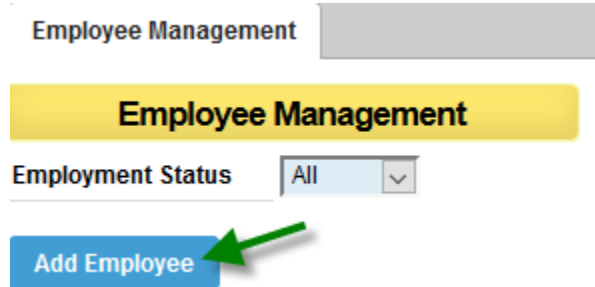

MedSoft Standard Operating Procedure - Account Creation

So you've hired a new employee? Congratulations! An Admin user at your clinic can create a new user account for the employee. Begin by navigating to the HR – Employee tab.

Step 1: Click the “Add Employee” button.



Step 2: Fill out all required information on the “Employee” tab, being sure to include the email address, which will become the employee’s user login name.

The screenshot shows the 'Employee' form window. The window has tabs for 'Employee', 'Employment', 'Documents', and 'Account'. The 'Employee' tab is active. The form contains several input fields: Last Name*, First Name*, Middle Initial, Title, Email, Payroll ID, Work Phone, Cell Phone, Home Phone, Fax Phone, Address 1*, Address 2, City*, State* (dropdown), and Zip*. A 'Notes' text area is at the bottom. A callout box with a green border and arrow points to the 'Email' field, containing the text: 'User Login name will be email address; please fill in this field.' At the bottom right of the form are 'Add Employee' and 'Cancel' buttons.

Step 3: Fill in the employee’s hire date on the “Employment” tab.

Step 4: Click on the “Account” tab. Click the “Create User” box to begin the employee account creation process. User Name will populate based on employee’s email address. Create a password for the employee (employee will be able to modify his/her password once logged in). Assign employee to appropriate User Group* and select appropriate access levels**. Multiple access levels can be selected by using CTRL + click.

The screenshot shows the 'Employee' window with the 'Account' tab active. A yellow 'Account' header is present. Below it, the 'Create User' checkbox is checked. The 'User Name' field is populated with 'test@email.com'. The 'Password' and 'Confirm Password' fields are empty. The 'Group' dropdown is set to 'Supervisor1 Group'. The 'Access Level' dropdown is open, showing options: Supervisor, Employee, Billing, Admin, FrontOffice, and Financial. Green arrows point to the 'Create User' checkbox, the 'User Name' field, the 'Password' field, the 'Group' dropdown, and the 'Access Level' dropdown.

*Assigning an employee to a user group automates two actions:

1. The supervisor of the user group will receive email notifications of the user’s time off requests.
2. The supervisor of the user group will be able to view the status of that employee’s tasks.

**See User Roles Guide for descriptions of access levels.

Step 4: Follow up with support@getcavu.com for any necessary additional actions, as outlined below.

If User is also a Calendar Resource:

1. Email support@getcavu.com to request the user be added to the Calendar. Please include in the email the new employee’s full name, as well as what name should show up on the calendar.

If User is also a Therapist:

1. Email support@getcavu.com with a completed copy of the Therapist Signature Form.
2. Please note:
 - a. Therapist’s signature will not be included on any documentation until this form has been submitted.
 - b. Signature must fit completely within the box provided.