

## Update User Information

Users assigned with the **User Administrative** Role will be able to view or edit user information.

1. Click on the **List** link beside the **User** option on the Admin tab.

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

2. Select the **user** from the **User List** page.


Showing 1 to 7 of 7 entries

**NOTE** Deactivating a user will remove all profiles and privileges. To temporarily suspend access, use Lock/Unlock.

| Login Name ↑         | First Name           | Last Name            | Title                 | Employee ID          | Status | Status Action | Lock / Unlock | Lock / Unlock Action |
|----------------------|----------------------|----------------------|-----------------------|----------------------|--------|---------------|---------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/>  | <input type="text"/> | All ▾  |               | All ▾         |                      |
| aamira               | Aamira               | Shabnam              | Software Engineer, QA |                      | Active | Deactivate    | Unlocked      | Lock                 |
| abdullah             | Abdullah             | Khan                 | Teacher               |                      | Active | Deactivate    | Unlocked      | Lock                 |
| abdur                | Abdur                | Hossain              | Special Teacher       | 1122                 | Active | Deactivate    | Unlocked      | Lock                 |
| abir                 | Abir                 | Mia                  | Teacher               |                      | Active | Deactivate    | Unlocked      | Lock                 |
| abraham              | abraham              | linkon               | Academic Coordinator  |                      | Active | Deactivate    | Unlocked      | Lock                 |
| abrar                | Abrar                | Hayat                | Therap Admin          |                      | Active | Deactivate    | Unlocked      | Lock                 |
| abu                  | abu                  | taher                | Academic Coordinator  |                      | Active | Deactivate    | Unlocked      | Lock                 |

Showing 1 to 7 of 7 entries

< 1 >

 Export to Excel

Cancel

3. Search options are also available to find a **user** by filling out any of the blank fields Login Name, First Name etc.

## User List

⚠ **NOTE** Deactivating a user will remove all profiles and privileges. To temporarily suspend access, use Lock/Unlock.

| Login Name ↑ | First Name | Last Name | Title           | Employee ID | Status | Status Action | Lock / Unlock | Lock / Unlock Action |
|--------------|------------|-----------|-----------------|-------------|--------|---------------|---------------|----------------------|
| john         |            |           |                 |             | All    |               | All           |                      |
| john ←       | John       | Albert    | Special Teacher | 01234       | Active | Deactivate    | Unlocked      | Lock                 |

Showing 1 to 1 of 1 entries

< 1 >

Export to Excel

Cancel

Click on the **Login Name** of the **user** to view the information.

4. On the **Update User Information** page, the user's account and employer information fields will be editable.

**Note:** Users will not be able to edit **User Initials**, **Login Name**, **Status** and **Self Enroll Account** fields.

## Update User Information

NOTE: Password has expired for this user's account. You need to reset the password.



### User Information

|               |  |
|---------------|--|
| * First Name  | <input type="text" value="John"/>        |
| * Last Name   | <input type="text" value="Albert"/>      |
| User Initials | JA                                       |
| Login Name    | john                                     |
| * Time Zone   | <input type="text" value="Asia/Manila"/> |

### Account Settings

Status Active

### Employer/Work Information

|                    |  |   |
|--------------------|--|---|
| * Title            | <input type="text" value="Special Teacher"/> |  |
| Employee ID Number | <input type="text" value="012345"/>          |   |
| Hire Date          | <input type="text" value="03/15/2020"/>      |  |

[Go to Personal Details](#)

[Go to Privilege](#)

[Back](#)

[Delete](#)

[Update and go to Personal Details](#)

[Update and go to Privilege](#)

[Update](#)

5. Click on the **Go To Personal Details** link or the **Update and go to Personal Details** button (if changes were made) to switch to the user's **Personal Details** page.

[Go to Personal Details](#)

[Go to Privilege](#)

[Back](#)

[Delete](#)

[Update and go to Personal Details](#)

[Update and go to Privilege](#)

[Update](#)

Or if all the necessary information is already updated, click on the **Update** button.

6. On the **Personal Details** page of the **user**, a user's personal details and other contact details in the Personal Information section can be edited.

Personal Information

Basic Information

Photo

Add Image

User Name

John Albert

User Initials

JA

Title

Special Teacher

Gender

☒ Male
 ☐ Female
 ☐ Other

Date of Birth

01/01/1998

License Number

SSN

ID(s)

- Please Select -

ID Number

+ Add

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

### Contact Information

Address

Street 1

Street 2

City

State

Zip Code

Country

Phone Number

Home

Mobile

Temporary

Extension

Phone Number

Comments

E-Mail Address

In the **Preferences** section, **Time Zone** can be changed if needed.

### Preferences

\* Time Zone

Enable  
Notification

☐

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

Additional Contact Information

Employer/Work Information

Work Phone Number

234875

Extension

Fax Number

Emergency Contact 1

Name

Julia Albert

Phone Number

1234567890

+880

Emergency Contact 2

Name

Jason Albert

Phone Number

1334567890

+880

The fields under the **EVV** section can also be edited if applicable for the organization

EVV

EVV ID

EVV Caregiver Type

- Please Select -

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7. After updating the user's information, click on the **Update** button to save the changes.

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Profile(s)

User Links

Cancel

Back

Update

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8. After clicking on the **Update** button a successfully updated message will be displayed.

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Successfully updated.

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Actions

Create New User

Go to User Privilege

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