

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.

A screenshot of the CubHub interface showing a blue '+ NEW' button. Below the button is a dropdown menu with four options: 'New Client', 'New Employee', 'New Physician', and 'New Stand-Alone User'.

Option 2

[Employees](#) > [List](#) > [+New](#)

This option is typically used, when inputting new clinicians.

A screenshot of the 'Employee - CANDIDATE' form. The form has tabs for 'PROFILE', 'EMPLOYEE', 'SKILLS/DISCIPLINES', and 'CREDENTIALS'. The 'PROFILE' tab is active, showing fields for 'First', 'Last', 'Email', 'Gender', 'SSN', 'Date of Birth', 'Ethnicity' (with 'Unselected' as the current selection), and 'Teams'. There is also a 'CONTACT INFO' section with fields for 'Addresses' (with a '+ NEW' button), 'Type', 'Street 1', 'City', 'State', and 'Phone Numbers' (with a '+ NEW' button). The 'Phone Numbers' section has fields for 'Type', 'Phone Number', and 'Description'.

Option 3

[Clients](#) > [List](#) > [+New](#)

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

A screenshot of the 'Quick Intake' form. The form has a 'PROFILE' tab and a 'CONTACT INFO' section. The 'PROFILE' section has fields for 'First Name', 'Last Name', 'Primary Language', 'Birth Date', 'Street', 'Apartment #', 'City', 'State' (with 'AL' as the current selection), 'Zip', 'Primary Phone', and 'Team'. The 'CONTACT INFO' section has fields for 'Type', 'Phone Number', and 'Description'.

User names & passwords

Username 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.

A screenshot of the 'Reset Password' form. The form has a blue '+ SAVE' button in the top right corner. Below the button is a yellow message box that says: 'You have logged in with a temporary password and must create a new CubHub password and set up security questions to proceed.' The form has fields for 'New Password' and 'Confirm Password'. Below these fields is a section for 'Security Questions' with three questions and their corresponding answers. The questions are: 'Security Question 1', 'Security Question 2', and 'Security Question 3'. The answers are: 'Security Answer 1', 'Security Answer 2', and 'Security Answer 3'. There is a password requirement note: 'Password Requirements: Password must contain a lower case letter, one upper case letter, a number and a symbol, and be between 8 and 20 characters in length'.

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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

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Clinician - Care Manager

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.

User - Delta Heart Inactive ☒ Active

PROFILE SECURITY NOTIFICATIONS **PATIENT PERMISSION**

☒ Can See All Patients

[Admin> Users> Select user> Patient Permissions> Check box to see all patients OR + to give chosen patient permission> Save](#)