## Partner Portal – Users Tab

The Users tab is available to any user with the "Office Administrator" role. Additional office administrators/office users can be added to individual offices (program codes).

Lifeline 🎍	Nartner I 🔊 📲	Portal		English v Lifeline 200
Home Care plans Sites Jobs Equip	pment Actions Activities Reports Dashboards Users 0	Offices Agencies		
User Management		Show all users	Search	+ Add new user
User Name 🕇	Login ¢	Role 0	Office o	
Kerin VanSickle	kerin.vansickle	Office Administrator	HealthCare Services #TT200	1
Kim Test	Kim Test	Office Administrator	HealthCare Services #TT200	1
Lifeline 200	Lifeline200	Office Administrator	HealthCare Services #TT200	1
Portal 200	Portal200	Office User	HealthCare Services #TT200	1
Samir Hidjir	samir.hidjir	Office Administrator	HealthCare Services #TT200	1

## Adding a User

To add a new user, click the + Add new user button in the top right corner of the screen.

Show all users	Search	+ Add new user

The Add New User window will display

Add new user						Is Internal
Login*		Employee Number			Name *	
Username		Enter Employee Number	Find		Firstname Lastname	
Phone			Email*			
(508) 555-1234			Example.Email@lifeline.co	om		
Role		Office			Default Language	
Office User	×	HealthCare Services #TT200	×		English	×
Program Codes						
20200-× 20201-× 20202-×						×
Must Change Password			Can Read Data Only			
Add						

Fill out the appropriate fields:

•

- Login: The username they will enter to log in to the portal (required)
  - Restrictions:
    - The Login name should not exceed 30 characters.
    - The Login name should not contain any spaces. If you save a username with spaces, you
      will need to set the account to "Inactive" and submit a new account without spaces in the
      name

- Name: The office users first and last name (required)
- Phone: The contact number for the user
- **Email:** The email linked to the account (required)
- Role: The users assigned role
  - **Office Administrator:** This role allows the user to create and manage user accounts, review and adjust office settings (templates and 2 factor authorizations), and create new Care Plan templates.
  - **Office User:** This role will restrict the user to only creating or updating Care Plans associated to the assigned Program Codes/Office
- **Office:** The associated office (Parent Program Code) for the user. This will drive which Program Codes can be assigned to the user account
- Default Language: The default language for the user
- Program Codes: The associated Service Companies (Program Codes) that the user can access
- Must Change Password: This will require the user to change their password upon login
- Can Read Data Only: This will set the users account to read only.

After the appropriate fields have been populated, click Add to add the users account.

Note: You will need to refresh to page to see the new user account listed on the Users tab

## Updating and Removing Users

To make updates to a user account, click the user you wish to update from the list to display the users information

Evan Testing #2466				Is Internal Inactive
Login*	Employee Number		Name *	
Evan. Test	Enter Employee Number	Find	Evan Testing	
Phone		Email*		
XXX-XXX-XXXX		Evan.Blanchard@lifeline.com		
Role	Office		Default Language	
Office User ×	HealthCare Services #TT200	×	English	×
Program Codes				
20200-× 20201-× 20202-×				×
Must Change Password		Can Read Data Only		
Reset 2FA Authenticator App Key			Update	

From this window, you can make updates to the fields listed in the prior section or reset their two factor authentication key as needed. Once updates are made, click the *Update* button save the changes.

From the Users tab, you can also click the 3 dots next to a user account to display 3 options

User Name 🛧	Login o	Role o	Office o		
Evan Testing	Evan.Test	Office User	HealthCare Services #TT200	Edit	1
Kerin VanSickle	kerin.vansickle	Office Administrator	HealthCare Services #TT200	New Password	
KimTest	Kim Test	Office Administrator	HealthCare Services #TT200	Lock	14

- Edit: This will bring up the user edit page as outlined above
- **New Password:** Generates a new password to be emailed to the user.
- Lock: This will lock the account to prevent further access.