

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.

The screenshot shows the top navigation bar of the Connect application. The 'Security' dropdown menu is open, and 'Group Manager' is highlighted. Other options in the menu include User Manager, Security Options, Audit Report, Team Manager, and Tamper Detection. The 'Group Manager' option is also highlighted in a yellow box. Below the navigation bar, the 'Therapist Dashboard' is visible, showing search filters for 'Search All', 'Search Text', and 'Facility: Park Place'. A calendar for September 2023 is also shown.

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

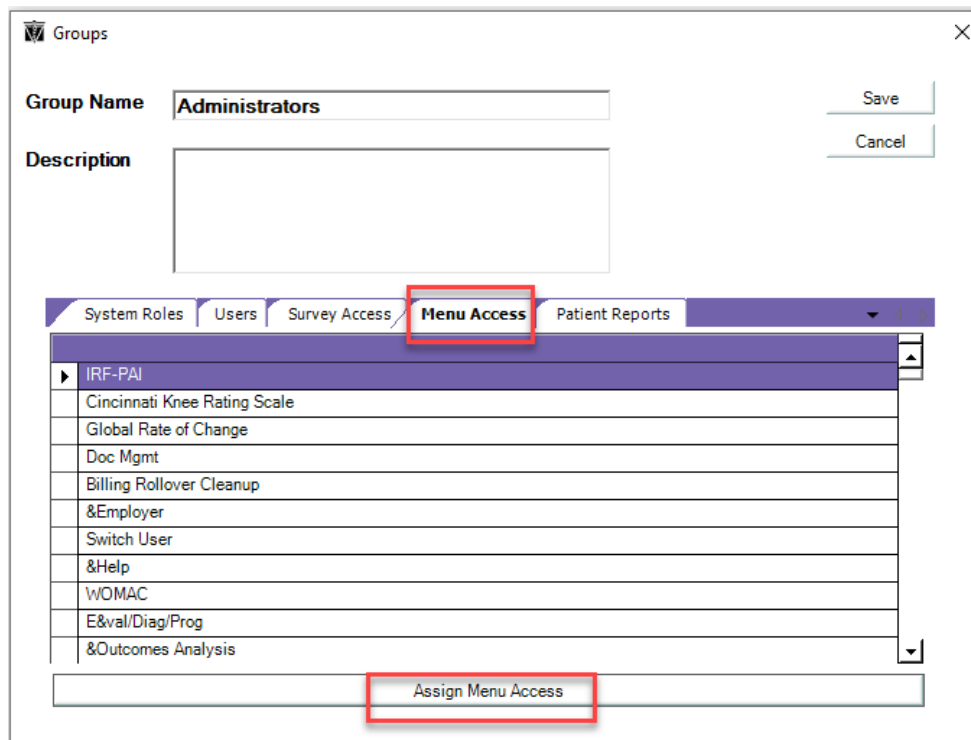
Double click on **Administrators** under Group Manager.

The screenshot shows the 'Group Manager' window with a table of user groups. The 'Administrators' group is highlighted with a red box. The table has two columns: 'Group Name' and 'Description'.

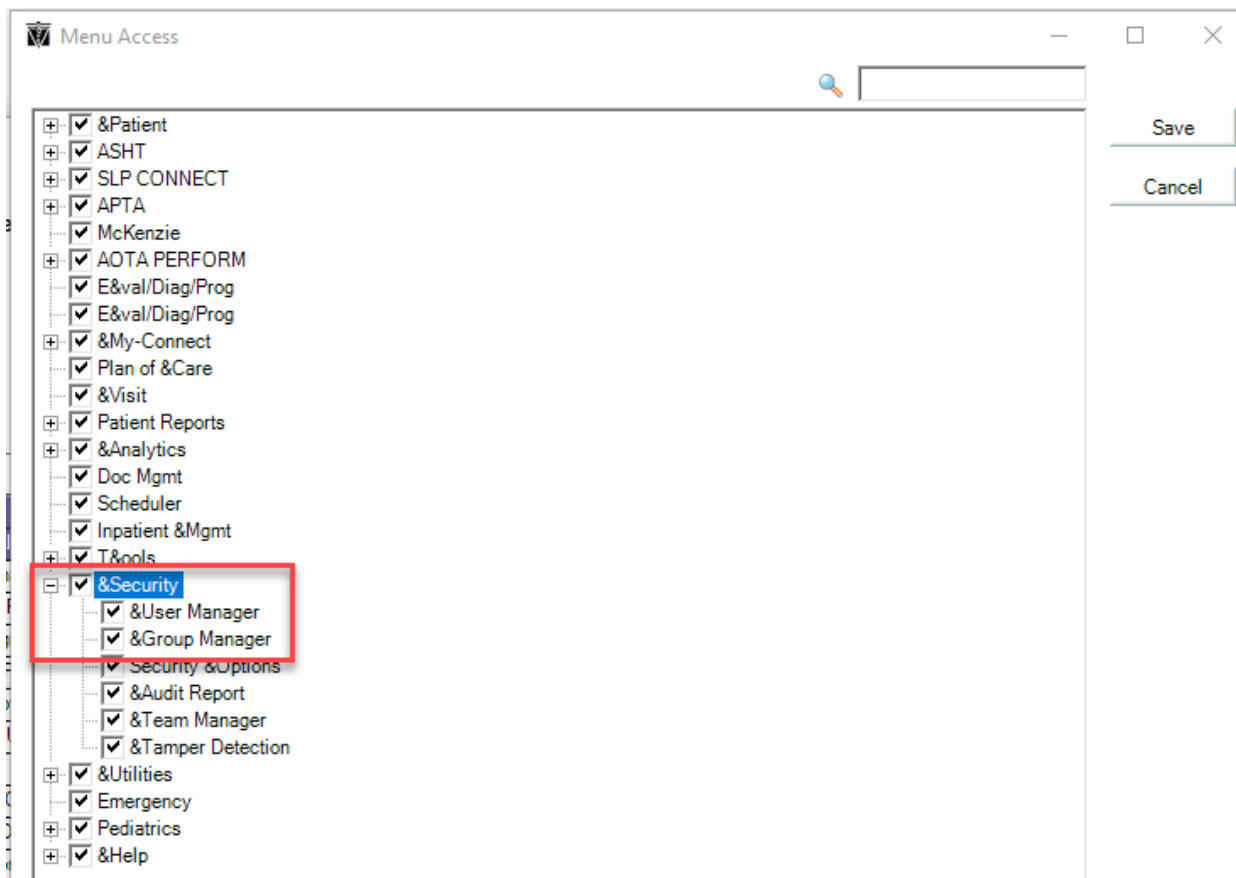
Group Name	Description
Administrators	
Clinicians	R/W clinical - Read Only Admin
Front Desk Personnel	Scheduler Module Access
Therapist Assistant	Requires full time therapist signature

At the bottom of the window, there are three buttons: 'New', 'Edit', and 'Delete'.

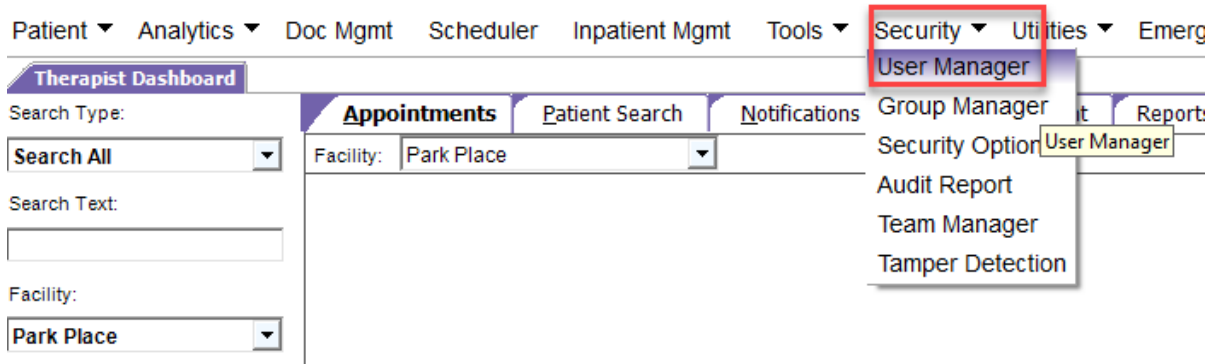
Select Menu Access. Then select Assign Menu Access.



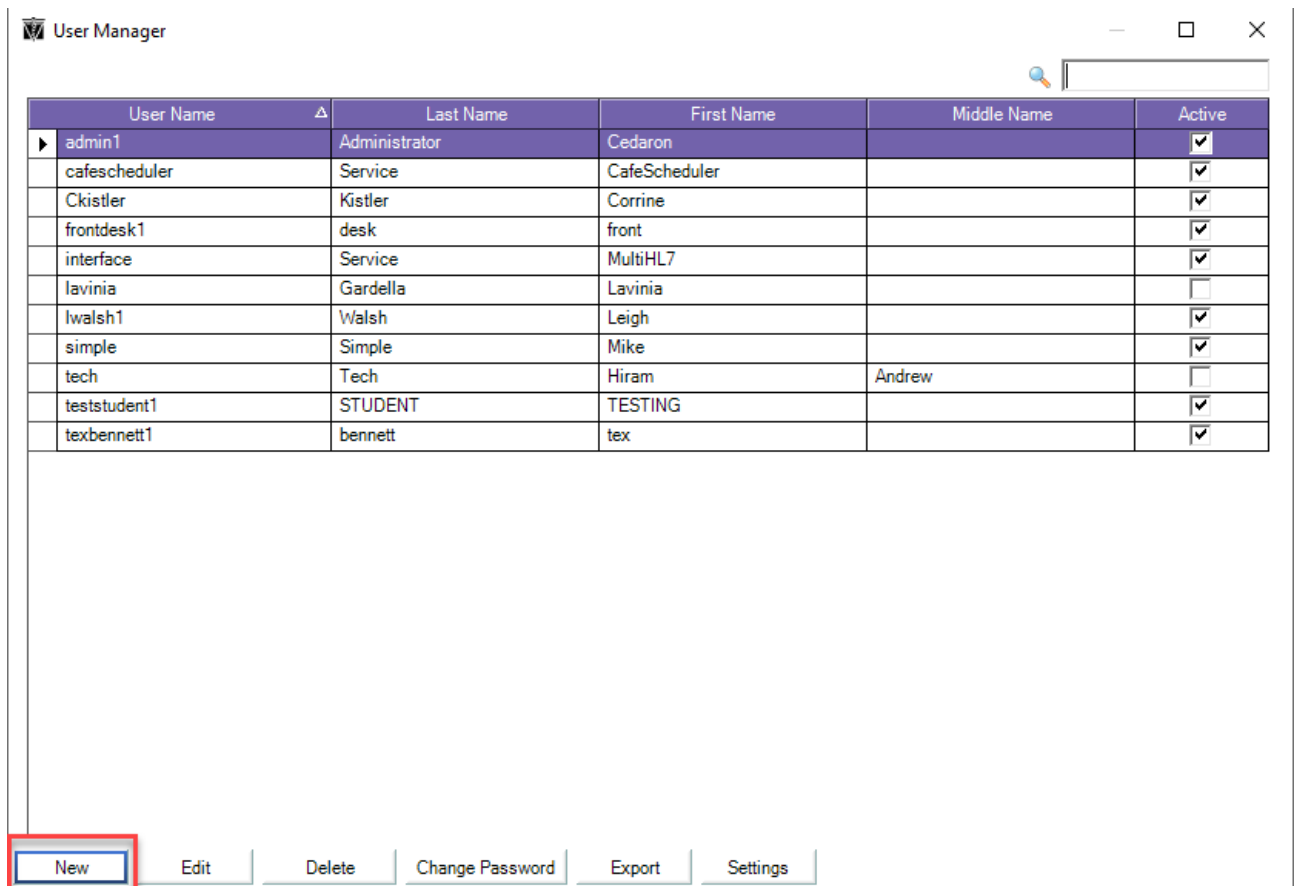
Under the &Security tab, one would need access to the &User Manager and &Group Manager permissions.



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.

User

First Name: Donald

Middle Name: D

Last Name: Duck

User Name: DDuck1

Password: [Redacted]

Verify Password: [Redacted]

Organization: St James

Active

Change Password on Next Login

System Roles | Groups | Facilities | Survey Access | Menu Access | Access Times

System Role

Modify User System Roles...

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**.

User System Roles

- Accounting Dashboard
- Admin Delete
- AOTA
- APTA Nomenclature
- BioEx Interface
- BlockSchedulerCharts
- Copy Examinations
- Delete Notification
- DocMgr All Therpsts
- DocuExchange
- DocuExchangeAdmin
- ExercisePro Live

Select All | Select None

OK

Cancel

Change Password on Next Login

System Roles | Groups | Facilities | Survey Access | Menu Access | Access Times

System Role

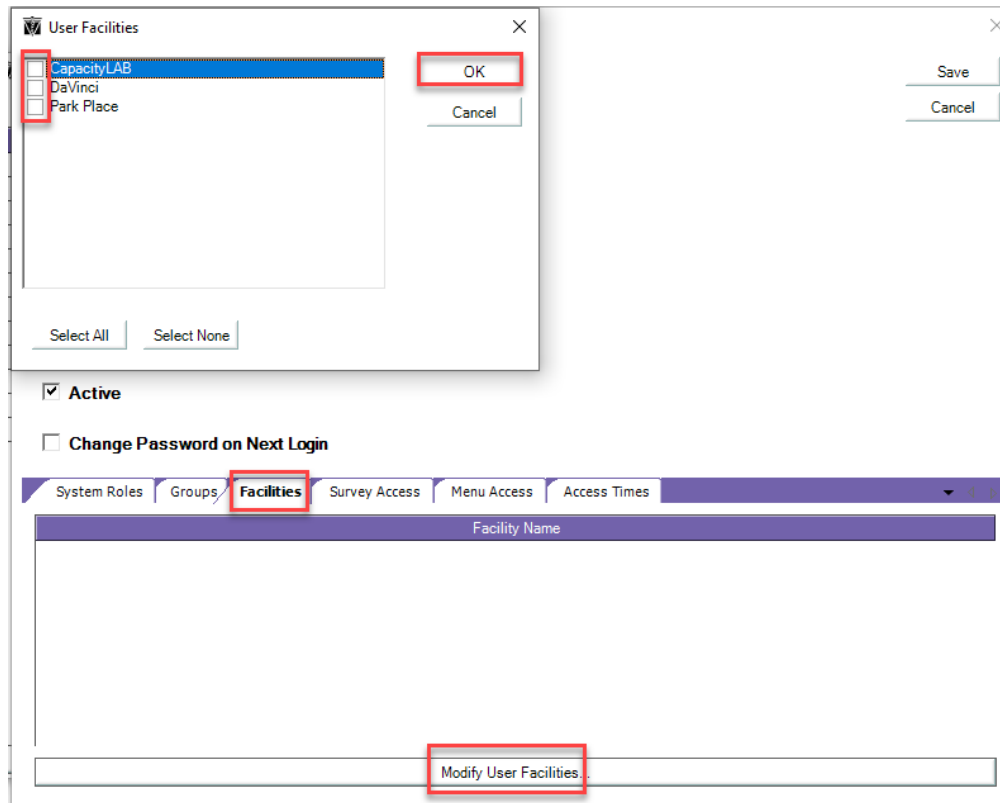
Modify User System Roles...

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

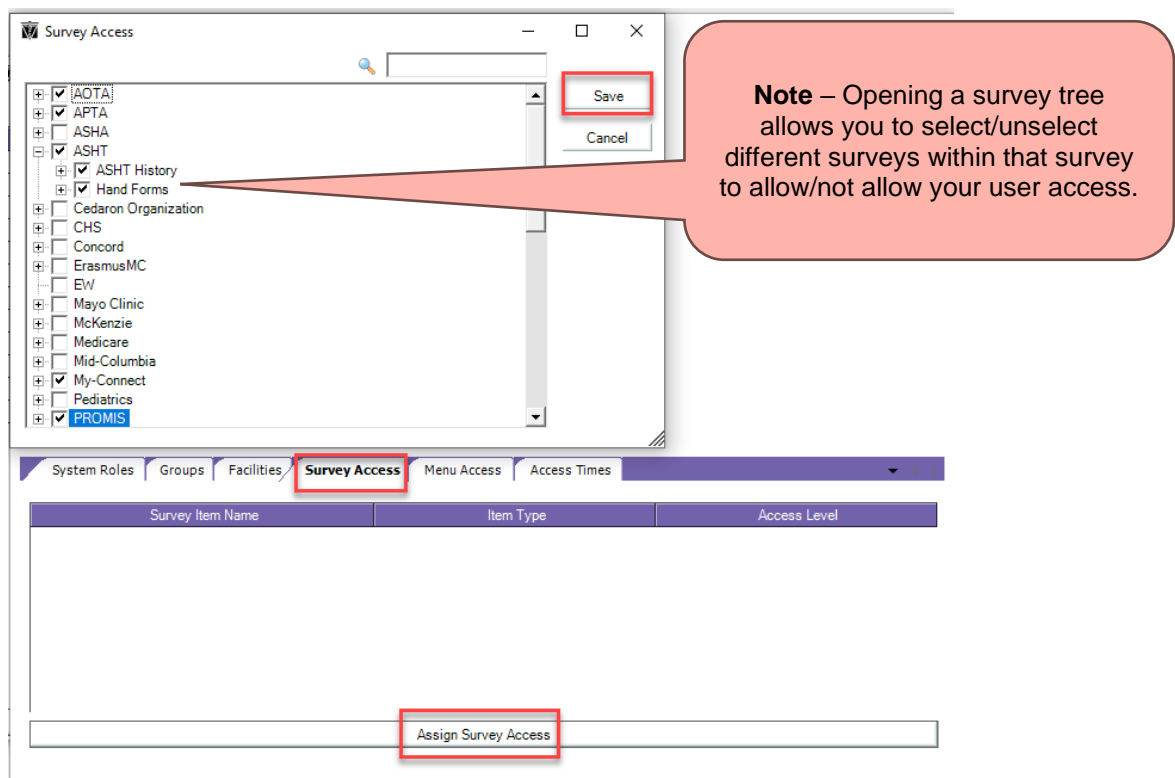
The image shows a software interface with a 'Group Select' dialog box open. The dialog box has a title bar with a close button (X) and a list of groups: Administrators, Clinicians, Front Desk Personnel, and Therapist Assistant. The 'Clinicians' group is selected, indicated by a checkmark and a blue highlight. Below the list are 'Select All' and 'Select None' buttons. To the right of the list are 'OK' and 'Cancel' buttons. Below the dialog box, the main interface has a 'Groups' tab selected, highlighted with a red box. The 'Groups' tab contains a table with a header 'Group Name' and a single row. Below the table is a 'Modify User Groups...' button, also highlighted with a red box. A red arrow points from the 'Modify User Groups...' button to the 'Group Select' dialog box.

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.

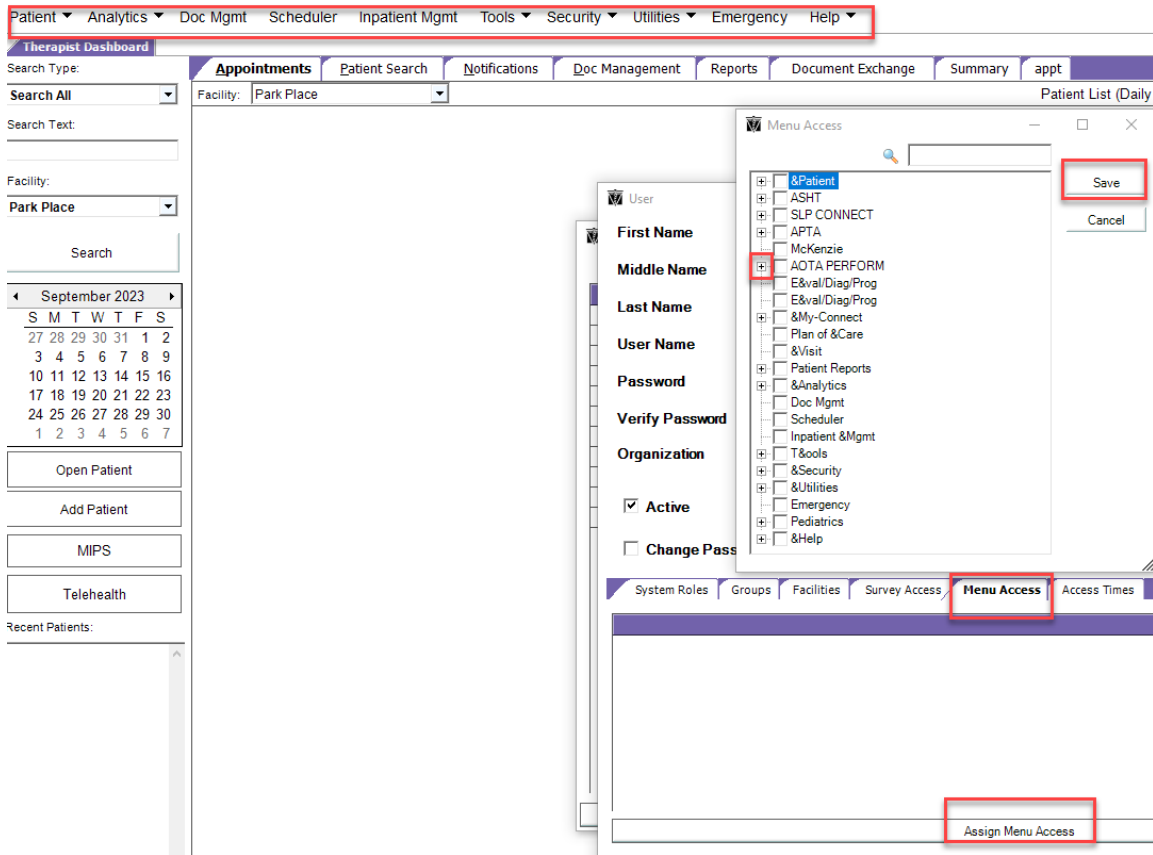
Next, select the facility you would like the user to have access to. You can choose one or all of the available facilities.



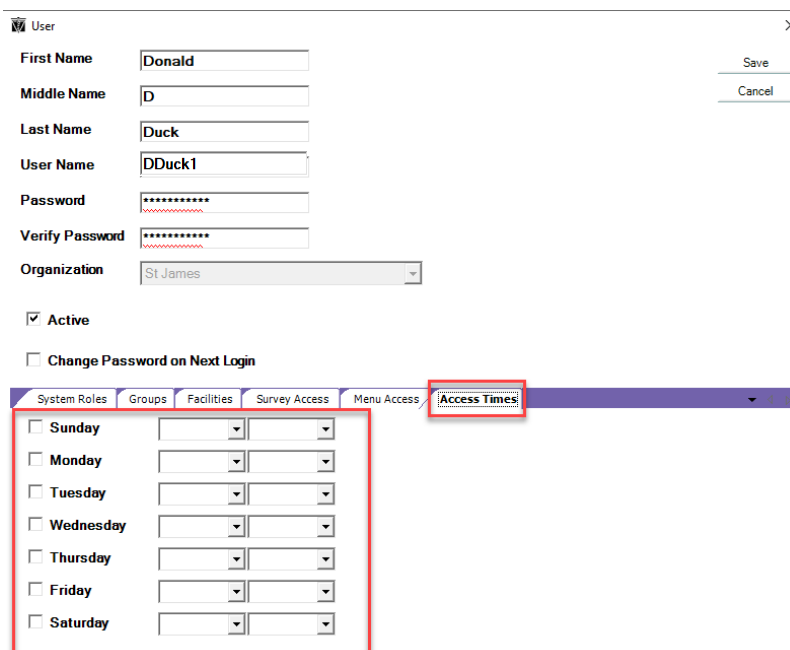
Survey Access should be set up based on the group. Here, you can select what surveys you would like the new user to have access to.



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.



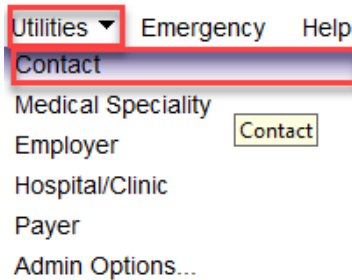
Access Times allows you to choose a day and time to allow users to use the application. This section is optional to complete.



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.

User Name	Last Name	First Name	Middle Name	Active
admin1	Administrator	Cedaron		<input checked="" type="checkbox"/>
cafescheduler	Service	CafeScheduler		<input checked="" type="checkbox"/>
Ckistler	Kistler	Corrine		<input checked="" type="checkbox"/>
DDuck1	Duck	Donald	D	<input checked="" type="checkbox"/>
frontdesk1	desk	front		<input checked="" type="checkbox"/>
interface	Service	MultiHL7		<input checked="" type="checkbox"/>
lavinia	Gardella	Lavinia		<input type="checkbox"/>
lwalsh1	Walsh	Leigh		<input checked="" type="checkbox"/>
simple	Simple	Mike		<input checked="" type="checkbox"/>
tech	Tech	Hiram	Andrew	<input type="checkbox"/>
teststudent1	STUDENT	TESTING		<input checked="" type="checkbox"/>
texbennett1	bennett	tex		<input checked="" type="checkbox"/>

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**.

Patient ▾ Analytics ▾ Doc Mgmt Scheduler Inpatient Mgmt Tools ▾ Security ▾ Utilities ▾ Emergency Help ▾

Therapist Dashboard **Contact Search**

Park Place CapacityLAB DaVinci All Facilities

Search Type Last Name ▾

Search Text

New Contact Import Contacts

First ▾ Last ▾ Email ▾

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.

Therapist Dashboard | **Contact Search** | **Contact**

Prefix: Address1:

First Name: Address2:

Middle Name: City:

Last Name: County:

Suffix: State:

ID Number: Zip Code:

Gender:

Day Phone: FAX:

Evening Phone: Pager:

Email:

Contact Type: Physician **Therapist** Healthcare Provider Support Non Clinical Contact Insurance Company Managed Care

Specialties: **Physical Therapist** PTA SLPA Speech Language Pathologist

Active Practitioner Default Practitioner

NPI: CODE:

Login ID:

Company:

Facilities: CapacityLAB DaVinci Park Place

Additional Information

Annual Training Trac	
APTA Member#	
APTA Residency/Fell	
ASHA Member#	
Clinical Ladder Histo	
Comments	
Competency Trackin	
Corporate Complian	
CPR Completion Dat	
CPR Renewal Date	
Date Of Hire	
Degree(s)	
Emergency Contact	
Employ Review Date	
Graduation Date	
Inactive Date	
License Date of Issu	
License Number	
License Renewal Dat	

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.

Patient ▾ Analytics ▾ Doc Mgmt Scheduler Inpatient Mgmt Tools ▾ Security ▾ Utilities ▾ Emergency Help ▾

Therapist Dashboard **Contact Search**

Park Place CapacityLAB DaVinci All Facilities

Search Type Last Name

Search Text

First	Last	Email
Donald	Duck	tester@gmail.com

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

Patient ▾ Analytics ▾ Doc Mgmt Scheduler Inpatient Mgmt

Therapist Dashboard **Contact Search** **Scheduler**

Park Place CapacityLAB DaVinci All

September 2023

S	M	T	W	T	F	S
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

View Options

All by Therapist ▾

Show Hidden Appts

- DILISIO, GARY
- DINNERSTEIN, ERIC
- DIPIETRANTONIO, PETI
- DIXON, ROBERT
- Dow, Michelle
- DOWLING, CHRISTOPH
- DREHER, GEORGE
- DRESSEL, DOUGLAS
- Duck, Donald
- DUMONT, DAVID
- DUMONT, MELANIE
- Eberhart, Sarah
- Edison, Dana
- Edison, Dana
- Edison, Julie
- ELY, PATRICK
- ELY, PATRICK

Today's Patients

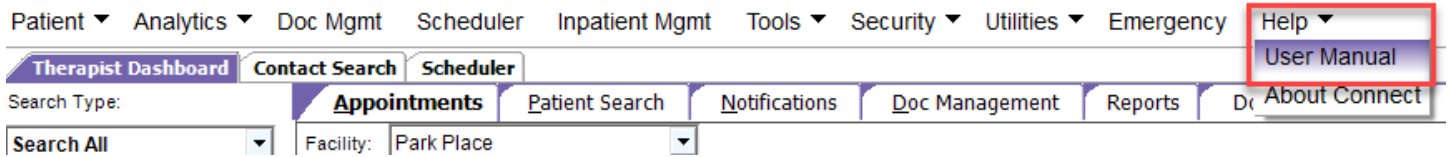
Day Week Month

Tuesday, September 12

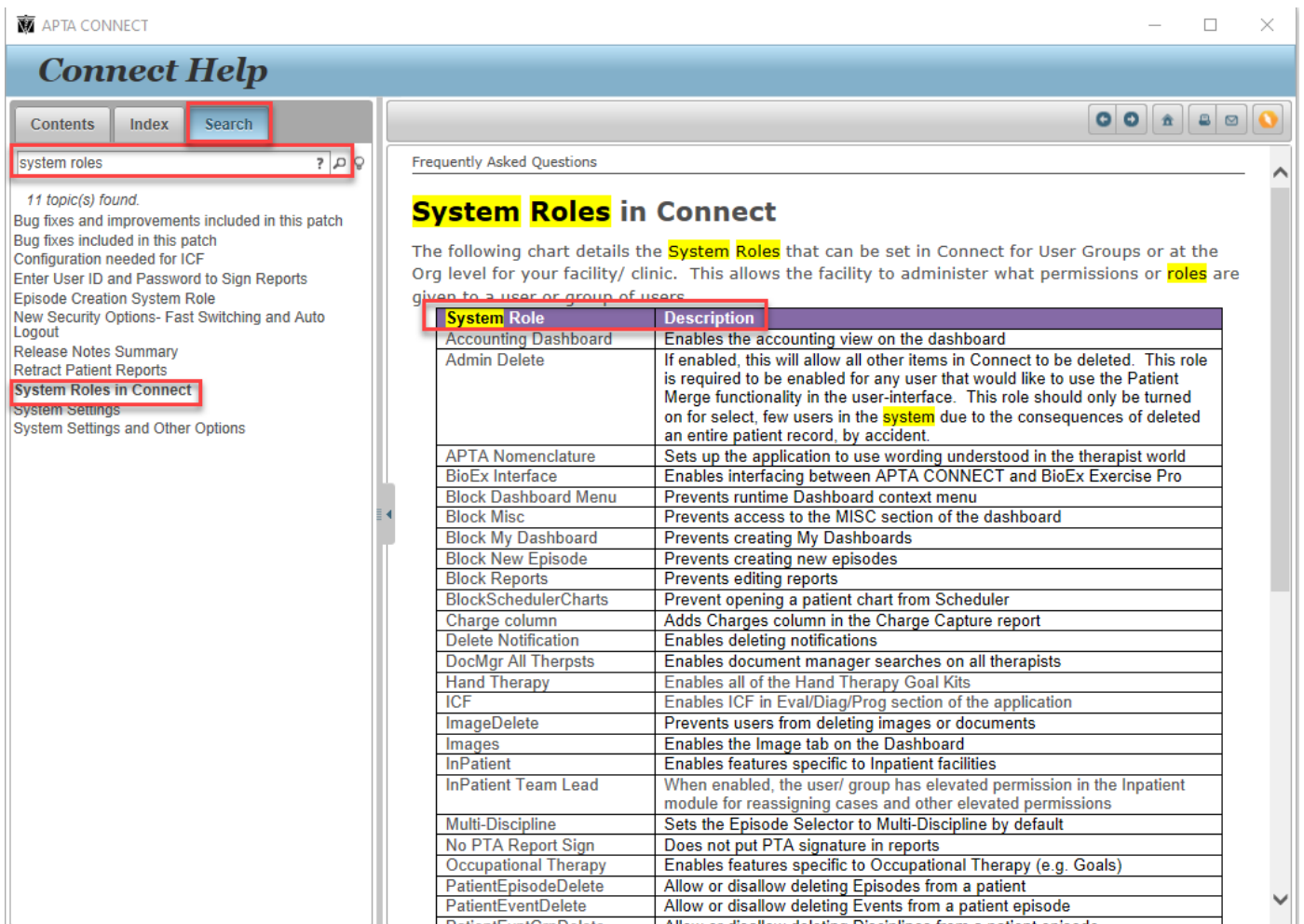
8 am	
8:15	
8:30	
8:45	
9:00	
9:15	
9:30	
9:45	
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10:15	
10:30	
10:45	
11:00	
11:15	
11:30	
11:45	
12 pm	
12:15	
12:30	
12:45	

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.