

ADD A NEW USER

Before a user can begin using *ServicePoint*, the user must first be added to the database and associated with a provider/organization by an administrative user.

1. Click the *Admin* tab on the navigation toolbar. The screen will refresh and display the **Administration Dashboard** screen. (See Figure 1-1)

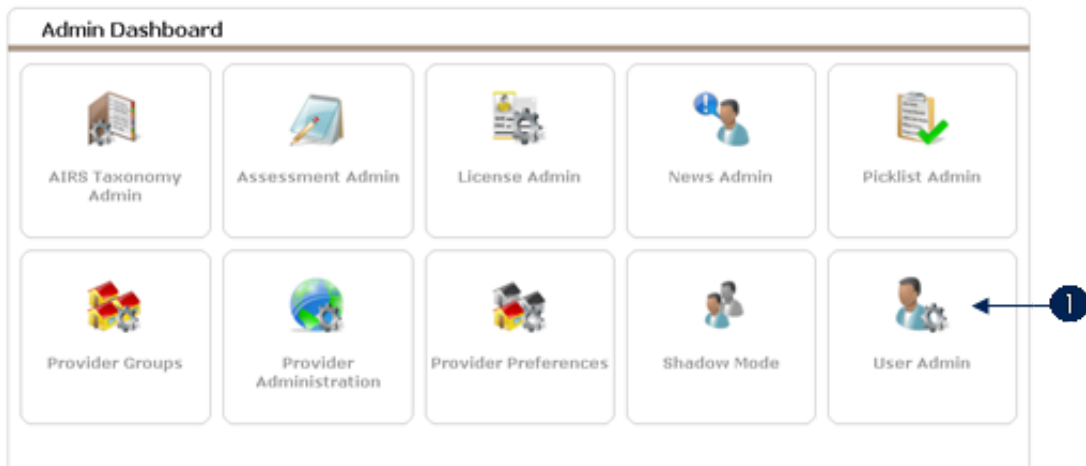


Figure 1-1

Note: *The options that display on the Admin Dashboard screen depend on the ServicePoint user access level and the ServicePoint modules installed in the application.*

2. Click **User Admin**. **(1)** The **User Search** screen will appear. (See Figure 1-2)



Figure 1-2

3. Click **Add New User**. **(1)** The **User Information** screen will display. (See Figure 1-3)

Figure 1-3

Note: *The Add New User button will not display if the provider has allotted all their user licenses. For information on purchasing more licenses, please view the Licensing section of this document.*

4. Click **Choose Provider (1)** if the assigned provide requires a change (the provider will initially default to the current user's provider.) A provider search window will appear. (See Figure 1-4)

Figure 1-4

5. Enter key words in **Search (1)** and click **Search. (2)** If the search result list is too long, click **Show Advanced Options** to narrow the search. **(3)** (See Figure 1-5)

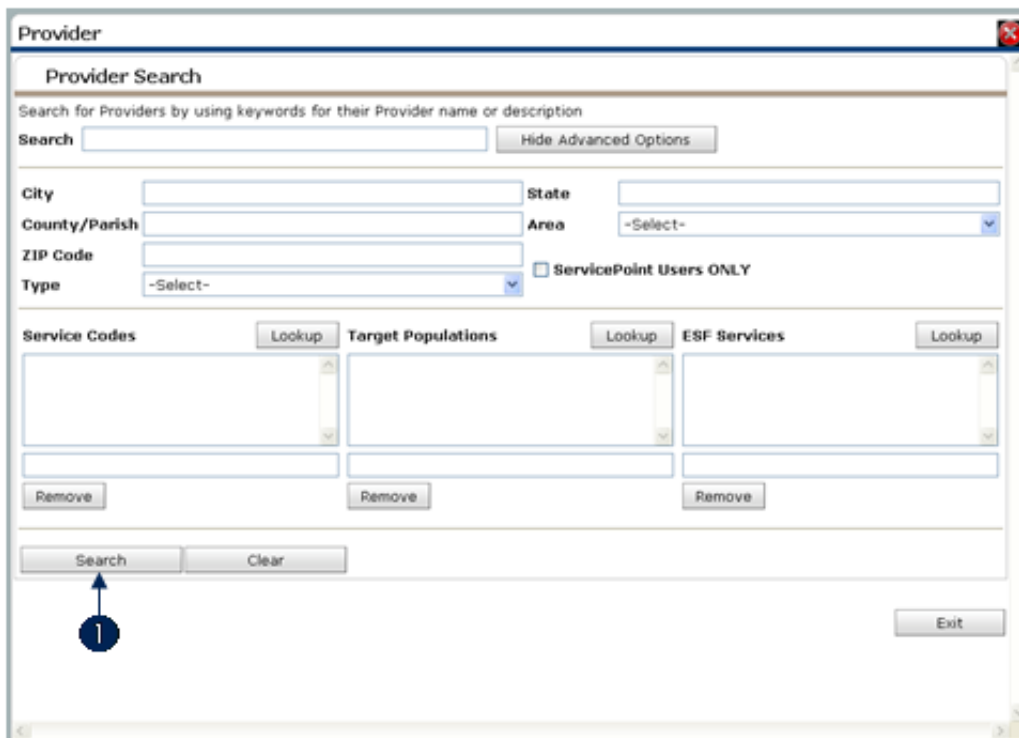


Figure 1-5

- On the **Advance Search** screen enter additional criteria to narrow the provider search. Click **Search** to generate **Provider Search Results**. **(1)** (See Figure 1-6)

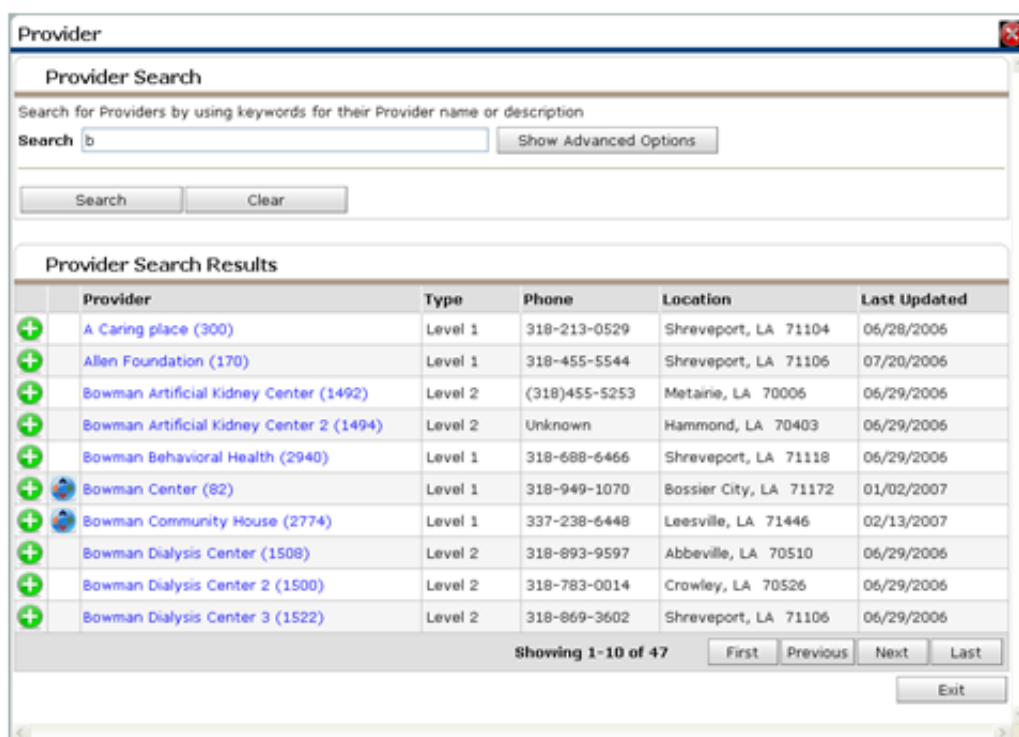


Figure 1-6


- Click the **Green Plus** icon  adjacent to the name of the provider to be assigned to the user. The search window will close and the selected provider will be listed next to **Provider** on the **Add New User** screen. (See Figure 1-7)

Figure 1-7

8. Complete the following fields:

- a: **Name** – The user's name.
- b: **Title** – The user's job title.
- c: **E-mail** – The user's email address.
- d: **Telephone** – The user's telephone number.
- e: **User Name** – The user's sign on.
- f: **Password** – The user's password. Click **Generate Password (1)** to use a system generated password.
- g: **Role** – The user's role, which defines the available *ServicePoint* functionality.
- h: **User Expiration** – The date the user record will no longer be active.
- i: **Time Zone** – The user's time zone.

Figure 1-8

9. Click **Save (1)** to retain the user information. Click **Exit (2)** to exit without saving the user information. After the new user record is saved, additional user related data areas appear at the bottom of the screen. (See Figure 1-9)

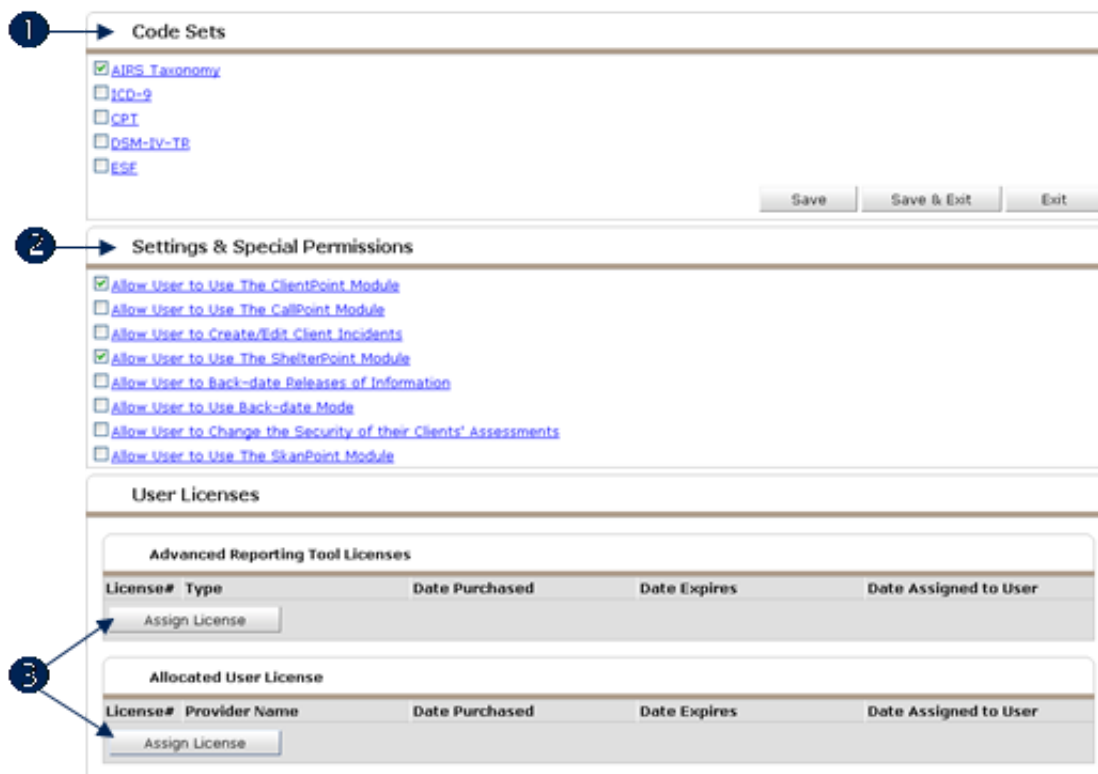


Figure 1-9

10. In **Code Sets (1)** select the code sets the user will access to while assigning services in *ServicePoint*. The AIRS Taxonomy code set is in use by default within *ServicePoint*.
11. In **Settings and Special Permissions (2)** check the check boxes that correspond to the functionality the user needs to perform their duties.
12. In **User Licenses** click **Assign License (3)** to assign an ART License or a *ServicePoint* license to the user.
13. When assigning a *ServicePoint* license the following screen will display. (See Figure 1-10)

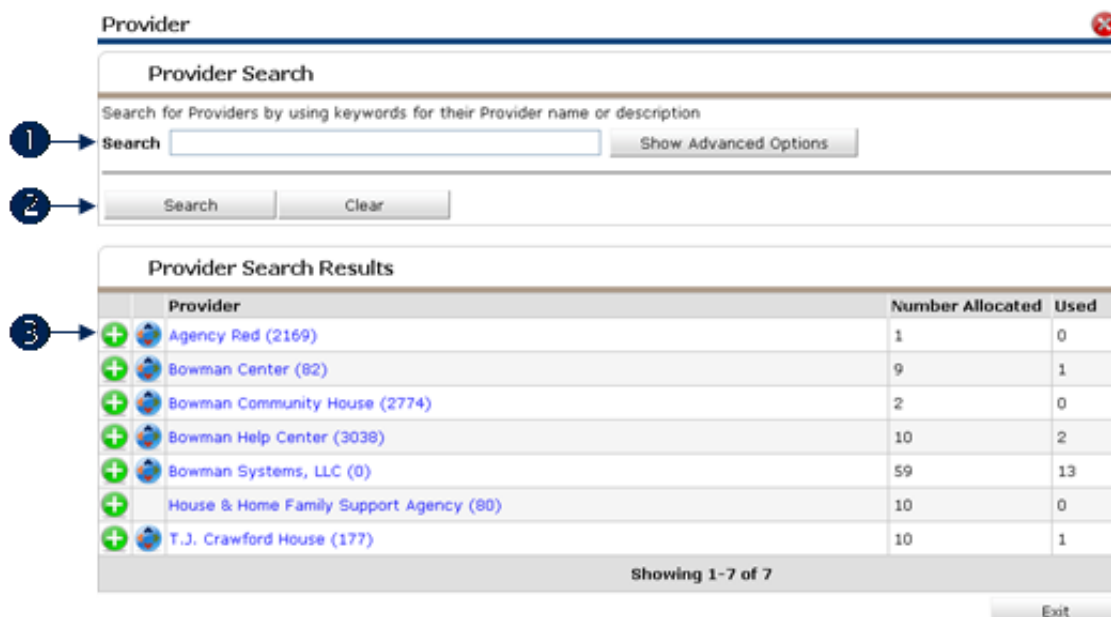


Figure 1-10

14. Use the **Search** field **(1)** to enter key words and click **Search** **(2)** to narrow the **Provider Search Results** display. Click the **Green Plus** icon **(3)** to assign a license to the user. **(3)**
15. When assigning an ART license the following screen will display. (See Figure 1-11)

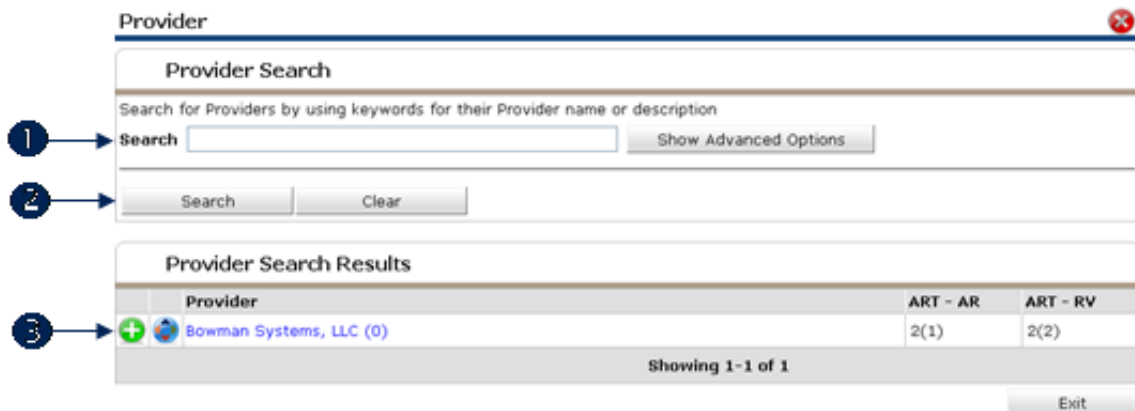


Figure 1-11

16. Use the **Search** field **(1)** to enter key words and click **Search** **(2)** to narrow the **Provider Search Results** display. Click the **Green Plus** icon **(3)** to display the available ART licenses at the selected provider. **(3)** (See Figure 1-12)

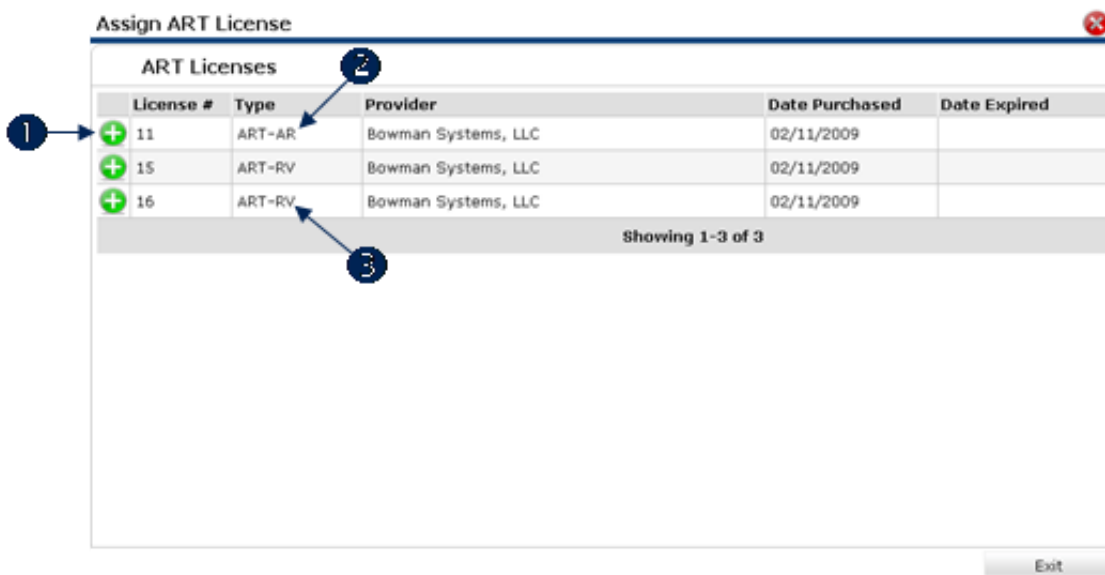


Figure 1-12

17. Click the **Green Plus** icon **(1)** next to the ART license to be assigned to the user. **(1)** ART AR **(2)** licenses are Adhoc Reporting licenses. ART RV **(3)** licenses are Report Viewer licenses. (See Figure 1-13)

| User Licenses | | | | |
|---|--------------------|------------------------------|--------------|----------------------------|
| Advanced Reporting Tool Licenses | | | | |
| License# | Type | Date Purchased | Date Expires | Date Assigned to User |
| 15 | ART Report Viewing | Wednesday, February 11, 2009 | | Friday, September 11, 2009 |
| <input type="button" value="Assign License"/> | | | | |
| Allocated User License | | | | |
| License# | Provider Name | Date Purchased | Date Expires | Date Assigned to User |
| 156 | Bowman Center | Tuesday, May 12, 2009 | | Friday, September 11, 2009 |

Figure 1-13

18. Licenses assigned to the user are now displayed