Second Opinion Enterprise – New Users

Create a New User

Log into the Enterprise site with a User account that has Administrator privileges and click *Manage*. The Manage section of the portal is used to create and manage Sites, Users and Templates.

Add, Sites, Users, Templates

In the Sites section, navigate to the Site that the new User will be created in. In this example we are selecting Demo Site which is a sub site of Second Opinion. With the *User* icon selected, click the *Add New User* button, the new User form will launch.

New User Form

Start filling in the fields. For the most part, fields are self-explanatory. To help the user fill out the form, information tips appear next to the selected field. When finished, click the *Save Changes* button.

Account Types

Choose the type of User Account to be created. Below are a list of privledges that each Account type possesses.

	Service Admin	Super Site Admin	Site Admin	Site Specialist	Site User
Access To Manage Screen	x	x	x		
Create Sites	x				
Create Sub-Sites	x	x	x		
Create Templates	x	x	x		
Create Service Admins	x				
Create Super Site Admins	x	x			
Create Site Admins	x	x	x		
Create Site Users	x	x	x		
Access To Review Page	x	x		x	x
Modify Locked Content	x	x			

Site Specialists and Site Users will make up the majority of Users. The only difference between these two account types is that Referrals can be assigned to a Site Specialist but not to a Site User.

Account Security Rights

Account Security Rights are the individual privileges a User can possess.

Account Security Rights

- (●) Un-Restricted User ( ) Restricted User
- [ ] Coordinator
- [x] View
- [x] Create
- [x] Edit
- [ ] Customize
- [x] Lock
- [x] View Referral Content
- [ ] View/Edit QA Fields
- [x] Create Meetings
- [x] Create Shares
- [ ] Peer Review
- [ ] View Only Public

Choose *Un-Restricted* or *Restricted* User and then select the Users's individual Rights based on the role this User will perform in the Enterprise. Below are the definitions of each Right.

Un-Restricted User: Will allow the user to view/create any referral without being filtered by any specific specialty.

Restricted User: Will allow the user to be assigned specialties, and will allow the user to view only referrals which are assigned to at least one of his specialties.

Coordinator: Will allow the user to view the unassigned referral list in the dashboard.

View: Will allow the user to View both content which the user has created, and also content which the user has not created.

Create: Will allow the user to Create content.

Modify: Will allow a user to modify content.

Customize: Will allow a user to customize fields.

Lock: Will allow the user to Lock content.

View Referral Content: Will allow the user to view objects contained in referrals.

View/Edit QA Fields: Will allow the user to view/edit QA content.

Create Meetings: Will allow the user to create meetings.

Create Shares: Will allow the user to create shares.

Peer Review: Will not allow the user to view patient names.

View Only Public: Will only allow the user to view objects marked as public.

Un-Restricted Specialists and Users can see all Patients and Referrals contained in the Site(s) they have access to. Restricted Specialists and Users will only be able to see Patients that contain Referrals that are assigned the medical specialty the User is associated with.

All Users can create Patients and Referrals but only Specialists can create Consultations and as stated earlier, Referrals can only be assigned to a Specialist.

Site Coordinators are responsible for managing all of the interactions among the various Users. Coordinators are assigned the medical specialty(s) they are responsible for. Each time a new Referral is created, assigned to a Specialist or a Consultation created, the Coordinator for that specialty is notified. They also have access to unassigned Referrals so they can assign the Referral to the appropriate Specialist.

Email

The Email field is a mandatory field. It will be used to send Enterprise notifications to the User.

First Name
Joan

Last Name
Smith

Email Address
Joan@somedomain.com

User Name
JoanSmith

New Password
••••••

Confirm New Password
••••••

Phone Numbers

Entering phone numbers, though not mandatory, is highly recommended. Mobile phone number(s) defined in the User's account will also receive SMS text messages from the Enterprise, when notifications are sent out. If there is ever a question about a particular Patient or Referral, the profile information of the User who created the content is readily available. Multiple phone numbers can be defined for a User.

Phone numbers

Add number

Phone numbers

Type	Phone Number	Phone Carrier		
Mobile	310-122-5512	Sprint	Test SMS	Remove

Add another number

Addresses

Entering addresses, though not mandatory, is also highly recommended. If there is ever a question about a particular Patient or Referral, the profile information of the User who created the content is readily available. Multiple addresses can be defined for a User.

Addresses

Add address

Addresses

Address Type
Home

Country
United States of America

State
(Please choose one)

Line 1

Line 2

City

Zip/Postal Code

Select Associated Sites

Next choose the Site(s) the User has an affiliation with. The Site being used when creating the new User is automatically selected. Users can be associated with multiple Sites.

Sites associated with this account

Default Site:
Demo Site

Select Sites To Add/Remove

Second Opinion
Demo Site

Restricted Users

Restricted Site Users and Specialists must be assigned to the appropriate medical specialty(s) they are affiliated with. Restricted Users and Specialists can be associated with multiple specialties. Choosing the *All* field will make the User un-restricted.

Once the form is Saved, the new User is created. To create additional Users for this Site, select the *User* icon and click the *Add New User* button and repeat the process.

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For More Information or Technical Support Give Us a Call

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