

Registering for a Cohere Account

To get started using Cohere’s portal, your organization should designate one administrator to register for an account. The person who completes registration will be set up as an admin user and will be responsible for managing user access for your entire organization. Admins **will have** the ability to set up other organization administrators.

Step 1:

Complete registration

Visit Cohere’s [registration page](#), to start the process of registering for an account.

Step 2:

Activate account

Once registration is complete, you will receive an email* prompting you to activate your account. This email will include your username.

**Don't forget to check your spam folder.*

Step 3:

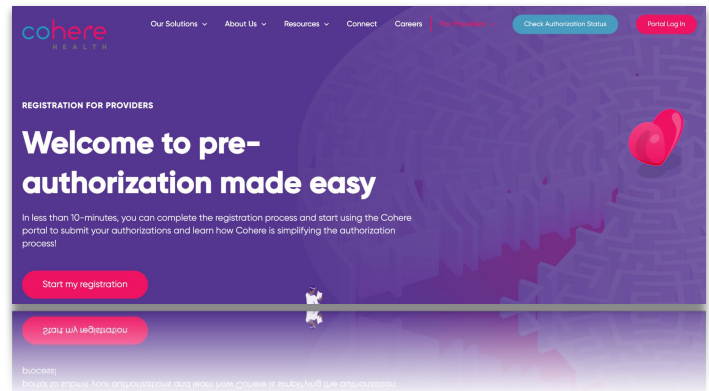
Login

Create a password and choose your security question and image.

When logging in, your username will always be your email.

Steps to Register

- 1 Visit Cohere’s [registration page](#), and click the pink **“Start my registration”** button.



- 2 To start registration, enter the main practice/organization’s tax ID number (TIN) and your email address.

→ Click “Create an account”

3

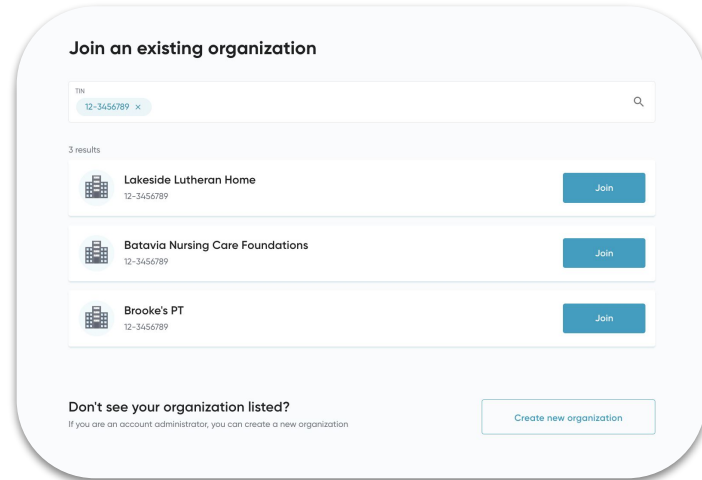
After entering this information there are a few possible options you may experience from the results returned.



Your organization is listed.

What to do? Select the **“join”** button to the right of the corresponding organization.

Authorization requests are viewable at the organization level within the Cohere portal. This means that you will be able to view and submit requests for all of the associated organizations regardless of the physical location that is selected.



Your organization has multiple tax ID numbers (TINs).

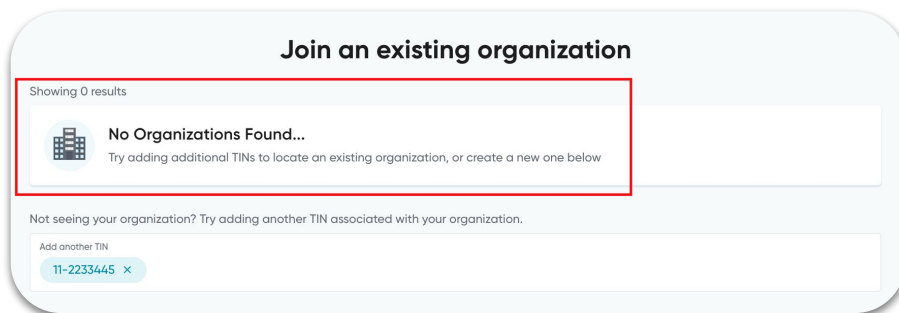
What to do? If your organization is not listed, however you have multiple tax IDs, please enter the additional TINs to view your organization has multiple tax ID numbers, you are able to **add more** to learn more about if it is in our system.



Your organization is not listed.

What to do? Start by entering additional TINs in the search bar at the top of the page to expand the organization options. If you still do not see your organization, press **“Create a new organization”**.

If you submit authorization requests for multiple locations under the same tax ID number, please select the location that constitutes the majority of your pre-authorization requests. If submissions are roughly equal, select any of the listed organizations. Admin users will be able to add additional TINs.



4 Share more about yourself by answering a few basic questions, including:

- Name & Title
- Contact information
- Specialties you submit

The screenshot shows a registration form titled "Share more about you" with a progress indicator at the top showing steps 1, 2, and 3. The form is divided into three main sections: "About you", "About your role", and "Which specialties do you personally submit auths for (to any vendor or payer, not just Cohere?)".

About you

Your name and title

First name: Mallory, Last name: Hinman

Your contact information

Phone number: (555) 123-9658, Ext., Fax number

About your role

Your title

Your title (e.g. Pre-cert manager): Manager

Which specialties do you personally submit auths for (to any vendor or payer, not just Cohere?)

Select all that apply

<input type="checkbox"/> Acute inpatient care (direct & emergency admits)	<input type="checkbox"/> Neurology
<input type="checkbox"/> Behavioral health	<input type="checkbox"/> Neurosurgery
<input checked="" type="checkbox"/> Cardiology	<input type="checkbox"/> OB/GYN
<input type="checkbox"/> Cardiothoracic surgery	<input type="checkbox"/> Oncology
<input type="checkbox"/> Dermatology	<input type="checkbox"/> Ophthalmology
<input type="checkbox"/> Diagnostic	<input type="checkbox"/> Orthopedics
<input type="checkbox"/> Family medicine	<input type="checkbox"/> Pain management
<input type="checkbox"/> Gastroenterology	<input checked="" type="checkbox"/> Physical medicine and rehabilitation
<input type="checkbox"/> General surgery	<input type="checkbox"/> Plastic surgery
<input type="checkbox"/> Head and neck surgery	<input type="checkbox"/> Podiatry
<input type="checkbox"/> Internal medicine	<input type="checkbox"/> Urology

Account Verification Options

5 Cohere requires account verification to ensure the security of sensitive patient information. After completing the screening questions, you will be asked to verify your account. You may do so in three ways:

Option 1: Verify by email domain

If you are an admin completing the registration on behalf of your organization, you will be able to set up what is called auto-verification based on email domain. This means that other users at your organization will be given full access to start submitting authorizations immediately after they register.

- You can enable this option when initially creating the organization.
- In order for this to work as described above, users must have the same email domain as the admin.
- If this option is not enabled during the registration process, the administrator at the organization must manually verify all new users requesting access.

Would you like to make it faster for other people at your organization to set up accounts by enabling auto-verification based on email domain?

email@orthotennessee.com

Yes No



Important information

By selecting yes, you are confirming that other members from your organization using the same email domain (email@orthotennessee.com) can join your account. Anyone who requests an account with this email domain will be able to automatically join your organization.

Option 2: Verify by member info

If an administrator has not enabled auto-verification by email domain for your organization, you will be asked to provide the member ID and date of birth for 5 patients at your practice.

After entering this information, you will automatically receive an activation link so you can sign-in to the portal and start submitting authorizations. However, users **will not** be associated with their organization until the admin on the account verifies the request.

Those “pending” users will see a purple banner, like the one below, upon signing in to the Cohere portal.

Don't have member ID and date of birth information? Review option 3 to learn more about how to continue your registration without this information.

Option 3: Manual verification

You may need to use this option in the case where auto-verification by email domain is not setup and you do not have member ID and date of birth information for 5 members at your practice.

In these situations, you should press the **“verify manually”** link at the bottom of the same page asking for member IDs. A Cohere team member will manually process this request and send an activation email once the account has been created.

Admin Responsibilities

As the administrator of your organization, we rely on you to verify the users that register for an account at your practice.

Please do the following to ensure that users at your organization receive access as soon as possible:

- Periodically check the management page within the Cohere portal to verify those new users (screenshot below)
- Keep an eye out for email notifications of the addition of these users.

Additionally, if auto-verification by email domain was not setup during the initial registration process, an admin will be able to enable that on the management page so subsequent users registering will be able to auto-verify as they complete registration.

Follow the steps below to verify new users within the management page of the Cohere portal.

- 1 Click the **“review”** button next to the users name.
- 2 A popup screen with the users information will populate, please confirm that the information is correct and then select **“verify account”** or **“reject access”**.
- 3 This user will then be added under the ‘General members’ header.

A blue line to the left of a user, indicates they are a new member. This will refresh after each time you visit the management page so it is clear who is new to the organization.

The screenshot displays the 'Users & Permissions' management page. At the top, there's a section for 'Ortho Tennessee' with details like creation/modification dates and tax ID. Below this is a table of 'Unverified members' with columns for Name, Email, and Phone number. Three users are listed: Flo Jo, Seth Snyder, and Cara Kittios, each with a 'Review' button. A blue vertical line is next to Flo Jo's name, indicating they are a new member. A lightbulb icon points to this line. A modal window is open over Flo Jo's entry, titled 'Florin Handelman' (note the discrepancy in the name between the modal and the table row). The modal shows fields for First name (Florin), Last name (Handelman), Phone number (123-456-7890), Email (florin.handelman@orthotennessee.com), Title (Pre-cert associate), and User specialties (OB/GYN, Urology). At the bottom of the modal are buttons for 'Verify account' and 'Reject access'. Below the unverified members table is a 'General members' section with a table containing Flo Jo, Seth Snyder, and Cara Kittios. At the bottom, a new row for 'Florin Handelman' is shown with a blue line to the left, indicating they are a new member. The table columns include Name, Email, Phone number, Admin (toggle), and Status (Pending).