

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)

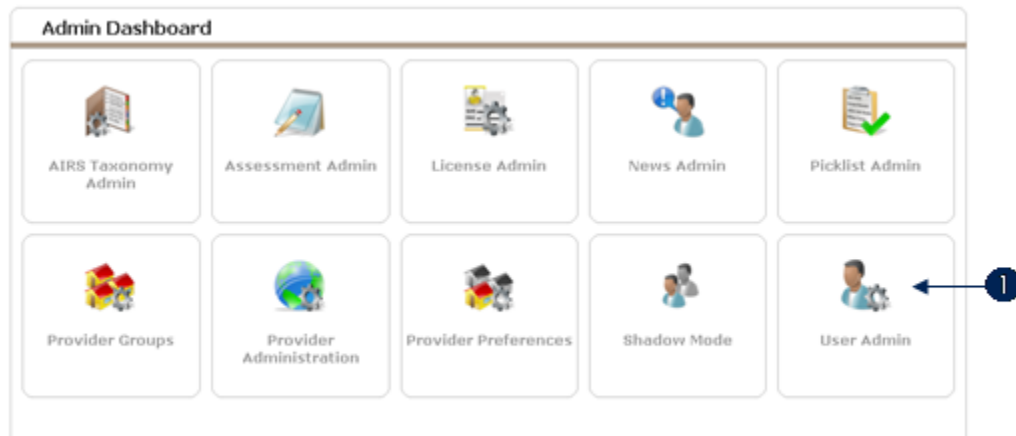


Figure 1-1

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)

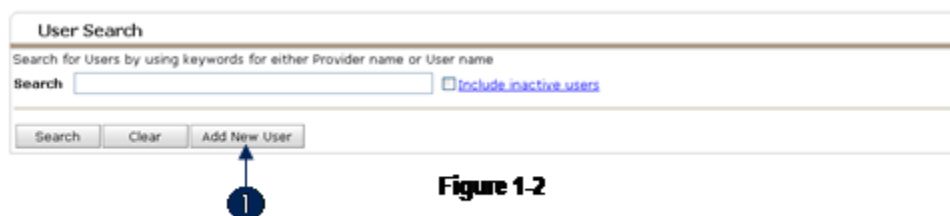


Figure 1-2

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)

Provider

Provider Search

Search for Providers by using keywords for their Provider name or description

Search

City State

County/Parish Area

ZIP Code

Type ServicePoint Users ONLY

Service Codes Target Populations ESF Services

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)

Provider

Provider Search

Search for Providers by using keywords for their Provider name or description


Search

Provider Search Results

| | Provider | Type | Phone | Location | Last Updated |
|--|--|---------|---------------|------------------------|--------------|
| | A Caring place (300) | Level 1 | 318-213-0529 | Shreveport, LA 71104 | 06/28/2006 |
| | Allen Foundation (170) | Level 1 | 318-455-5544 | Shreveport, LA 71106 | 07/20/2006 |
| | Bowman Artificial Kidney Center (1492) | Level 2 | (318)455-5253 | Metairie, LA 70006 | 06/29/2006 |
| | Bowman Artificial Kidney Center 2 (1494) | Level 2 | Unknown | Hammond, LA 70403 | 06/29/2006 |
| | Bowman Behavioral Health (2940) | Level 1 | 318-688-6466 | Shreveport, LA 71118 | 06/29/2006 |
| | Bowman Center (82) | Level 1 | 318-949-1070 | Bossier City, LA 71172 | 01/02/2007 |
| | Bowman Community House (2774) | Level 1 | 337-238-6448 | Leesville, LA 71446 | 02/13/2007 |
| | Bowman Dialysis Center (1508) | Level 2 | 318-893-9597 | Abbeville, LA 70510 | 06/29/2006 |
| | Bowman Dialysis Center 2 (1500) | Level 2 | 318-783-0014 | Crowley, LA 70526 | 06/29/2006 |
| | Bowman Dialysis Center 3 (1522) | Level 2 | 318-869-3602 | Shreveport, LA 71106 | 06/29/2006 |

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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)

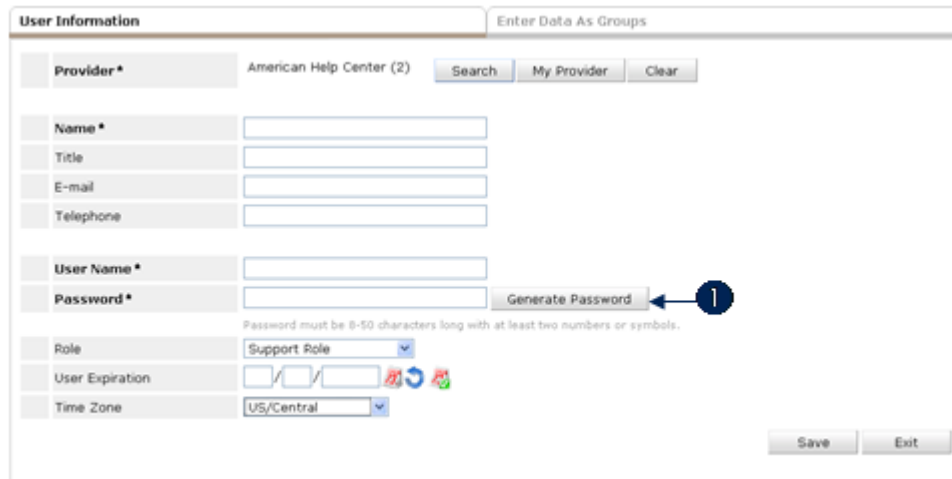


Figure 1-7

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.

User Information Enter Data As Groups

Provider * [Bowman Center \(B2\)](#)

Name *

Title

E-mail

Telephone

User Name *

Password *

Password must be 6-50 characters long with at least 2 numbers.

Role

User Expiration / /

Figure 1-8

- 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)

1 → **Code Sets**

[AIRS Taxonomy](#)

[ICD-9](#)

[CPT](#)

[DSM-IV-TR](#)

[ESE](#)

2 → **Settings & Special Permissions**

[Allow User to Use The ClientPoint Module](#)

[Allow User to Use The CallPoint Module](#)

[Allow User to Create/Edit Client Incidents](#)

[Allow User to Use The ShelterPoint Module](#)

[Allow User to Back-date Releases of Information](#)

[Allow User to Use Back-date Mode](#)

[Allow User to Change the Security of their Clients' Assessments](#)

[Allow User to Use The SkanPoint Module](#)

- 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*.
- In **Settings and Special Permissions (2)** check the check boxes that correspond to the functionality the user needs to perform their duties.