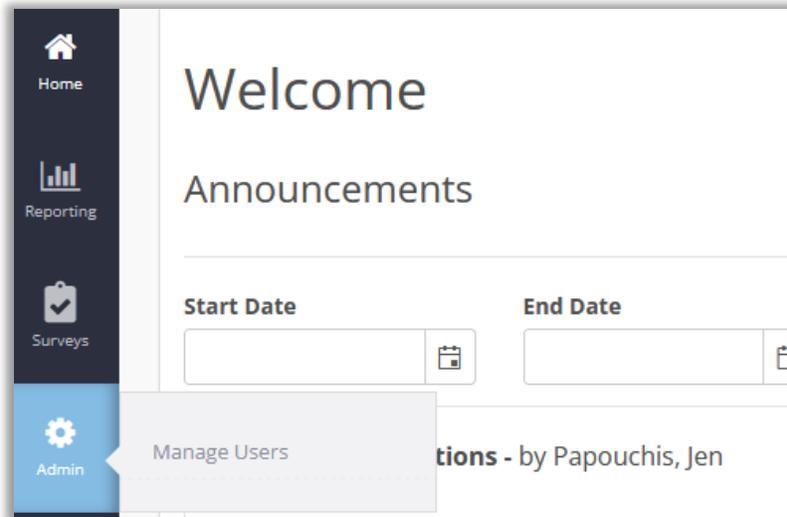


Manage Users

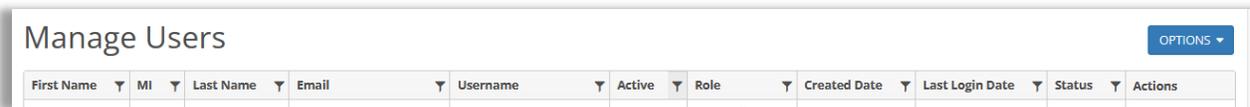
Super Users in PORTAL have the ability to add and edit users at their organization.

Add a User

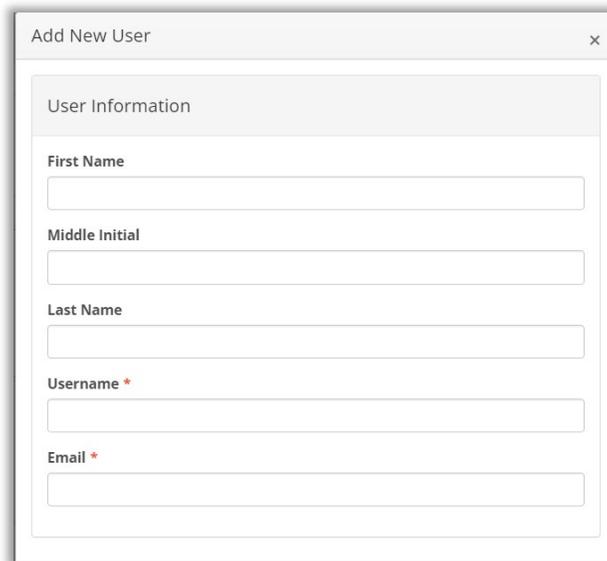
1. Navigate to the **Admin** icon
2. Select **Manage Users**



3. Click the **Options** button in the upper right

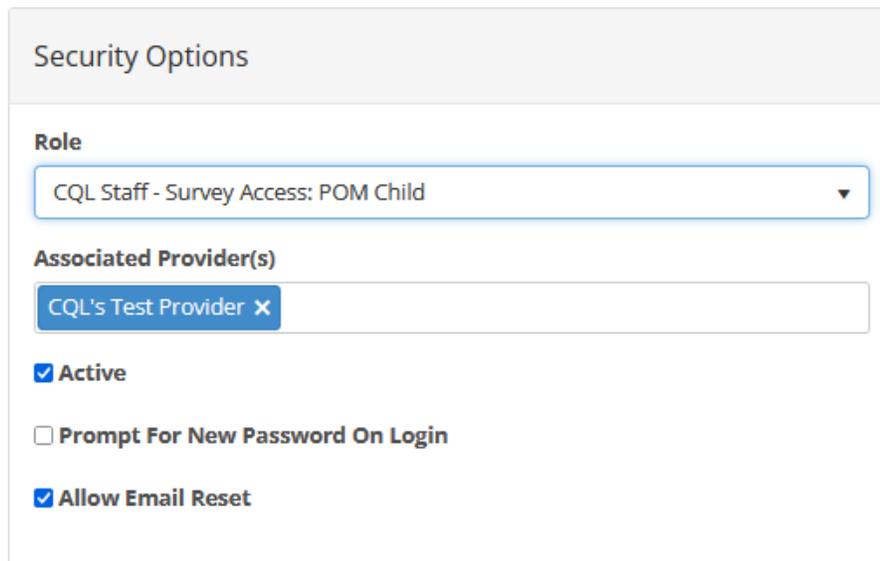


4. Select **Add New User**
5. Fill out all User Information fields. Red * are required fields that will need information inserted before a user can be added.



Note: Username should always be the same as email.

6. Complete the **Security Options**.
 - a. Be sure to select the appropriate Role. Role is the user's access level within PORTAL (Super User or Standard User) and dictates what surveys the person has access to (Basic Assurances®, POM Adult, POM Child).
 - b. Select your organization from the drop-down menu in the Associated Provider(s) option. The associated provider determines what organization the user is connected to.



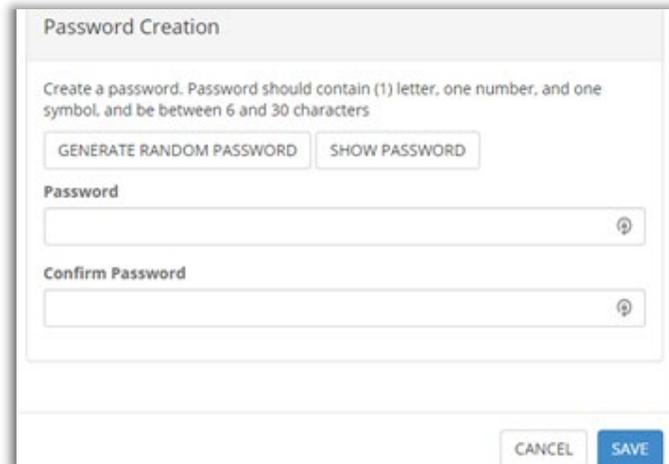
Note: Super Users can only create users with equal or lesser permissions and affiliations than themselves.

Option	Description
Active	Unchecking this box makes the user inactive and the user will no longer be able to login
Prompt for New Password on Login	The password assigned is temporary and the user will be prompted to change it upon initial log-in
Allow Email Reset	Allows a user to reset their password via a 'forgot your password' link, which will send an email to the user to reset

7. Complete the **Password Creation** section to enter a password for the user.

NOTE: Passwords must meet the following criteria:

- One letter
- One number
- One symbol
- Be between 6-30 characters



Option	Description
Generate Random Password	Creates a random password for the user.
Show Password	Displays the password that is entered in the Password field. NOTE: By default, the entered password will be hidden.

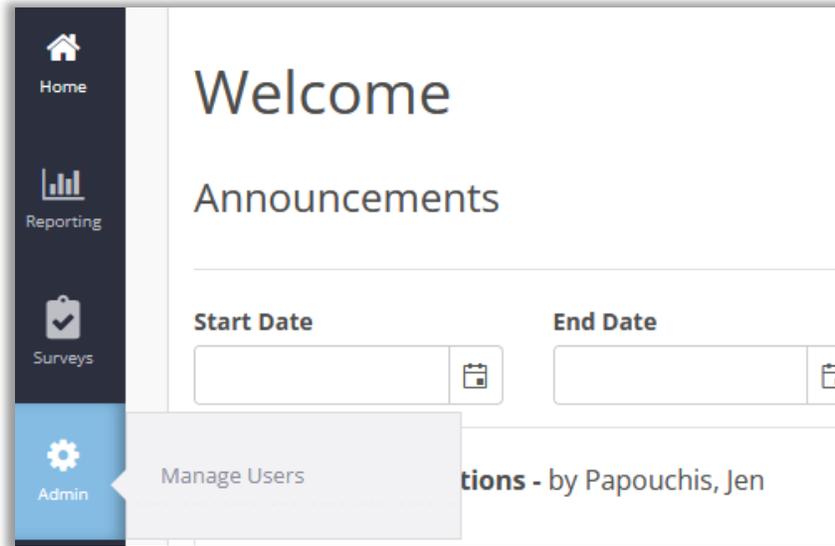
8. Click **SAVE** to add the user . A banner message will pop up to inform you that the user was successfully created.

9. Send the new user their username and password via email.

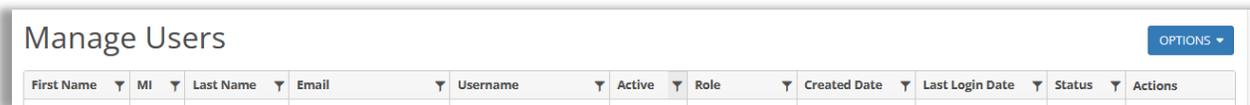
NOTE: The system will not automatically alert the person an account has been created; you will need to let the person know what their login information is. We also recommend instructing users to create a security question after logging in for the first time because it is needed if they ever forget their password in the future.

Edit a User

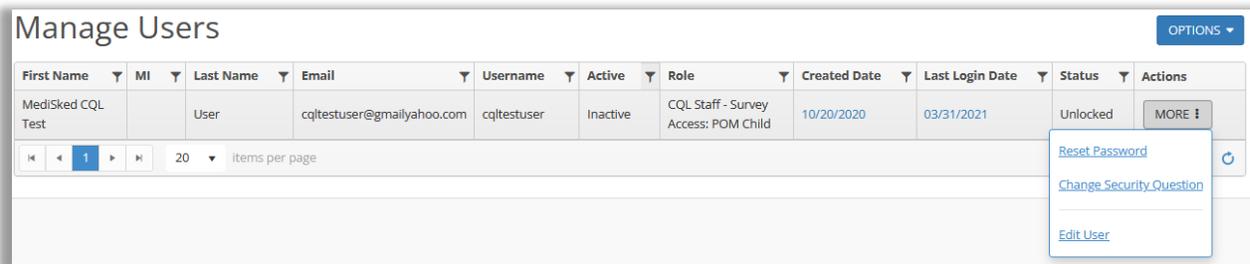
1. Navigate to the **Admin** icon
2. Select **Manage Users**



3. The Manage Users page will display a table with all users. Columns can be sorted or filtered by clicking on the column header.



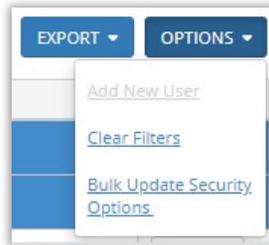
4. To edit a single user, click on the **MORE** button in that row and select **Edit User**



- a. Make changes as necessary and click **Save**
5. To edit multiple users at the same time, select the checkbox to the left of the users to be edited or select the checkbox in the header to select all users on that page.

Manage Users											OPTIONS ▾
<input checked="" type="checkbox"/>	First Name ▾	MI ▾	Last Name ▾	Email ▾	Username ▾	Active ▾	Role ▾	Created Date ▾	Last Login Date ▾	Status ▾	Actions
<input checked="" type="checkbox"/>	MediSked CQL Test		User	cqltestuser@gmailyahoo.com	cqltestuser	Inactive	CQL Staff - Survey Access: POM Child	11/20/2020	03/31/2021	Unlocked	MORE !
<input checked="" type="checkbox"/>	MediSked		TNTest	mstntest@test.c	MSTNadmintest	Inactive	CQL Staff - Survey Access: POM Child	03/31/2021	07/29/2021	Unlocked	MORE !

- a. Click on the **Options** button and select **Bulk Update Security Options**



- b. The **Bulk Update Security Options** drawer will open, allowing the user to select specific fields to edit for all selected (checkbox) users

Bulk Update Security Options ✕

Choose the Security Option field(s) and new value(s) with which you'd like to bulk update the selected users. If needed, you can bulk update more than one field at a time by selecting Additional Fields to Change.

Field to Change *

Select One
▾

New Value *

Select One
▾

[Additional Fields to Change](#)

SELECTED USERS (2) ▾

UPDATE

- c. Select your desired options from the dropdowns within **Field to Change** and **New Value** to change those fields
- d. If multiple fields require edits, select **Additional Fields to Change** to add an additional row of dropdowns

Bulk Update Security Options ✕

Choose the Security Option field(s) and new value(s) with which you'd like to bulk update the selected users. If needed, you can bulk update more than one field at a time by selecting Additional Fields to Change.

Field to Change * **New Value ***

Role CQL Staff - Survey Access: POM Child

[Additional Fields to Change](#)

SELECTED USERS (2)

- e. Once all changes have been entered, click **Update**. A banner message will pop up to inform you that your changes were made successfully.