How to Create a Staff Test User with Admin Rights in your EHR

1. Go to the **Admin** band, click the **Staff** button, then click the **Add** button.

2. Fill out the **Personal Info** screen like in the example below, using the following nomenclature: for **Last Name** - [Your Practice name]test, for **First Name** - **Ehx** and for **Username** - [Your Practice name]test, to help us distinguish among different test users on the eEHX. Then enter a **Password**, **Confirm Password** and ensure the user **Status** is **Active**. Lastly, click the **Save** button.

Your staff test user "Goldbergtest, Ehx" is now created. The next step is to give him/her administrative rights, so that the CIQN team can troubleshoot any eEHX issues in your EHR and do quality testing.

* *Credentialing messages will not pop up at login for Staff users, but only for Provider users, hence we recommend creating the test user as Staff instead of Provider.*

Please note that every practice roles, categories, and security attributes will vary according to practice customization and installation.

1. Go to the **File** menu, then click on **Security Settings**.
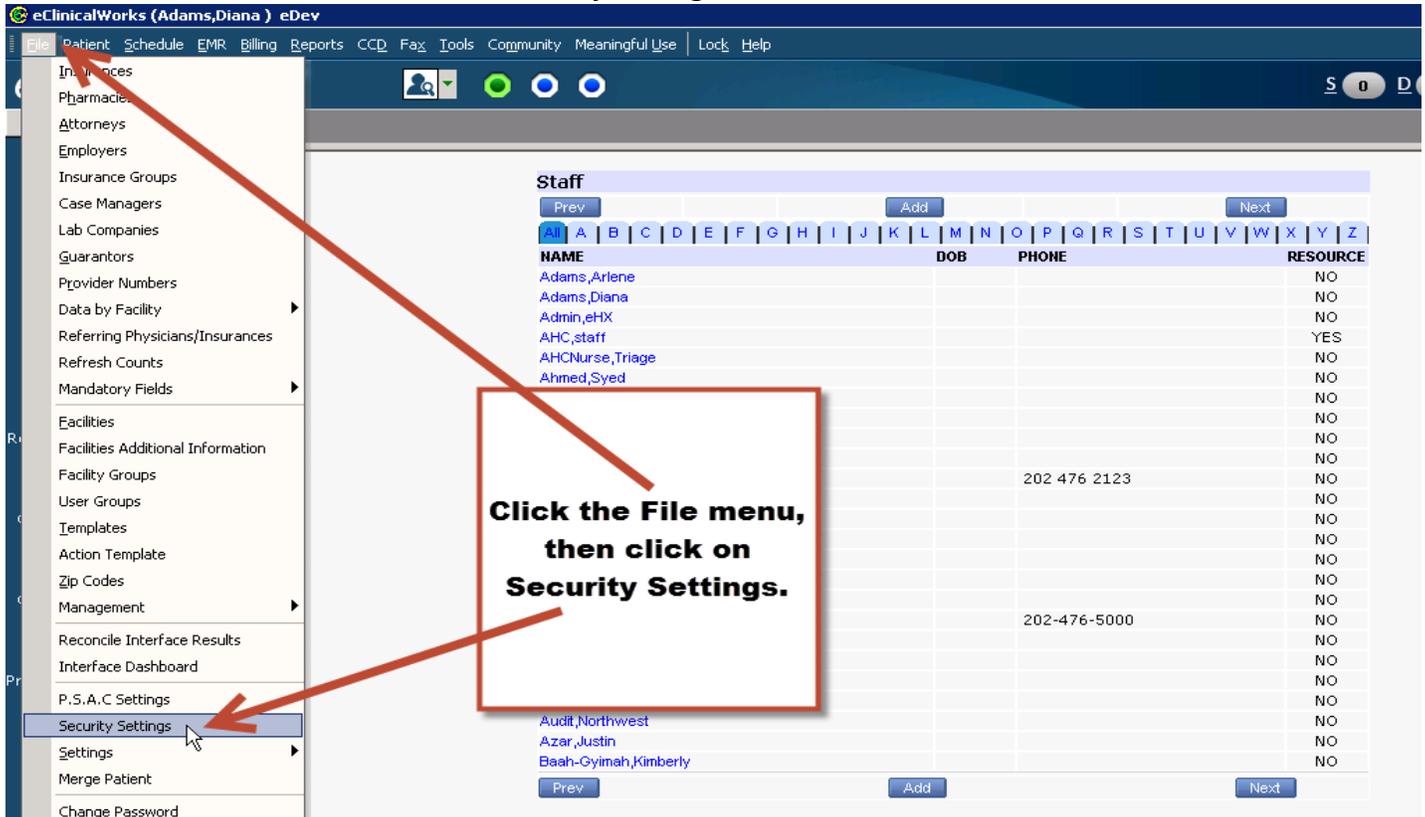
*If you are set up "by roles" and have an **"Administrator"** or **"System Administrator"** role created in your EHR, jump to **Step 3, then follow Step 4 and 5**; if not, follow **Step 2** only.*

2. **By User Set-up:** On the left side of the **Security Settings** window that opens up, find your staff test user, then click on it and the security permissions/rights for that user will display on the right. Then, check the box next to **Permission** at the top right corner in order to select all the permissions, and click the **Save** button in order to grant your staff test user all security rights for administrative privileges.
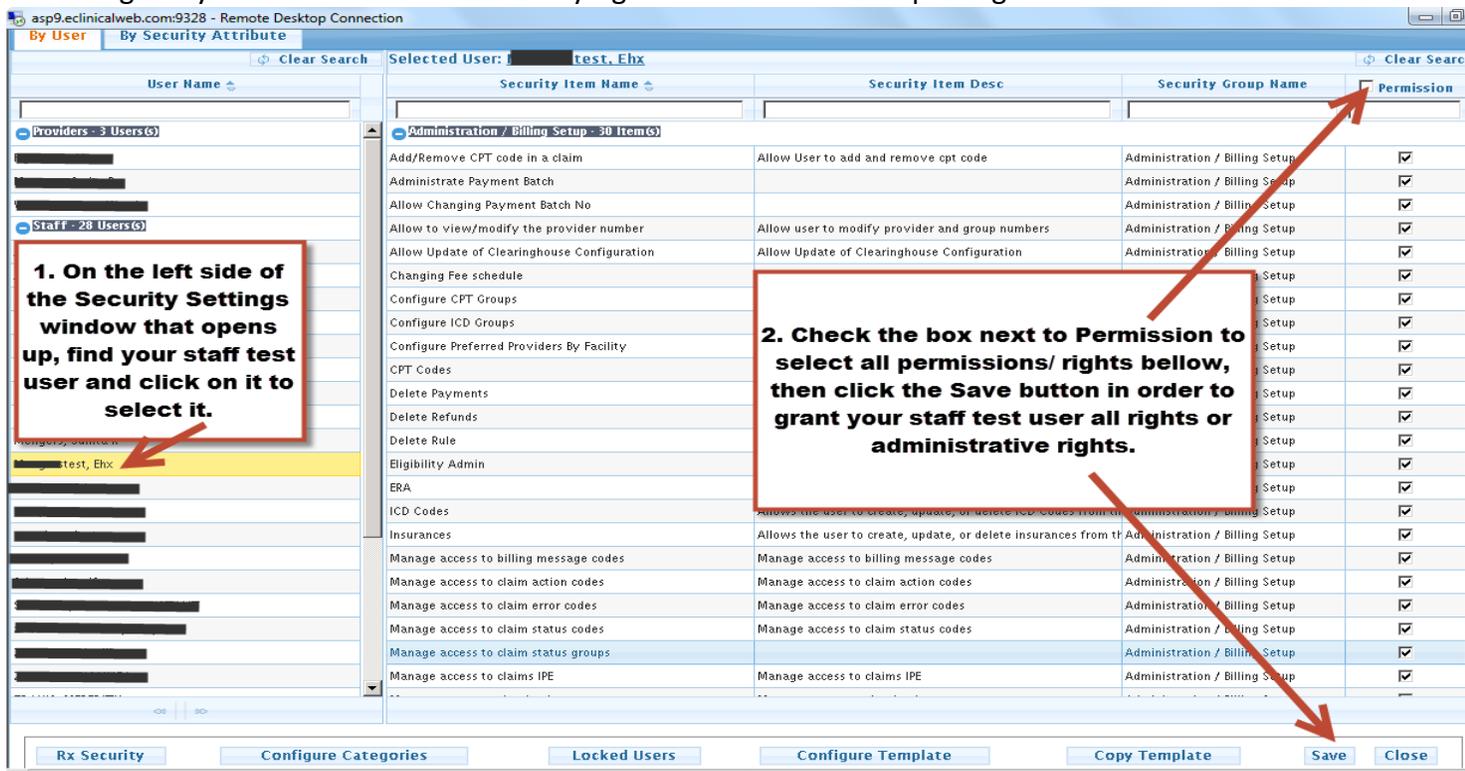
3. **By Role Set-up:** In the **Security Settings** window that opens up, click the **Role Membership** button.

By Role	By Security Attribute			↻ Clear Search				↻ Clear Search

	Role Name ↕	Role Desc		Security Item Name ↕	Security Group Name	□ Permission
	[ ]	[ ]		[ ]	[ ]	[ ]
1	***** CCCC	CCCC				
2	******AAAA New	New				
3	**bbb	bbb				
4	**Example	**Example Additional				
5	**NEW Example	CIQN EMR Coach Training				
6	Ancillary Staff	Ancillary Staff				
7	Block Schedule	Block Schedule				
8	Call Center Registrar	Call Center Registrar				
9	Call Center SME	Call Center managers and super-users				
10	Call Center Staff	Call Center Staff				
11	Charge-entry Staff	Charge-entry Staff				
12	Clinical Operations Manager	Clinical Operations Manager				
13	Data Analyst	Clinical QI				
14	ED Staff	ED Staff & Providers				
15	Front-end Admin Staff	Front Office Staff				
16	General	No Attributes				
17	Immunization Dashboard - View Only	Immunization Dashboard - View Only				
18	IR Security	IR Security Test				
19	Lab Analyst	Lab Anlayst				
20	Language Services Staff	Language Services Staff				
21	Medical Records Auditor-DOH	Medical Records-Dept of Health Auditor				
22	Medical Records MPI Admin	Medical Records MPI Admin				
23	Medical Records Staff	Medical Records Staff				
24	Medical Student	Medical Student				

Nothing to display

In the Security Settings window that opens up, click the Role Membership button.

Rx Security	Configure Role	Role Membership	Configure Categories	Locked Users	Save	Close

4. In the **Role Membership** window that opens up, click the **By User** tab, then click the **"+"** sign next to **Staff** and a list of all staff users will display.

Role Membership

By User	By Role

Role Membership
⊞ Providers
⊞ Staff

Role Name | □ Role Member

In the Role Membership window that opens up, click the By User tab, then click the "+" sign next to Staff for a list of all Staff users.

Save   Close

5. Once you locate your staff test user on the left, click on it and the roles list on the right side will update. Then, check the box next to the **System Administrator** or **Administrator** role and click the **Save** button to grant your staff test user administrative rights.

Role Membership for (Goldbergtest, Ehx)

| By User | By Role |

Call Center SME
Call Center Staff
Charge-entry Staff
Clinical Operations Manager
Data Analyst
ED Staff
Front-end Admin Staff
General
Immunization Dashboard - View C
IR Security
Lab Analyst
Language Services Staff
Medical Records Auditor-DOH
Medical Records MPI Admin
Medical Records Staff
Medical Student
Nursing SME
Nursing Staff
Provider
Provider SME
Resident
System Administrator

Gill, eant
Goldbergtest, Ehx

1. Once you locate your staff test user, click on it to select it.

2. On the right side, find the System Admin or Admin Role.

3. Check the box next to the System Administrator Role, then click the Save button to grant your test user administrative rights or all rights.

Save   Close