

Create New User

Any staff member at your organization that will be documenting information with the Therap software must have a **user** account in the Therap system. Administrators with the **User Administrator** Role will be able to create a new **user** account for other staff members.

1. Click on the **Admin** tab.



2. Click on **New** beside **User**.

The screenshot shows the Therap Global Admin interface. On the left is a navigation sidebar with 'Admin' highlighted. The main content area displays the 'User' management page, which includes a table of user-related actions:

User	
Caseload	Manage Archive
Change Password	User List
Default Notification Profile	Configure
Signup Agreement	New List
Splash Message	Create Update/Delete
Super Role	Manage Archive Legacy Archive
Title	New List Import from Excel Search Imported Excel
User	New List Update SSO User from Excel Import from Excel Search Imported Excel Assign External System ID Two Factor Authentication Self Password Reset
User Privileges	Manage Archive Legacy Archive Upto Jul 2011

3. **Create New User** page will come up. In the **User Information** section, enter the necessary details of the user.

Fields mark with a **Red Asterisk (*)** must be filled in. That means **First Name, Last Name, User Initials, Time Zone** fields can't be empty.

Create New User

User Information

→* **First Name**

→* **Last Name**

→* **User Initials**

→* **Time Zone**

4. The **User Initials** field requires at least two letters or numbers. Initials may consist of 2 or 3 characters.

Note: Each set of initials can only be used once within the account. Users may select the First Name's first letter and the Last Name's first letter as a User Initials.

By clicking on the search icon beside the **User Initials** field, available initials can be checked. The system will then display whether the User Initials are available, and suggest similar initials which can be chosen for this field.

If the initials are available for use, the message will be green and indicate that set of initials is available. If those initials have already been used, there will be a yellow banner that states those set of initials are not available.

Create New User

The screenshot shows the 'Create New User' form with the following fields:

- * First Name: John
- * Last Name: Ferdous
- * User Initials: JF
- * Time Zone: [Dropdown]

The 'Select Initial' modal is open, displaying a green banner that says "'JF' is available!'. Below the banner is a table of suggested initials:

JFS	JFU	JFA
JFD	JFR	JFE
JF0	JF2	JF3
JF4	JF5	JF6
JF7	JF8	JF9

5. In the **Authentication Configuration** section, Fill up the necessary fields: **Login Name, Password, Confirm Password.**

Authentication Configuration

→ * Login Name

→ * Password Weak Medium **Strong**

→ * Confirm Password

Ignore Password Policy Yes No

Note: The Password must be at least 8 characters long.

6. In the **Account Settings** option, the status will be marked as **Active**, and you would want to keep it that way to allow the user to access the account once it is set up.

Account Settings

Status Active Pending

7. Under the **Employer/Work Information** section select the title of the new user.

Employer/Work Information

* Title Special Teacher ▲ **+**

Employee ID Number 01234

Hire Date 01/01/2018

Back

Save

If the title is not there, click on the **add icon (+)** to add it. On the **Create New Title** page enter the title. The **Description** field is optional.

Title

×

Create New Title

* Title Special Education Teacher

Description

About 255 characters left

Save

When finished, click on the **Save** button. Once you have entered the title here, it will then appear on the drop-down list of titles for future use.

8. After entering information in the **Create New User** page, click on the **Save** button.

Back	Save
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
9. On the **Personal Information** page enter information as appropriate.

Under the **Basic Information** Section, **Photo**, **Gender**, **Date of Birth** may be entered. While **User Name**, **User Status**, and **Title** will be autofilled from the information updated in the previous page.

Personal Details

Personal Information

Basic Information

Photo	<input type="button" value="Add Image"/>
User Name	John Ferdaus
User Initials	JF
Title	Special Teacher
Gender	<input checked="" type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Other
Date of Birth	<input type="text" value="01/01/2000"/> 
License Number	<input type="text"/>
SSN	<input type="text"/>
ID(s)	<input type="text" value="- Please Select -"/> <input type="text" value="ID Number"/>
	<input type="button" value="+ Add"/>

Under the **Contact Information** section, **Address, Phone Number, Phone Number Comments, E-Mail Address** may be entered.

Contact Information

Address	<input type="text" value="12234 Main Street"/> Street 1	<input type="text"/>	Street 2
	<input type="text" value="Anytown"/> City	<input type="text" value="State"/> ▾ State	<input type="text" value="012345"/> Zip Code
			<input type="text" value="Philippines"/> ▾ Country
Phone Number	<input type="text" value="012346985"/> Home	<input type="text" value="01234567890"/> Mobile	
	<input type="text"/> Temporary	<input type="text"/> Extension	
Phone Number Comments	<input type="text"/>		
E-Mail Address	<input type="text" value="demo@demoaccount.com"/>		

In the **Preferences** section, **Time Zone** must be selected from the dropdown.

Preferences	
* Time Zone	<input type="text" value="Asia/Manila"/> ▾
Enable Notification	<input type="checkbox"/>

In the **Additional Contact Information** section, **Employer/Work Information**, **Emergency Contact 1**, **Emergency Contact 2** may be entered.

Additional Contact Information	
Employer/Work Information	
Work Phone Number	<input type="text" value="234875"/> <input type="text" value="Extension"/>
Fax Number	<input type="text"/>
Emergency Contact 1	
Name	<input type="text" value="Julia Albert"/>
Phone Number	<input type="text" value="1234567890"/> <input type="text" value="+880"/>
Emergency Contact 2	
Name	<input type="text" value="Jason Albert"/>
Phone Number	<input type="text" value="1334567890"/> <input type="text" value="+880"/>

Enter the fields under the **EVV** section if applicable for the organization.

EVV	
EVV ID	<input type="text"/>
EVV Caregiver Type	<input type="text" value="- Please Select -"/>

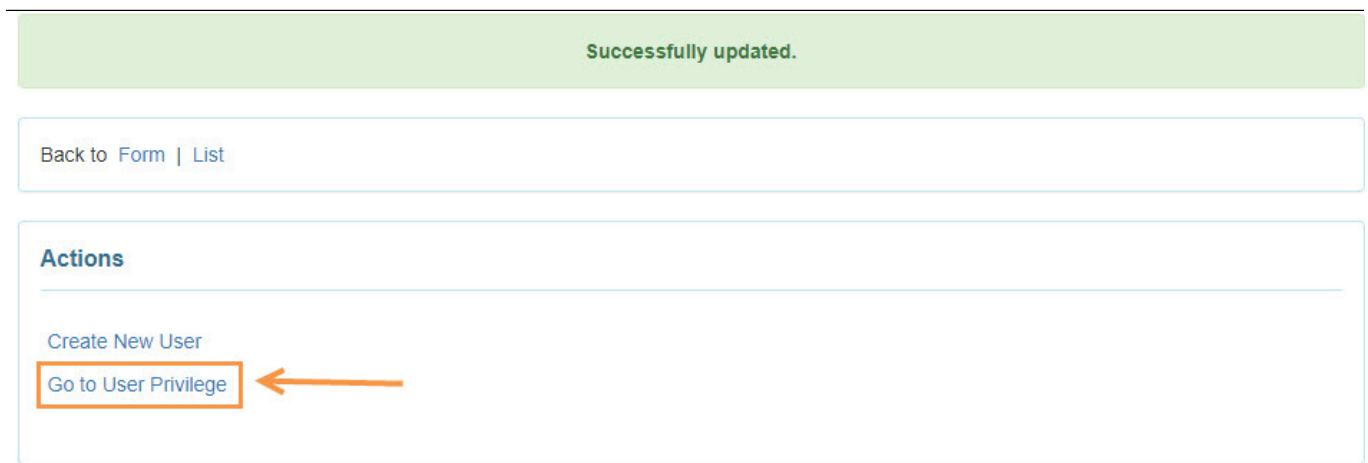
Once the account is set up, users can also enter this information for themselves from the settings tab.

10. After entering the necessary information of the user click on the **Save** button



A light blue horizontal bar containing two buttons. On the left is a white button with the text "Cancel". On the right is a blue button with the text "Save".

11. After clicking on the **Save** button a success message will be displayed.



A green banner at the top contains the text "Successfully updated." Below this is a white bar with the text "Back to [Form](#) | [List](#)". Underneath is a section titled "Actions" with a horizontal line. Below the line are two links: "Create New User" and "Go to User Privilege". The "Go to User Privilege" link is highlighted with an orange border and an orange arrow points to it from the right.

Users may click on the **Go to User Privilege** link to assign or unassign the Super Admin Administrative Role, Caseload, Super Role, Agency Wide Administrative Roles and other privileges from the **User Privilege page**.

To learn more about **Agency Wide and Administrative Roles** click [here](#).

To learn more about creating **Super Roles** [click here](#)

To learn more about creating **Caseloads** [click here](#)