Adding new **Users to CubHub**



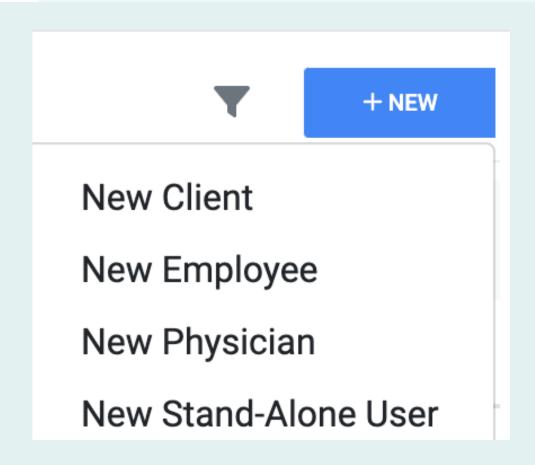
There are three main options for adding new users to the system.

Option 1

Admin> Users> +New

There are four types of users.

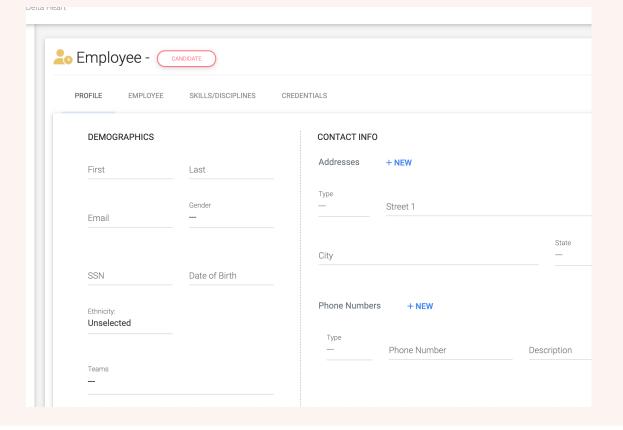
Make a selection and the system will navigate you to the correct screen to input the user.



Option 2

Employees> List> +New

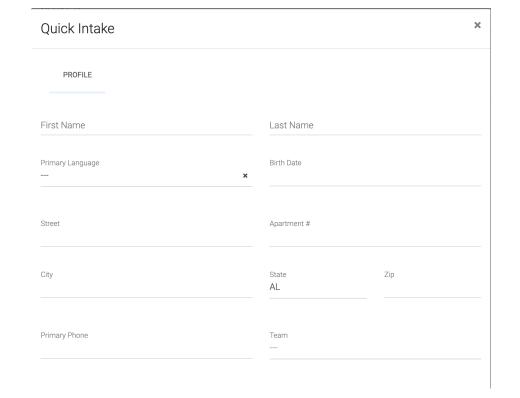
This option is typically used, when inputting new clinicians.



Option 3

Clients> List> +New

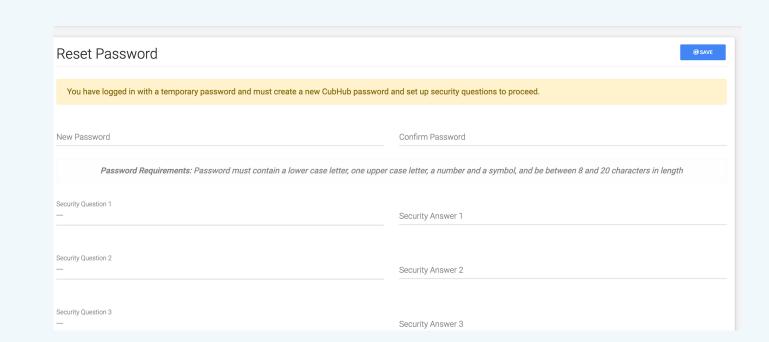
This option allows patient to be added through quick intake option.



User names & passwords

Usernames are automatically created with the user's first initial and last name, followed by the user's company code (ex. dheart.dev)

A temporary password is required to save the user. Use a generic and universal password for all users added to the system. The user will be prompted to change the password and set security questions upon first login to the system.



Adding new Users to CubHub



Permission Groups

All clinicians added to the system default to the same clinician user group. To adjust specific users to the admin level, go to Admin' Users' Select User' Security Group' Permission Groups: Select Clinician Admin' Save

Permission Groups
Clinician
Ollflician - Care ivianayei
Clinician - Limited Access
Clinician - Therapy Assistant
Clinician Admin
Clinician: Calendar Access
Finance

Employee vs. Stand-Alone User

Employees include clinicians and other licensed users. These are users who may be on payroll and who may need to be scheduled in the calendar.

Stand alone users will not need clinical access to patients and do not need to be paid through the system.



Patient Permissions

A user's access to patients will depend on the role of the user.

Access to a patient is possible if:

- 1) the clinician is scheduled with or has working visits with the patient.
- 2) the user has been given permission to 'see all patients.'
- 3) the user has been given 'chosen' permission to the patient.

