**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](image1.png)

*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](image2.png)

3. Click *Add New User*. (1) The *User Information* screen will display. (See Figure 1-3)
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 provider requires a change (the provider will initially default to the current user’s provider.) A provider search window will appear. (See 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)
6. 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)
7. 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)

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 1-7]
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)

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.