



## 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.

Under the Admin band, click the Staff button, then click Add.

NAME	DOB	PHONE	RESOURCE
Adams, Arlene			NO
Adams, Diana			NO
Admin, eHX			NO
AHC, staff			YES
AHC Nurse, Triage			NO
Ahmed, Syed			NO
Ajide, Oluwakemi			NO
Al-Bawardy, Badr			NO
Alford, Dan			NO

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.

1. Enter the Last Name and First Name, Primary Service Location, Username, Password and Confirm Password. \* Ensure that the user Status is Active.

2. Click the Save button.

Personal Info

Last Name \* Goldbergtest | First Name \* Ehx | Middle Initial

Prefix | Suffix | Initials

Date of Birth | Social Security No |  Licensed Healthcare Professional or Credentialed Medical Assistant

Mailing Address | City | State

Zip Code | Home Phone | Mobile

Pager | Primary Service Location | Default Appointment Provider

Login Info

Username \* Goldbergtest | Password | Confirm Password | Status Active

Copy Options set in 'My Settings' from Staff

Select Staff

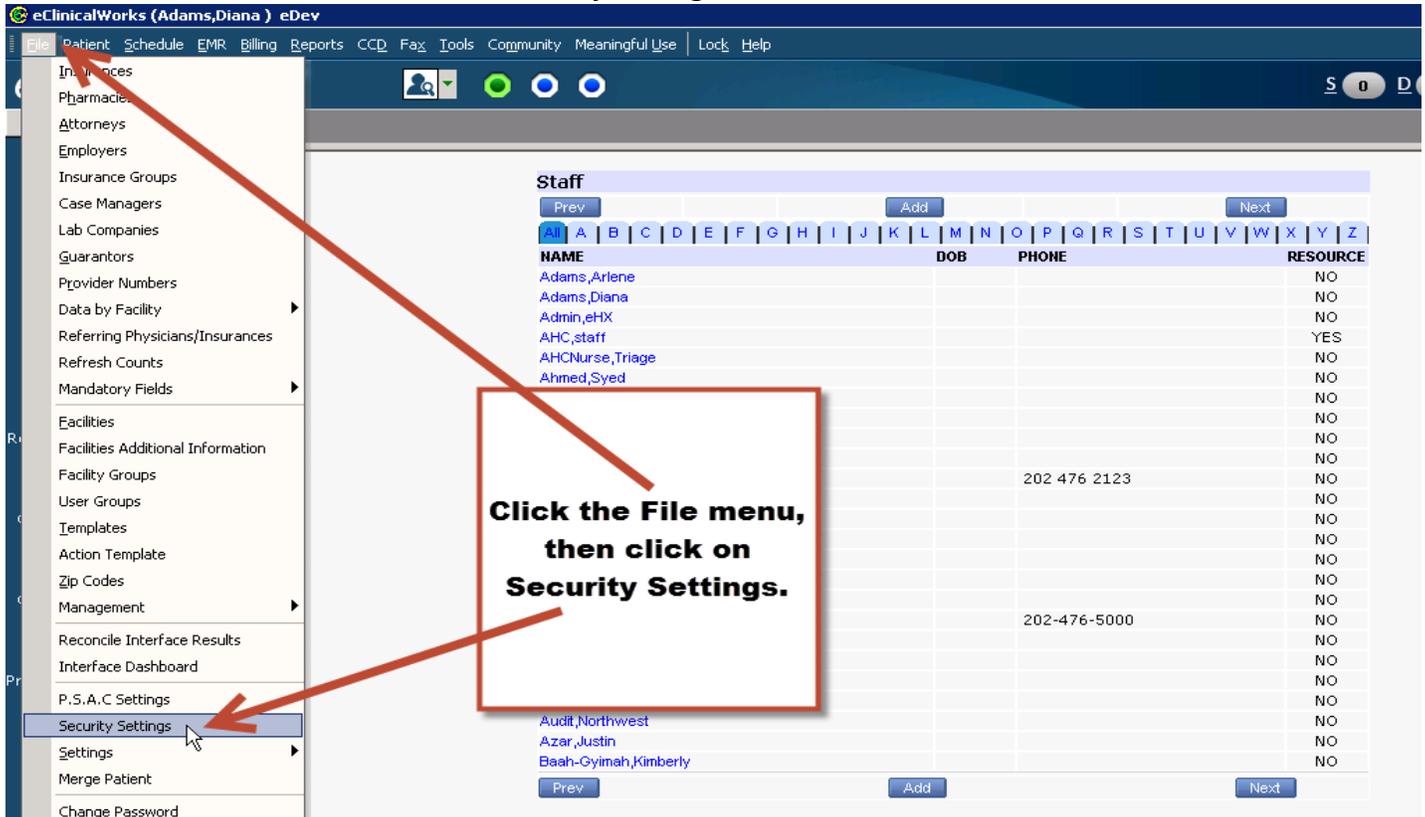
Save | Configure My Assigned Favorites | View Staff Log

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.*

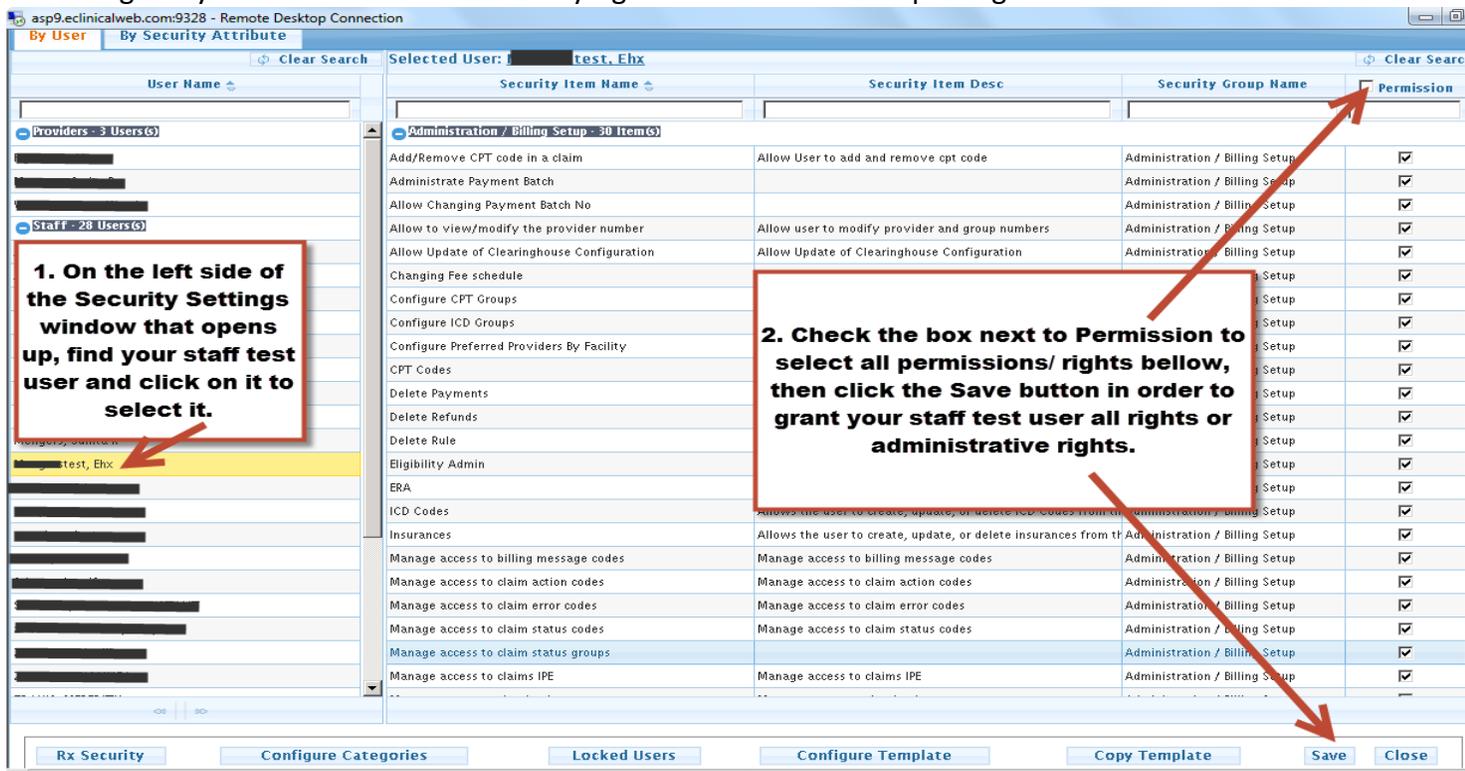
\*Please note that every practice roles, categories, and security attributes will vary according to practice customization and installation.

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.

The screenshot shows the 'Security Settings' window with two tabs: 'By Role' and 'By Security Attribute'. The 'By Role' tab is active, displaying a list of roles with columns for 'Role Name', 'Role Desc', 'Security Item Name', 'Security Group Name', and 'Permission'. A callout box with a red border contains the text: 'In the Security Settings window that opens up, click the Role Membership button.' A red arrow points from this box to the 'Role Membership' button in the bottom navigation bar.

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 Anlyst			
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			

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.

The screenshot shows the 'Role Membership' window with two tabs: 'By User' and 'By Role'. The 'By User' tab is active, displaying a tree view with 'Role Membership' at the top, followed by 'Providers' and 'Staff'. A callout box with a red border contains the text: '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.' A red arrow points from this box to the '+' sign next to 'Staff'.

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.

The screenshot shows a window titled "Role Membership for (Goldbergtest, Ehx)". It is divided into two panes: "By User" on the left and "By Role" on the right. The "By User" pane shows a list of users, with "Goldbergtest, Ehx" selected. The "By Role" pane shows a list of roles, with "System Administrator" selected and its checkbox checked. Three red callout boxes provide instructions: 1. "1. Once you locate your staff test user, click on it to select it." (pointing to the user list), 2. "2. On the right side, find the System Admin or Admin Role." (pointing to the System Administrator role), and 3. "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." (pointing to the checked checkbox and the Save button). The Save and Close buttons are visible at the bottom right of the window.

By User	By Role
Gill, Jeant	Call Center SME
Goldbergtest, Ehx	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