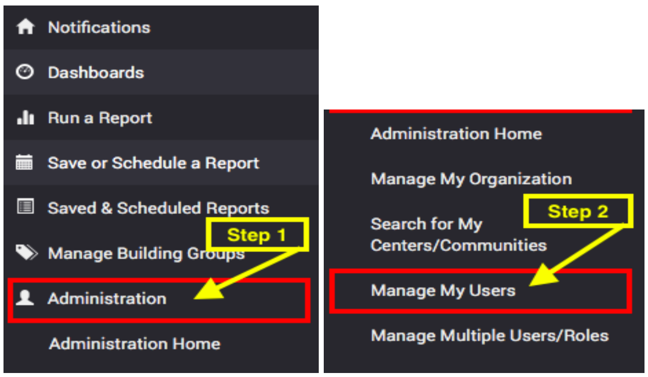
Objective:

The new and improved way to add users in LTC Trend Tracker allows for account administrators to add multiple users to their organization. Each user can either be added to a single facility or the entire organization with the standard permissions.

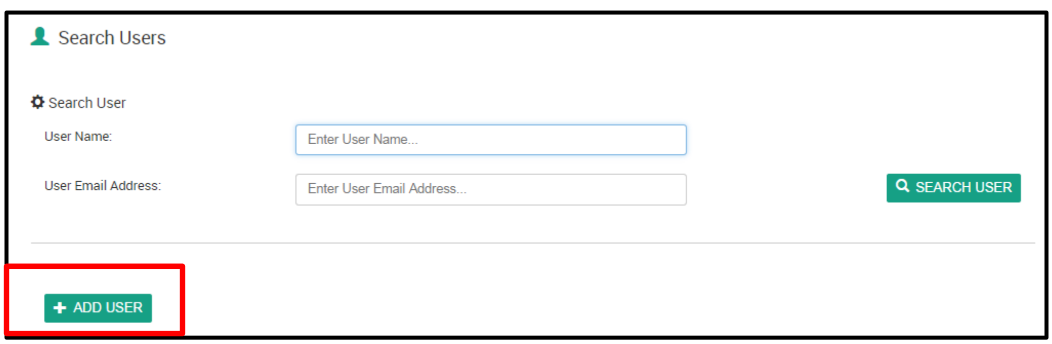
Note: If a user needs to be added to a subset of facilities within your organization, or needs specific permissions, these muse be done on the users' individual profile page.

Adding a single user

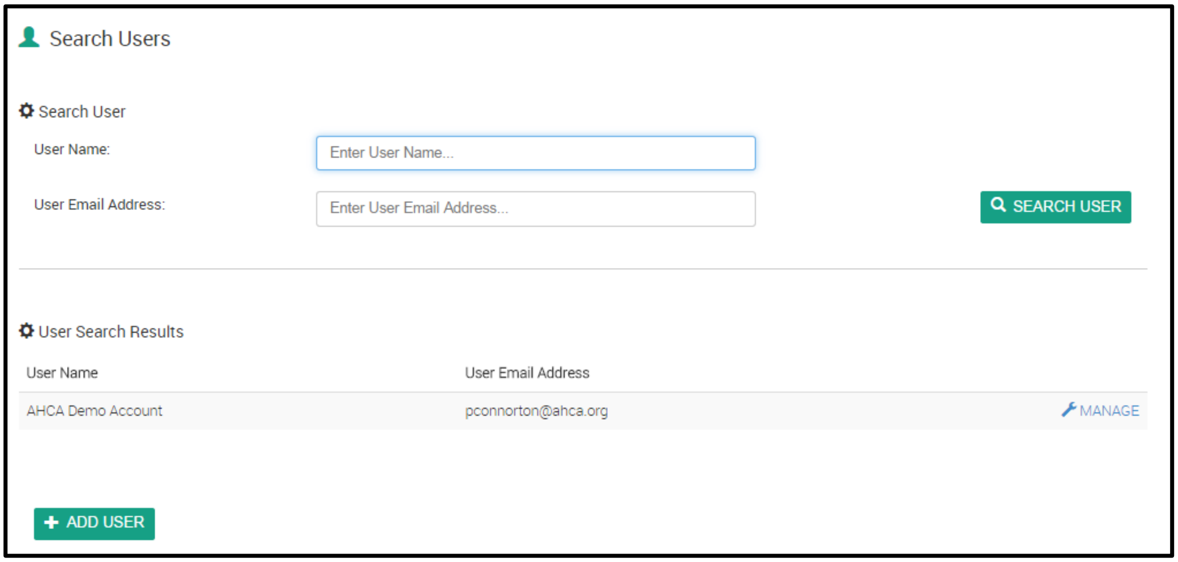


1. On the "**Manage My Users**" page you can search for users by their user name or email address. Users will not automatically be displayed until information is entered into the search bar.

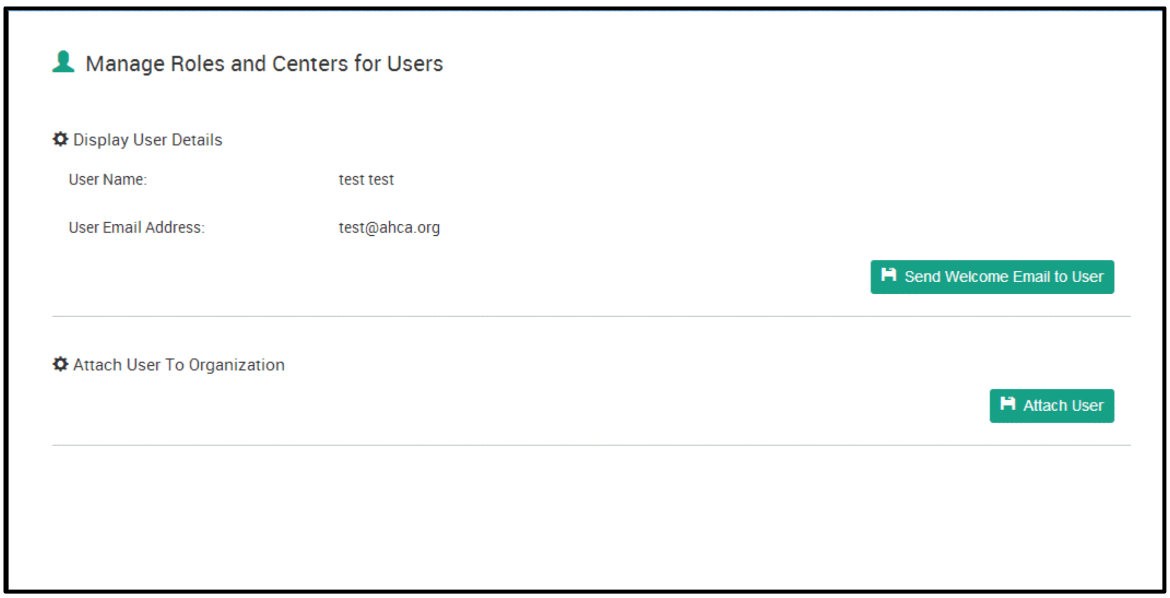
   TIP: Email Address is the fastest way to search!



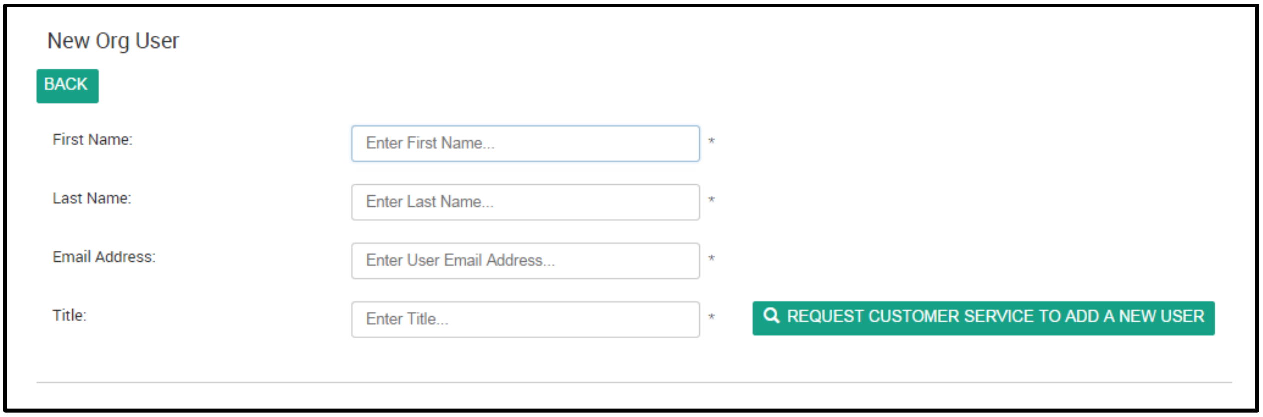
2. Search results will be displayed under "**User Search Results**." Once you have identified the individual you wish to add or delete in your search results, click "**Manage**" next to the name of the correct individual.



3. **<u>If this is a new user you have requested to have access,</u>** you will see the screen below prior to being able to click **"Manage"**. Please **<u>attach</u>** them to your organization.



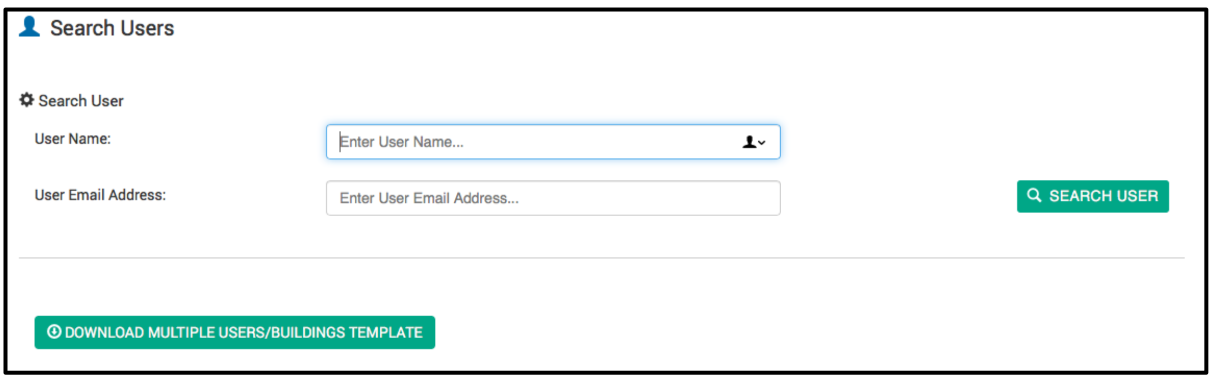
4. The "**Add User**" button (earlier screenshot) **<u>should be used only if the desired user cannot be found after searching by User Name and User Email Address.</u>** The Add User function is designed to add new individuals that have no pre-existing record in the system. To add a new user that cannot be found using the search function, complete the required information, as illustrated below, and then click "**Request Customer Service to Add a New User**."



PLEASE NOTE: THIS ACTION IS ONLY FOR INDIVIDUALS YOU WERE NOT ABLE TO FIND WHEN SEARCHING FOR THEM IN THE PREVIOUS SECTION.

Adding 2 or more users

1. Download the Multiple Users/Buildings Template



2. Fill out one row for each user, and choose the correct options for columns E &F. **Note: DO NOT FILL OUT THE CRM ORG ID COLUMN.**

Org Name	Email Address	First Name	Last Name	Job Title	Assigned to Individual Center or entire organization	If assigned to Individual, what is the FPN of the center?	CRM_ORG_ID

Tip: If you need the Medicare Provider Number for your SNF facility, or the NCAL ID for your AL Community, please visit www.ltctrendtracker.com and click "REGISTER".

3. Email the completed spreadsheet to help@ltctrendtracker.com. If there are any errors in your file and/or when the upload has been completed, the LTC Trend Tracker Team will be in touch within 2-4 business days.

4. Once your users have been uploaded to the system, they will **immediately** have access. If you would like to edit user roles, assign upload permissions, turn on access to specific reports, or add additional facilities to a singular user, please reference the following steps:

Editing Users

1. Clicking "**Manage**" will allow you to edit permissions for that user. Please reference the chart below for information on appropriate user roles for your staff:
    a. "**Assign User Role**" Each user **must** be assigned **one** primary role. There are three types of user roles that an organization may choose for its individual users:
        i. "Provider Org Administrator": This role assigns the user to the whole organization. This person manages centers and users and assigns permissions to other users for the whole organization. Also known as the Account Administrator.
        ii. "Provider Org Org Unrestricted User": this role assigns the user to the whole organization, allowing access to data for all centers attached to that organization.
        iii. "Provider Org Center Unrestricted User": this role assigns the user to one or more individual centers and allows access to data only for those centers.
        iv. To remove a user, click **"detach".**

    b. The "**(Optional) Additional Access**" section lists optional permissions for access to specific reports that can be selected or de-selected for each user. These additional options are not listed as selections for any user in the Account Administrator role because all permissions are automatically active for users in that role.

Note: By default, all user types have access to all reports **except** the Turnover, RUGs and Cost Reports. To allow permission to view these reports, the Account Administrator must turn these additional permissions on. To do so, the Account Administrator must go to the "**Manage Users**" tab and search for the user by name or by the user's email address. When the user is found, click "**Manage**" to make changes to permissions.

To assign optional permissions, select each of those desired by marking the check box. When all desired permissions for the user have been selected, click "**Save.**" Permissions can be modified by the Account Administrator at any time by returning to this page.

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a. "**Select Centers that Users can access**" section allows you to edit the selection of centers within a user's existing profile.
    i. The "Status" indicator Next to the Center Name will display the access status of that specific center to a user. Click "Detach" to remove access to a center's information from a given user. 

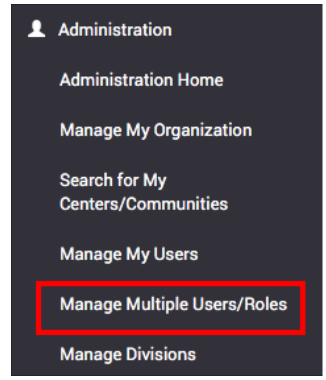
    ii. At the bottom of the list of centers, the 

button will allow for the Account Administrator to assign all centers at once to a user with one click.

Editing Multiple Users

If you would like to edit user roles, assign upload permissions, turn on access to specific reports, or add additional facilities to a multiple users, please reference the following steps:

a. Under the Administration Tab, click **"Manage Multiple Users/Roles".**



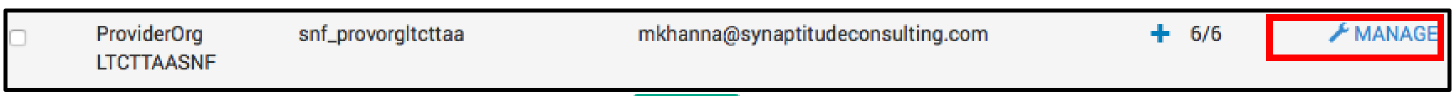
b. Select a Primary Role.

c. In the Permissions box, select the permissions that you would like to add to your users.

d. Assign Roles And Permissions to these Users In this box, select each individual user that you would like to assign the previously selected user role and permissions too.

e. If you would like to manage the profile a specific user or remove a user from your organization, click "Manage" next to the users name.

f. If you would like to see a snapshot of which centers or communities the user is attached to, click the + sign next to the number ratio.



g. Once all selections have been made, click SAVE

User Roles	Definition
Provider Org Administrator	Sets the user privileges and facilities for the organization, has access to information for the entire organization
Provider Org Org Unrestricted User	Has access to information for the entire organization (all centers)
Provider Org Center Unrestricted User	Has access to information for one or more individual center(s)
Default Functions/Permissions By User Role	**Definition**
Provider Org Account Administrator:	
Create/edit centers and profiles	The ability to create/edit facility profiles
Create/edit center groups (sub orgs)	The ability to create/edit sub organizations
Create/edit users & their permissions	The ability to create/edit user permissions
Create/Edit org focus tags (F & K tags)	The ability to edit and change the organization-wide focus tags visible on CASPER Citation reports for the organization and all associated centers
Provider Org or Center Unrestricted User:	
Edit Own Dashboard, Report and Peer Group selections, run all reports except Turnover, RUGs, and Cost Reports	The ability to select report & dashboard options and peer groups, run reports (except Turnover and RUGs) for all centers assigned (Provider Org Center Unrestricted User) or for entire organization (Provider Org Org Unrestricted User)
Additional (Optional) Permissions (Assigned to Users by Account Administrator)	**Definition**
Edit Center and Profile Information	Permission to modify, delete, and add facilities to organization (subject to AHCA customer service approval), edit facility profiles (name, contact info).
Upload RUGs data	Permission to upload, edit & download RUG data (does **not** include permission to view RUG reports or RUGs metrics on dashboard)
Edit Turnover data	Permission to upload, edit & download Turnover data
View Cost Report	Permission to see the Medicare cost report data
View RUGs Report	Permission to view & download RUGs report, upload/edit RUGs data, and view RUGs dashboard metrics
View Turnover Report	Permission to view & download Turnover report, upload/edit turnover data ,and view Turnover dashboard metrics
Allowed to list and report on SNF centers	View SNF related reports for associated facilities
Allowed to list and report on AL centers	View AL related reports for associated facilities
Allowed to Upload NCAL Measures Data	Can upload AL Quality Measures data
Allowed to Edit Organization Building Goals	Create and Edit Organization Building Goals