CONNECT – Adding a User

To add a user to Connect, one must be in the correct Security settings. To check your access to the required security settings, select the Security drop down, then choose Group Manager.

Double click on Administrators under Group Manager.

Note – Your organization may call your System Administrators by a different group name.

Select Menu Access. Then select Assign Menu Access.
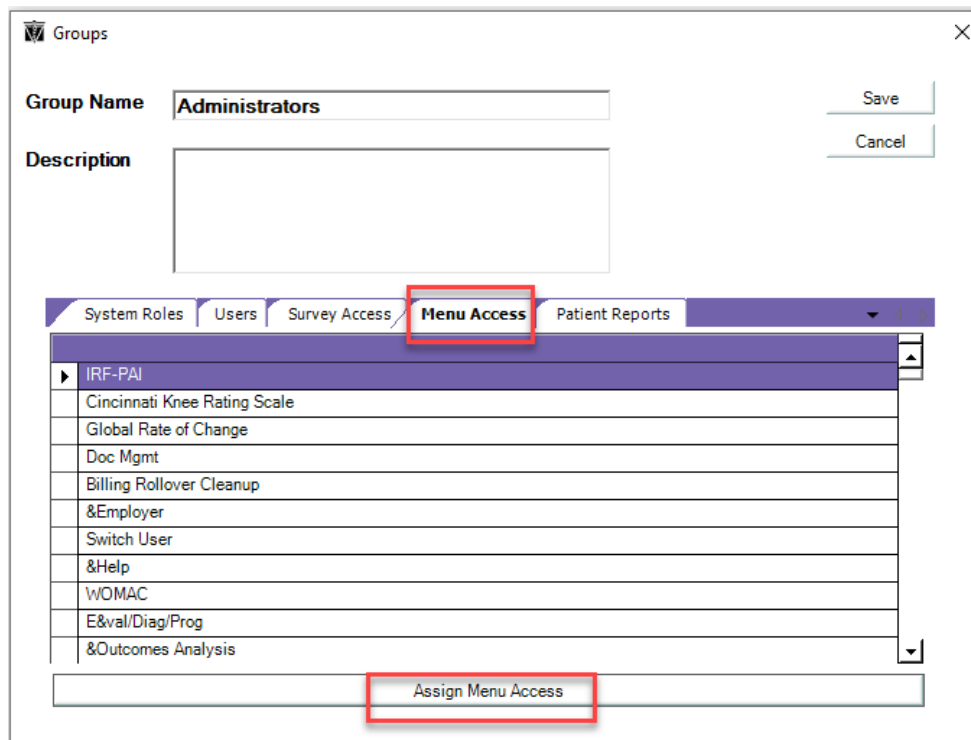
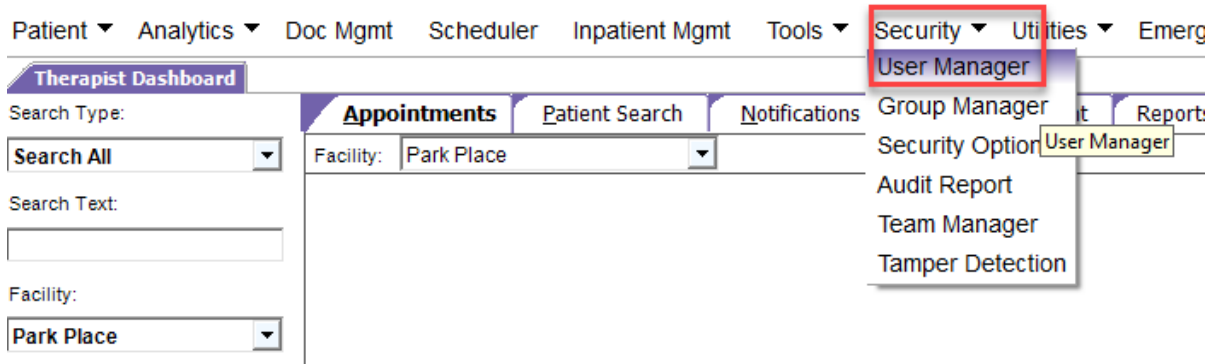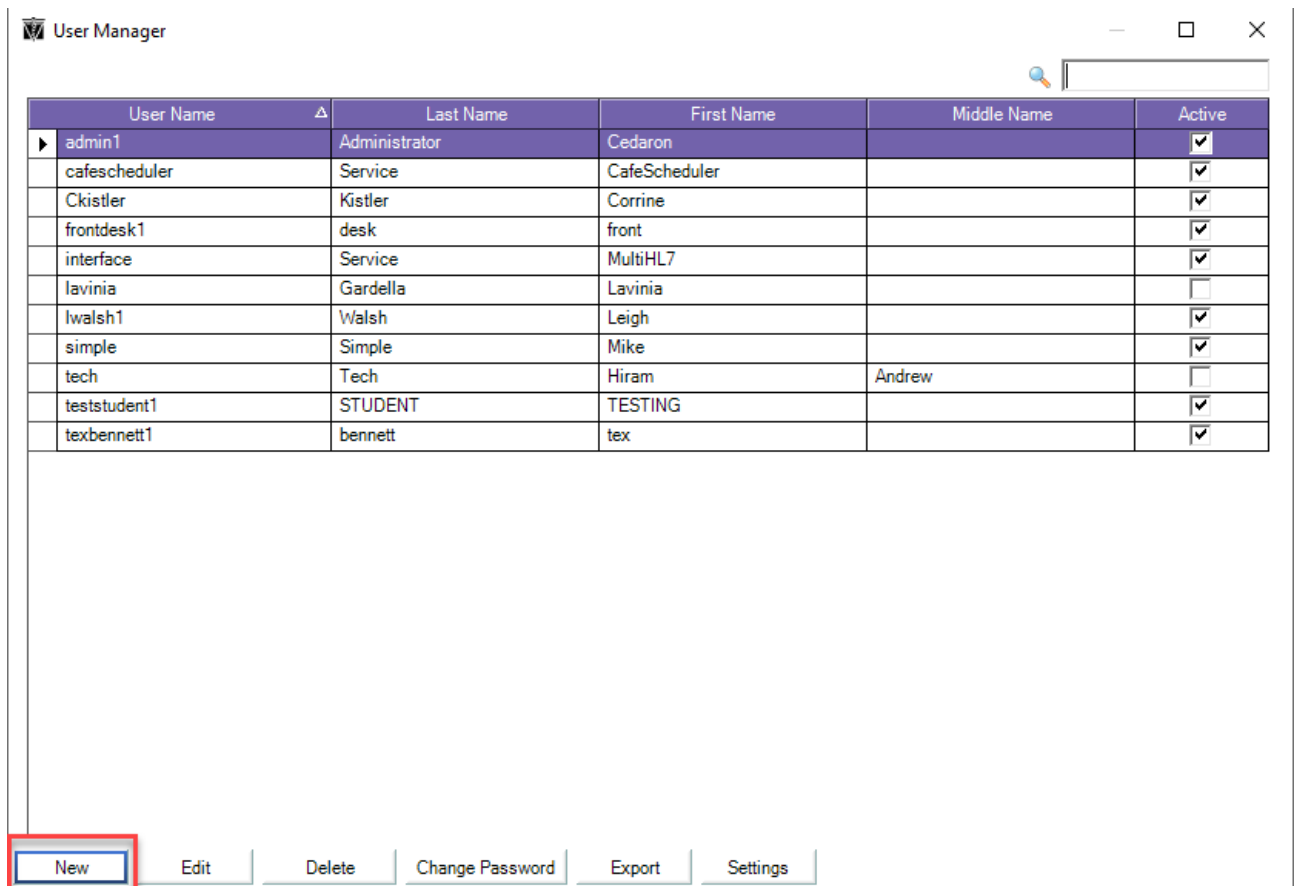Under the &Security tab, one would need access to the &User Manager and &Group Manager permissions.
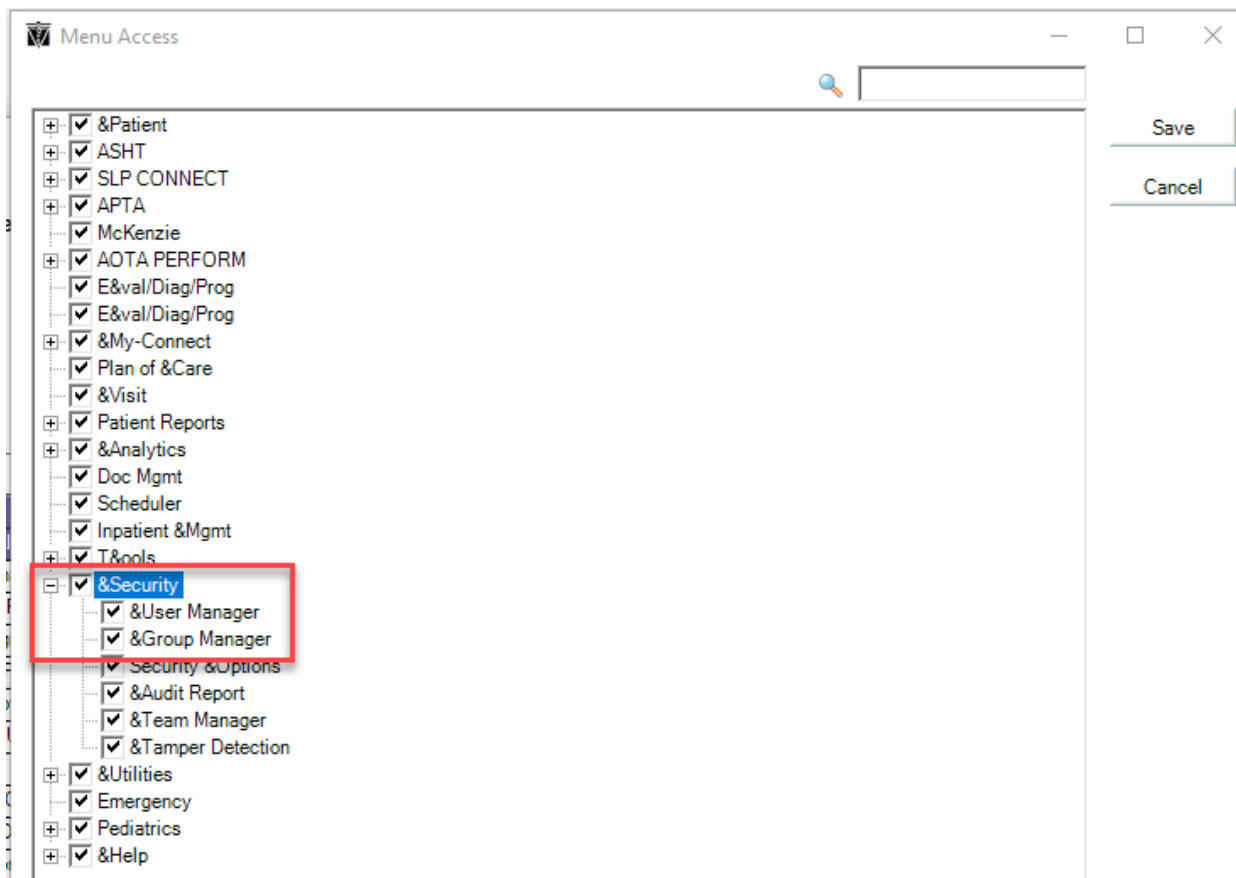
Once you have the required permissions, you can now add a user. Hover over the Security tab and select User Manager.

Select New, under User Manager.

Selecting New will prompt a user window to open, requiring you to fill out all necessary information for the new user.

See the example below.

When adding a new user, you can add a password to their profile, then prompt the user to change their password the next time they login. Once this information is filled out, select Modify User System Roles.

Select the System Roles you would like the new user to have, then select Ok.

Select Groups on the previous page to put the user in the desired Group.

Select the appropriate group for the Clinician. Therapists should only be part of **one** group. Once you select the desired group, you will see that group listed under Group Name under the Groups tab.

Next, select the facility you would like the user to have access to. You can choose one or all of the available facilities.
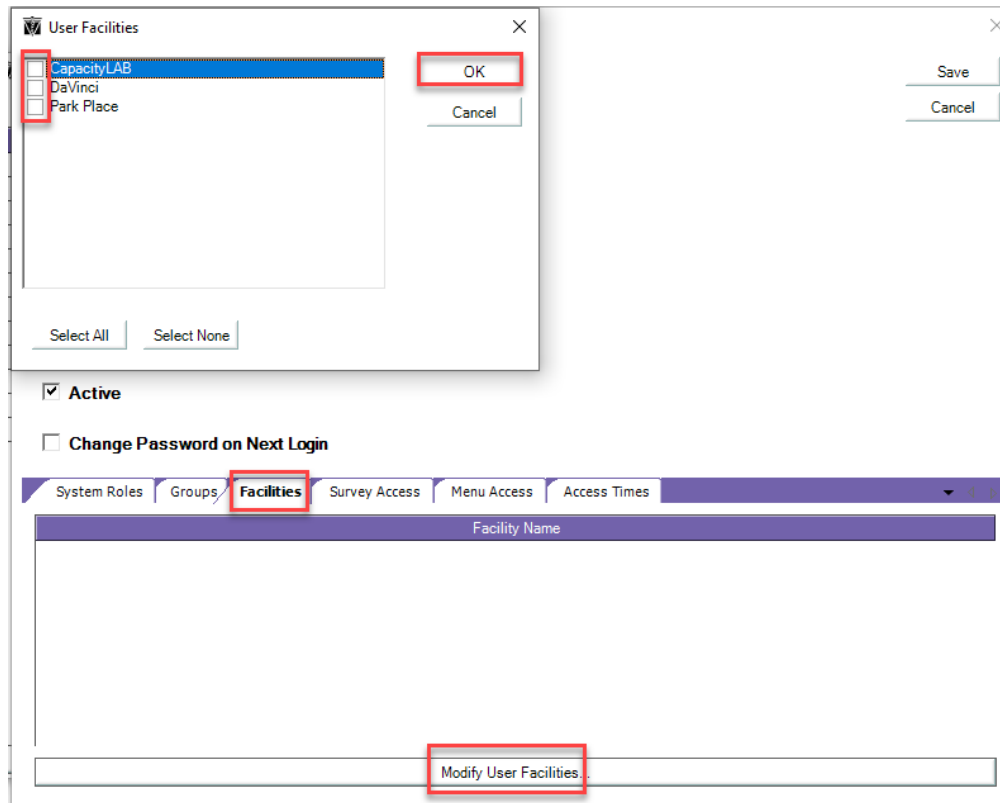
Survey Access should be set up based on the group. Here, you can select what surveys you would like the new user to have access to.

Note – Opening a survey tree allows you to select/unselect different surveys within that survey to allow/not allow your user access.
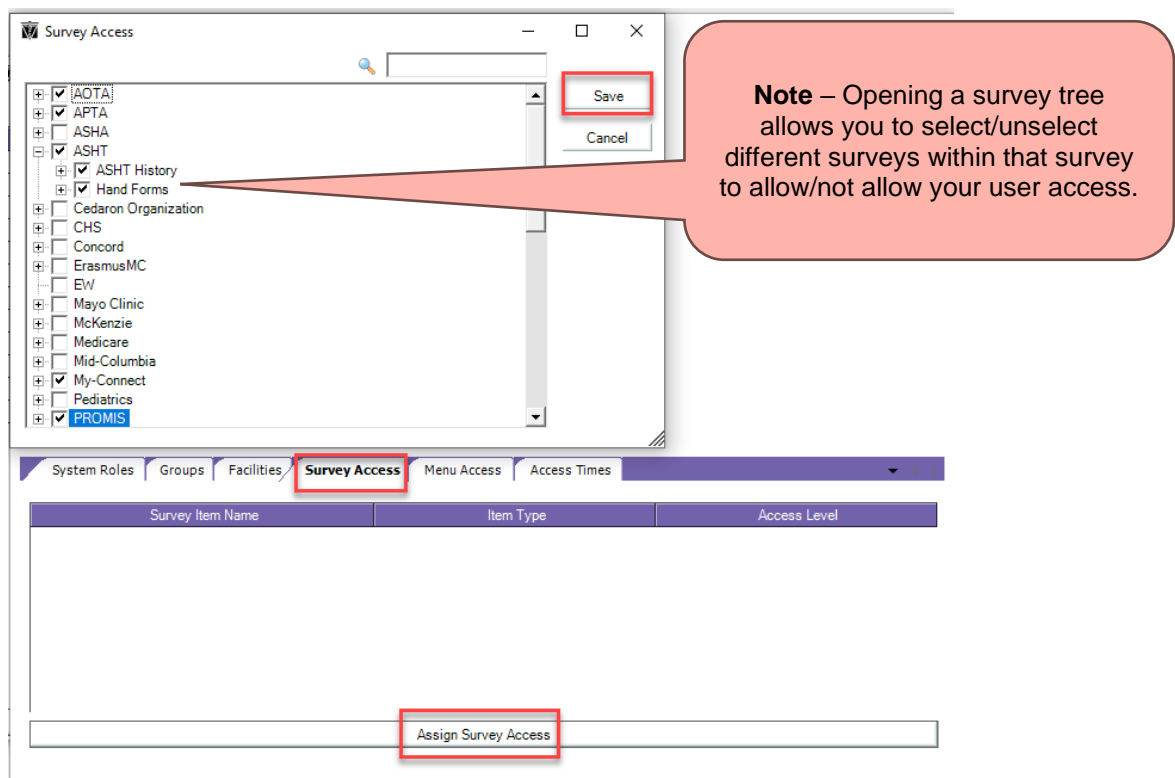
Menu Access allows you to choose the options the user will see at the top. Select the options you would like the user to have. Remember to select the + sign to open more options under the initial menu item. Make sure all user's permissions match within the group. Press Save when done.
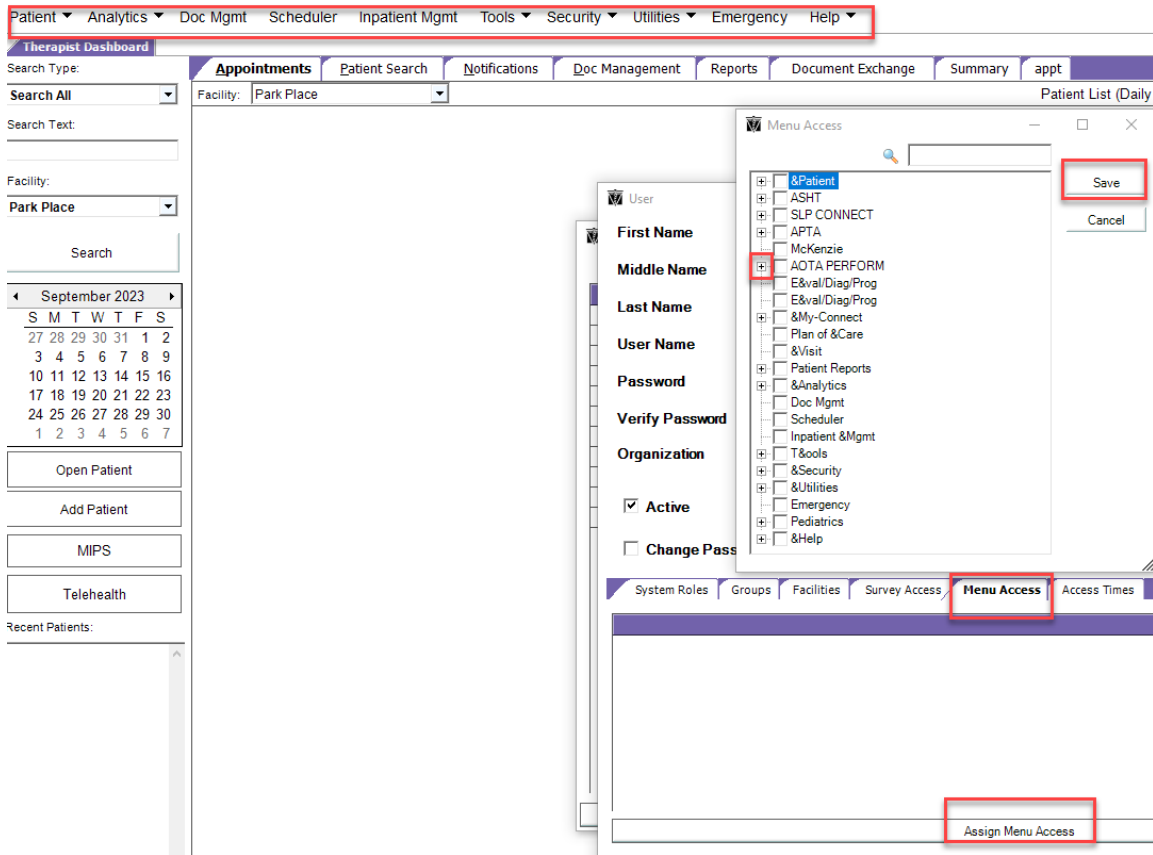

Access Times allows you to choose a day and time to allow users to use the application. This section is optional to complete.
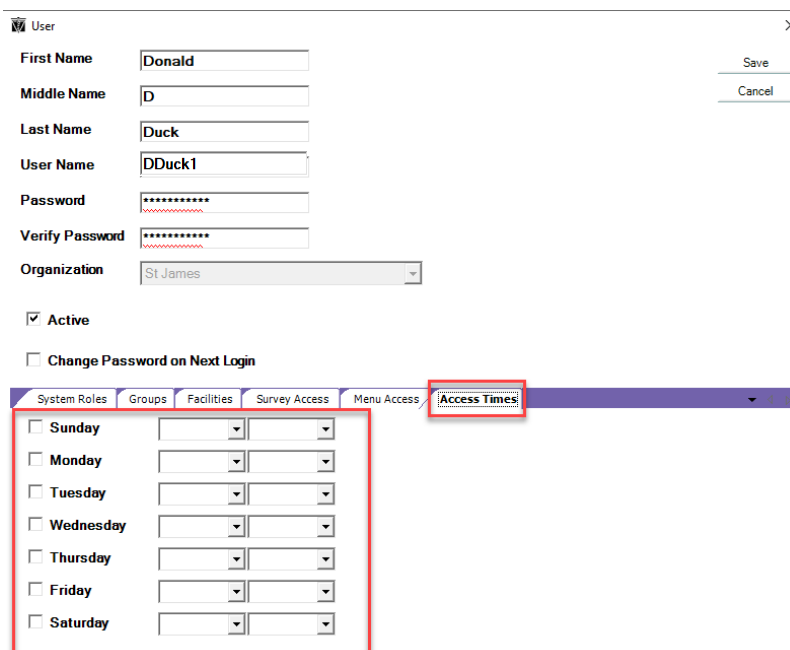
Select Save on the User screen and the User Manager tab will pop up showing your new user as Active. You may now exit out of the User Manager box.

Now, you can set the user up as a contact within the application. This will allow your user to appear on the Scheduler and different reports. You can do this by hovering over Utilities and selecting Contact.
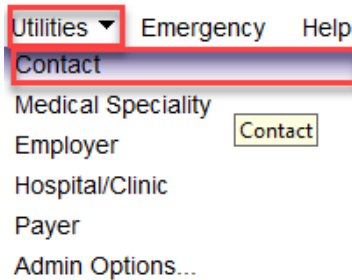
Select one or all facilities that you would like to add your user to, then select New Contact.

Fill out as much information as possible about the new user, paying close attention to the Contact Type and Specialties section. In the example below, Therapist was chosen as the Contact Type and Physical Therapist was chosen as the Specialty. The Login ID should give you an option based on the user you just created, and the Company drop down allows you to choose the company as well.

When you get to **Facilities**, ensure that the facilities you want the user to have access to are selected.

On this page, you also have the option to add Additional Information on the right-hand side of the page, reset your MIPS Measures, and choose a Signature Image or Portrait. Be sure Active Practitioner is selected before pressing Save.

You are now able to search for your new user under the Contact Search tab.

Now, when you are on the Scheduler tab, your new user will be available to select.

Additional Help and Support

If you hover over the Help tab, then select User Manual, it will open a help screen that allows you to search for different topics and questions you may have.
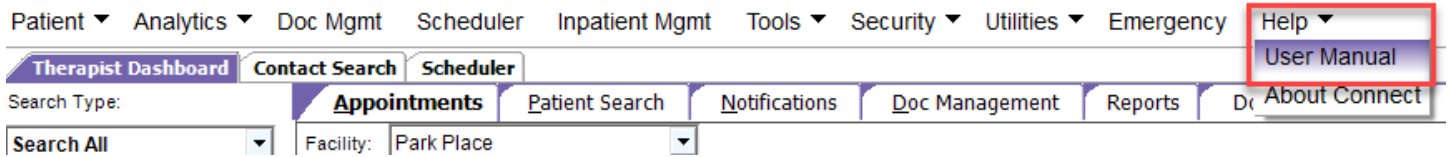
The example below shows a search for "system roles" and it pulls up the section, System Roles in Connect. By selecting this topic, it goes into detail about what roles can be set in Connect for user groups. It explains the System Role and the Description.
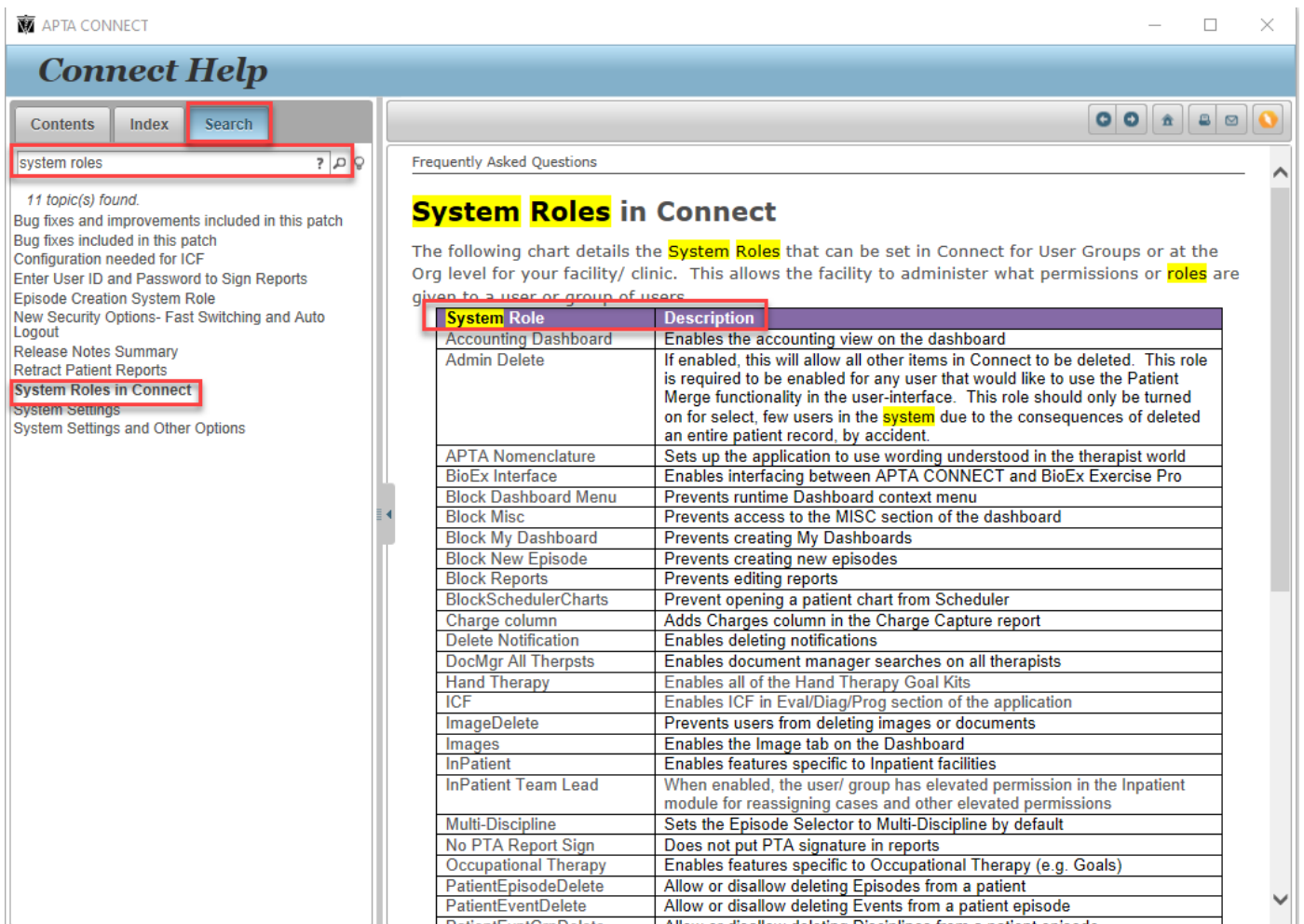
The above image is just an example of a topic you can search for. Feel free to search by any word or topic to see what solutions Connect Help can provide for you.