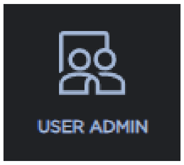
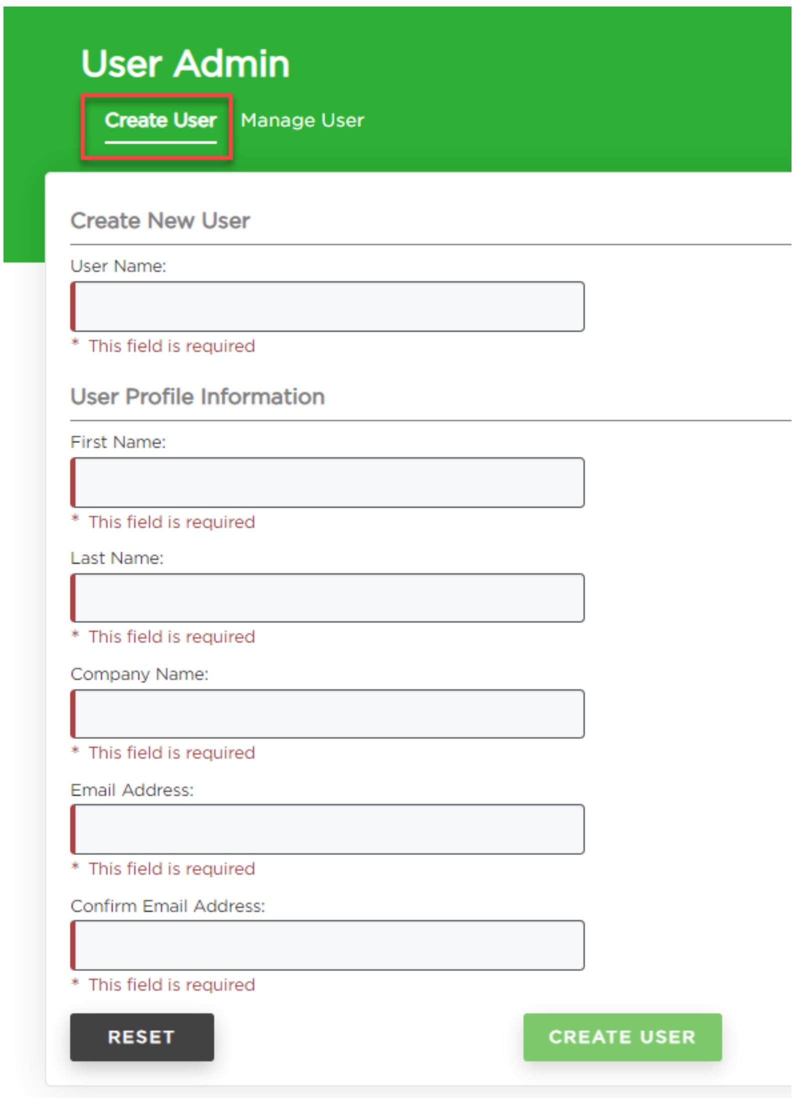
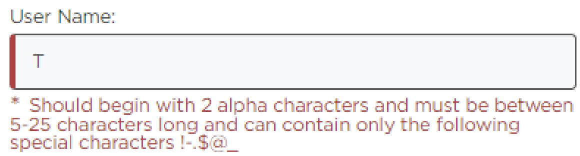
In order to create a new User, the Admin or Delegate logs in and then navigates to the 'User Admin' icon in the left hand navigation:



Once on this page, they can start the 'Create User' workflow by specifying the required fields:

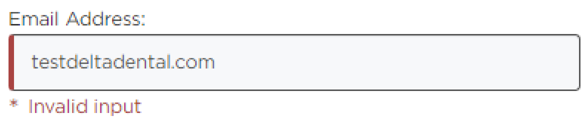


Once they start typing in the User Name field, the requirements will be shown. If the User Name does not meet these requirements, then field will be considered Invalid and user will not be able to complete the workflow:

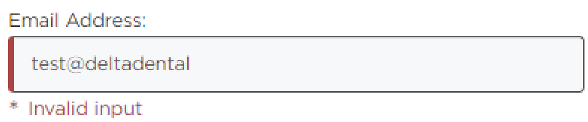


Aside from the User Name, the Email Address field requires the @ symbol and the period with trailing characters (.com, .gov., etc.):

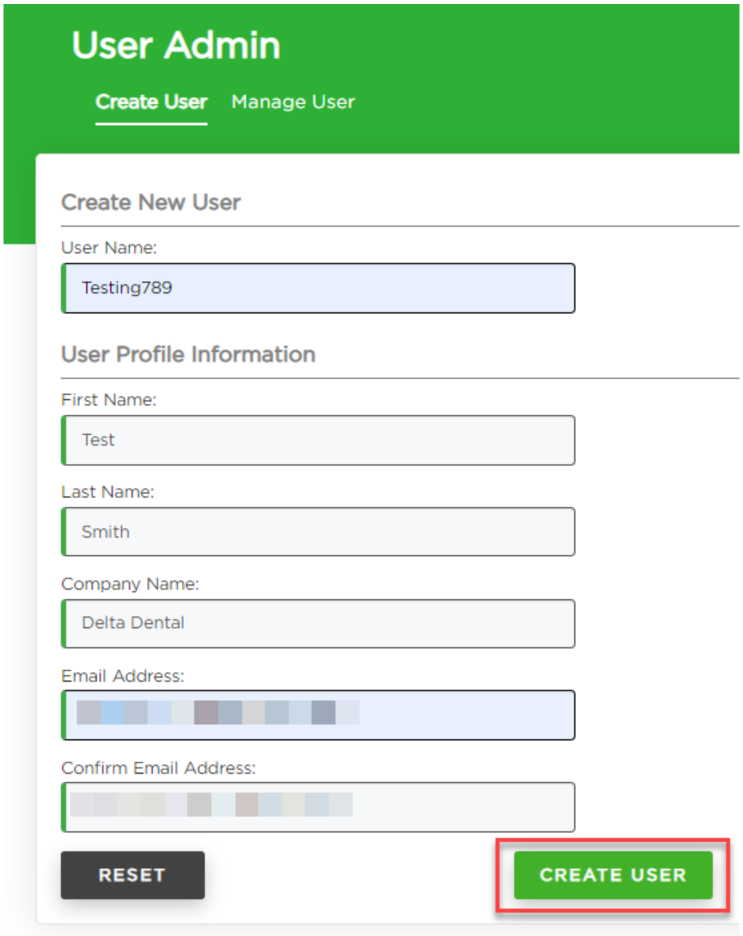
Missing the @:



Missing the period with trailing characters:

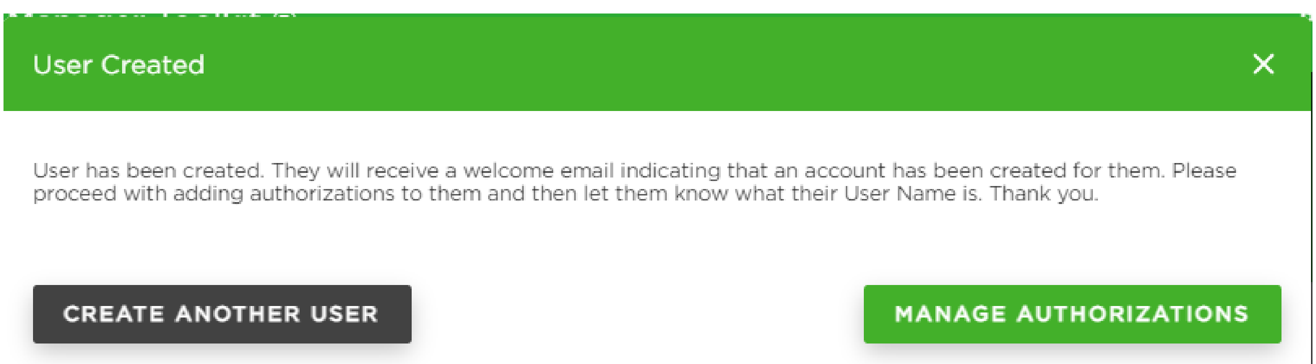


Once all of the required information has been filled in the ‘Create User’ button will become enabled:



Upon clicking 'Create User' there are two things that happen:

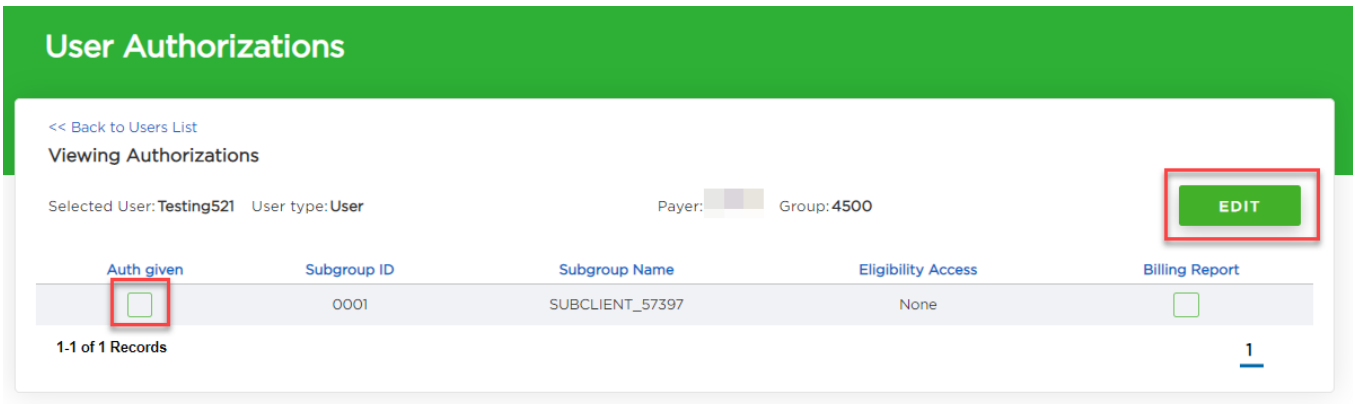
1. There will be a confirmation popup with the reminder that authorizations will still need to be added to this new user and that they are responsible for letting the new user know their User Name.
2. A welcome email is generated for the new user letting them know that an account has been created for them and that they need to obtain the User Name from whoever created them.



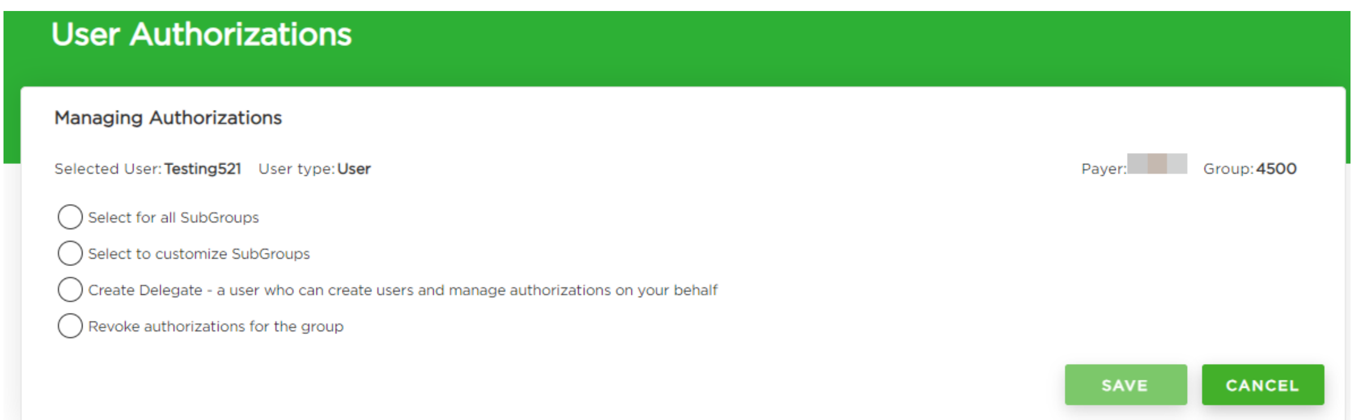
From this popup screen, a user could keep adding users but it is recommended that they proceed with 'Manage Authorizations' so that the new user will have what they need to start working within the application.

After clicking 'Manage Authorizations' you will be able to see what authorizations the user could have. In this instance they only have the ability to have access to one subgroup and since they are newly created, they do not currently have any authorizations as indicated by the checkbox on the left.

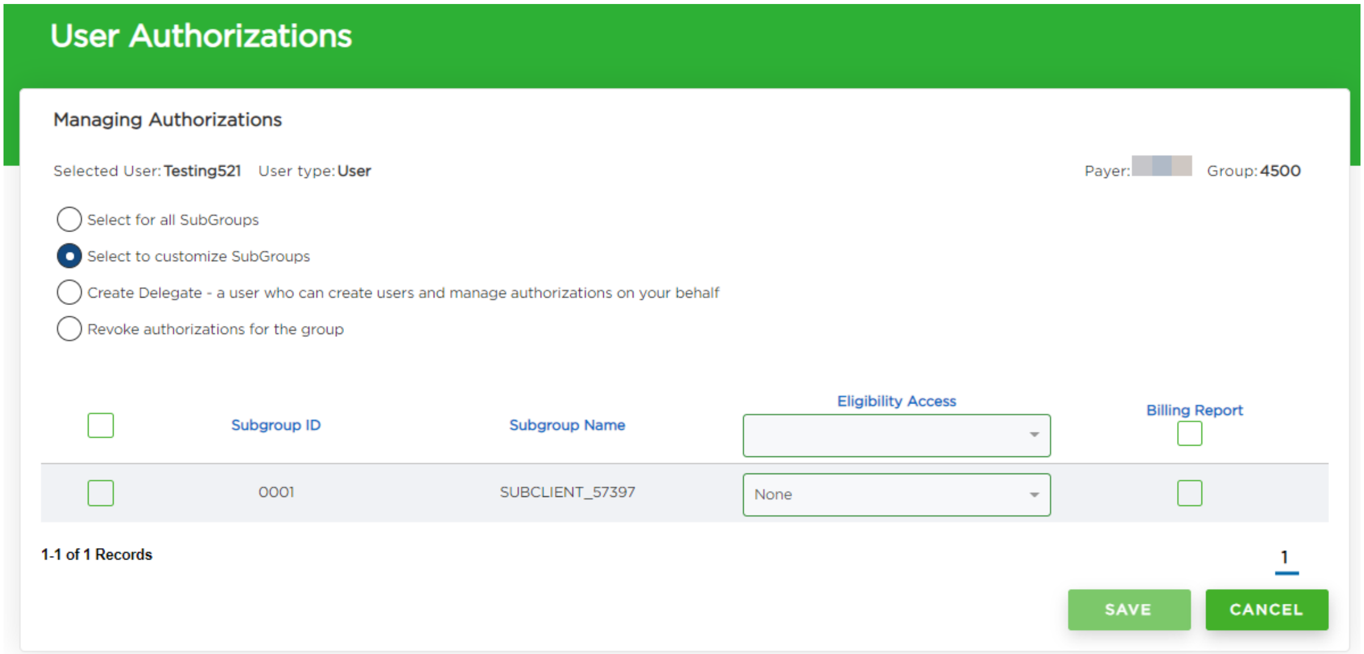
In order to add authorizations, the user should click 'Edit':



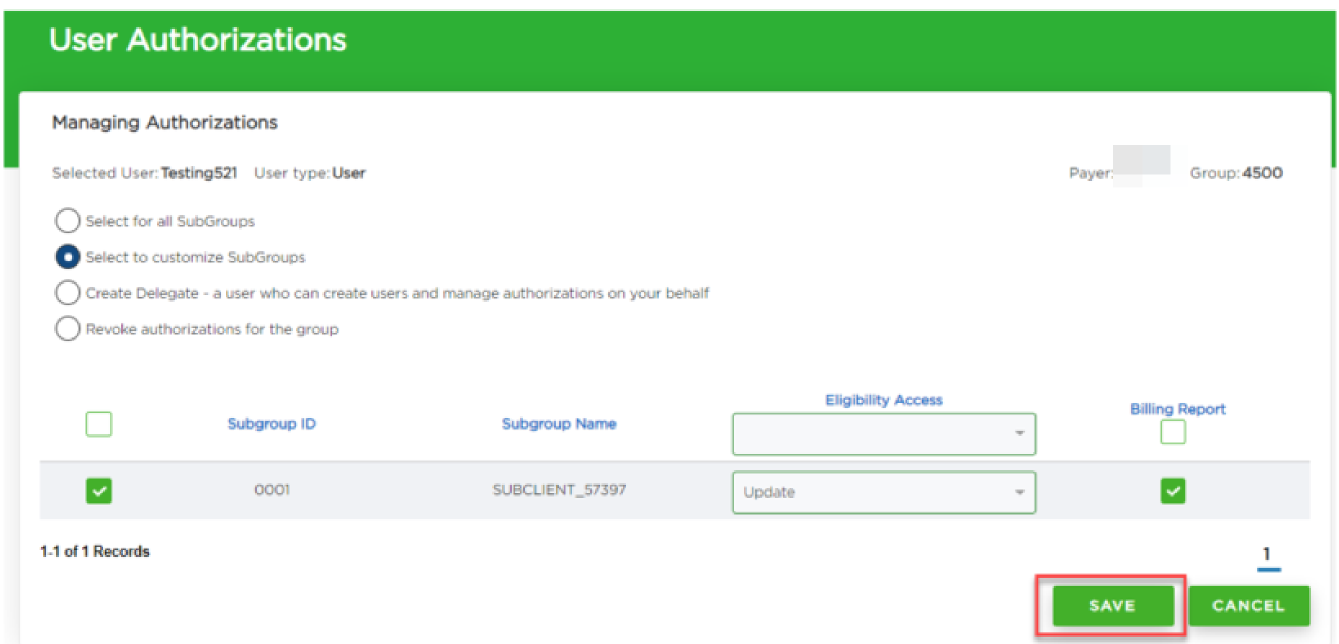
After clicking 'Edit' the user can determine if they want to assign authorizations for 'All Subgroups', 'Customize Subgroups' or turn them into a Delegate. In this instance there is only one Subgroup so either of the first two options will work.



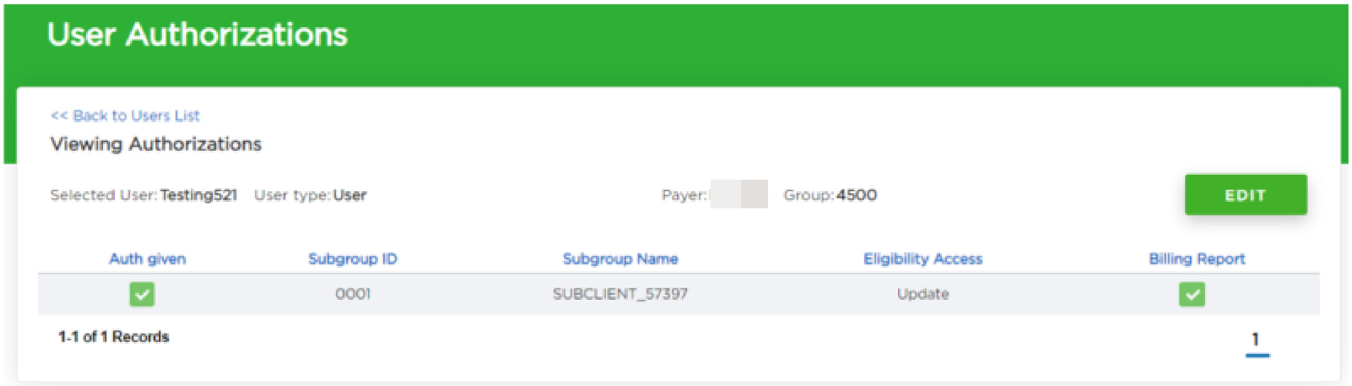
After selecting the radio button for 'Select to customize Subgroups' the user can then specify what authorizations to give the user. These options will display based on the Admin's own access – a User will never have the ability to have more authorizations than their Admin.



After making the selections, the 'Save' button becomes enabled:



The user will then be able to view the authorizations they just assigned:


User Authorizations
<< Back to Users List
Viewing Authorizations
Selected User: Testing521
User type: User
Payer:
Group: 4500
EDIT
Auth given
Subgroup ID
Subgroup Name
Eligibility Access
Billing Report
0001
SUBCLIENT_57397
Update
1-1 of 1 Records
1