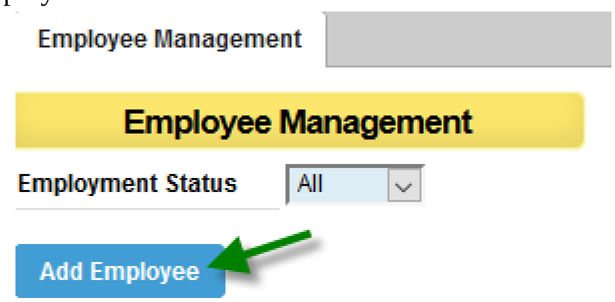
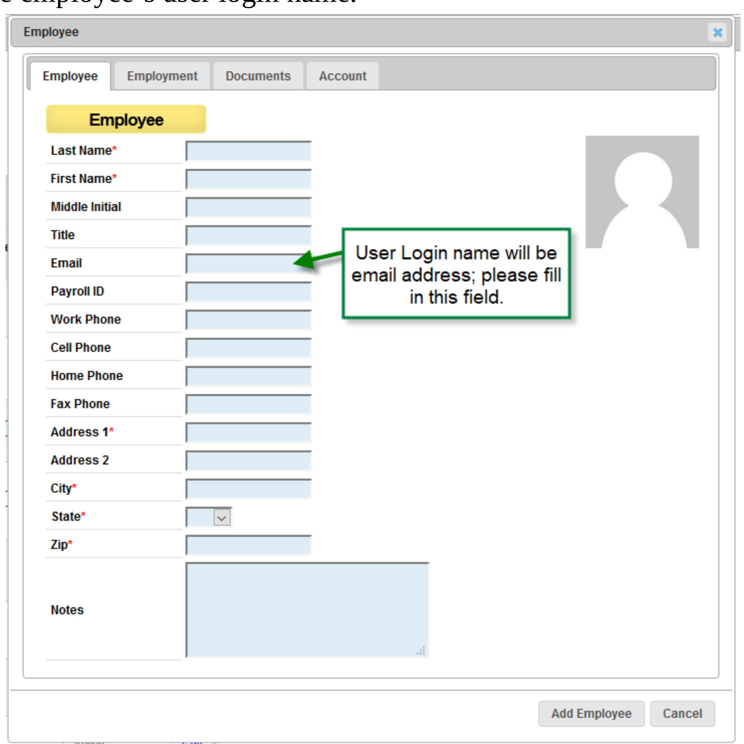
# MedSoft Standard Operating Procedure - Account Creation

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.

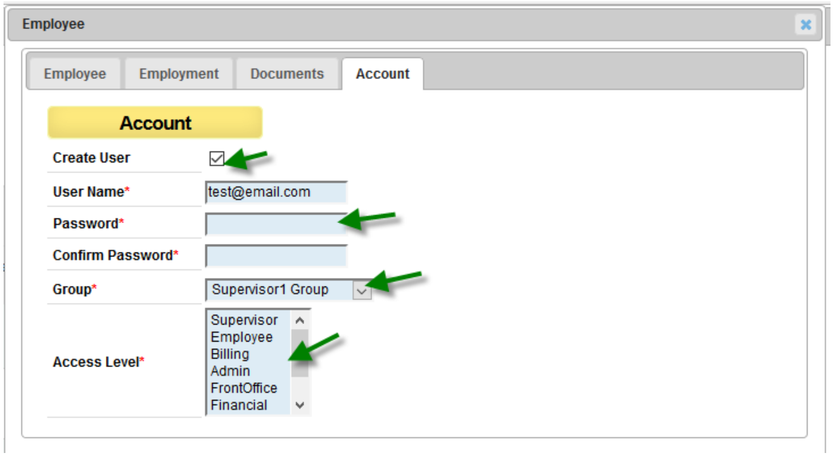



Step 2: Fill out all required information on the "Employee" tab, being sure to include the email address, which will become the employee's user login name.




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.




*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.

<u>If User is also a Calendar Resource:</u>

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.

<u>If User is also a Therapist:</u>

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.