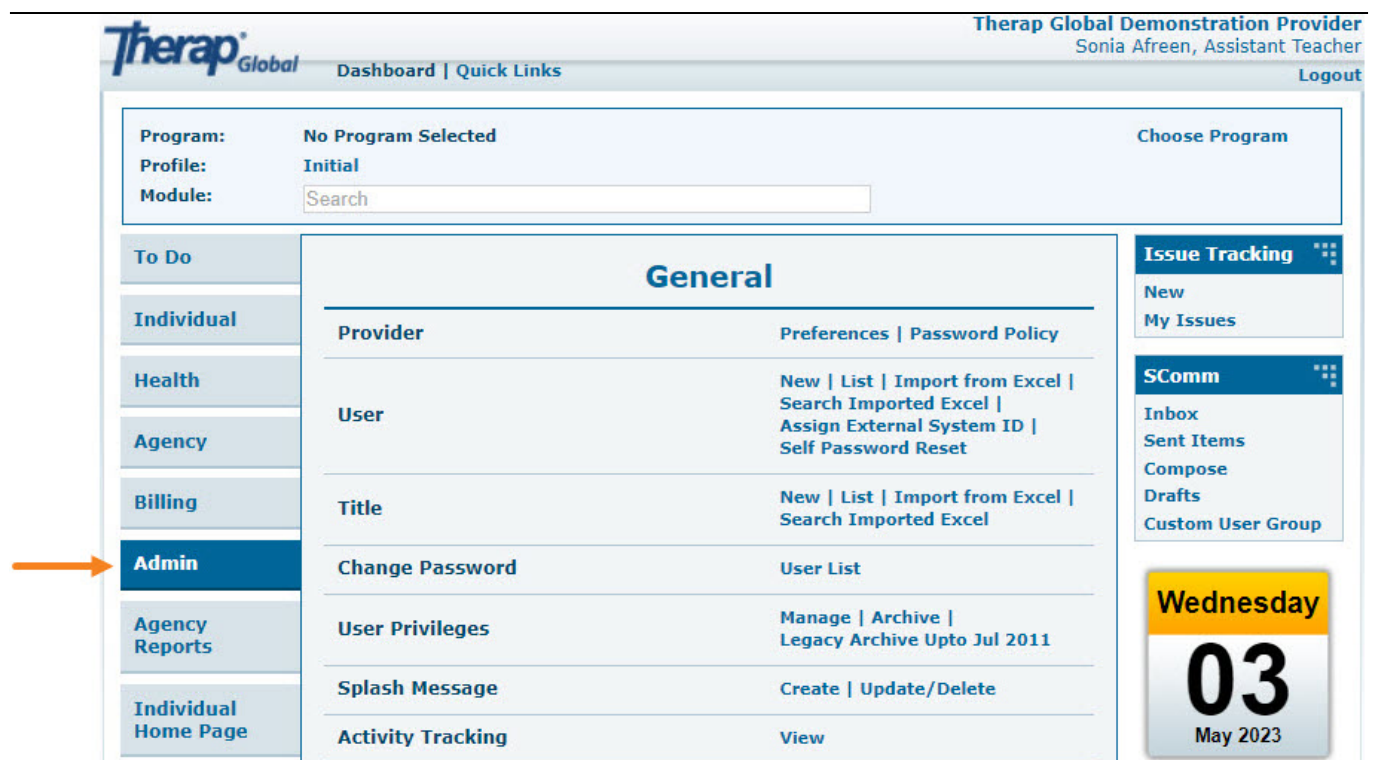


Create New User

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.



The screenshot shows the Therap Global Dashboard. At the top, the header includes the Therap Global logo, the text "Therap Global Demonstration Provider", the user name "Sonia Afreen, Assistant Teacher", and a "Logout" link. Below the header, there is a "Dashboard | Quick Links" section. The main content area is divided into three columns. The left column contains a sidebar with tabs: "To Do", "Individual", "Health", "Agency", "Billing", "Admin" (highlighted with an orange arrow), "Agency Reports", and "Individual Home Page". The middle column is titled "General" and contains a table with the following rows:

Provider	Preferences Password Policy
User	New List Import from Excel Search Imported Excel Assign External System ID Self Password Reset
Title	New List Import from Excel Search Imported Excel
Change Password	User List
User Privileges	Manage Archive Legacy Archive Upto Jul 2011
Splash Message	Create Update/Delete
Activity Tracking	View

The right column contains two sections: "Issue Tracking" with links "New" and "My Issues", and "SComm" with links "Inbox", "Sent Items", "Compose", "Drafts", and "Custom User Group". At the bottom right, there is a date widget showing "Wednesday 03 May 2023".

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

To Do	General	
Individual	Provider	Preferences Password Policy
Health	User	New List Import from Excel Search Imported Excel Assign External System ID Self Password Reset
Agency	Title	New List Import from Excel Search Imported Excel
Billing	Change Password	User List
Admin		

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

User Information

* First Name

John

* Last Name

Ferdous

* User Initials

JF

Q

* Time Zone

Select Initial

'JF' is available!

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

ferdaus

→ *

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

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

Add Image

User Name

John Ferdaus

User Initials

JF

Title

Special Teacher

Gender

☒ Male ☐ Female ☐ Other

Date of Birth

01/01/2000

License Number

SSN

ID(s)

- Please Select -

ID Number

+ 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"/>	<input type="text"/>		
	Street 1	Street 2		
	<input type="text" value="Anytown"/>	<input type="text" value="State"/>	<input type="text" value="012345"/>	<input type="text" value="Philippines"/>
	City	State	Zip Code	Country
Phone Number	<input type="text" value="012346985"/>			
	Home			
	<input type="text" value="01234567890"/>			
	Mobile			
	<input type="text"/>	<input type="text"/>		
	Temporary	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.

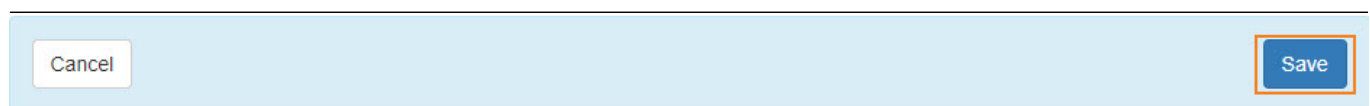
Additional Contact Information		
Employer/Work Information		
Work Phone Number	<input type="text" value="234875"/>	<input type="text" value="Extension"/>
Fax Number	<input type="text"/>	
Emergency Contact 1		
Name	<input type="text" value="Julia Albert"/>	
Phone Number	<input type="text" value="1234567890"/>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

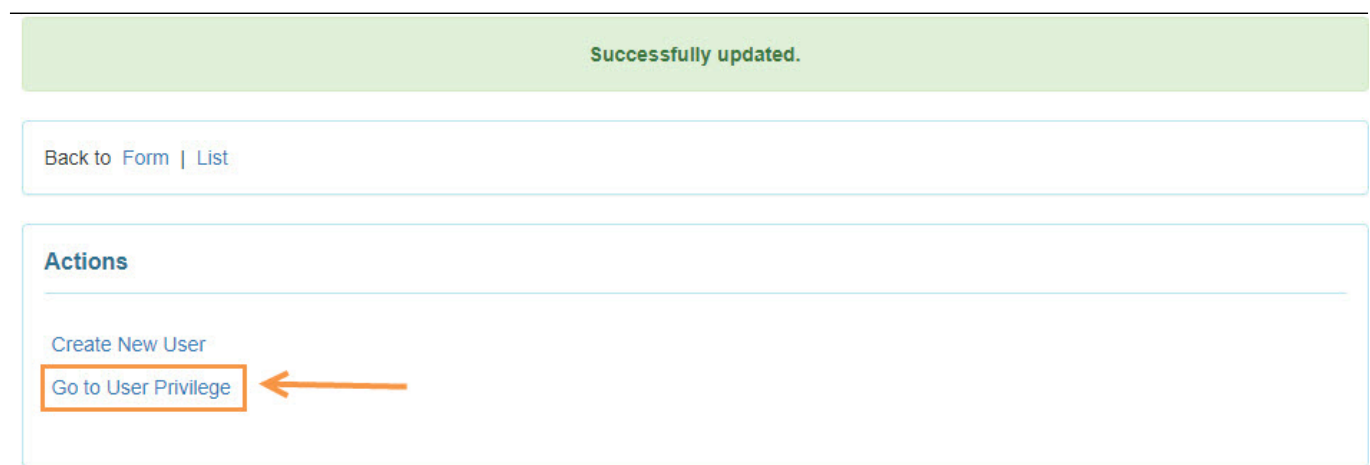
EVV	
EVV ID	<input type="text"/>
EVV Caregiver Type	<input type="text" value="- Please Select -"/>

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 at the bottom of a form. On the left is a white button with the text "Cancel". On the right is a blue button with the text "Save", which is highlighted with an orange border.

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

A screenshot of a web interface. At the top is a green banner with the text "Successfully updated." Below this is a white bar with the text "Back to Form | List". Underneath is a section titled "Actions" in blue. Inside this section 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](#)

