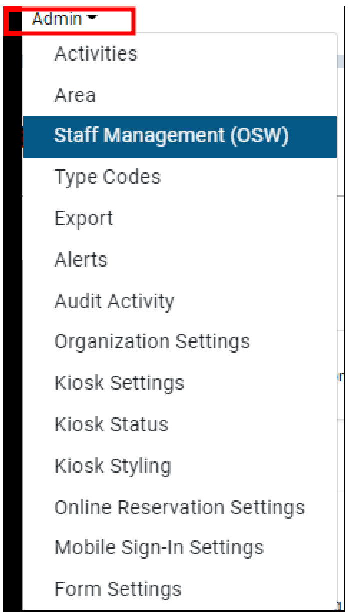
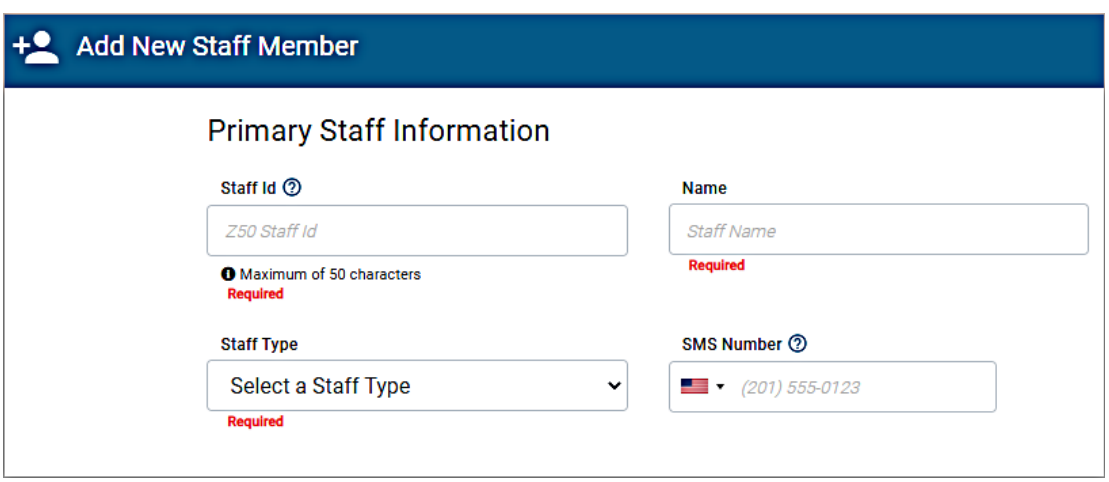
Adding Users Guide

Adding a New User – Admin Only – Non-Enterprise

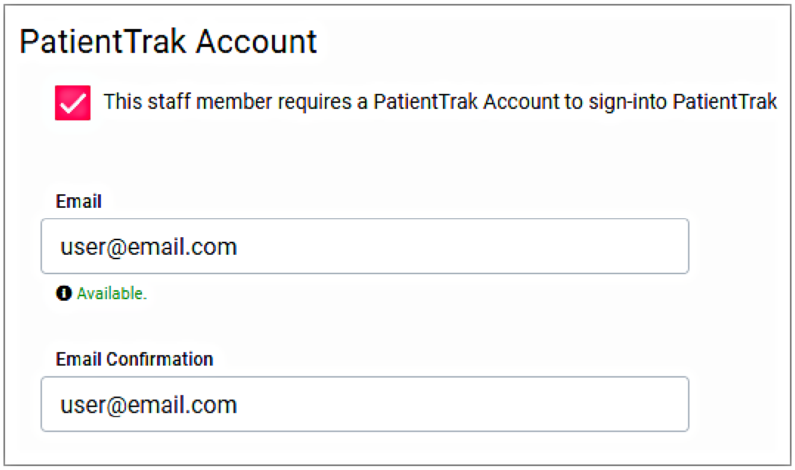
- Under the Admin dropdown menu, select Staff Management



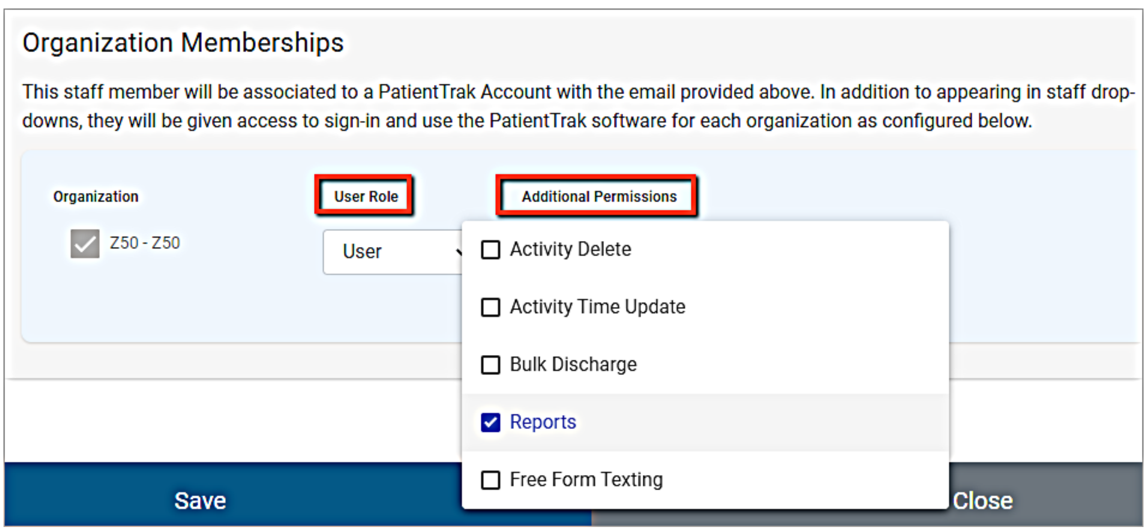
- Select “add User” on the right side of the page.
- Enter in the required fields.



- 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.



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

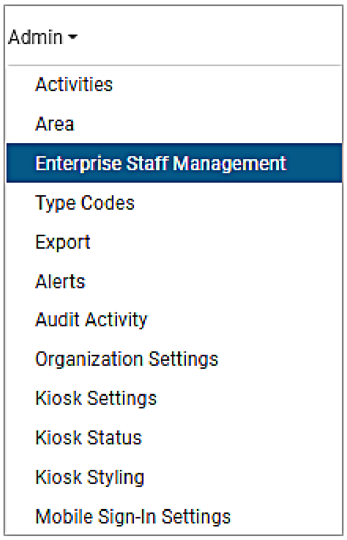


The user will receive an email with a verification link and a temporary password. **The user will need to click on the verification link**, which will then verify their account and then send them to the log in page. The user will now enter in their Org ID, username (email address) and the temporary password.

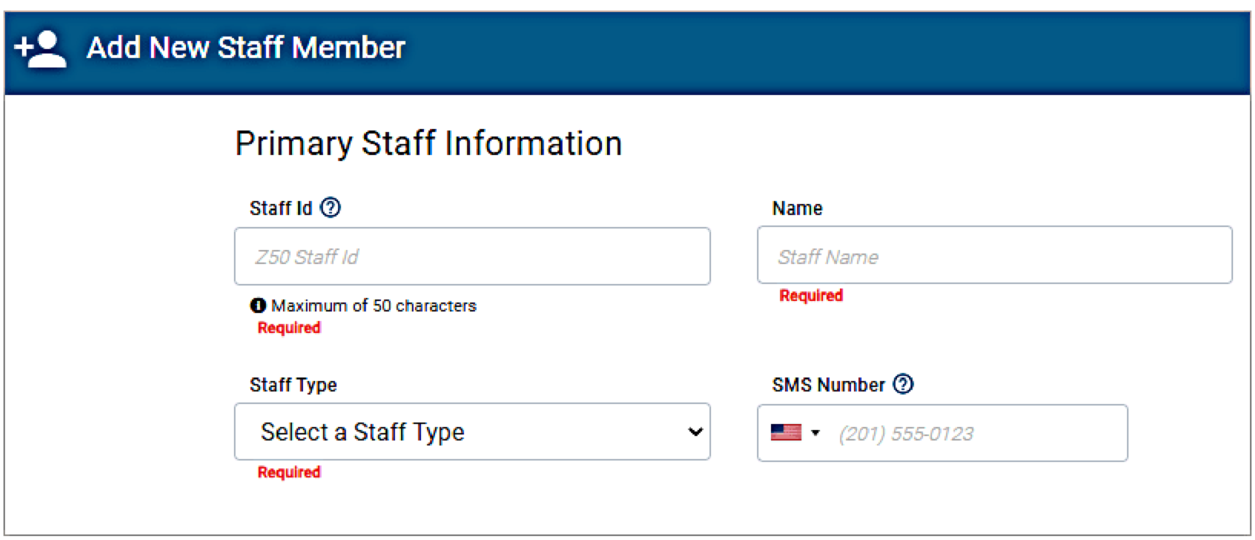
Adding New User - Enterprise

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

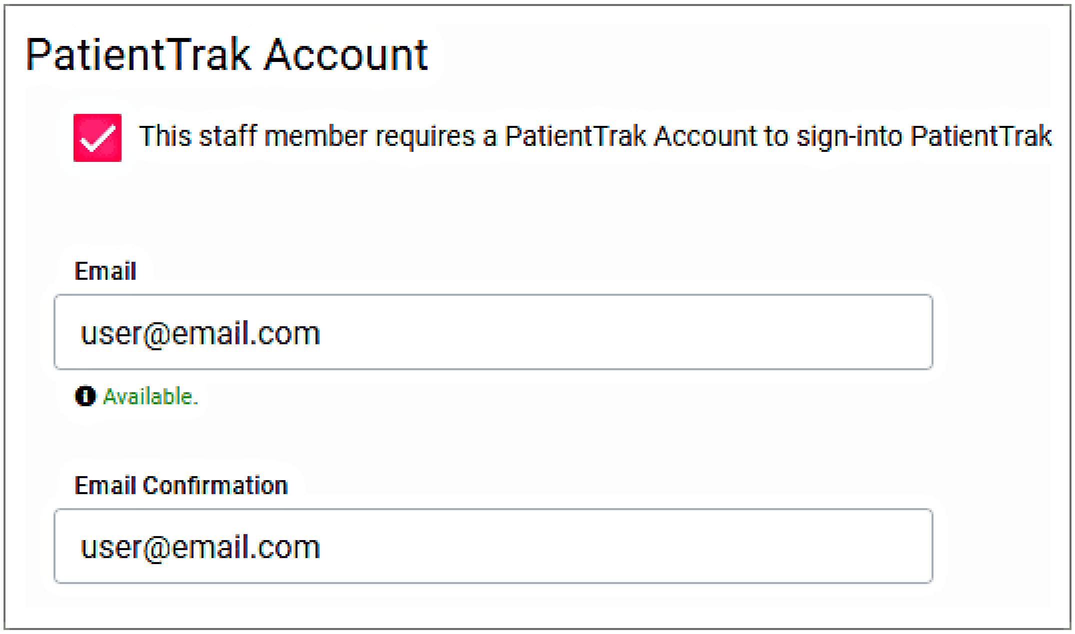
- Under the Admin dropdown menu, select Enterprise Management



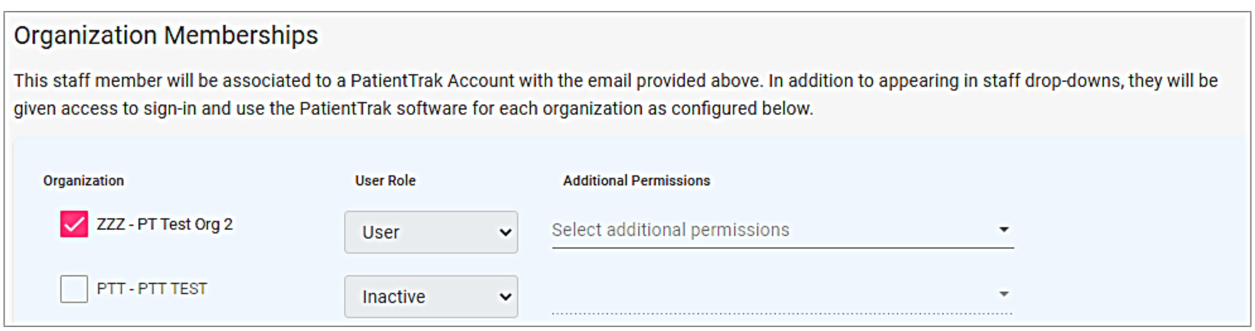
- Select “add User” on the right side of the page.
- Enter in the required fields.



- 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.



- 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.

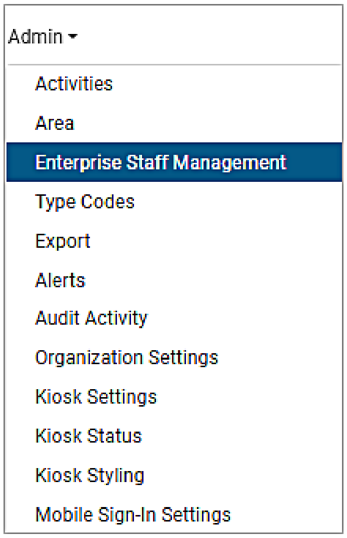


The user will receive an email with a verification link and a temporary password. **The user will need to click on the verification link**, which will then verify their account and then send them to the log in page. The user will now enter in their Org ID, username (email address) and the temporary password.

Adding Existing User to New Organization – Enterprise.

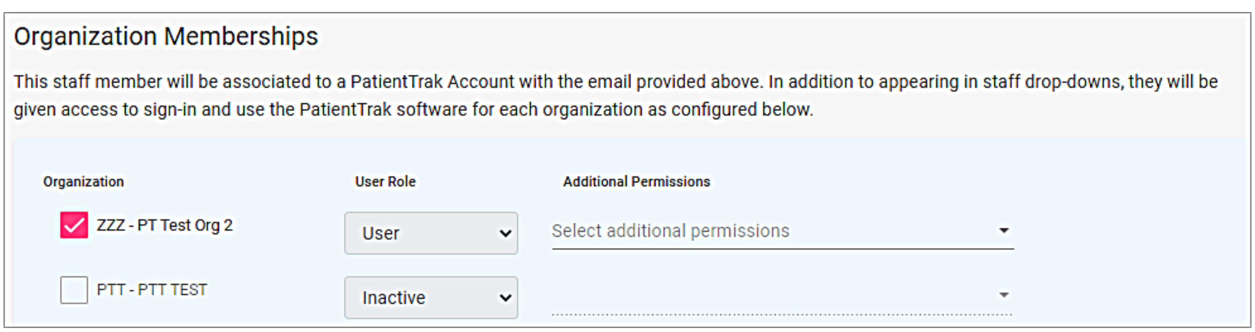
If a user already has access to a location for your Enterprise, but needs access to other locations, follow these steps.

- 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.



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