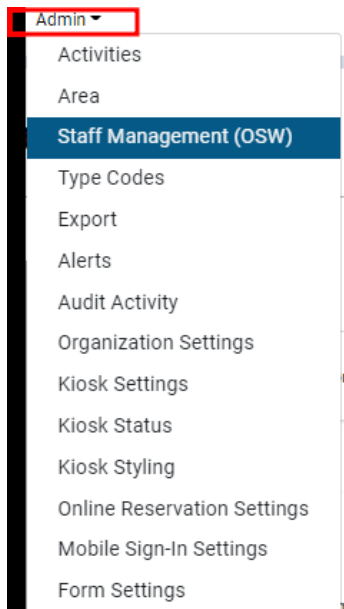


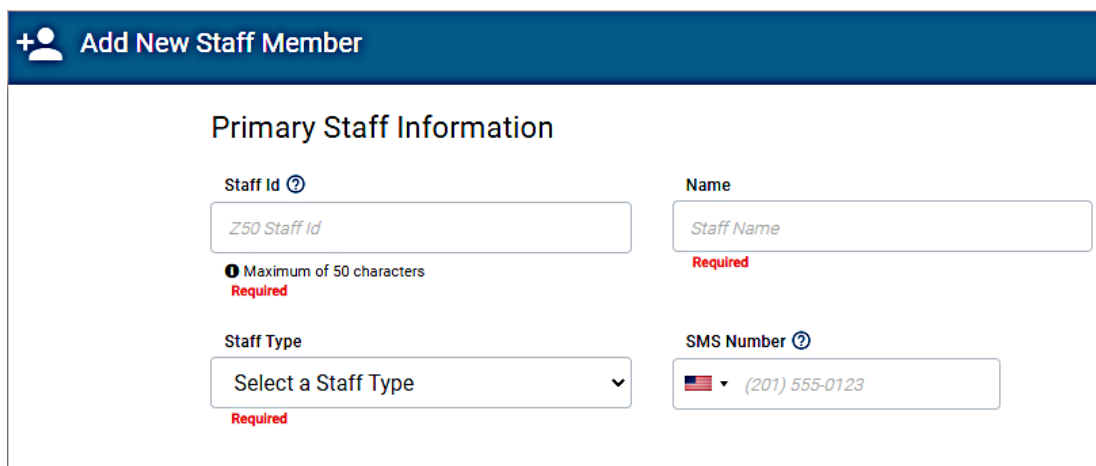
# Adding Users Guide

## Adding a New User – Admin Only – Non-Enterprise

- Under the Admin dropdown menu, select Staff Management



- Select “add User” on the right side of the page.
- Enter in the required fields.



A screenshot of a web form titled "Add New Staff Member". The form is set against a dark blue header with a white plus icon and the text "Add New Staff Member". Below the header, the section "Primary Staff Information" is displayed. It contains four input fields arranged in a 2x2 grid. The top-left field is labeled "Staff Id" with a help icon and contains the text "Z50 Staff Id". Below it is a red "Required" label and a note "Maximum of 50 characters". The top-right field is labeled "Name" and contains the text "Staff Name". Below it is a red "Required" label. The bottom-left field is a dropdown menu labeled "Staff Type" with the text "Select a Staff Type" and a downward arrow. Below it is a red "Required" label. The bottom-right field is labeled "SMS Number" with a help icon and contains a US flag icon, a dropdown arrow, and the text "(201) 555-0123".

- If a user needs to be able to log into PatientTrak, select the “This staff member requires a PatientTrak Account to sign-into PatientTrak”.
- Enter in the user’s valid email address and confirm the email address.

### PatientTrak Account

This staff member requires a PatientTrak Account to sign-into PatientTrak

Email

Available.

Email Confirmation

- Scroll down to Organization Memberships.
- Select the user’s roles and permissions, then click on Save.

### Organization Memberships

This staff member will be associated to a PatientTrak Account with the email provided above. In addition to appearing in staff drop-downs, they will be given access to sign-in and use the PatientTrak software for each organization as configured below.

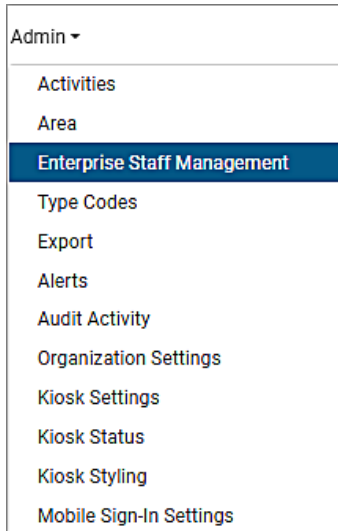
Organization	User Role	Additional Permissions
<input checked="" type="checkbox"/> Z50 - Z50	User	<input type="checkbox"/> Activity Delete <input type="checkbox"/> Activity Time Update <input type="checkbox"/> Bulk Discharge <input checked="" type="checkbox"/> Reports <input type="checkbox"/> Free Form Texting

The user will receive an email with a verification link and a temporary password. **The user will need to click on the verification link**, which will then verify their account and then send them to the log in page. The user will now enter in their Org ID, username (email address) and the temporary password.

## Adding New User - Enterprise

If your organization is an Enterprise Organization (multiple locations) for PatientTrak and you need to add a user, follow these steps.

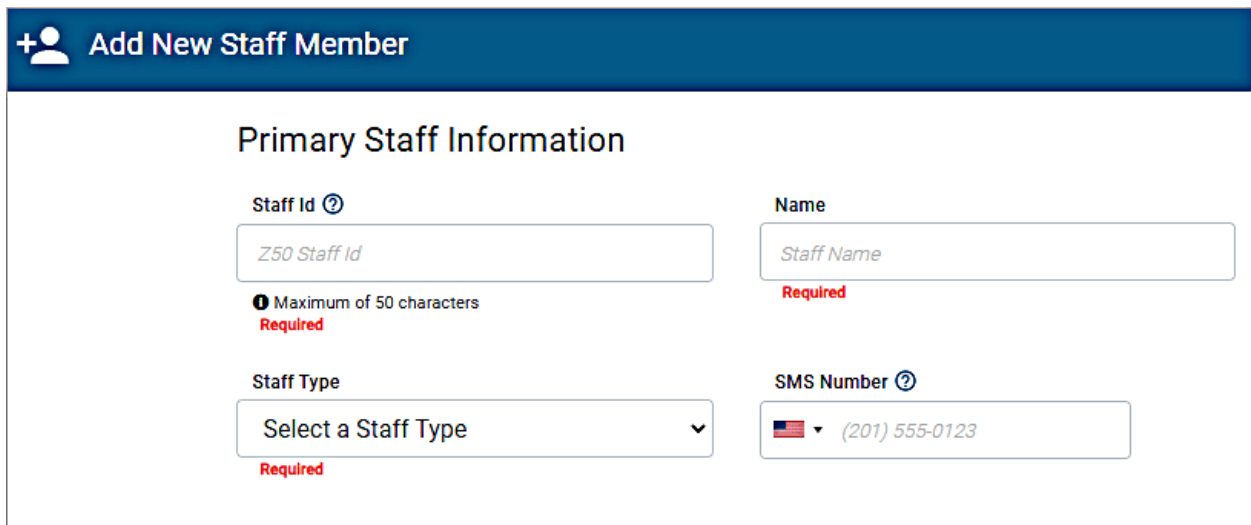
- Under the Admin dropdown menu, select Enterprise Management



Admin ▾

- Activities
- Area
- Enterprise Staff Management**
- Type Codes
- Export
- Alerts
- Audit Activity
- Organization Settings
- Kiosk Settings
- Kiosk Status
- Kiosk Styling
- Mobile Sign-In Settings

- Select “add User” on the right side of the page.
- Enter in the required fields.



**+ Add New Staff Member**

### Primary Staff Information

<b>Staff Id</b> ⓘ	<b>Name</b>
<input type="text" value="Z50 Staff Id"/>	<input type="text" value="Staff Name"/>
<b>Required</b> <small>Maximum of 50 characters</small>	<b>Required</b>
<b>Staff Type</b>	<b>SMS Number</b> ⓘ
<input type="text" value="Select a Staff Type"/>	<input type="text" value="(201) 555-0123"/>
<b>Required</b>	

- If a user needs to be able to log into PatientTrak, select the “This staff member requires a PatientTrak Account to sign-into PatientTrak”.
- Enter in the user’s valid email address and confirm the email address.

## PatientTrak Account

This staff member requires a PatientTrak Account to sign-into PatientTrak

**Email**

user@email.com

● Available.

**Email Confirmation**

user@email.com

- Scroll down to Organization Memberships.
- Select which locations the user will have access to.
- Select the user’s roles and permissions, then click on Save.

### Organization Memberships

This staff member will be associated to a PatientTrak Account with the email provided above. In addition to appearing in staff drop-downs, they will be given access to sign-in and use the PatientTrak software for each organization as configured below.

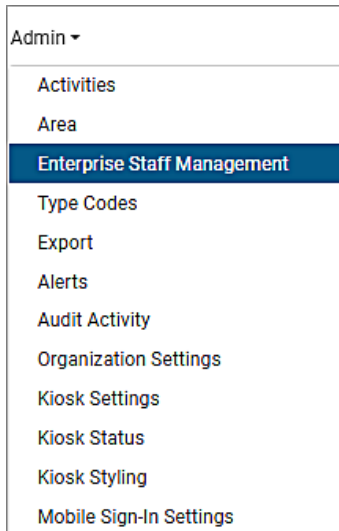
Organization	User Role	Additional Permissions
<input checked="" type="checkbox"/> ZZZ - PT Test Org 2	User <span style="float: right;">▼</span>	Select additional permissions <span style="float: right;">▼</span>
<input type="checkbox"/> PTT - PTT TEST	Inactive <span style="float: right;">▼</span>	<span style="border-bottom: 1px dashed #ccc; display: inline-block; width: 100%;"></span>

The user will receive an email with a verification link and a temporary password. **The user will need to click on the verification link**, which will then verify their account and then send them to the log in page. The user will now enter in their Org ID, username (email address) and the temporary password.

## Adding Existing User to New Organization – Enterprise.

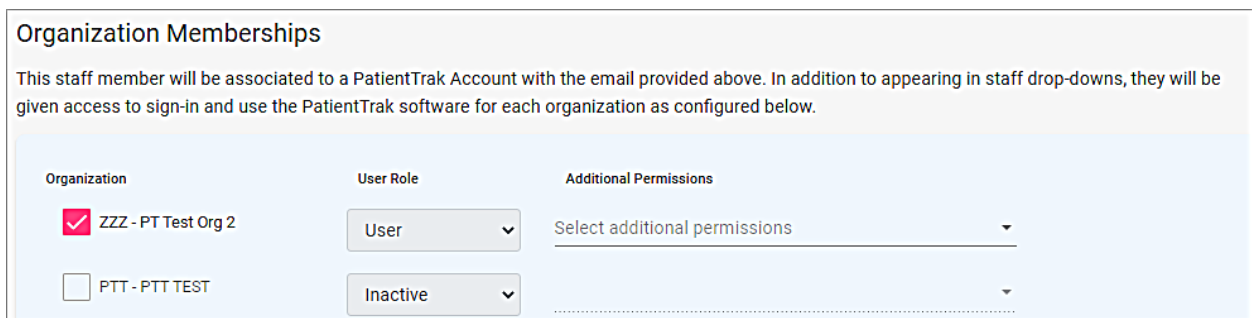
If a user already has access to a location for your Enterprise, but needs access to other locations, follow these steps.

- Under the Admin dropdown menu, select Enterprise Management



Find the desired user and click on Edit.

Scroll down to Organization Memberships and select which Organization and Additional Permissions the user should have and click on Save.



**Organization Memberships**

This staff member will be associated to a PatientTrak Account with the email provided above. In addition to appearing in staff drop-downs, they will be given access to sign-in and use the PatientTrak software for each organization as configured below.

Organization	User Role	Additional Permissions
<input checked="" type="checkbox"/> ZZZ - PT Test Org 2	User	Select additional permissions
<input type="checkbox"/> PTT - PTT TEST	Inactive	

The user will now have access to the desired Organizations using the same username/password.