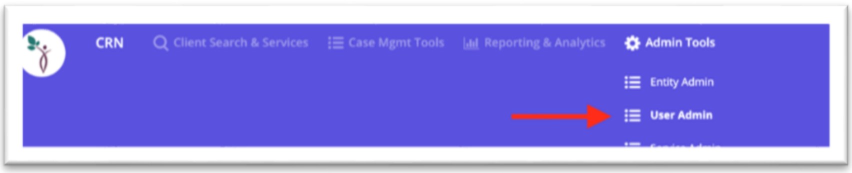
Admin Tools

New User Set Up

As an Entity Admin you can set up your own users. From the Admin tools select User Admin.



Then click + Add New User.

Follow the guide on the right to make sure all required fields are filled in then click submit.

For User Role there are 3 Options:

1. Navigator: Permissions include: Search CRN Registry, Search MPI Database, Create New Clients, Obtain Consent, Send Client Package, Client Profile Access, Joining a Care Team
2. Case Worker: Includes all Navigator Permission plus the following: Add/Remove in Agency Users
3. Level Y: Agency Admin: Includes all of the above plus the following: Edit Agency Information, Create Users, Edit Users and soon to be available, Create Forms, Edit Forms and Delete Forms.

ProTip: You can add additional permissions to users by clicking on the appropriate permission. But not all permissions are available to all user role.

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