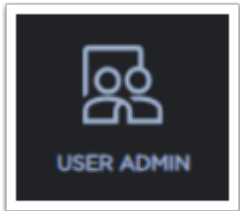


How to Create a New User

In order to create a new User, the Admin or Delegate logs in and then navigates to the 'User Admin' icon in the left hand navigation.



Once on this page, they can start the 'Create User' workflow by specifying the required fields.

A screenshot of the 'User Admin' interface. At the top, there's a green header with 'User Admin' in white. Below it, two buttons are visible: 'Create User' (highlighted with a red box) and 'Manage User'. The main content area is titled 'Create New User'. It contains several input fields: 'User Name:', 'First Name:', 'Last Name:', 'Company Name:', 'Email Address:', and 'Confirm Email Address:'. Each field has a red border and a red asterisk with the text '* This field is required' below it. At the bottom, there are two buttons: 'RESET' (black) and 'CREATE USER' (green).

Once they start typing in the User Name field, the requirements will be shown. If the User Name does not meet these requirements, then field will be considered Invalid and user will not be able to complete the workflow.

User Name:

* Should begin with 2 alpha characters and must be between 5-25 characters long and can contain only the following special characters !-.\$@_

💡 Aside from the User Name, the Email Address field requires the @ symbol and the period with trailing characters (.com, .gov., etc.)

Additional examples that wouldn't meet required content.

Missing the @

Email Address:

* Invalid input

Missing the period with trailing characters

Email Address:

* Invalid input

Once all of the required information has been filled in the 'Create User' button will become enabled.

User Admin

[Create User](#) [Manage User](#)

Create New User

User Name:
Testing789

User Profile Information

First Name:
Test

Last Name:
Smith

Company Name:
Delta Dental

Email Address:
[Redacted]

Confirm Email Address:
[Redacted]

RESET **CREATE USER**

i Upon clicking 'Create User' there are two things that happen:

1. There will be a confirmation popup with the reminder that authorizations will still need to be added to this new user and that they are responsible for letting the new user know their User Name.
2. A welcome email is generated for the new user letting them know that an account has been created for them and that they need to obtain the User Name from whoever created them.

User Created X

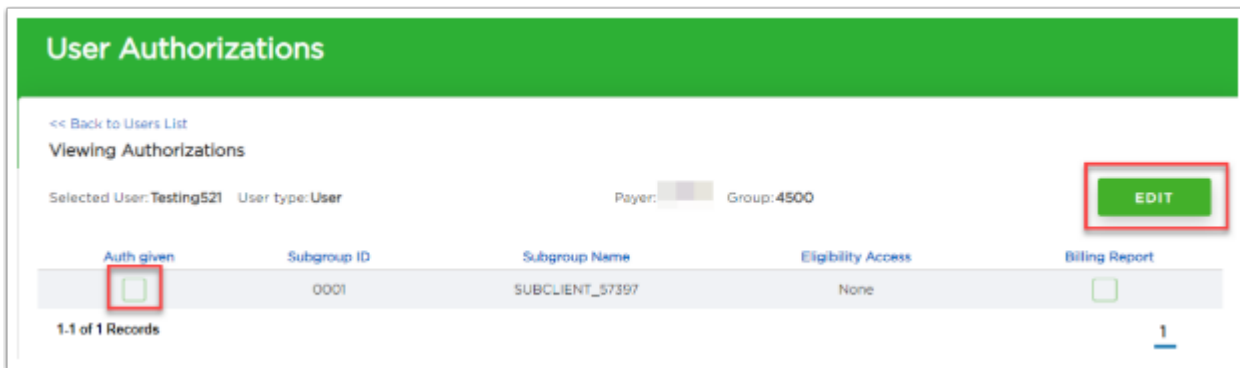
User has been created. They will receive a welcome email indicating that an account has been created for them. Please proceed with adding authorizations to them and then let them know what their User Name is. Thank you.

CREATE ANOTHER USER **MANAGE AUTHORIZATIONS**

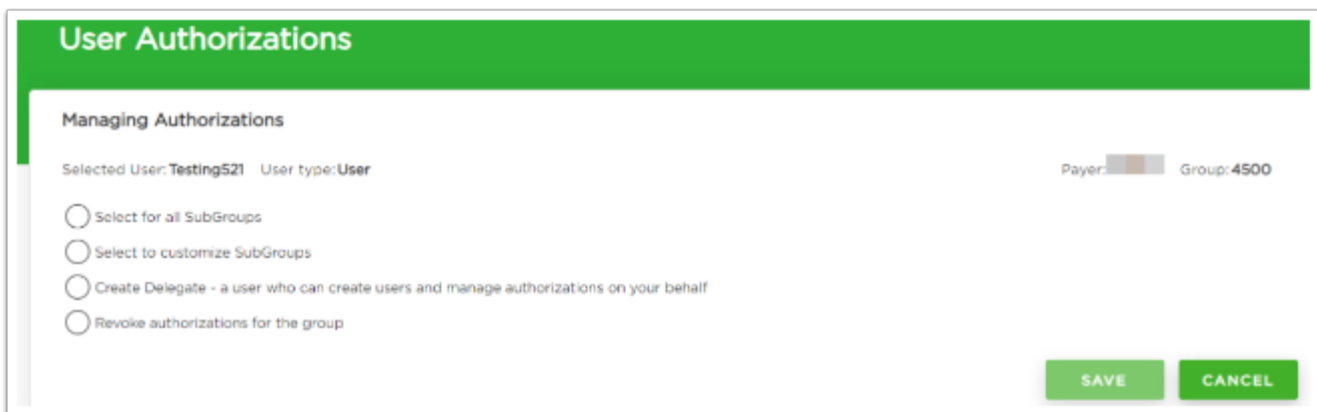
💡 From this popup screen, a user could keep adding users but it is recommended that they proceed with 'Manage Authorizations' so that the new user will have what they need to start working within the application.

After clicking 'Manage Authorizations' you will be able to see what authorizations the user could have. In this instance they only have the ability to have access to one subgroup and since they are newly created, they do not currently have any authorizations as indicated by the checkbox on the left.

In order to add authorizations, the user should click 'Edit':



After clicking 'Edit' the user can determine if they want to assign authorizations for 'All Subgroups', 'Customize Subgroups' or turn them into a Delegate. In this instance there is only one Subgroup so either of the first two options will work.



After selecting the radio button for 'Select to customize Subgroups' the user can then specify what authorizations to give the user. These options will display based on the Admin's own access – a User will never have the ability to have more authorizations than their Admin.

User Authorizations

Managing Authorizations

Selected User: **Testing521** User type: **User** Payer: Group: **4500**

Select for all SubGroups
 Select to customize SubGroups
 Create Delegate - a user who can create users and manage authorizations on your behalf
 Revoke authorizations for the group

<input type="checkbox"/>	Subgroup ID	Subgroup Name	Eligibility Access	Billing Report
<input type="checkbox"/>	0001	SUBCLIENT_57397	None	<input type="checkbox"/>

1-1 of 1 Records

1

After making the selections, the 'Save' button becomes enabled.

User Authorizations

Managing Authorizations

Selected User: **Testing521** User type: **User** Payer: Group: **4500**

Select for all SubGroups
 Select to customize SubGroups
 Create Delegate - a user who can create users and manage authorizations on your behalf
 Revoke authorizations for the group

<input type="checkbox"/>	Subgroup ID	Subgroup Name	Eligibility Access	Billing Report
<input checked="" type="checkbox"/>	0001	SUBCLIENT_57397	Update	<input checked="" type="checkbox"/>

1-1 of 1 Records

1

The user will then be able to view the authorizations they just assigned.

User Authorizations

[<< Back to Users List](#)

Viewing Authorizations

Selected User: **Testing521** User type: **User**

Payer: Group: **4500**

[EDIT](#)

Auth given	Subgroup ID	Subgroup Name	Eligibility Access	Billing Report
<input checked="" type="checkbox"/>	0001	SUBCLIENT_57397	Update	<input checked="" type="checkbox"/>

1-1 of 1 Records

[1](#)