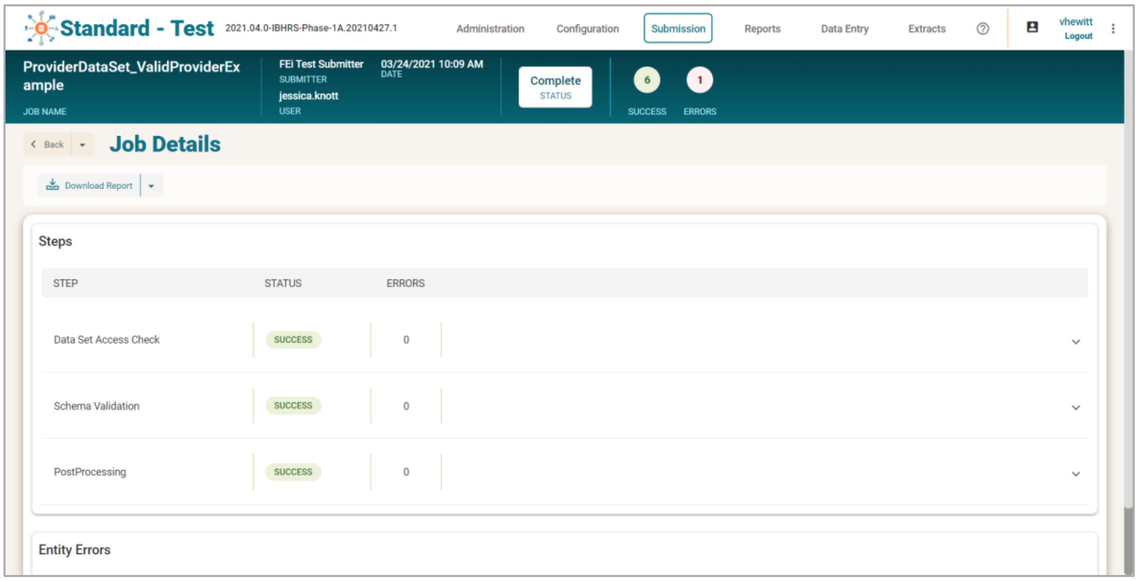
Column	Description
Source	Includes the entity name, and field names associated.
Type	Indicates the type of error.
Message	Messages can include the entity name, relevant field names, a description of the error, and the key information to associate the error to the correct record in the file.



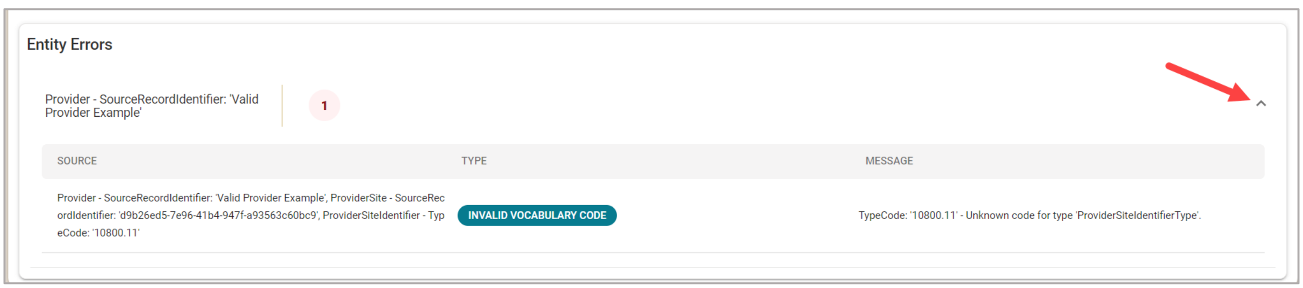
2.2.7 How to Correct Job Errors

Follow the steps below to view and correct errors from the Jobs Workspace screen.

1. To identify the cause of an error, click the **Step**. This will expand the step to show additional information.



2. When the Step is expanded, review the **Source**, **Type**, and **Message** to identify the cause of the Error. Once the Error has been identified, use the information in the IBHRS Submission Guide on the IBHRS website to resolve the issue.

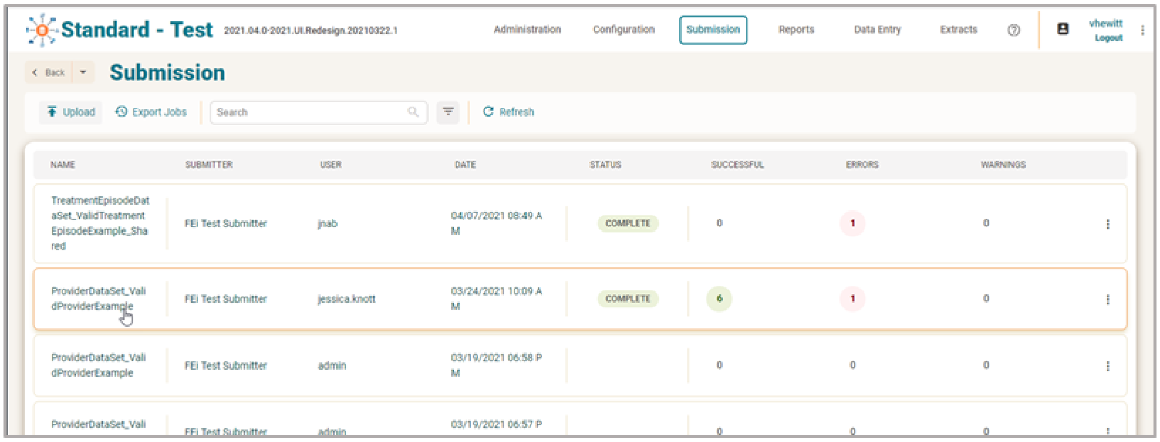


3. Once the issue is fixed within the source system, resubmit the file.
4. Repeat the steps above to confirm all errors have been corrected.

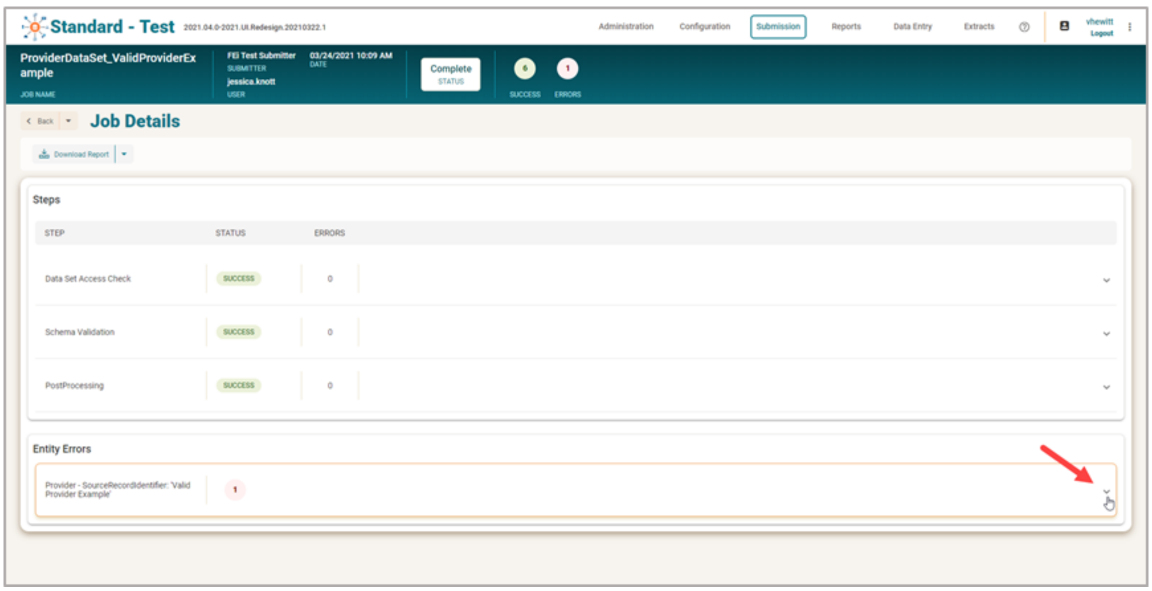
2.2.8 Vocabulary Mapping

If errors are found with vocabulary mapping, follow these steps to map the vocabulary.

1. After submitting a file that shows errors, click on the file to open the job and review the errors.

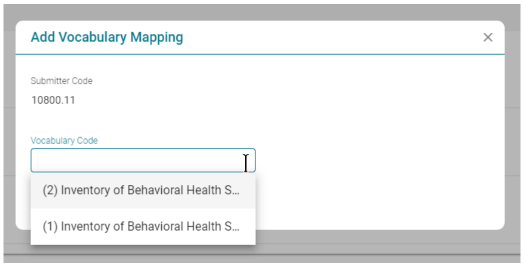


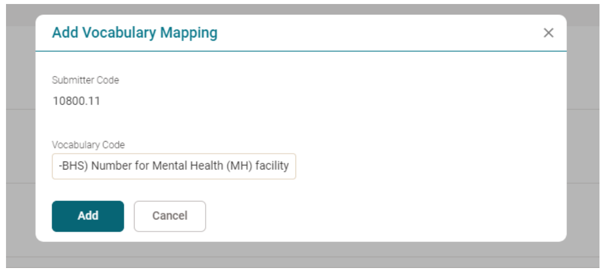
2. Click on the Entity Error row to expand the row to see more detail.



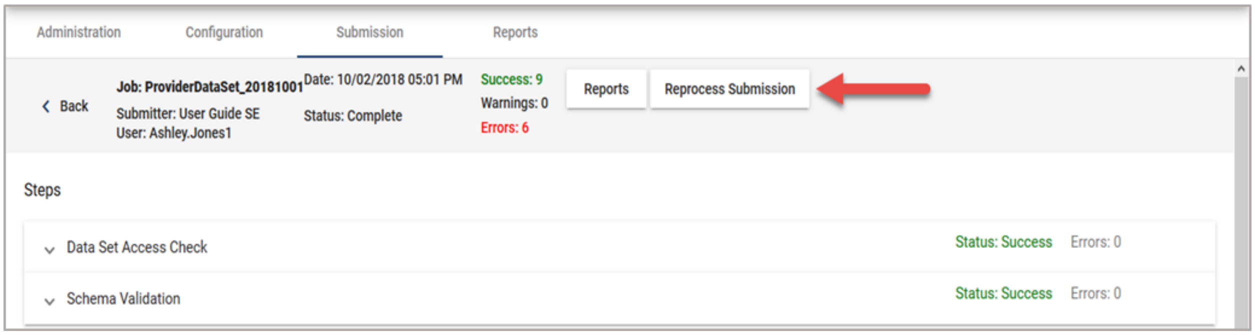
3. With the Entity Errors expanded, note the hyperlink with the Error Type of Invalid Vocabulary Code. Click on the hyperlink to view the invalid code and map it to the correct IBHRS code.

4. The Add Vocabulary Mapping window will open and will display the Submitter Code along with a drop-down menu showing the potential IBHRS codes for the file submission. In this example, the Submitter Code is 'M' and can be mapped to any of the four options in the drop-down (see below). Select the correct IBHRS Code that the Submitter Code should map to and then click **Add**.



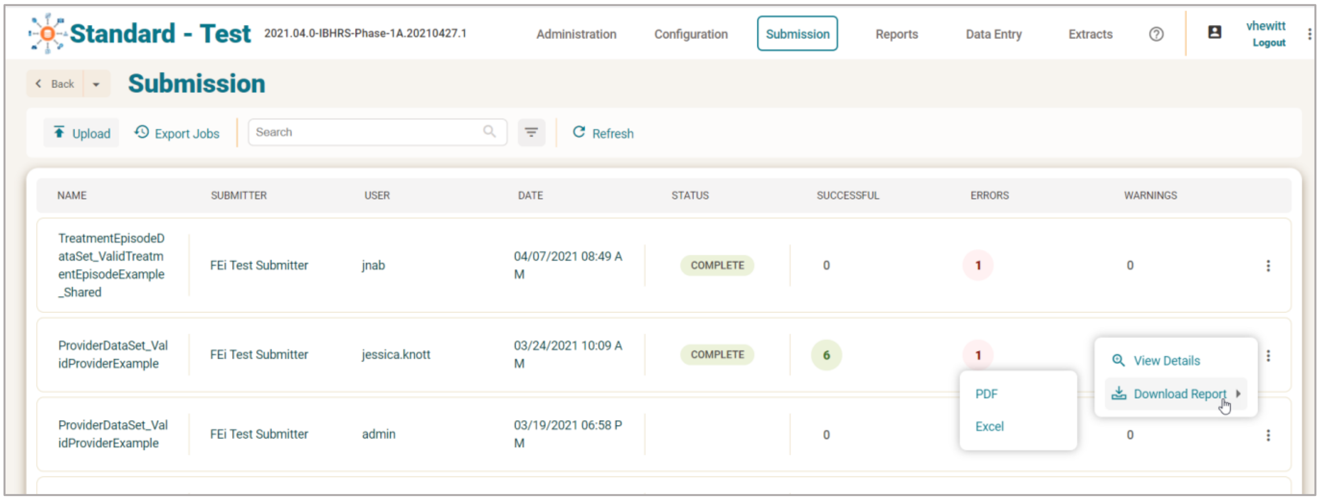


5. To finalize the process, click "**Add**", and then "**Reprocess Submission**".



2.2.9 Download Data

Information about each Job can be downloaded as a PDF file or Excel spreadsheet.



2.3 Data Entry

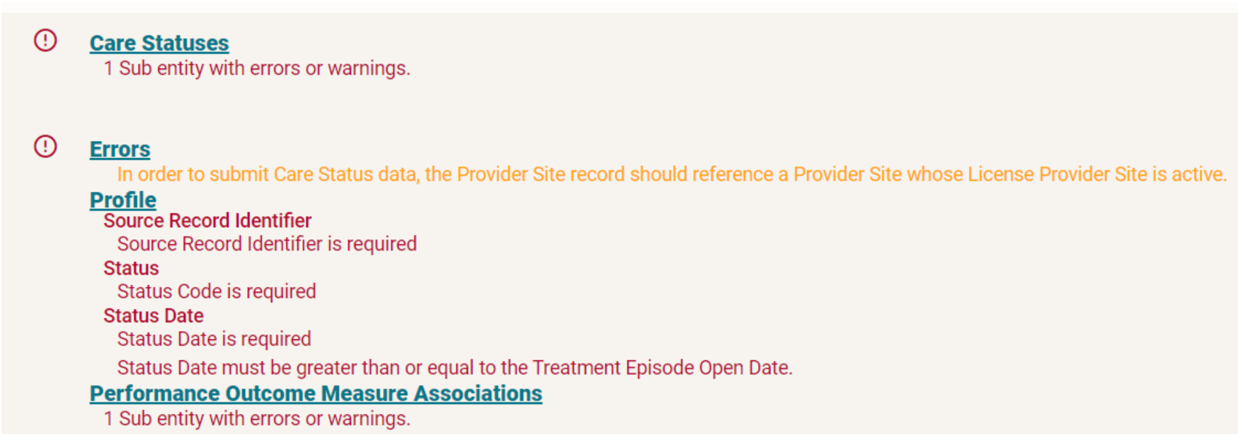
This section is for providers manually reporting data via IBHRS Reporting module.

IBHRS users who have had the data entry roles assigned by IDPH are able to input Integrated Treatment (SUD/PG) information directly into the system.

Below is a table of the Data Entry Screen Conventions in IBHRS.

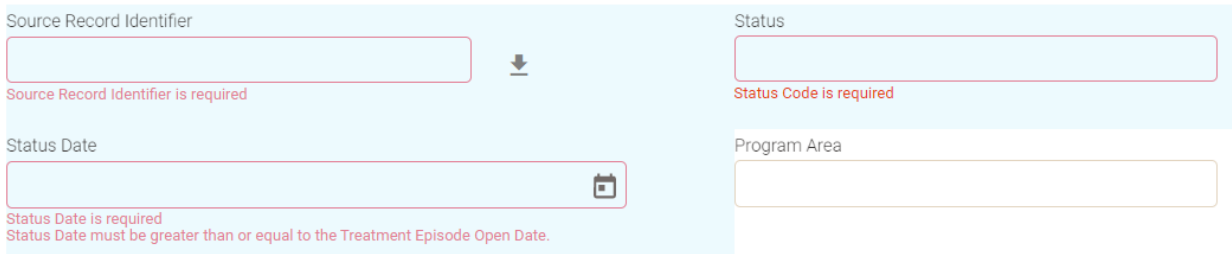
Data Entry Screen Conventions	Name	Description
+ Add Entity	Add Entity	Add information for a data set, or information within a data set.
Submit	Submit Entry	Submits the information entered into IBHRS
Source Record Identifier	Source Record Identifier Generator	Generates a unique identifier for the SRI
	Delete	Delete Entity information
Deleted	Show Deleted Records	Will show records that have been deleted from IBHRS
	Duplicate	Will duplicate an Entity record (Only used in Performance Outcome Measure)

IBHRS Data Entry screens will display errors and warnings on screen upon Submission of the record. These will display at the top of the screen. Users may click on the error / warning at the top of the screen and IBHRS will take the user to that specific area within the screen itself.


Care Statuses
1 Sub entity with errors or warnings.
Errors
In order to submit Care Status data, the Provider Site record should reference a Provider Site whose License Provider Site is active.
Profile
Source Record Identifier
Source Record Identifier is required
Status
Status Code is required
Status Date
Status Date is required
Status Date must be greater than or equal to the Treatment Episode Open Date.
Performance Outcome Measure Associations
1 Sub entity with errors or warnings.

Errors and Warnings will display under each applicable field within the Data Entry Screen itself. Note that all Errors (in red) must be corrected before the record can be successfully submitted. Warnings do not need to be corrected for the record to be submitted, but it's advised users do resolve Warnings appropriately.

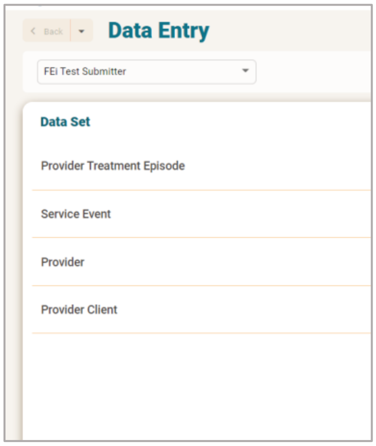
Profile


Source Record Identifier
Source Record Identifier is required
Status
Status Code is required
Status Date
Status Date is required
Status Date must be greater than or equal to the Treatment Episode Open Date.
Program Area

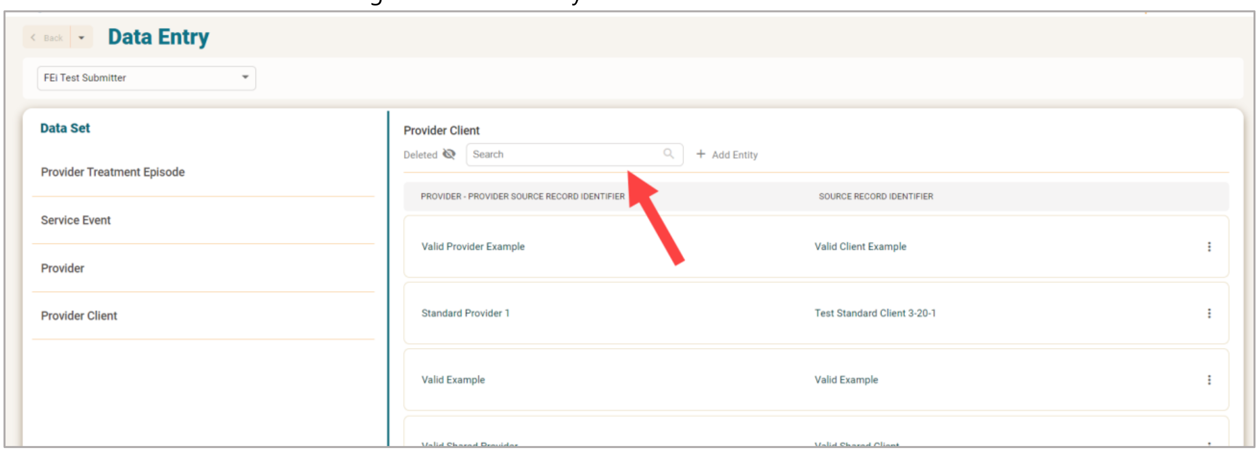
2.3.1 Enter Provider Client Data

To enter client provider data, the provider must be entered first.

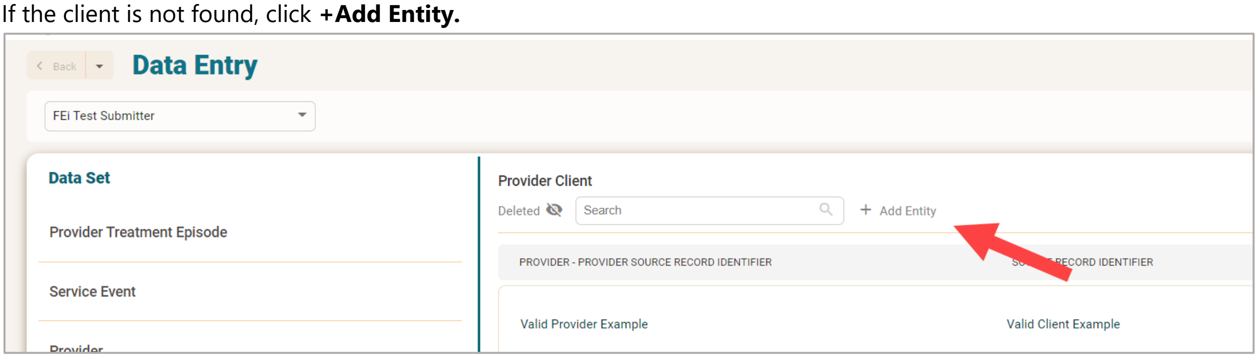
1. Click **Provider Client** on the Data Entry Screen.



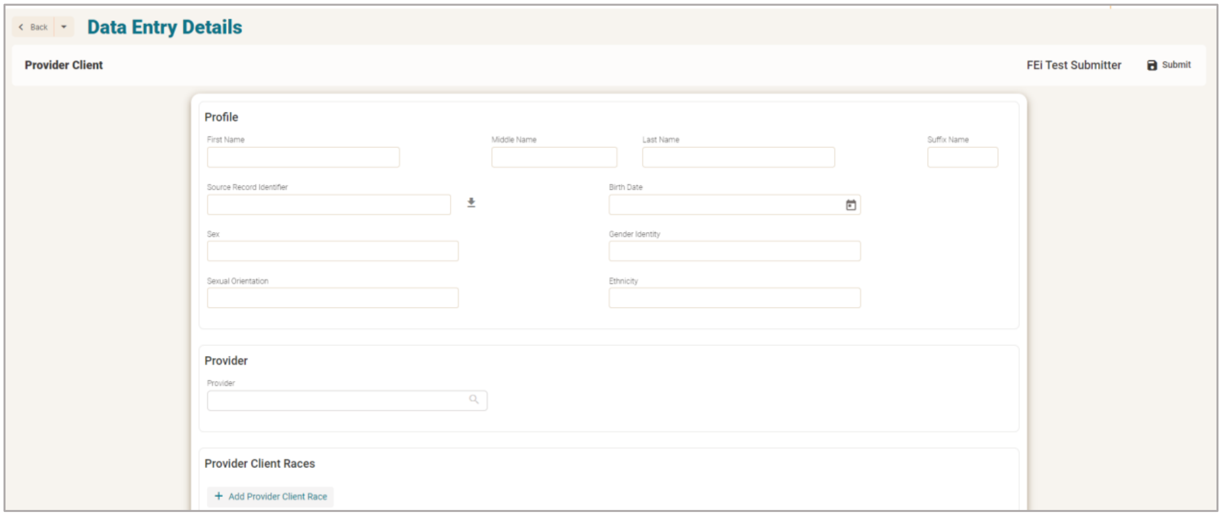
2. Search for the client before entering a client into the system with the search.



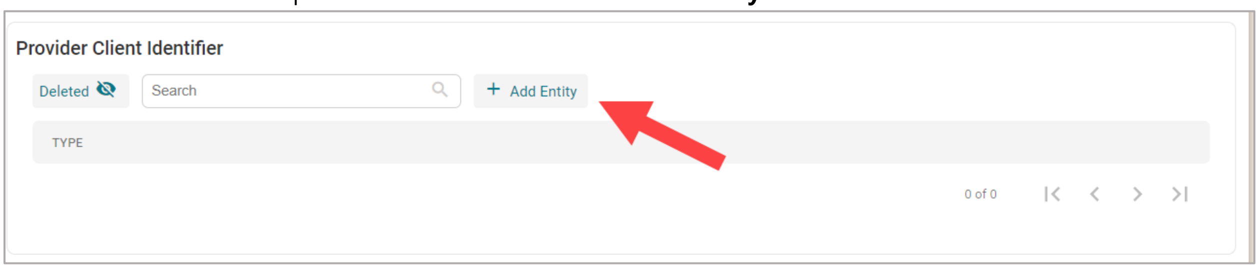
3. If the client is not found, click **+Add Entity.**



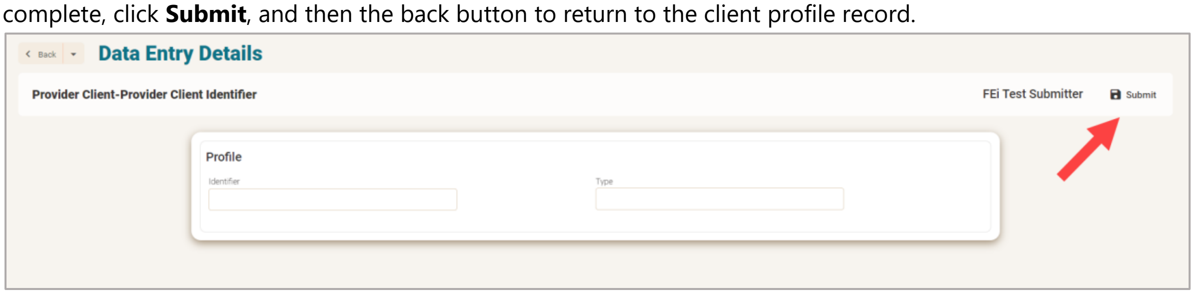
4. The Provider Client page will appear. Fill out the profile information.



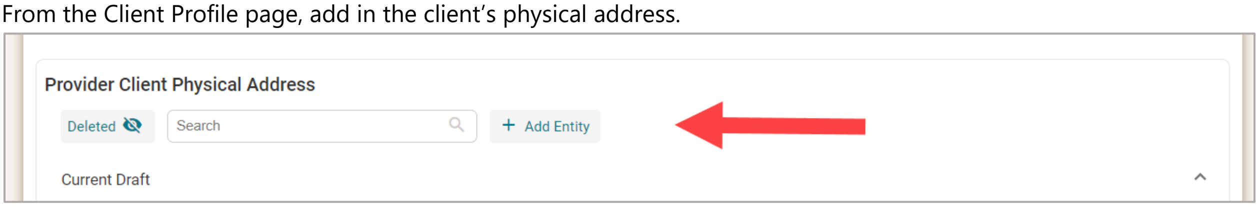
5. Scroll down and fill out the provider Client Identifier. Click **+ Add Entity.**



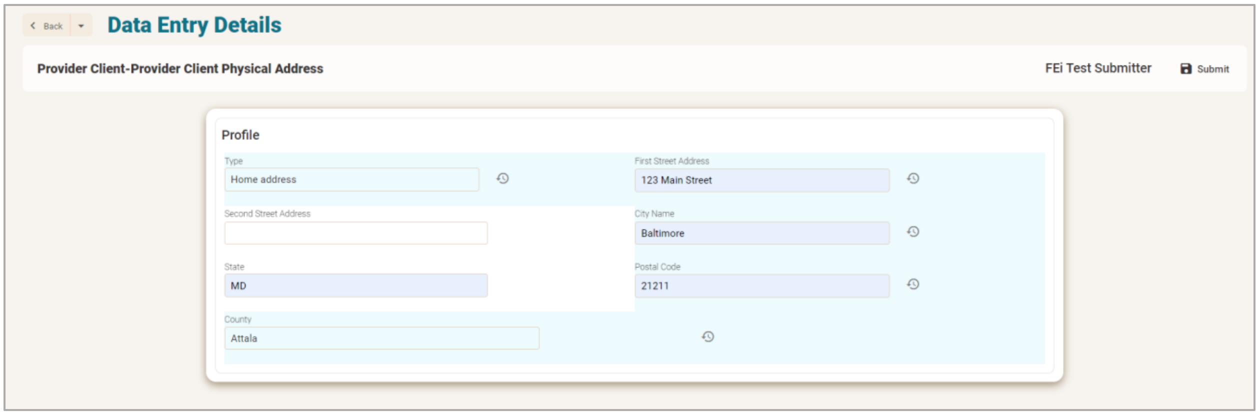
6. This will open the Provider Client page. Select the type of identifier, and input the information. When complete, click **Submit**, and then the back button to return to the client profile record.



7. From the Client Profile page, add in the client's physical address.



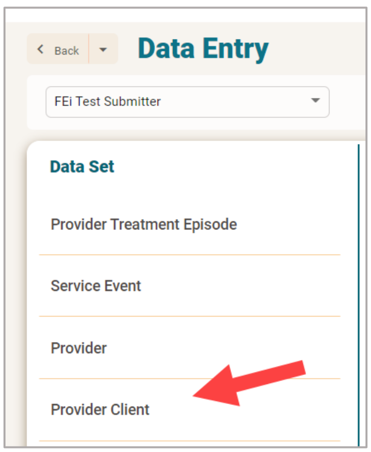
8. Fill out the address information for the client and click **Submit**, then the back button to return to the client profile page.



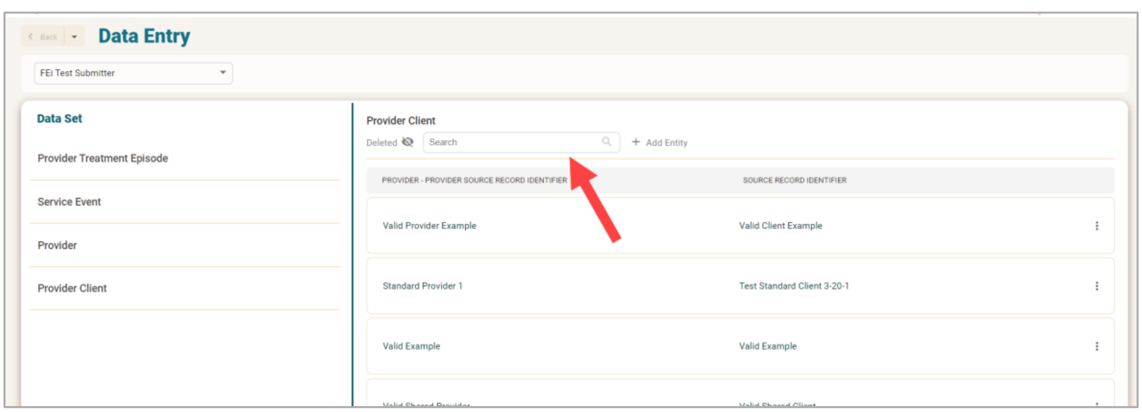
9. When the whole record is complete, click **Submit** on the client profile page.

2.3.1.1 Edit Provider Client Information

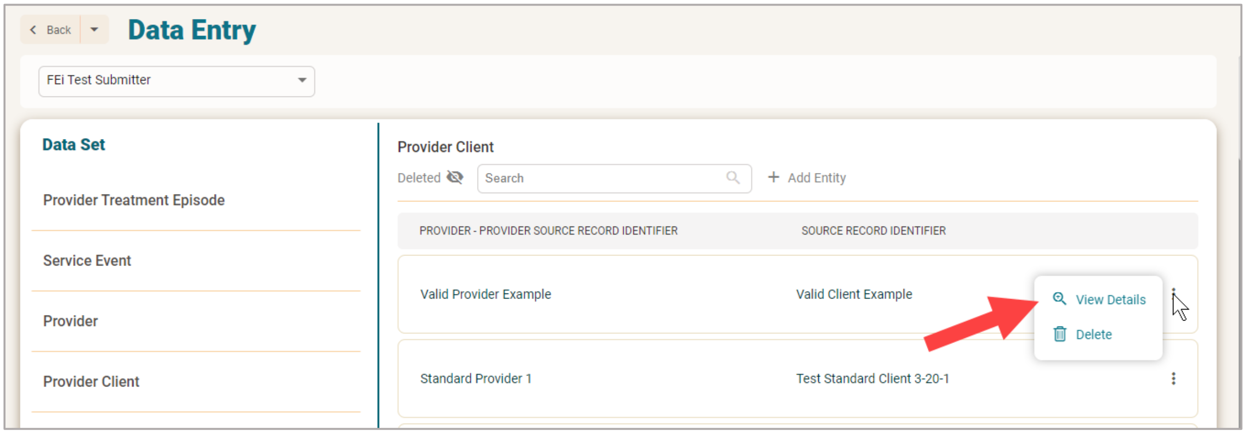
Step 1: Click **Client Provider** on the left side panel.



Step 2: Search for the Provider Client Record.



Step 3: When the Provider Client Record is identified, click the three dots to the right of the provider client, and go to **View Details.**

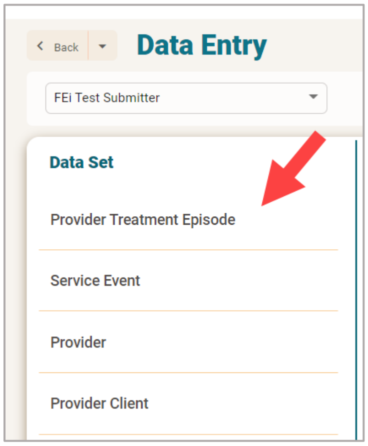


Step 4. Make your edits and click **Submit** when changes are complete.

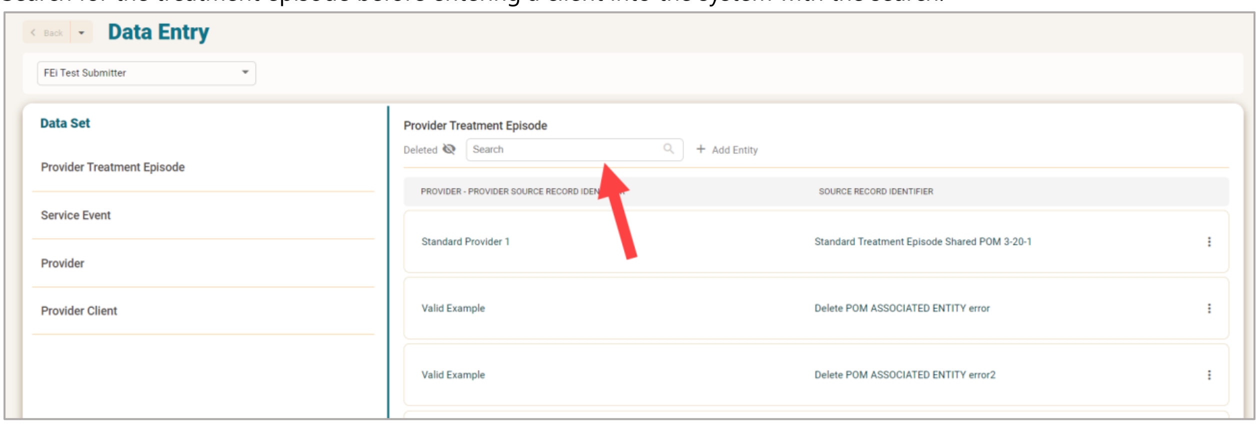
2.3.2 Enter Provider Treatment Data

To enter client provider treatment data, the client must be entered first.

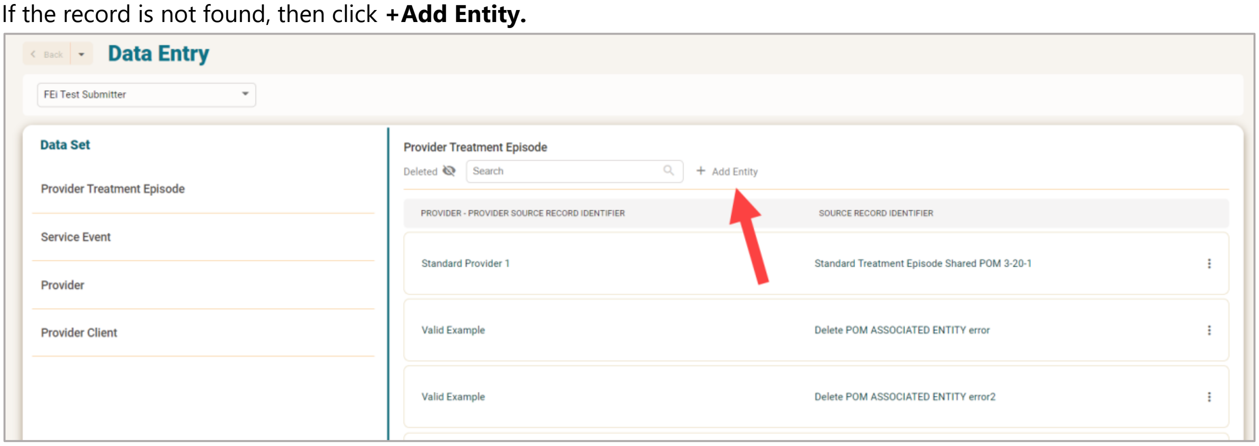
1. Click on Provider Treatment Episode on the Data Entry Screen.



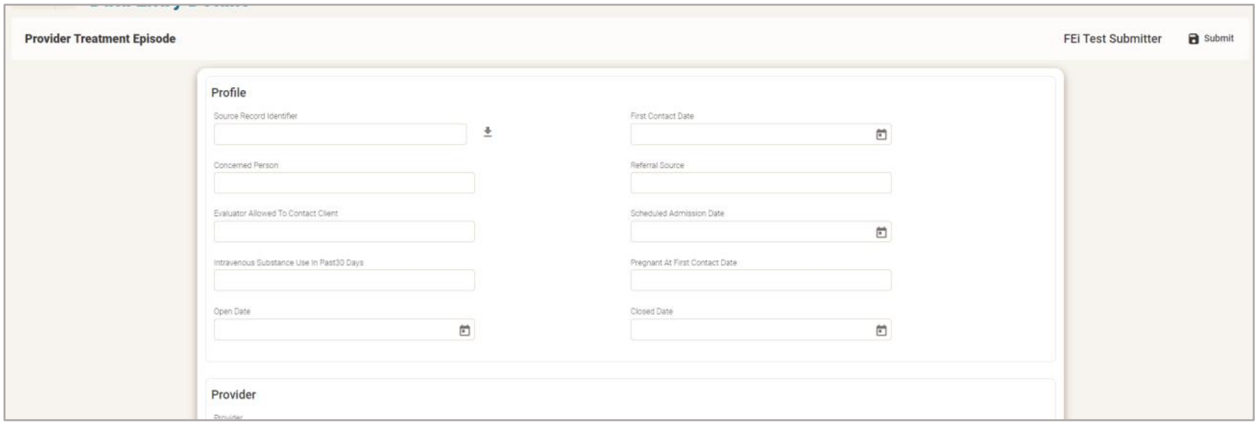
2. Search for the treatment episode before entering a client into the system with the search.



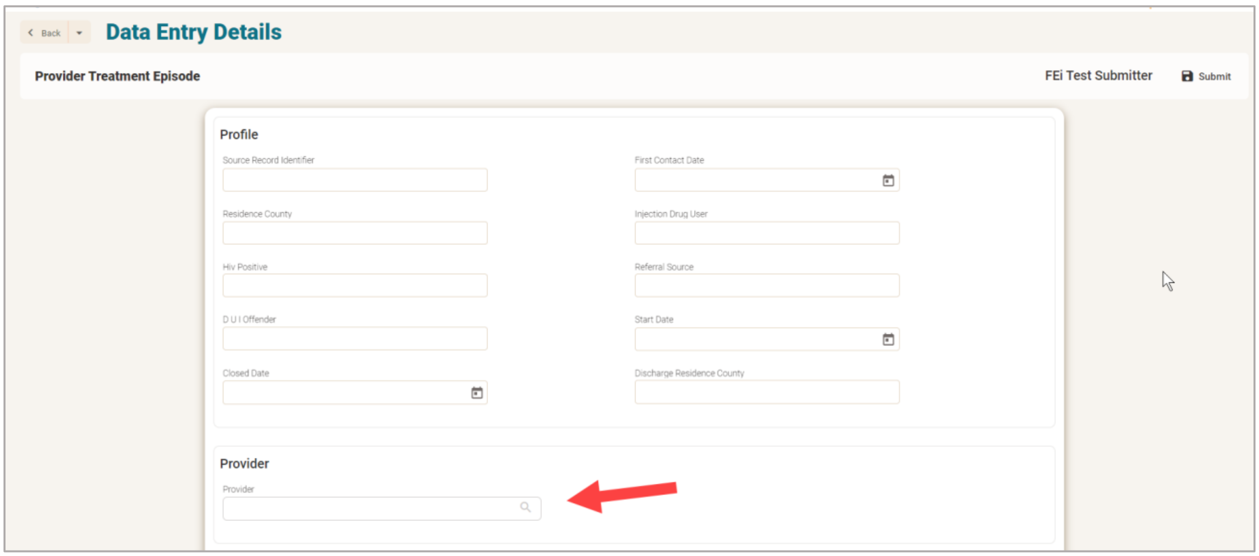
3. If the record is not found, then click **+Add Entity.**



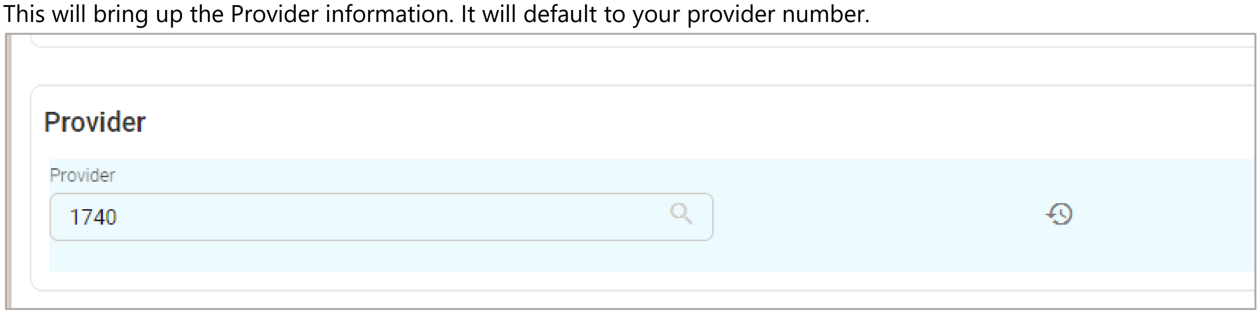
4. On the Provider Treatment Episode Page, fill out the profile information.



5. Scroll down and click the **Provider** field to select.

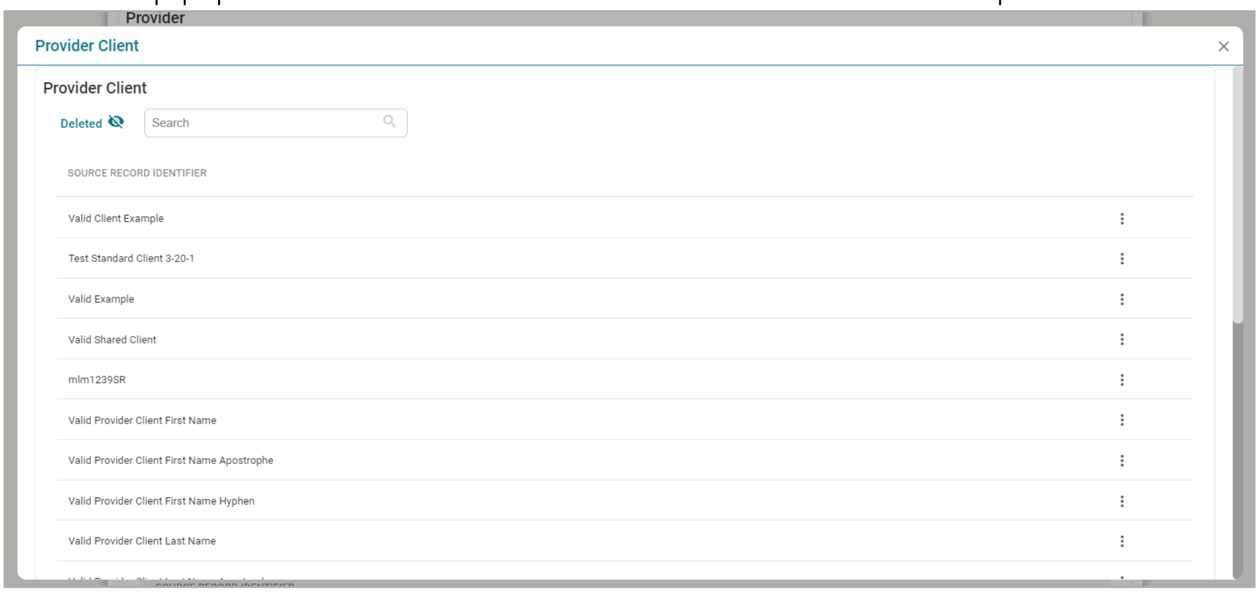


6. This will bring up the Provider information. It will default to your provider number.

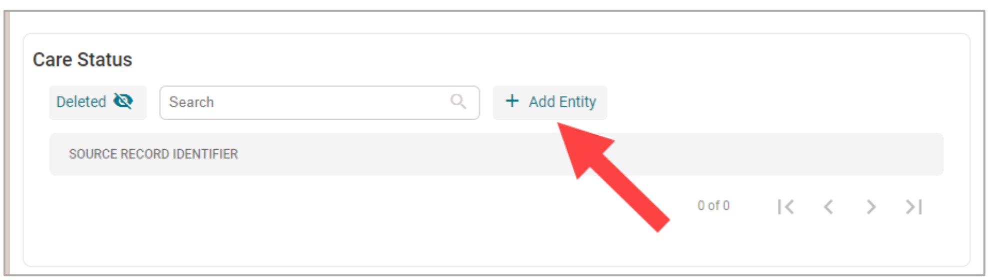


7. Scroll down and click the client field to select.

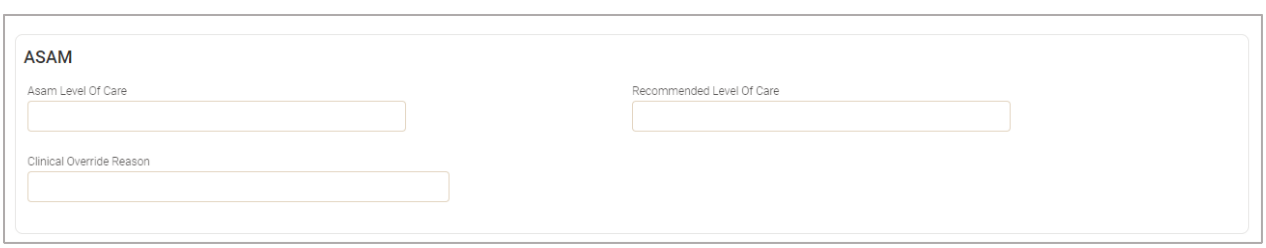
8. A window will pop up with client names. Select the client to associate them to the Treatment Episode.



9. Next, on the Care Status section, click **+Add Entity** to add admission information.

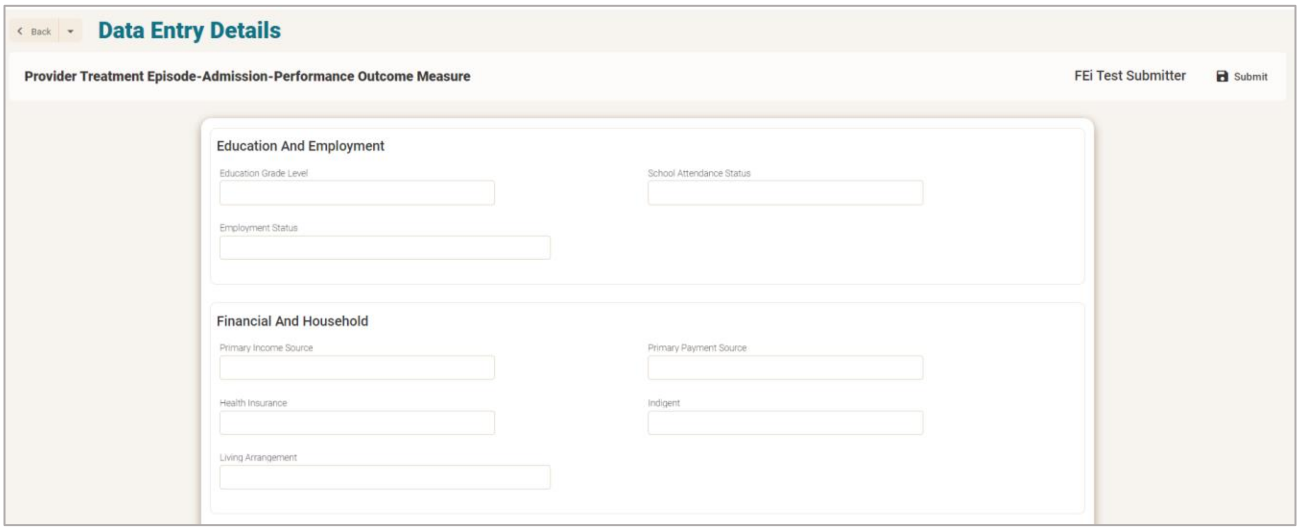


10. Fill out the Care Status information.



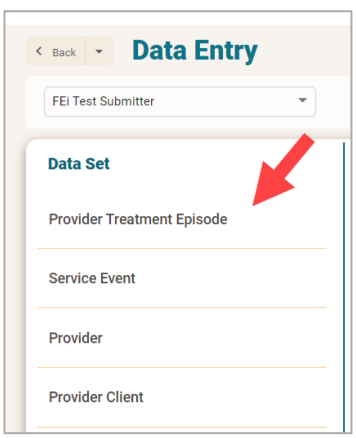
11. In the Performance Outcome Measure section, click **+Add Entity** to enter the Performance Outcome Measure information.

12. On the Perfomance Outcome measure page, enter the information, and click the **Submit** button.

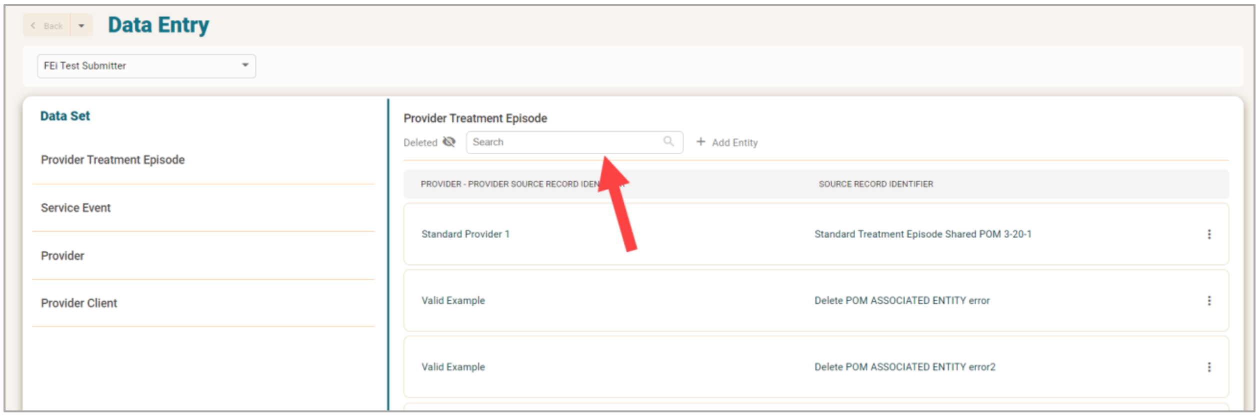


2.3.2.1 Edit Provider Treatment Information

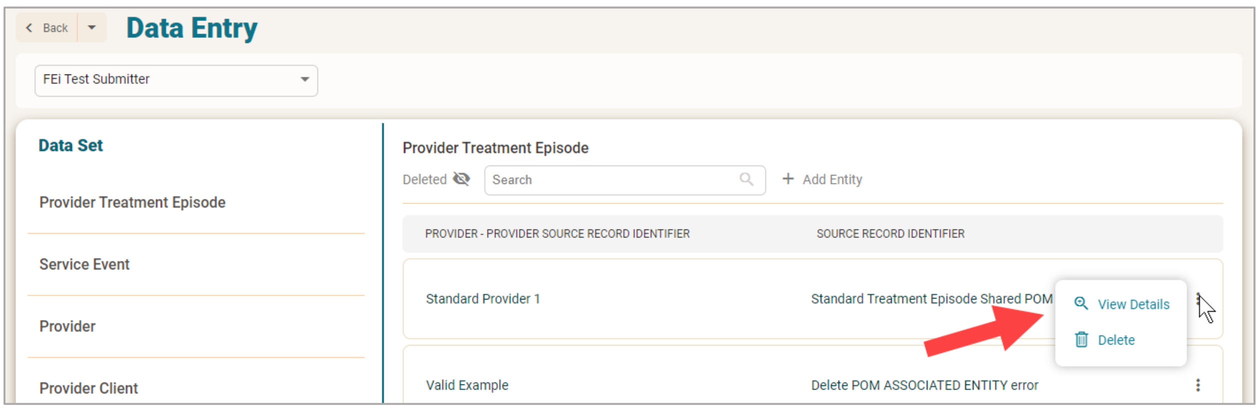
1. Click **Provider Treatment Episode** on the left side panel.



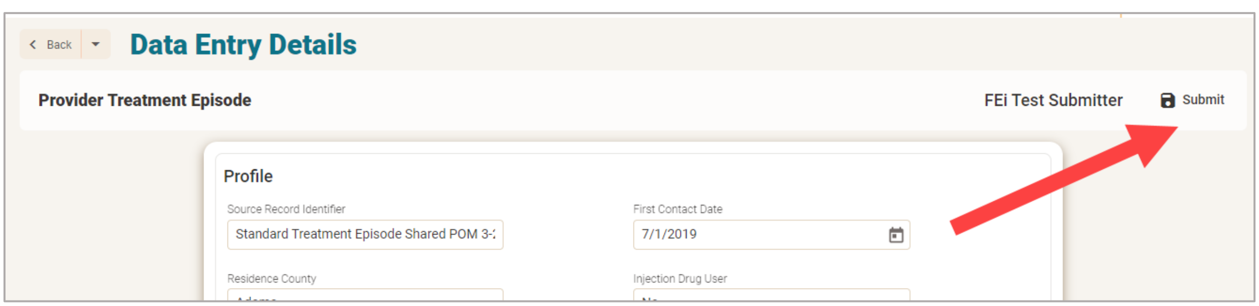
2. Search for the Provider Treatment Episode Record.



3. When the Provider Treatment Episode Record is identified, click the three dots to the right of the provider treatment episode, and go to **View Details**.



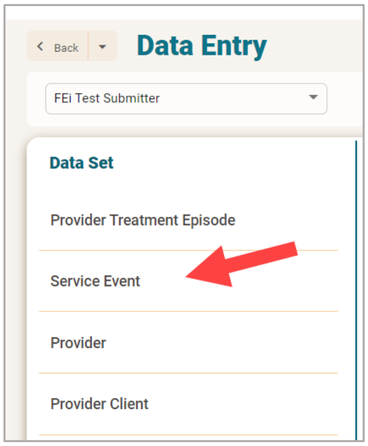
4. Make Edits and click **Submit** when changes are complete.



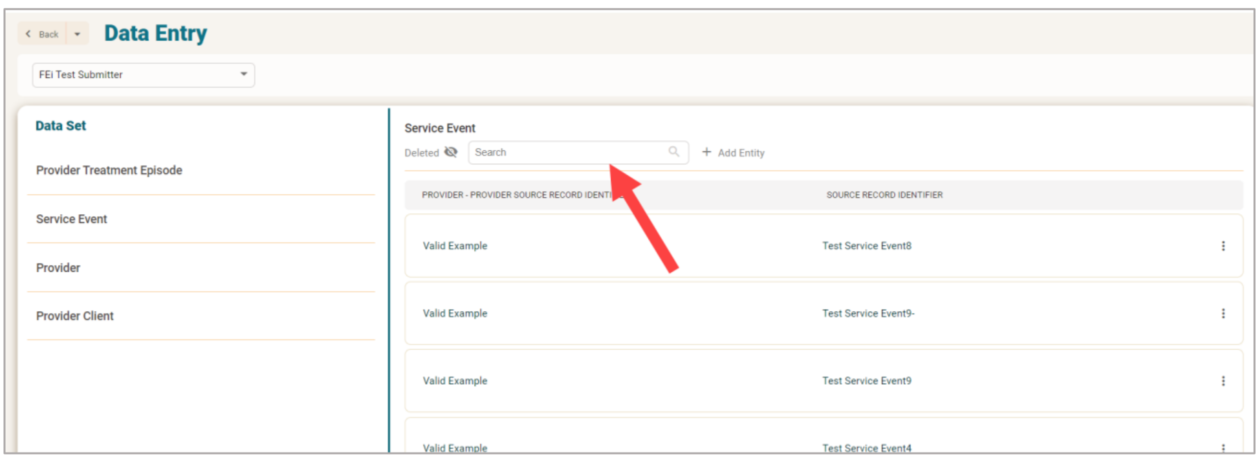
2.3.3 Enter Service Event Data

To enter Service Event data, the Treatment Episode must be entered first.

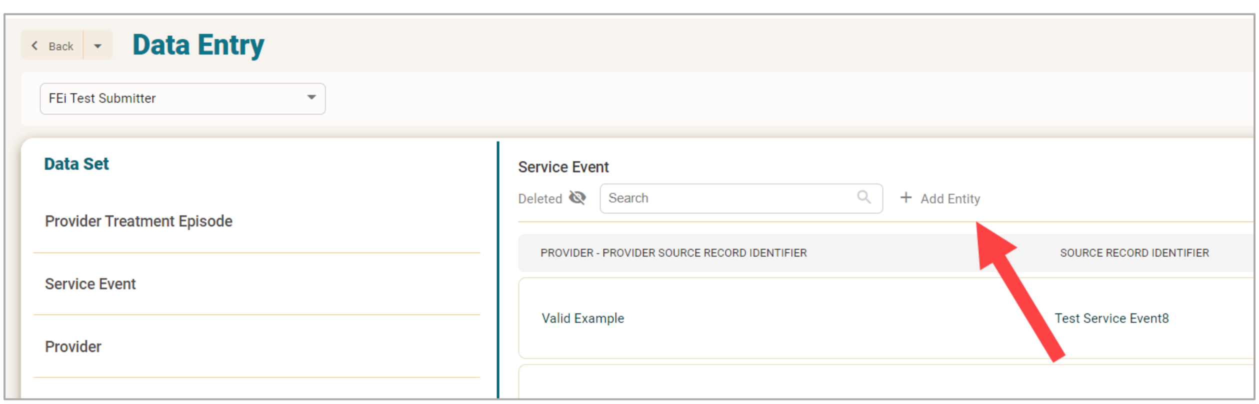
1. Click **Service Event** on the Data Entry Screen.



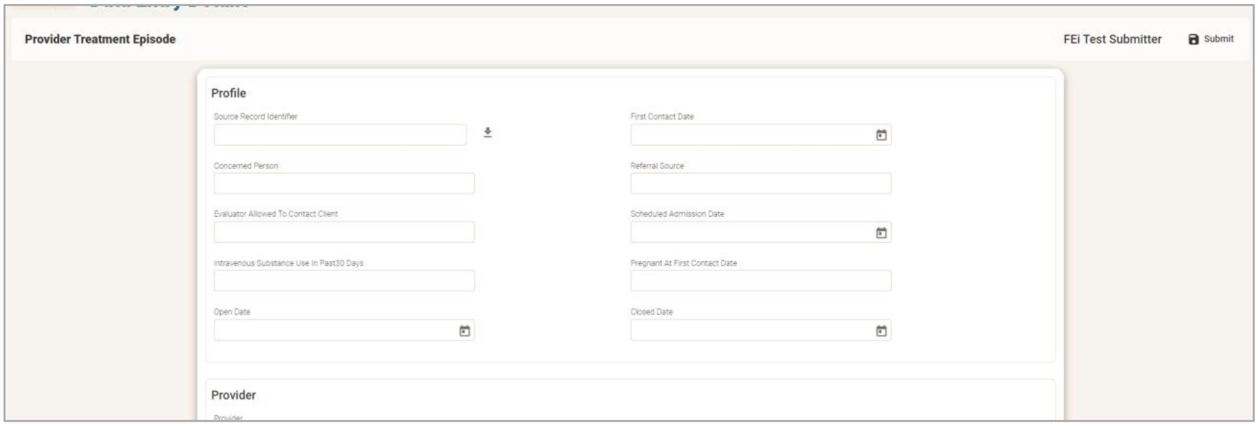
2. Search for the service event.



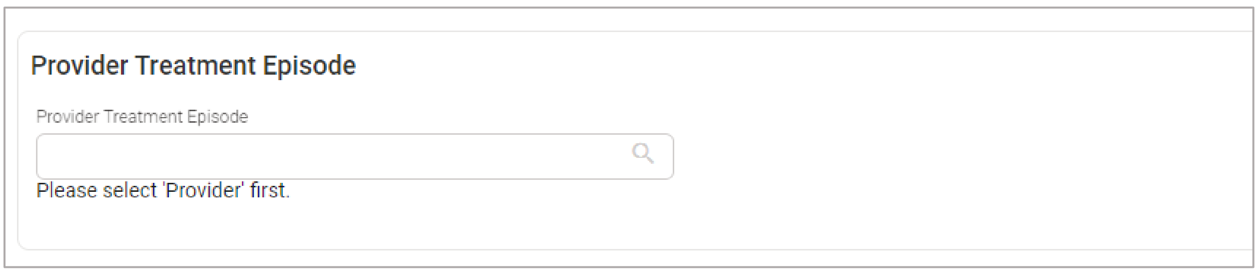
3. If the service event is not found, click **+ Add Entity** to add a new service event.



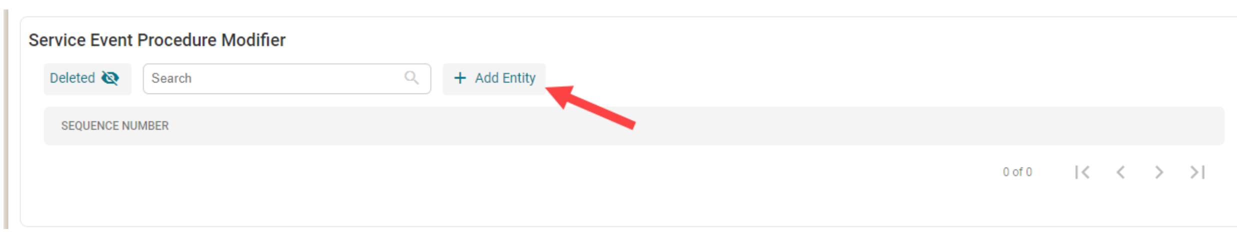
4. On the Service Event Screen, Enter the profile and provider information



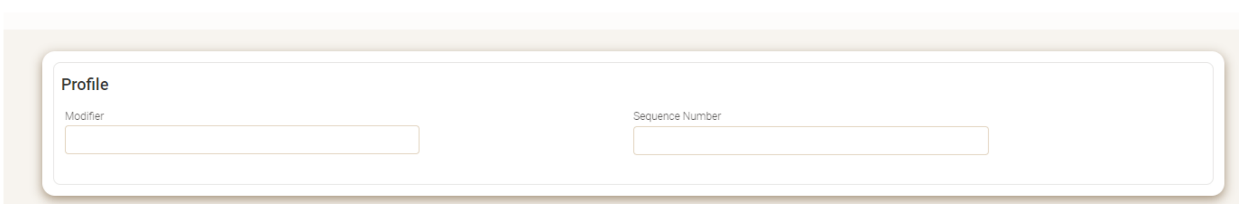
5. Search to connect the Provider Treatment Episode.



6. Click Add Entity to add Service Event Procedure Modifier.

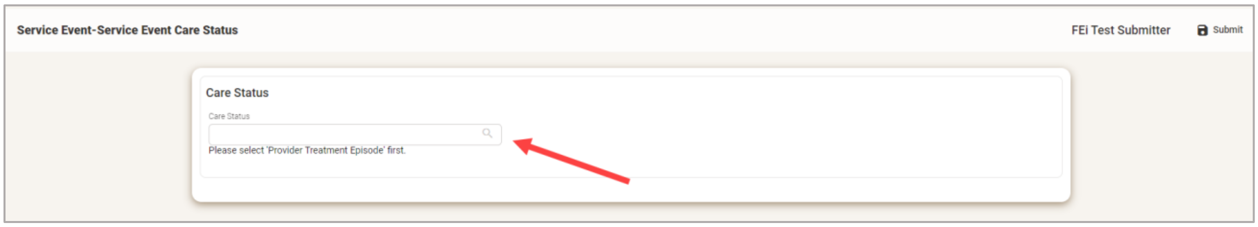


7. Add the Modifier and the Sequence number, and click **Submit.**

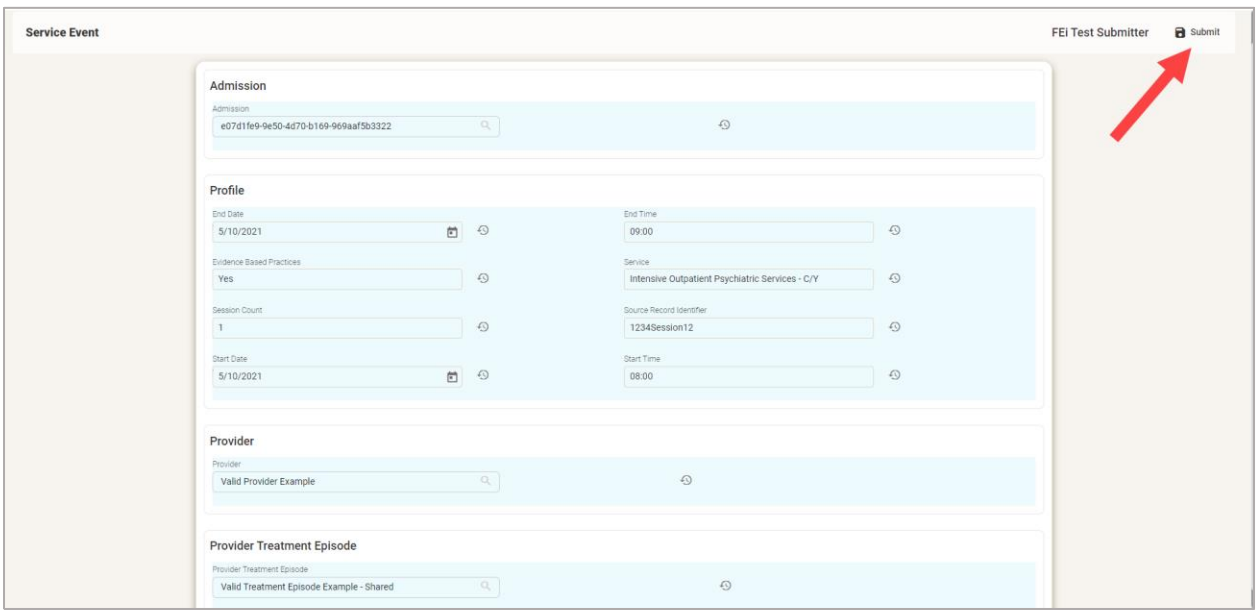


8. Click Add Entity to add Service Event Care Status.

9. Use the search to connect the Care Status to the Service Event, and click **Submit.**

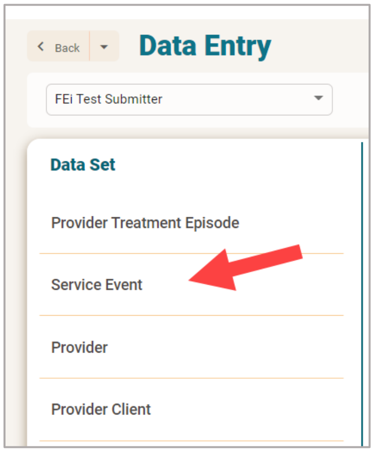


10. Once all fields are completed, Click the Submit button to submit the record.

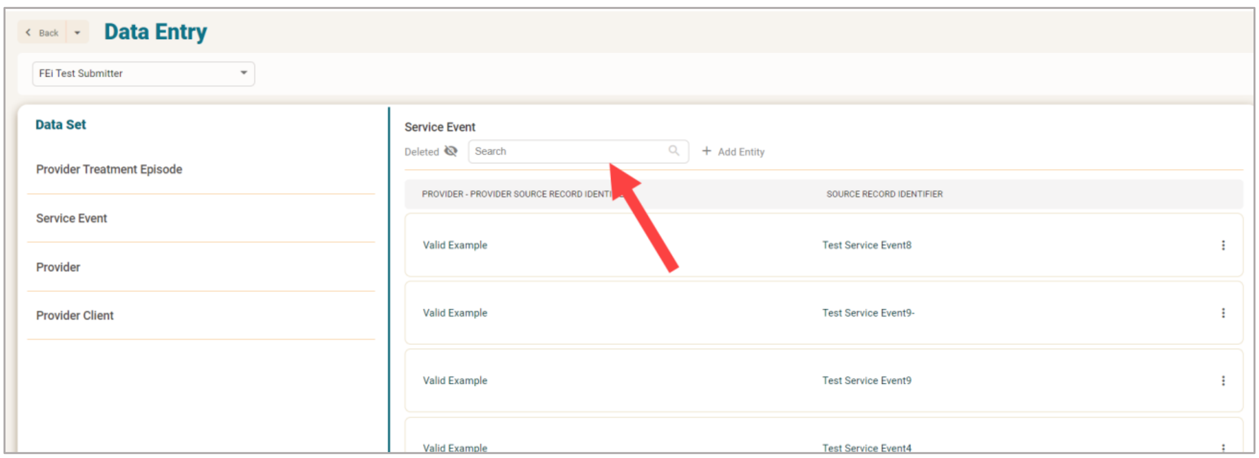


2.3.3.1 Edit Service Event Information

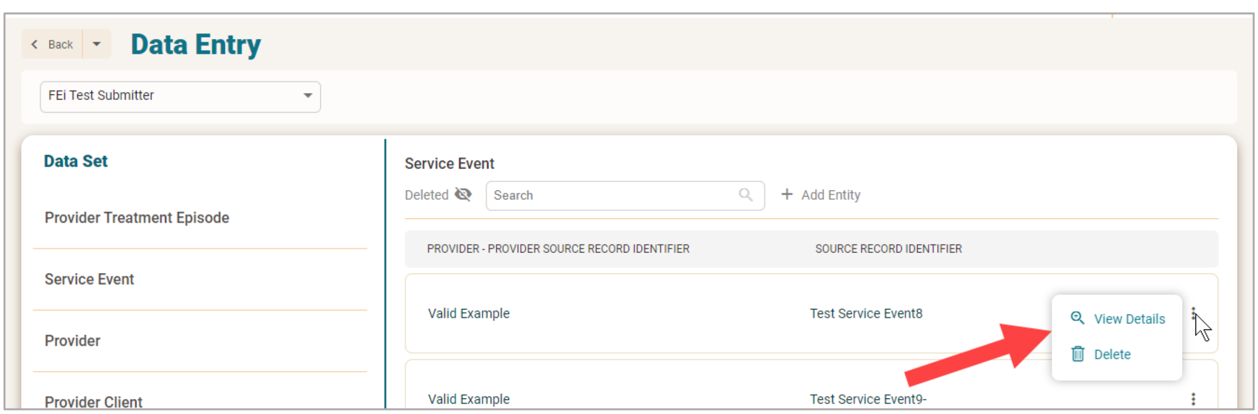
Step 1: Click Service Event on the left side panel.



Step 2: Search for the Service Event Record.



Step 3: When the Service Event Record is identified, click the three dots to the right of the Service Event, and go to **View Details**.



Step 4. Make your edits, and click **Submit** when changes are complete.

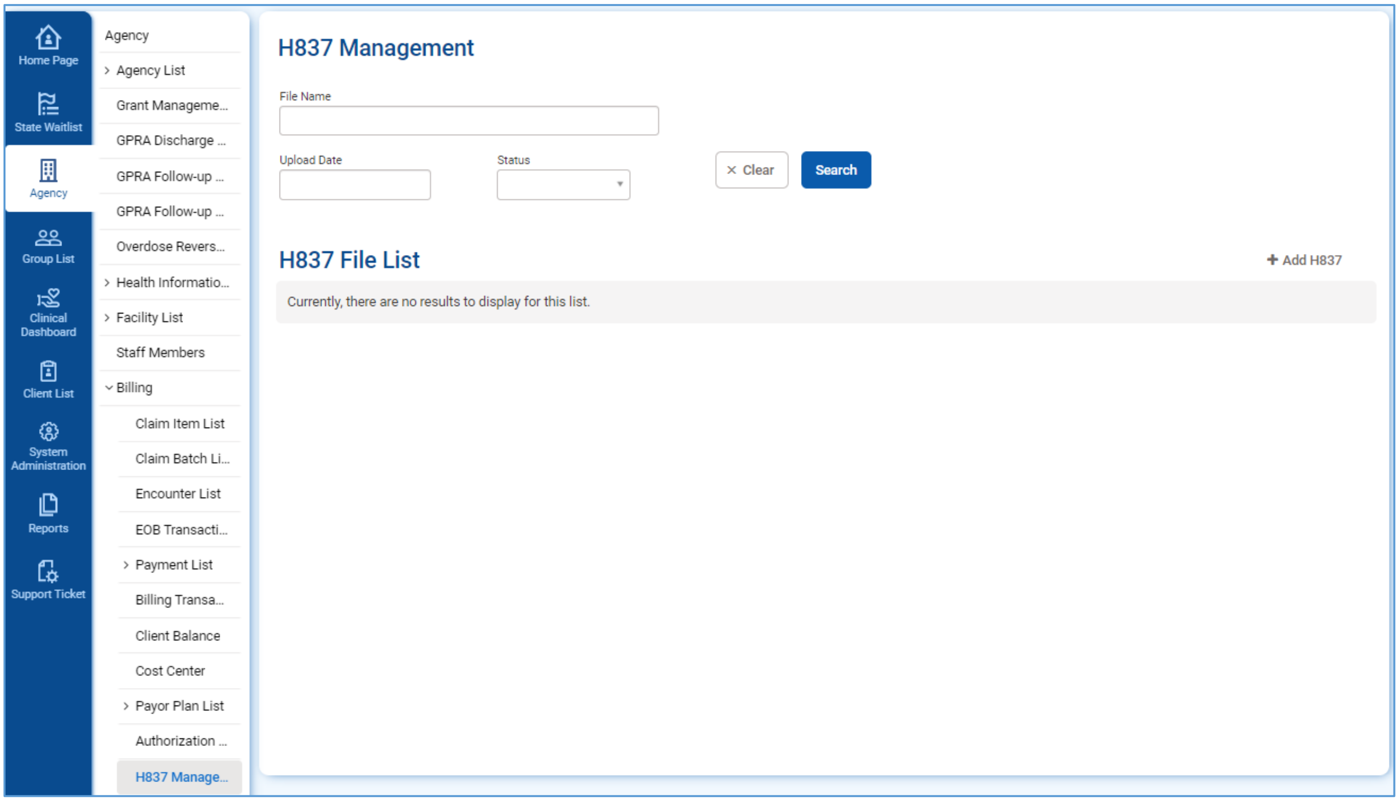
3 IPN Claims – H837 Process

IBHRS allows users to upload H837p files to submit IPN claims. This applies ONLY to IPN Providers. Further information regarding the requirements and specifications for the IPN H837p process is included in the **IBHRS 837p Companion Guide**, available at https://idph.iowa.gov/Bureau-of-Substance-Abuse/Substance-Use-and-Problem-Gambling-Data/Iowa-Behavioral-Health-Reporting-System/IBHRS-Documentation.

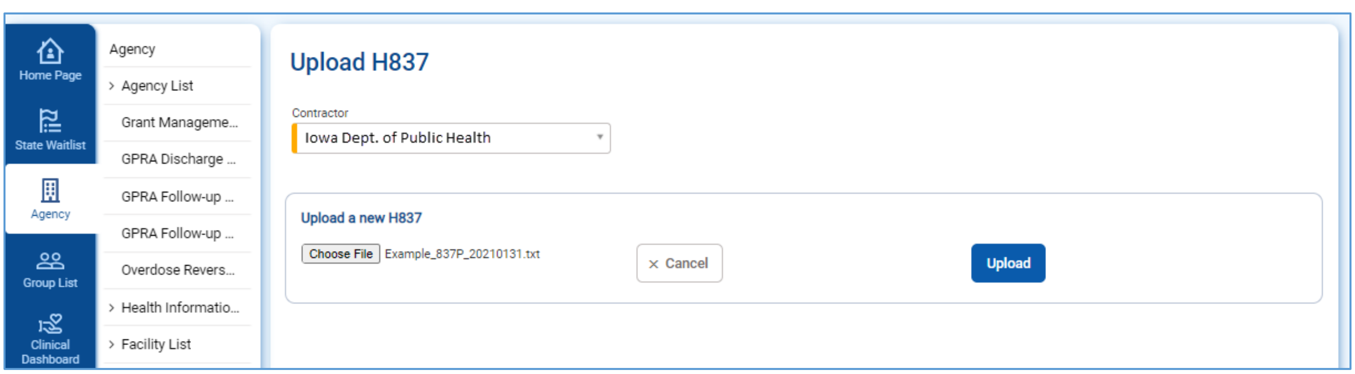
3.1 Upload Instructions

837P transactions are uploaded to IBHRS.

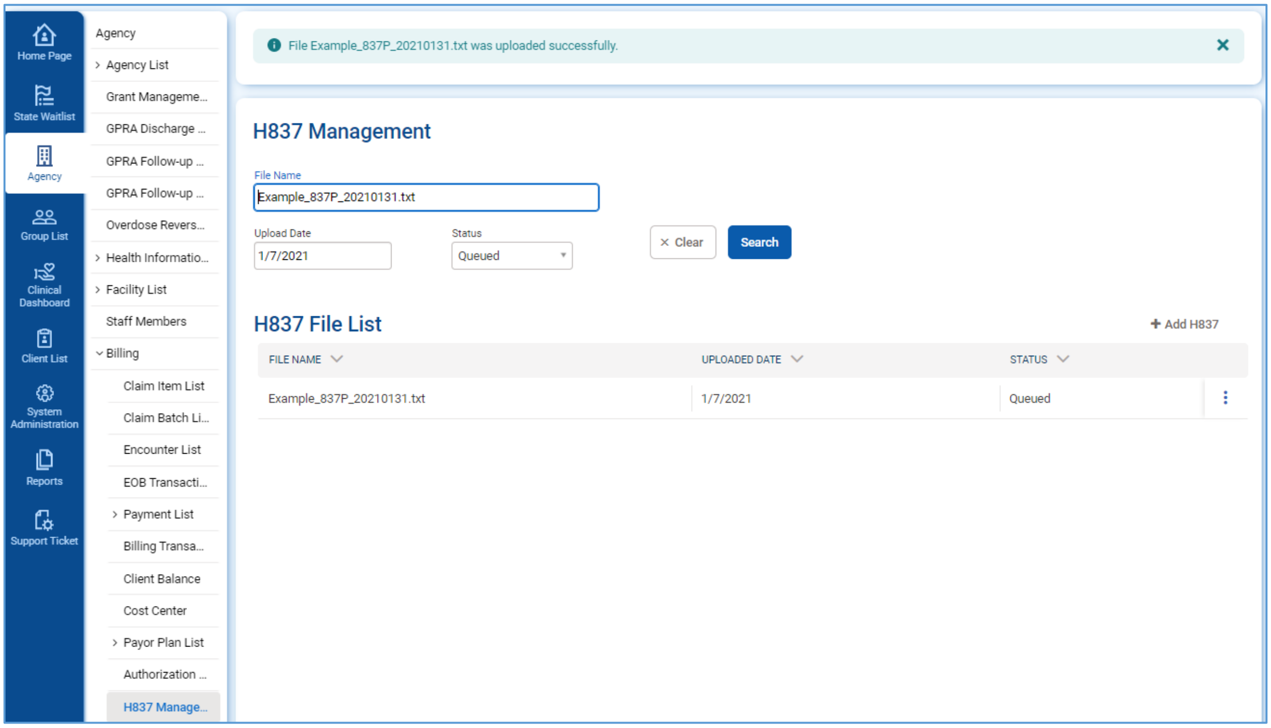
1. Navigate to the H837P Management screen under Agency/Billing and select **Add H837** from the list header.



2. Click the **Choose File** button, select the file on your computer, and click the **Upload** button.

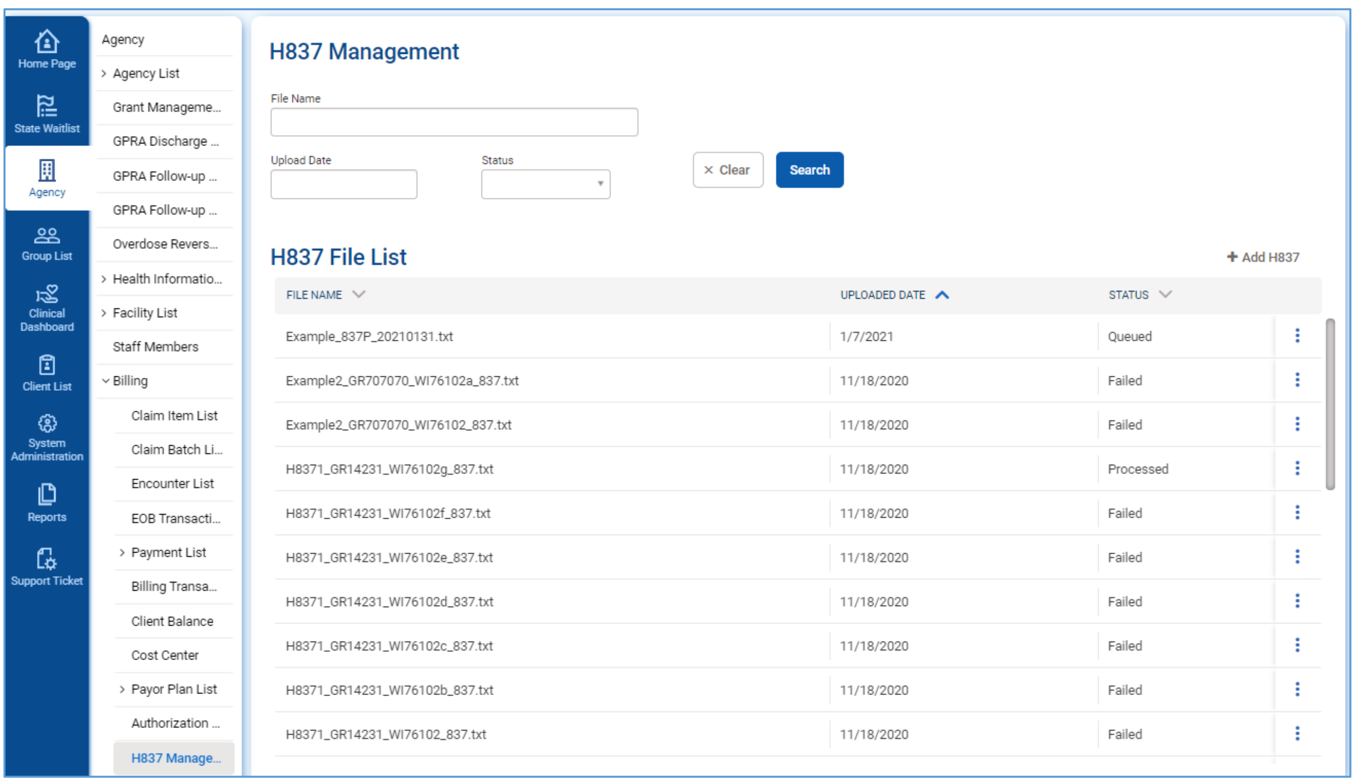


3. If the file is successfully uploaded, an information message is returned at the top of the screen. The file is queued for processing (Status = “Queued”).



4. Once processed, the file status changes to “Processed” or “Failed.” Failed 837P transactions must be resubmitted by the provider agency.

The H837 File List may be filtered based on file name, upload date, and status.

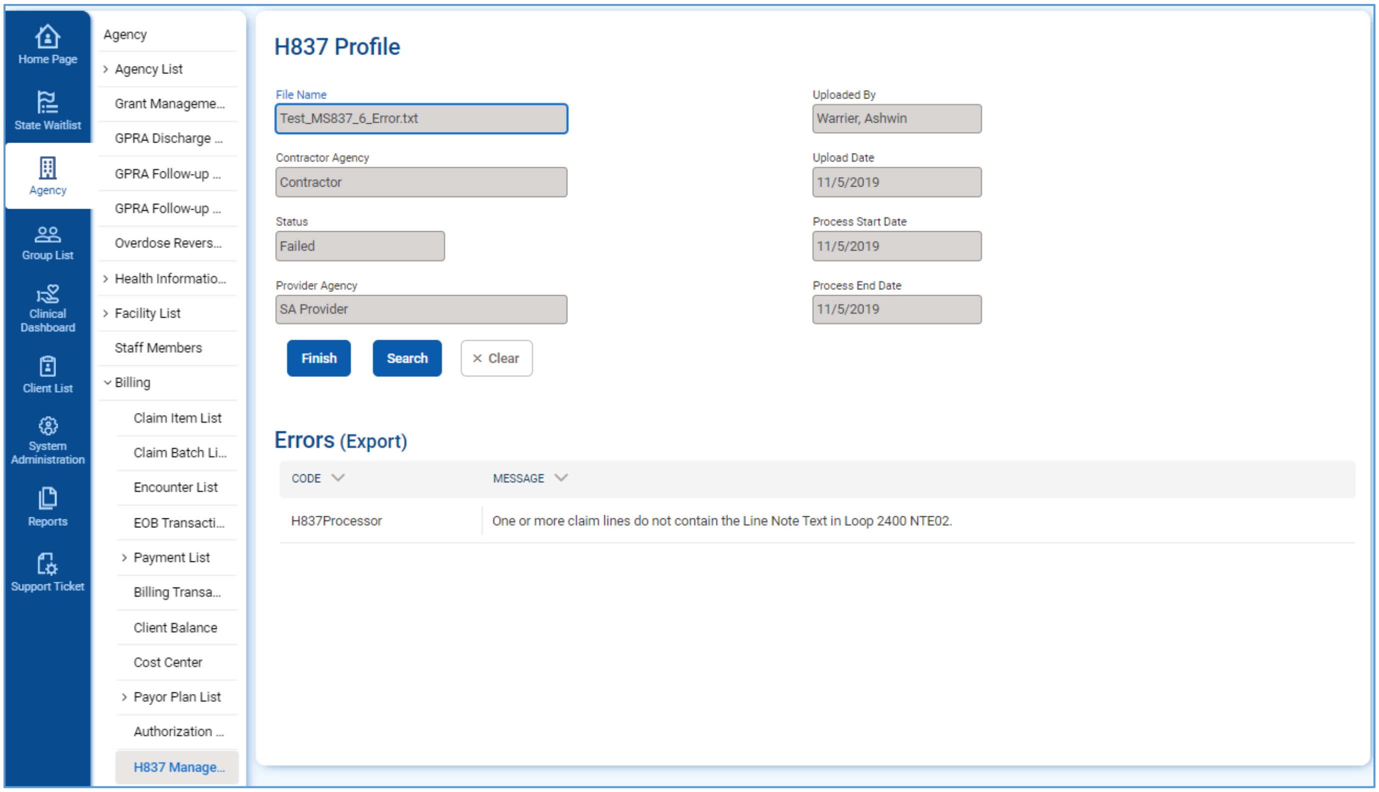


Processed Submissions

Processed 837P transactions will be adjudicated by IBHRS. The adjudication schedule will be posted at on IBHRS Documentation webpage and on the IPN Documents webpage.

Failed Submissions

If the 837P fails during processing, the error messages are displayed on the submission profile. A full list of error messages and resolutions is provided in Appendix D. Failed 837P submissions must be corrected and resubmitted. Provider agencies should notify IBHRS if they continue to receive an error after making necessary corrections.



3.2 999 Acknowledgment for Health Care Insurance

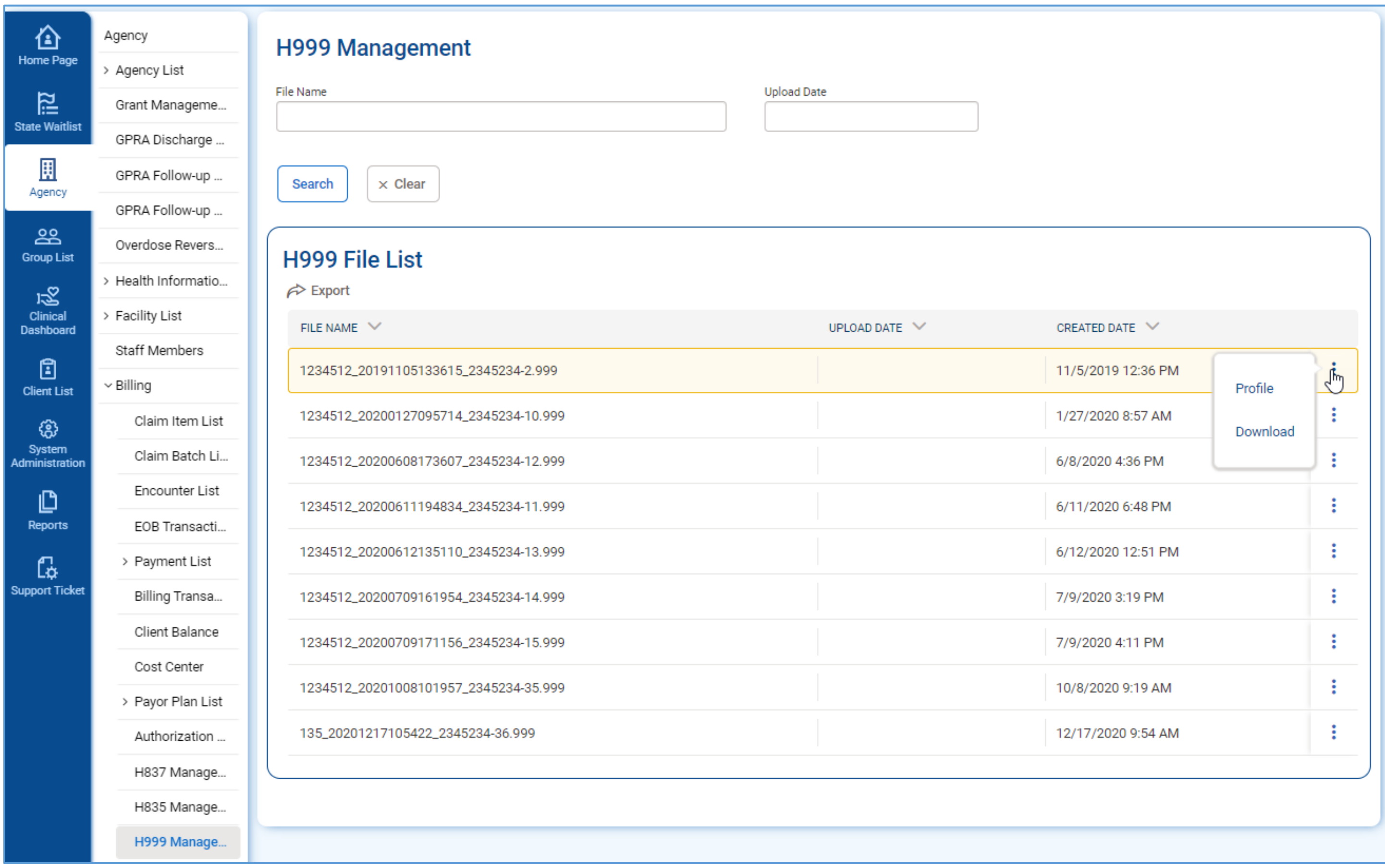
The 999 is returned for all 837P transactions that were successfully processed. Contact IBHRS if a 999 is not available for download within the expected timeframe. You will also receive an email when your file is accepted or rejected.

Navigate to the H999 Management screen under Agency/Billing. The 999 may be downloaded from the list or from the profile.

Note that a 999 is not returned for failed submissions. Refer to the Failed Submissions section for additional information.

Download Instructions

1. Navigate to the H999 Management screen under Agency/Billing.
2. Select "Download" from the Action column to download the 999.

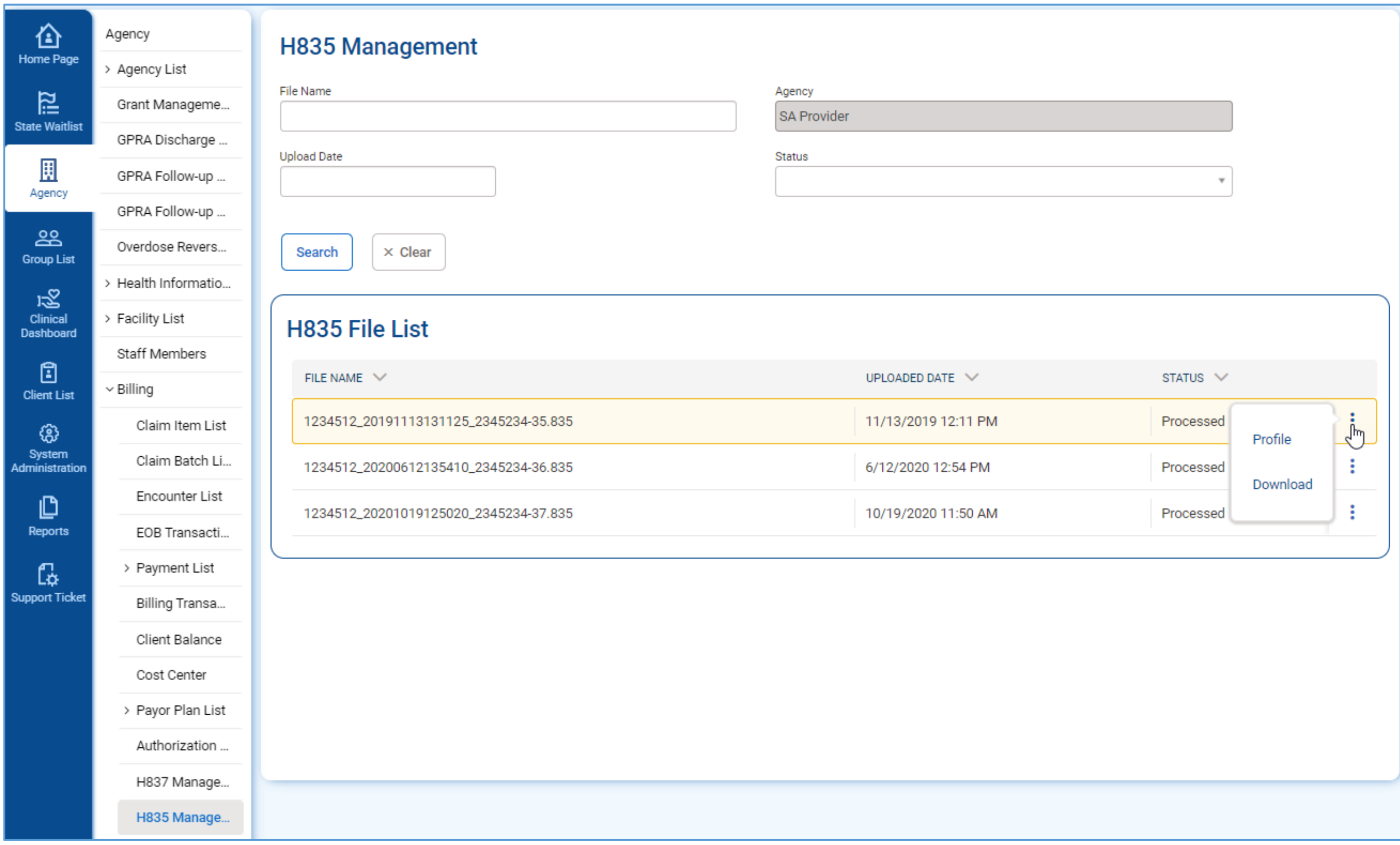


3.3 835 Health Care Claim Payment/Advice

The 835 is available for download once claims are adjudicated by IBHRS. Contact IBHRS if an 835 is not available for download within the expected timeframe.

Download Instructions

1. Navigate to the H835 Management screen under Agency/Billing.
2. Select "Download" from the Action column to download the 835.



4 Reports

PURPOSE

The IBHRS administrative portal allows users to run reports based on data contained within IBHRS.

4.1 Run Reports

Follow the steps below to run reports within the IBHRS Portal.

Reports:

Client

Client Search- Providers can use this report to look up the client's Enterprise Unique Identifier (EUID). This will be important for IPN providers for 837 file submission.

Job Submission Performance

Failed Records- Providers can use this report to view the failed records in uploads in order to see what records need to be fixed to successfully upload. This report can be filtered by date range, error status, and data set type.

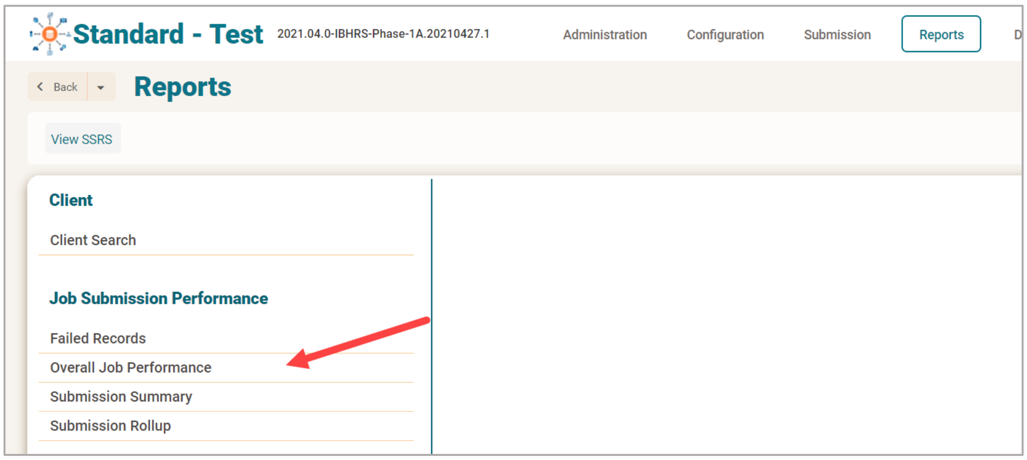
Overall Job Performance- This report illustrates with charts and graphs the overall job performance of uploaded files. It can be filtered by date range and data set.

Submission Summary- This report will give a summary of all submission for a provider. It includes number of files, % without errors, Number of submitted records, number of successful records, number of failed records, and % of successful records. This report can be filtered by date range and provider.

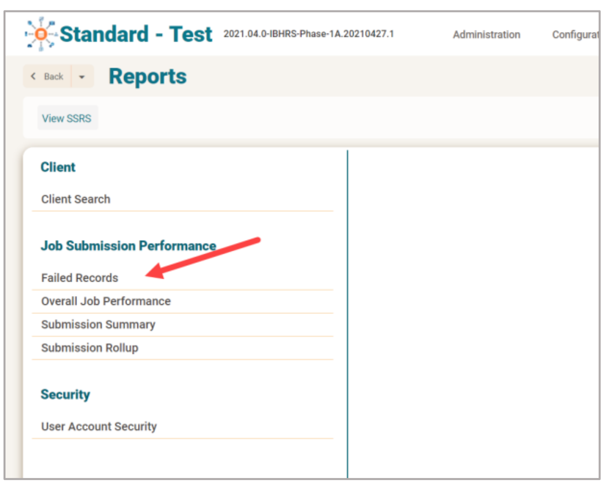
4.1.1 How to run a report

1. Log in to the IBHRS Portal.
2. Click the **Reports** tab. This will open the Reports screen.

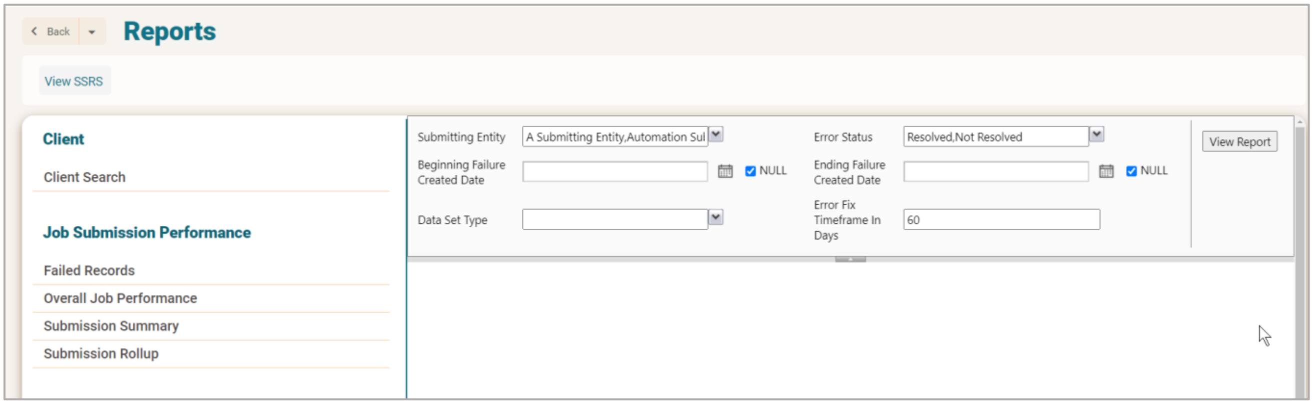
3. On the Reports screen different report categories will be displayed in this left menu.



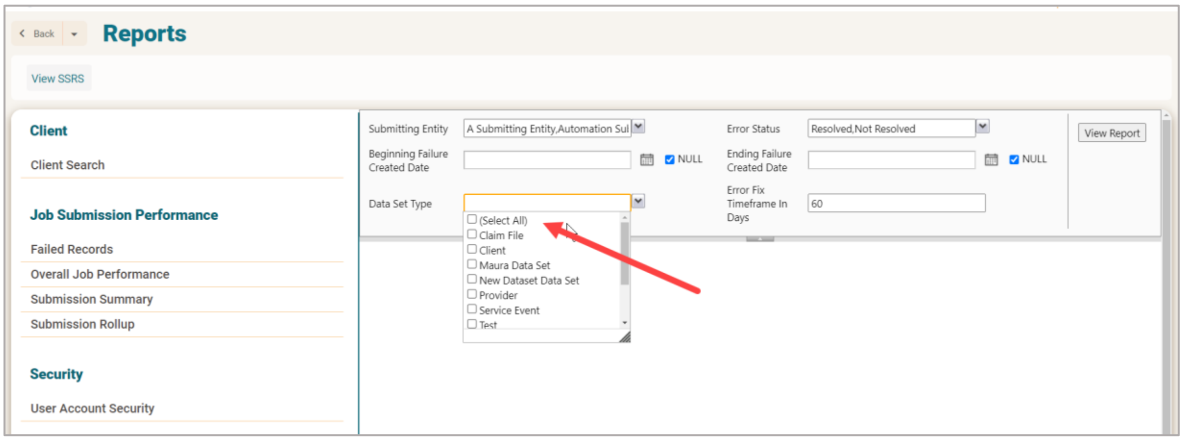
4. Click on any of the available report names.



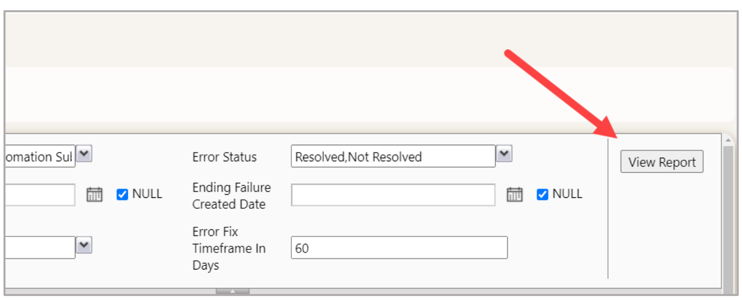
5. The screen will then refresh to display the report along with any associated parameters. Some reports may require you to select values for these parameters in order for the report to run. Unless the NULL checkbox is selected next to the parameter, the field is required.



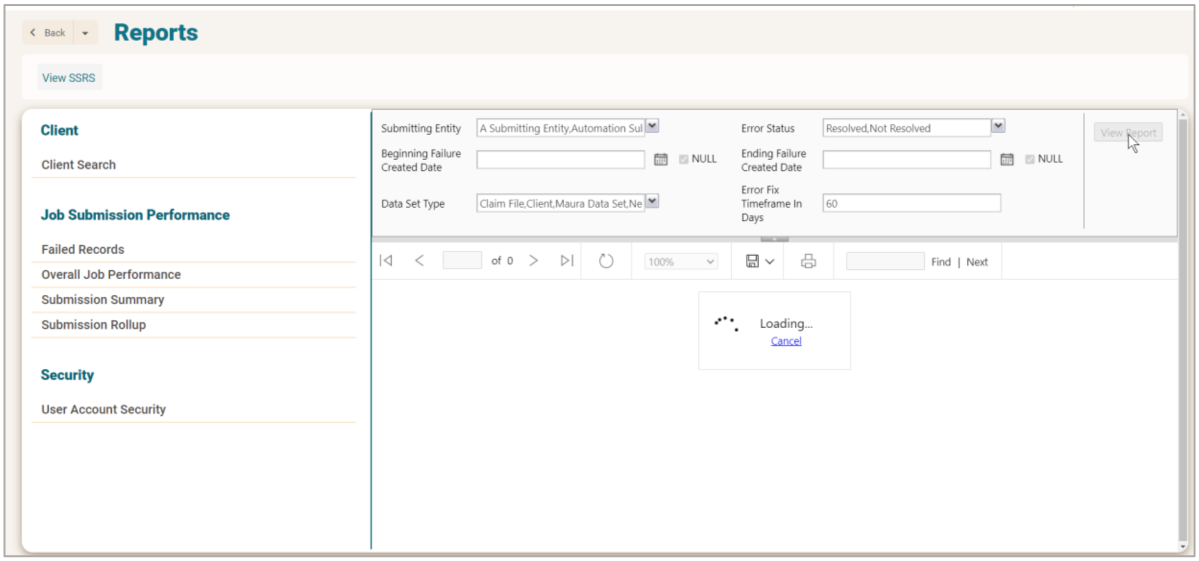
6. If the parameter fields are blank, enter or select values for each parameter. If the parameter fields have been pre-populated with values, modify those fields as needed.

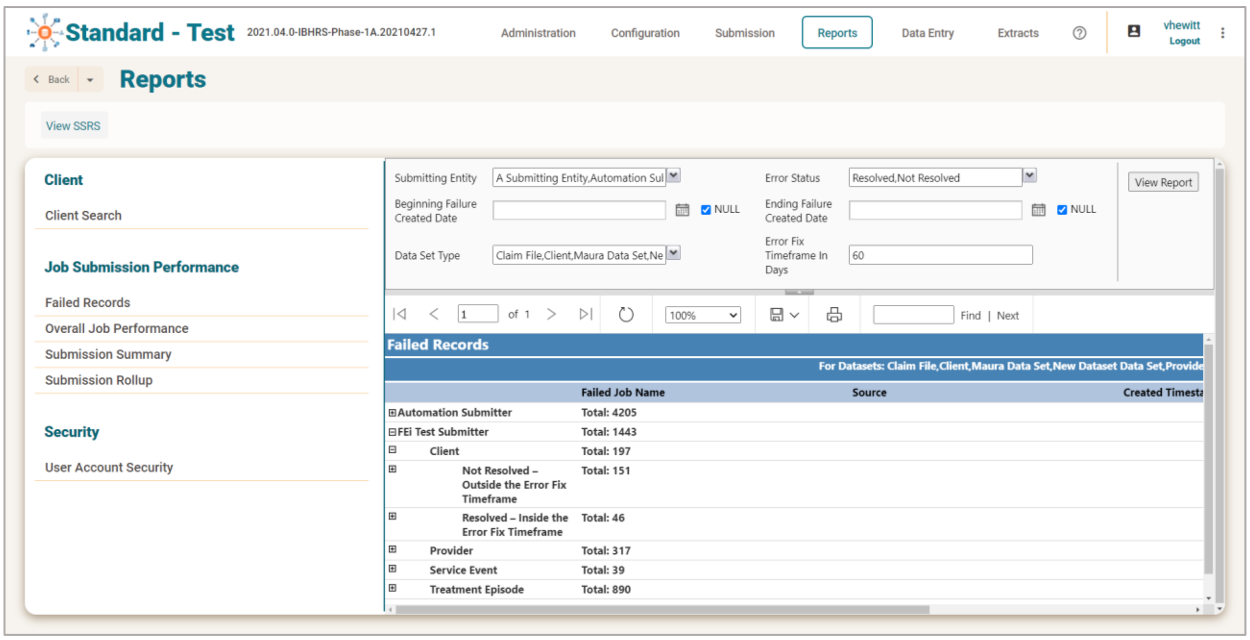


7. After selecting or updating the parameters, click **View Report**.

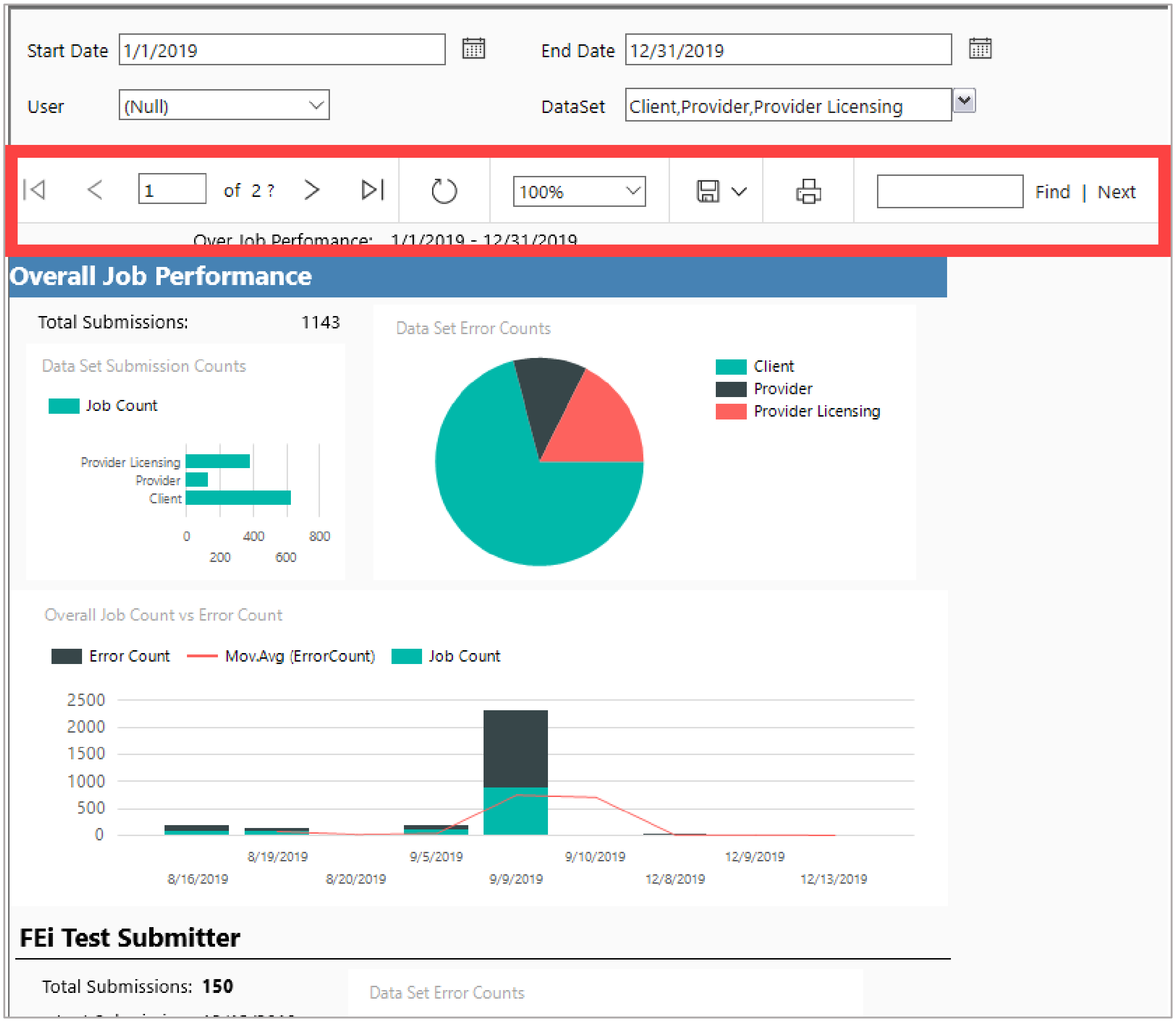


8. The report will then generate based on the selected parameters and will be displayed on screen. If no data is available based on the parameters, the report will be blank.



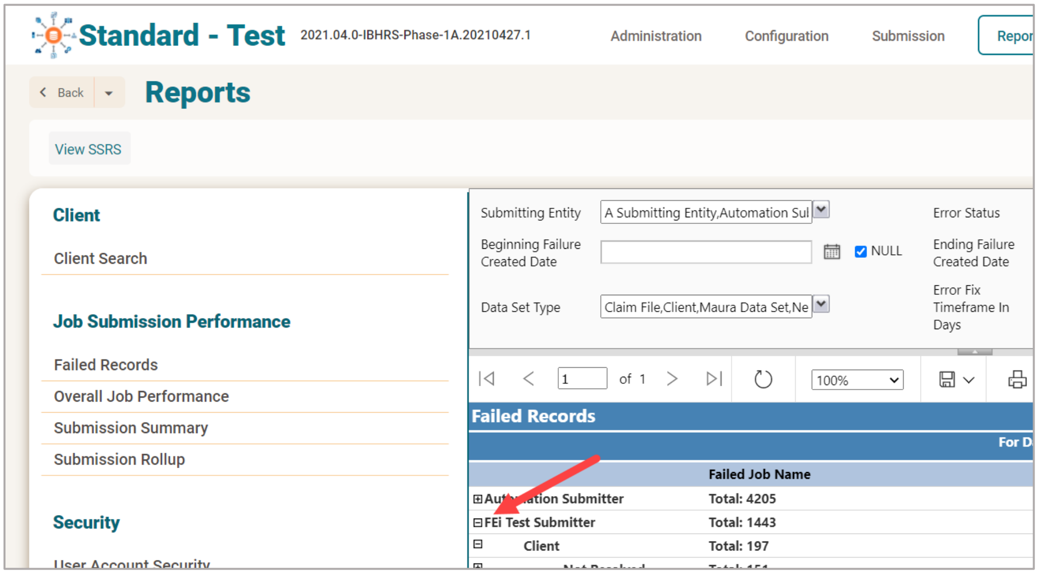


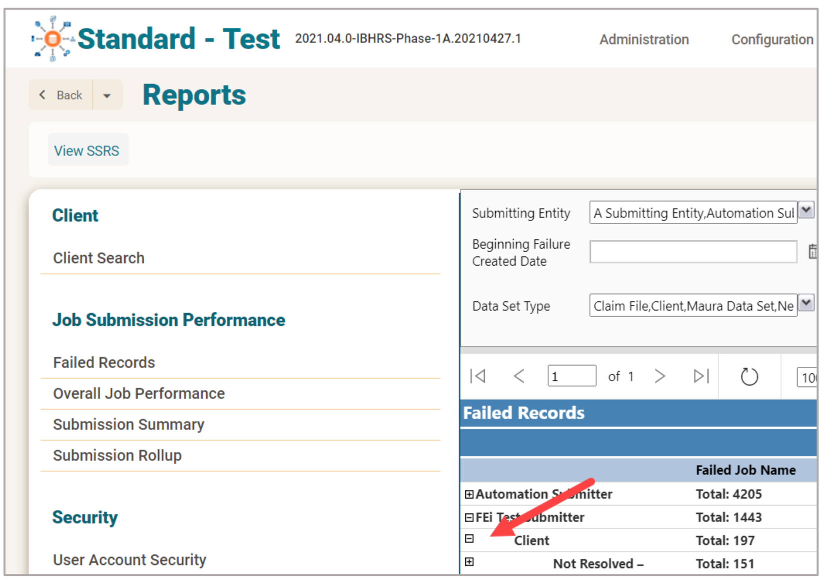
9. Use the controls within the report toolbar to scroll through pages of the report, refresh, zoom, save to your computer, print, and search.


Start Date
1/1/2019
End Date
12/31/2019
User
(Null)
DataSet
Client,Provider,Provider Licensing
1
of 2 ?
100%
Find | Next
Over Job Perfomance: 1/1/2019 - 12/31/2019
Overall Job Performance
Total Submissions: 1143
Data Set Error Counts
Client
Provider
Provider Licensing
Data Set Submission Counts
Job Count
Provider Licensing
Provider
Client
0
200
400
600
800
Overall Job Count vs Error Count
Error Count
Mov.Avg (ErrorCount)
Job Count
2500
2000
1500
1000
500
0
8/16/2019
8/19/2019
8/20/2019
9/5/2019
9/9/2019
9/10/2019
12/8/2019
12/9/2019
12/13/2019
FEi Test Submitter
Total Submissions: 150
Data Set Error Counts

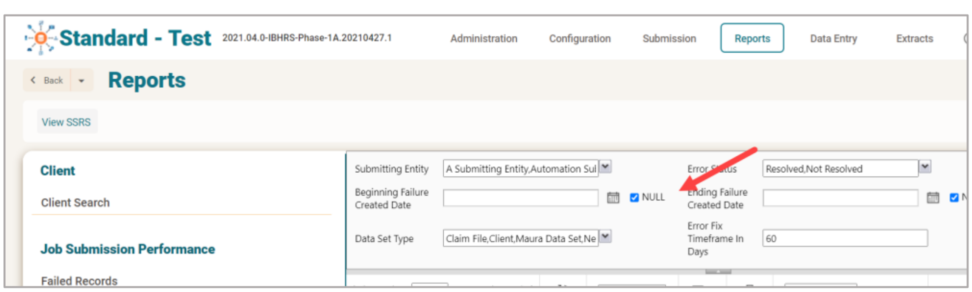
4.1.2 Additional Notes

Some reports may include detailed rows of information. These rows may be collapsed by default, and can be expanded by clicking the plus sign (+). To collapse a row, click the minus sign (-).





Uncheck “NULL” to select or enter a date.



5 User/Staff Management

Purpose

IBHRS allows those with applicable permissions the ability to manage IBHRS user accounts.

5.1 Overview

Staff Management functionality is accessed within IBHRS under Agency and Staff Members. Staff Management managing staff member accounts that have been created by IDPH.

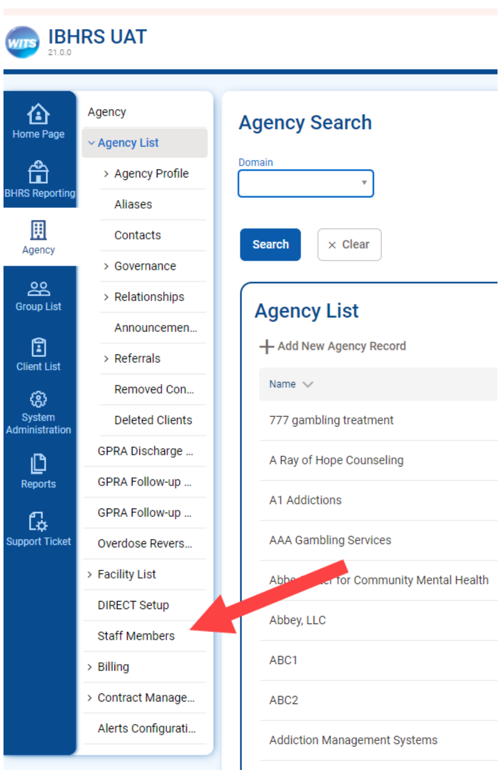
IBHRS Agency Administrators may complete the following actions for Staff Member accounts:

1. Update Staff Member Profile
2. Reset Credentials
3. Reset TOTP
4. Enable/Disable Accounts

Only IDPH may create new user accounts, assign roles and Lock/Unlock accounts.

Accessing the Staff Member Screen

On the left side panel, click Agency> Staff Members.



Searching for Staff Members

From the Staff Member Search screen, you can use the search bar to find existing staff members by searching for their first name, last name, email address or User ID (the User ID is displayed in the column titled, "Identifier").

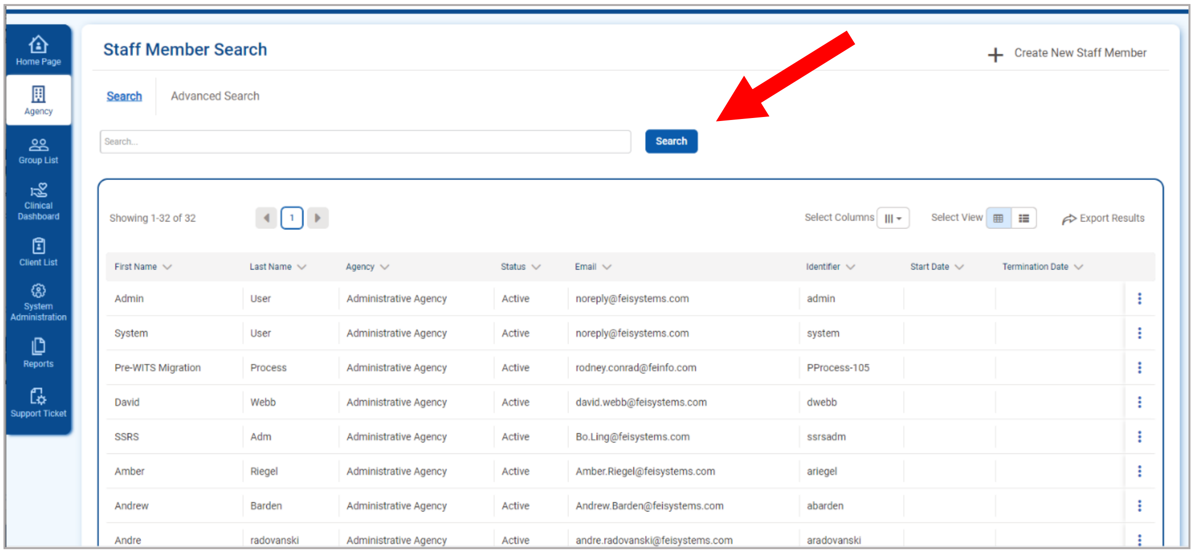
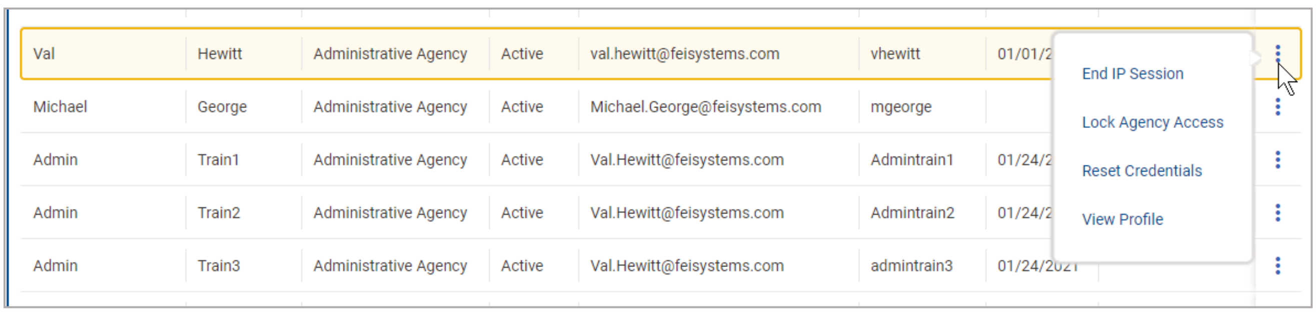
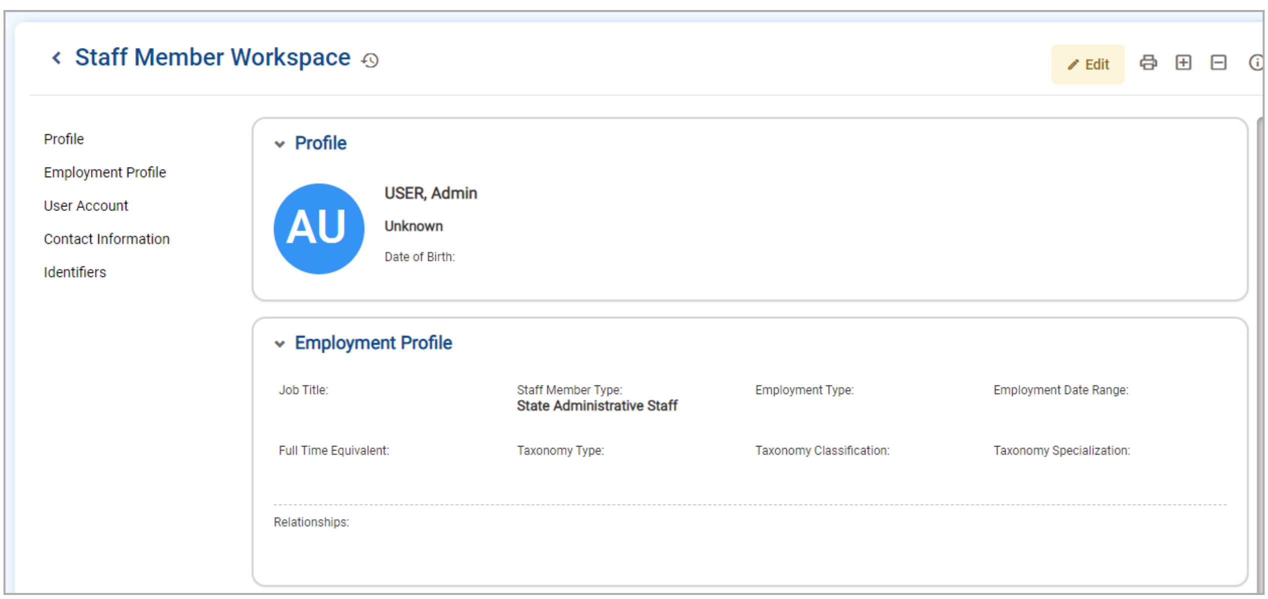


Table View



Panel View



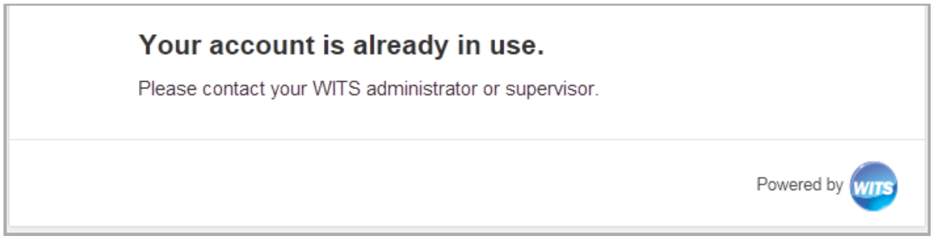
5.2 Troubleshooting Help for Staff Management

5.2.1 Use Case: Account in Use

Message: “Your Account is Already in Use”

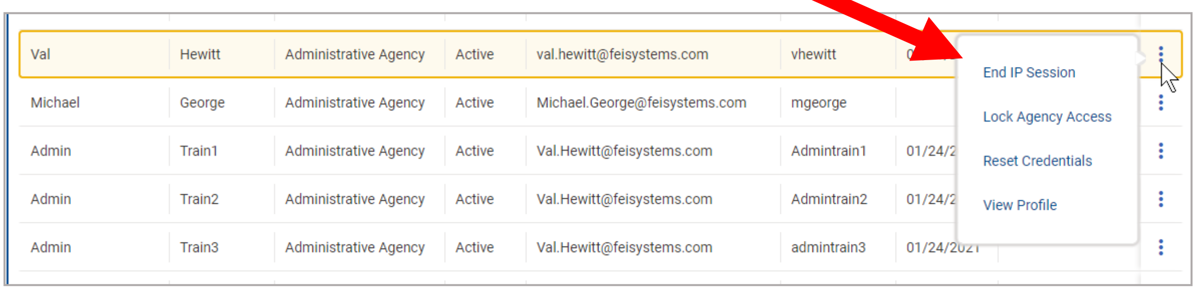
Solution: End IP System Session

There are two (2) options available to resolve this issue.



5.2.1.1 Option 1: Staff Members List

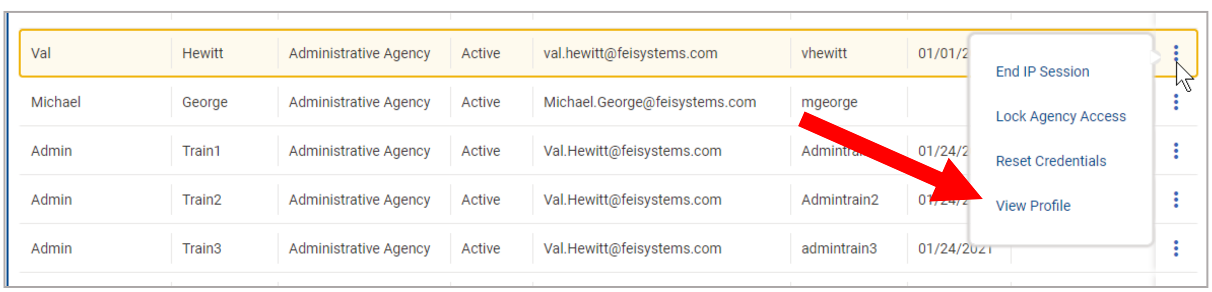
1. On the **Staff Members** list, locate the staff member, point to the pencil icon, and then click **End IP Session**.



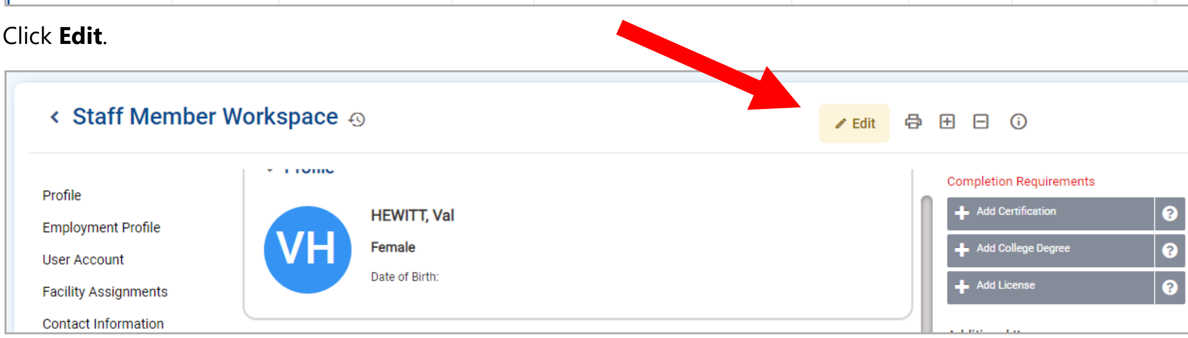
2. Ask the staff member to try logging in again.

5.2.1.2 Option 2: Staff Member Profile

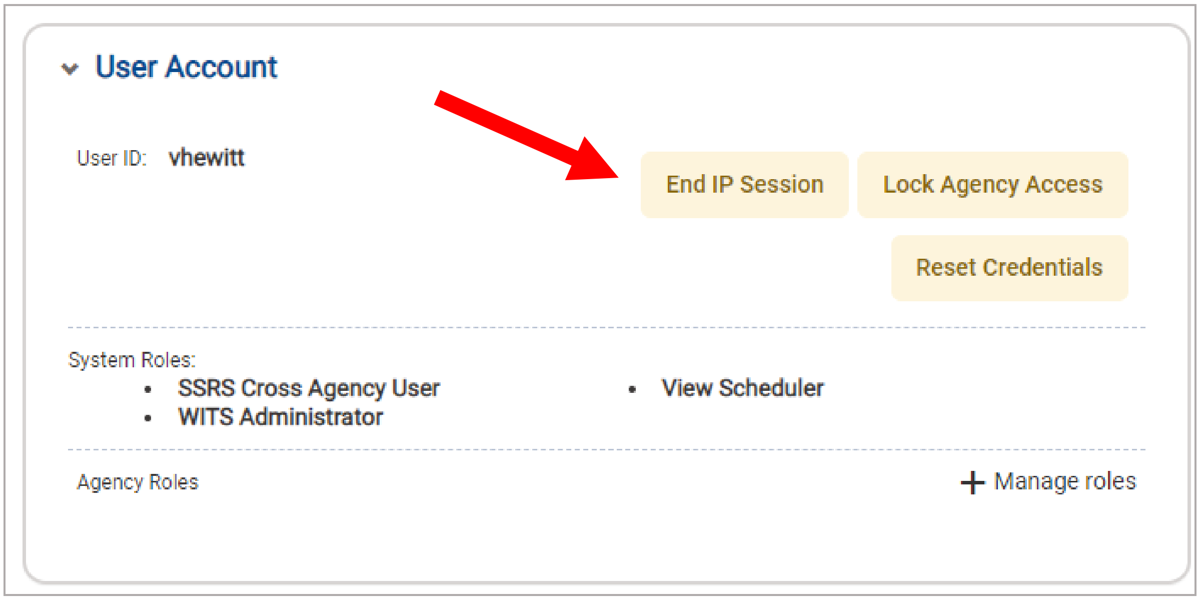
3. On the **Staff Members** list, locate the staff member, point to the pencil icon, and then click **View Profile**.



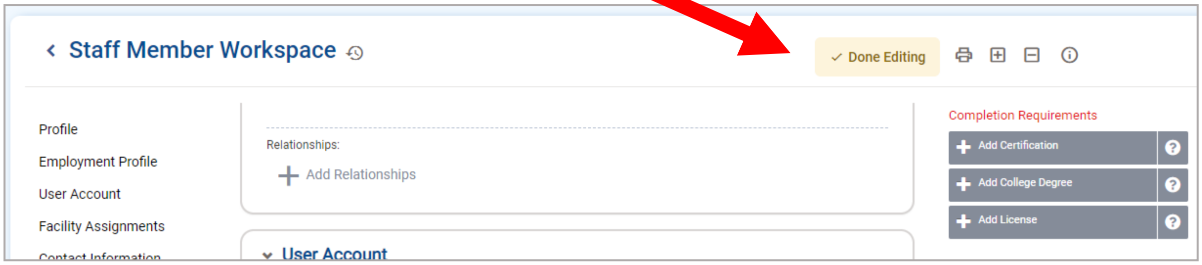
4. Click **Edit**.



5. In the User Account panel, click **End IP Session**.



6. Click **Done Editing**.



7. Ask the staff member to try logging in again.

5.2.2 Use Case: Reset Credentials Link Expired

Message: "Your Reset Credentials Link Has Expired"

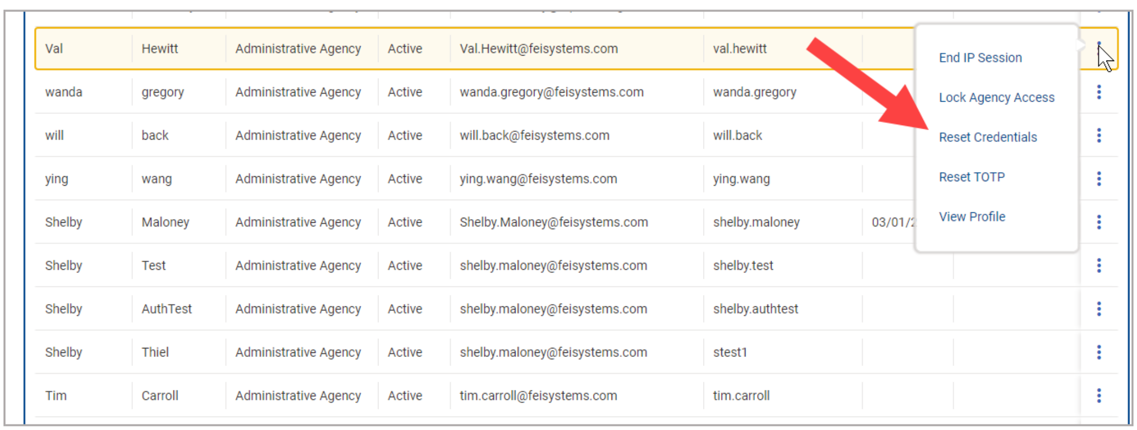
Solution: Reset Credentials

There are two (2) options available to resolve this issue.

Note: When resetting credentials, the staff member will receive an email containing a link to reset their credentials. Please note this link will remain active for 24 hours. If the staff member is unable to reset their credentials within that timeframe, they will need their credentials reset again.

5.2.2.1 Option 1: Staff Members List

8. On the **Staff Members** list, locate the staff member, point to the pencil icon, and then click **Reset Credentials**.



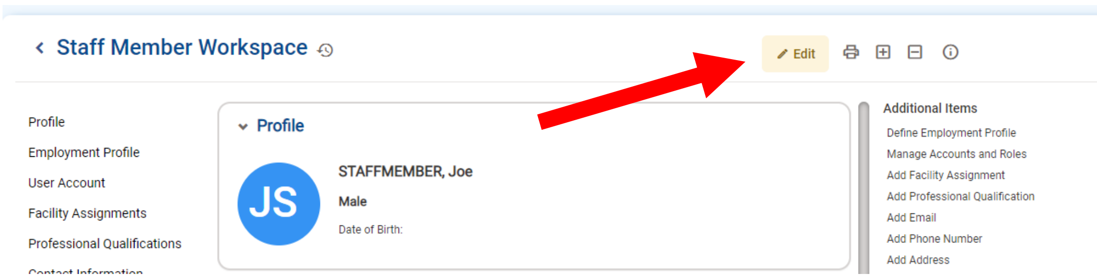
Val	Hewitt	Administrative Agency	Active	Val.Hewitt@feisystems.com	val.hewitt	
wanda	gregory	Administrative Agency	Active	wanda.gregory@feisystems.com	wanda.gregory	
will	back	Administrative Agency	Active	will.back@feisystems.com	will.back	
ying	wang	Administrative Agency	Active	ying.wang@feisystems.com	ying.wang	
Shelby	Maloney	Administrative Agency	Active	Shelby.Maloney@feisystems.com	shelby.maloney	03/01/2
Shelby	Test	Administrative Agency	Active	shelby.maloney@feisystems.com	shelby.test	
Shelby	AuthTest	Administrative Agency	Active	shelby.maloney@feisystems.com	shelby.authtest	
Shelby	Thiel	Administrative Agency	Active	shelby.maloney@feisystems.com	stest1	
Tim	Carroll	Administrative Agency	Active	tim.carroll@feisystems.com	tim.carroll	

5.2.2.2 Option 2: Staff Member Profile

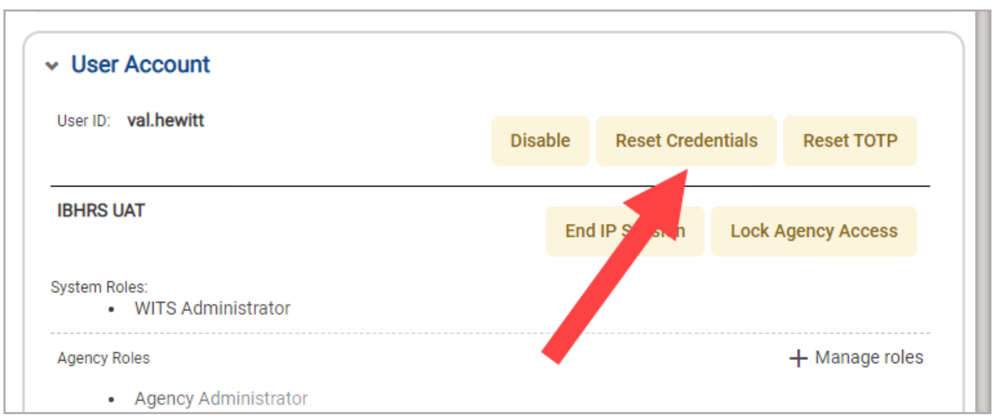
9. On the **Staff Members** list, locate the staff member, point to the pencil icon and then click **View Profile**.

Val	Hewitt	Administrative Agency	Active	Val.Hewitt@feisystems.com	val.hewitt	
wanda	gregory	Administrative Agency	Active	wanda.gregory@feisystems.com	wanda.gregory	
will	back	Administrative Agency	Active	will.back@feisystems.com	will.back	
ying	wang	Administrative Agency	Active	ying.wang@feisystems.com	ying.wang	
Shelby	Maloney	Administrative Agency	Active	Shelby.Maloney@feisystems.com	shelby.maloney	03/01/2
Shelby	Test	Administrative Agency	Active	shelby.maloney@feisystems.com	shelby.test	
Shelby	AuthTest	Administrative Agency	Active	shelby.maloney@feisystems.com	shelby.authtest	
Shelby	Thiel	Administrative Agency	Active	shelby.maloney@feisystems.com	stest1	
Tim	Carroll	Administrative Agency	Active	tim.carroll@feisystems.com	tim.carroll	

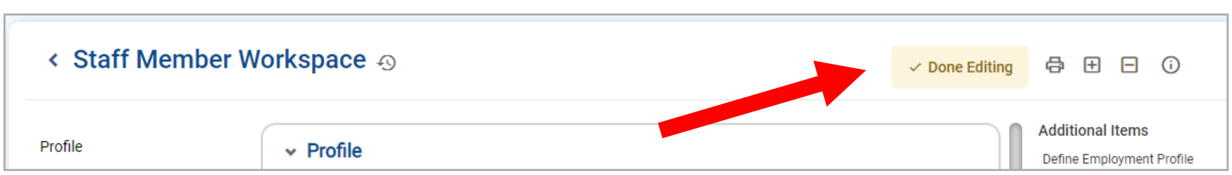
10. Click **Edit**.



11. In the User Account panel, click **Reset Credentials**.



12. Click **Done Editing**.

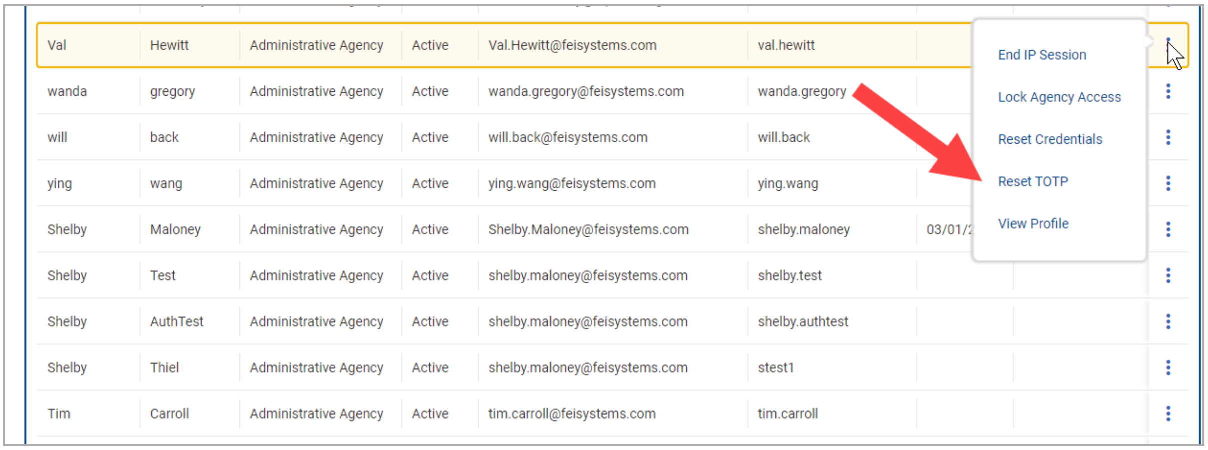


5.2.3 Use Case: Reset TOTP

Note: When resetting credentials, the staff member will receive an email containing a link to reset their credentials. Please note this link will remain active for 24 hours. If the staff member is unable to reset their credentials within that timeframe, they will need their credentials reset again.

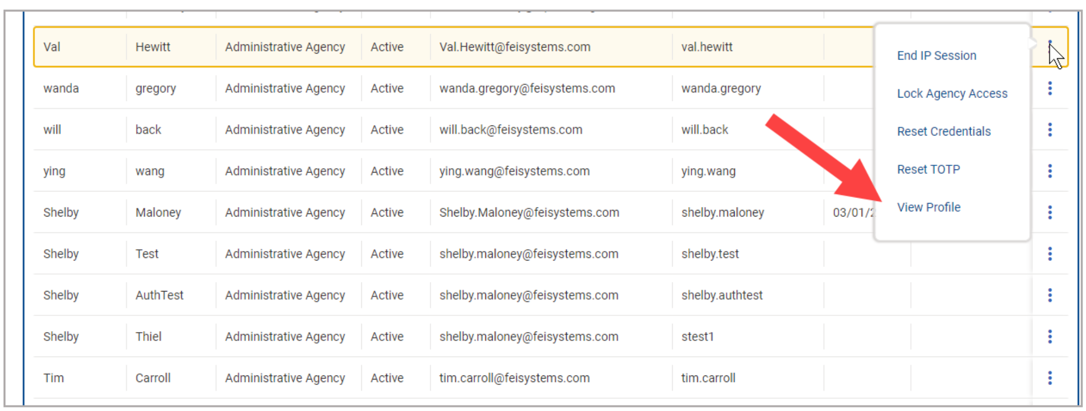
5.2.3.1 Option 1: Staff Members List

13. On the **Staff Members** list, locate the staff member, point to the pencil icon, and then click **Reset TOTP.**

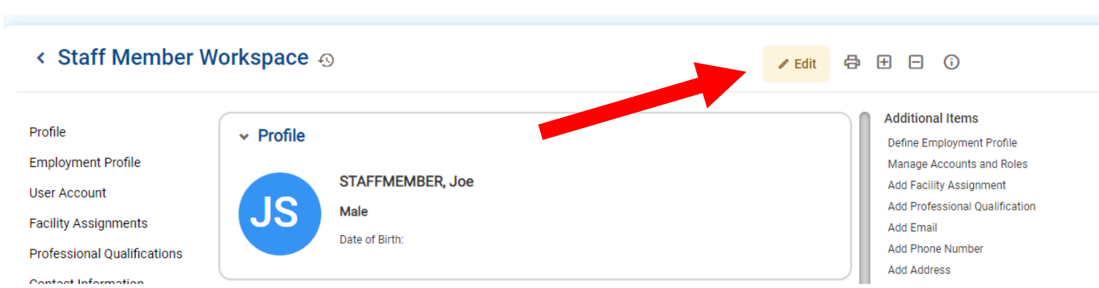


5.2.3.2 Option 2: Staff Member Profile

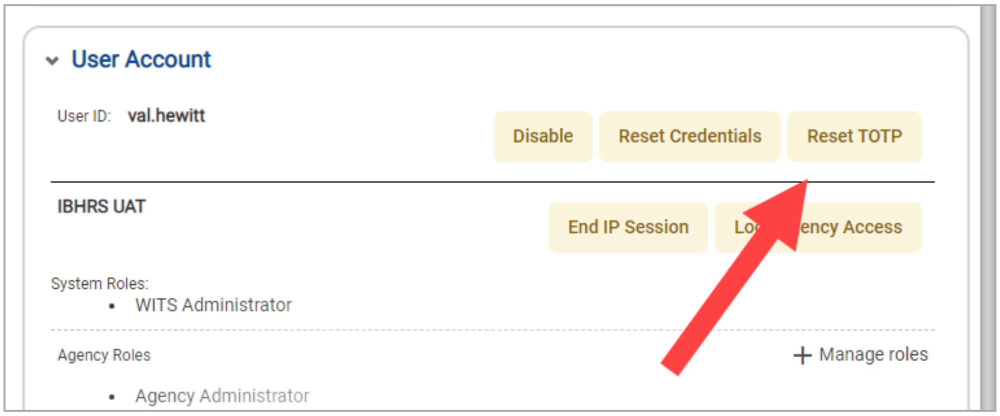
14. On the **Staff Members** list, locate the staff member, point to the pencil icon and then click **View Profile**.



15. Click **Edit**.



16. In the User Account panel, click **Reset Credentials**.



17. Click **Done Editing**.