

Truzo 101: Setting up additional users

To make your transition to Truzo as easy and successful as possible, follow these instructions to set up a 340B covered entity (CE) account. Truzo allows you to assign different roles to team members, ensuring they have the appropriate access. This guide explains the different roles and how to add and modify users.

Role Descriptions

- **Authorizing Official (AO):** Only the AO, as listed in the Health Resources and Services Administration (HRSA) 340B Office of Pharmacy Affairs Information System (OPAIS), initiates the onboarding process and accepts the platform's terms and conditions. This person has full access to the application, can invite additional users, and submit required claims data.
- **Primary Administrator (PA):** Assigned by the AO during initial account setup, the PA role has full access to the application and will make the initial attestations regarding entity-owned pharmacies, contract pharmacies, and, if applicable, child sites. The PA can also manage users, make pharmacy designations, and submit required claims data.
- **Administrator:** Users assigned to the administrator role can manage users, make pharmacy designations, and submit required claims data. Administrators cannot complete the initial attestation process.
- **Submitter:** Users assigned to the submitter role submit claims-level data but do not have administrative rights to manage your covered entity's Truzo account.
- **External Submitter (ES):** The ES is typically assigned to an outside third party, such as a Third-Party Administrator (TPA), who will submit claims-level data on your behalf. The ES can only view the data they upload and cannot access data submitted by other users.
- **Reviewer:** The reviewer role has read-only access to the data in Truzo. This role is typically assigned to individuals who monitor and analyze your data but will not submit data themselves.

Adding a new user

1. Go to "Team Management" from the left-hand navigation.
2. Click "Add New User" and enter the user's name and email address.
3. Select the appropriate role and click send.
 - New users will receive an email with directions for setting up their account.
 - Existing Truzo account holders will be notified of their new access and will see the account the next time they log in.

Managing existing users

1. Go to "Team Management" to review all current users and their assigned roles.
2. To edit a user, select their name, choose "Edit Information," and update their information or role as needed.

Need help? Visit <https://gotruzo.com/ce-onboarding/>, contact us at gotruzo.com/contact, or email us directly at truzo-support@kalderos.com.