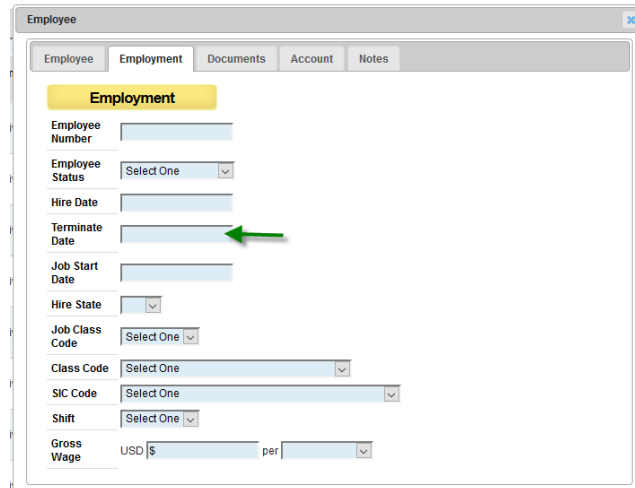


## MedSoft Standard Operating Procedure - Account Deactivation

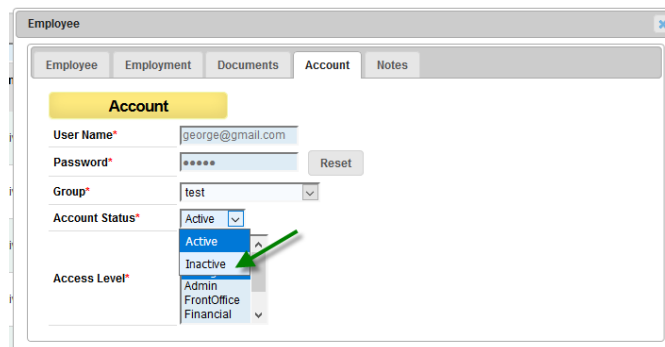
When MedSoft User Access Removal is necessary, time is often of the essence. Admin clinic users can immediately deactivate user access on the HR – Employee tab.

Step 1: Enter Employee Termination Date on the “Employment” tab.



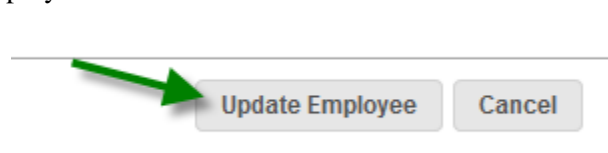
The screenshot shows the 'Employee' window with the 'Employment' tab selected. The 'Employment' section contains several fields: Employee Number, Employee Status (Select One), Hire Date, Terminate Date (highlighted with a green arrow), Job Start Date, Hire State, Job Class Code (Select One), Class Code (Select One), SIC Code (Select One), Shift (Select One), and Gross Wage (USD \$ per). A green arrow points to the 'Terminate Date' field.

Step 2: Update Account Status on “Account” tab to “Inactive.”



The screenshot shows the 'Employee' window with the 'Account' tab selected. The 'Account' section contains fields for User Name (george@gmail.com), Password (masked with asterisks), Group (test), Account Status (Active), and Access Level (Admin, FrontOffice, Financial). The 'Account Status' dropdown menu is open, and 'Inactive' is selected, highlighted with a green arrow.

Step 3: Click “Update Employee” at the bottom of the window.



The screenshot shows a close-up of the bottom of the 'Employee' window. There are two buttons: 'Update Employee' and 'Cancel'. A green arrow points to the 'Update Employee' button.

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

If User is also a Calendar Resource:

1. Email [support@getcavu.com](mailto:support@getcavu.com) to request a list of all upcoming appointments for the calendar resource.
2. CAVU Support will provide a report of appointments to be deleted/rescheduled.
3. The user's calendar must be cleared of all upcoming appointments before user deactivation can occur.

User access deactivation includes:

1. Role and Account deactivation in MedSoft
2. For Therapists, deactivation of Therapist role
3. For Calendar Resources, deactivation and removal of calendar
4. Removal from all MedSoft Email communications