

Admin Practice: Users

- Go to your username located to the upper right hand side of the screen, and click the down arrow to display additional options.
- Click on **Admin Practice**

The screenshot shows the CareEvolve interface. At the top right, the user's name 'CARE EVOLVE' is circled in red. A dropdown menu is open, showing the user's profile: 'Care Evolve', 'P: Lab Administration', and 'L: Test Account-CareEvolve123'. The 'Admin Practice' option is highlighted with a red arrow. Other options include 'Test Compendium', 'Downloads', 'Reset Password', 'Announcements', and 'Help'. At the bottom of the menu are language options 'ENG' and 'ESP', and a 'Logout' button.

Users: Manage

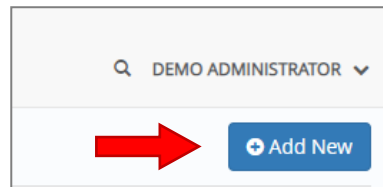
- In the options to the far left of the page, click the drop down arrow next to **Users**, and then click **Manage**

The screenshot shows the 'Users: Manage' page in CareEvolve. On the left, a sidebar menu is open, showing 'PRACTICE ADMINISTRATION' with options: 'Customs', 'Favorites', 'Practice', 'Users', and 'Manage'. The 'Users' option is circled in red, and a red arrow points to the 'Manage' option. The main content area shows a table of users with columns: 'User Name', 'Name', 'User Type', 'Access Level', and action icons (edit and delete). The table contains 5 rows of user data. At the bottom right, it says '1 - 5 of 5 items'.

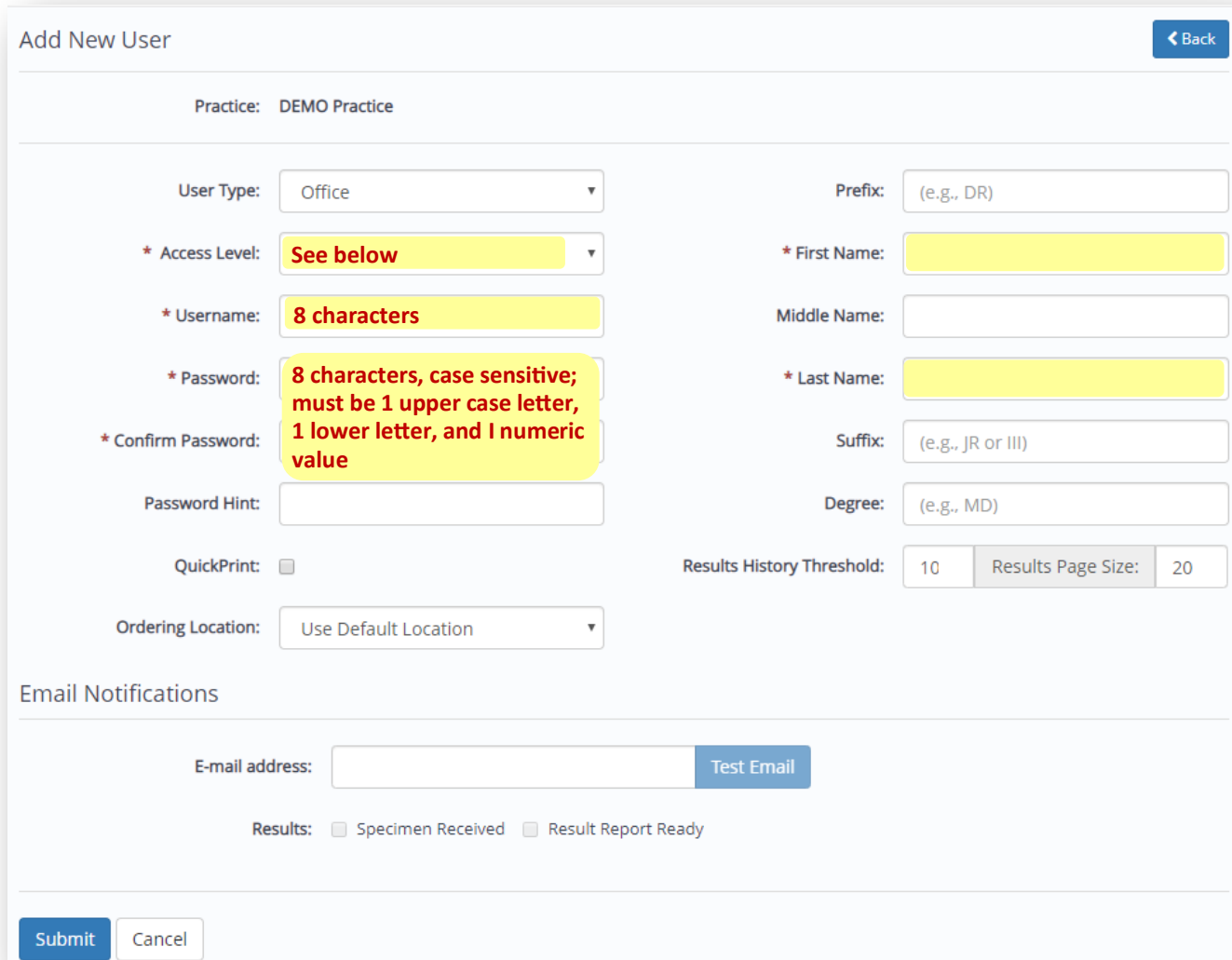
User Name	Name	User Type	Access Level	
DemoAdminUser	Administrator, Demo	Office	Practice Admin	
provider2	McDoctor, Physician	Provider	Results Only	
DemoProvider	McProvider, Demo	Provider	Practice Admin	
FullCEAccessUser	User, FullAccess	Office	Full CareEvolve Access	
LabOrderOnlyUser	User, Phlebotomist	Office	Lab Ordering Only	

Users: Add New User

- Client "Add New" (blue button) underneath your username located in the top right hand corner of the page.



The highlighted fields below are the only required fields to complete when setting up a user.

A screenshot of the 'Add New User' form. The form is titled 'Add New User' and has a 'Back' button in the top right corner. The practice is set to 'DEMO Practice'. The form contains several fields: 'User Type' (Office), 'Access Level' (See below), 'Username' (8 characters), 'Password' (8 characters, case sensitive; must be 1 upper case letter, 1 lower letter, and 1 numeric value), 'Confirm Password', 'Prefix' (e.g., DR), 'First Name', 'Middle Name', 'Last Name', 'Suffix' (e.g., JR or III), 'Degree' (e.g., MD), 'QuickPrint' (checkbox), 'Results History Threshold' (10), 'Results Page Size' (20), and 'Ordering Location' (Use Default Location). The 'Access Level', 'Username', 'Password', and 'Last Name' fields are highlighted in yellow. Below the form is an 'Email Notifications' section with an 'E-mail address' field and a 'Test Email' button. At the bottom, there are 'Submit' and 'Cancel' buttons.











Access Levels

- **Practice Administrator:** User may place orders, view results, adjust practice favorites, add/delete users, view duplicate patient reports, and view interface logs.
- **Full CareEvolve:** User may place orders and view results.
- **Lab Ordering Only:** User may only place orders.
- **Results Only:** User may only view results.
- **Patient ID Only:** User may place orders only and may only search for the patient using a patient ID.

Users: Reset Password

- Locate the username and click the BLUE edit button (blue) to the right of that user.

NOTE: You will NOT be able to edit any users with the User Type of **Provider**

User Name	Name	User Type	Access Level	
DemoAdminUser	Administrator, Demo	Office	Practice Admin	 
provider2	McDoctor, Physician	Provider	Results Only	 
DemoProvider	McProvider, Demo	Provider	Practice Admin	 
FullCEAccessUser	User, FullAccess	Office	Full CareEvolve Access	 
LabOrderOnlyUser	User, Phlebotomist	Office	Lab Ordering Only	 

- Select check box **Reset Password**
- Enter Password in both fields provided
- Click **Submit**

NOTE: Users will be asked to change their password after it is reset. They may enter a password hint at that time.

User: DemoAdminUser (Administrator, Demo)

User Type: Office

* Access Level: Practice Administrator





* Password: Reset Password

* Confirm Password:

Users: Delete User

- Locate the username and click the RED delete button to the right of that user.

NOTE: Practice Admin's will be able to users with User Type of **Provider**

User Name	Name	User Type	Access Level	
DemoAdminUser	Administrator, Demo	Office	Practice Admin	 
provider2	McDoctor, Physician	Provider	Results Only	 

- You will get a pop up box asking to confirm prior to deleting the user.

Do you want to delete?

Users: Additional Information

User Type:

- **Office:** normal access to all areas of the application
- **Phlebotomy:** restricted from Fax to Patient, Email to Patient, and e-Prescribing.
- **Client Services:** restricted from Fax to Patient, Email to Patient, and e-Prescribing.
- **Genetic Counselor:** will appear in the Copy To list in the order (and not in the Ordering Provider dropdown)

Access Level:

- **Practice Administrator:** User may place orders, view results, adjust practice favorites, add/delete users, view duplicate patient reports, and view interface logs.
- **Full CareEvolve:** User may place orders and view results.
- **Lab Ordering Only:** User may only place orders.
- **Results Only:** User may only view results.
- **Patient ID Only:** User may place orders only and may only search for the patient using a patient ID.

Username: 8 or more characters with the following requirements:

- Acceptable: letters, numbers, period, at sign, underscore, dash (hyphen)
- Unacceptable: special characters such as < > & % \ " ' ` \$: | ! ^ [], spaces; only numbers.
- If the account is for a mobile user, make the username and password in all lowercase letters.

Password Hint: this will appear after an unsuccessful login using the incorrect password; it cannot equal the password.

Reset Password: check the box and retype the password in the Password and Confirm Password fields.

Note 1: This password is only temporary. The user will be prompted to change their password again (to something private) when they login.

Note 2: If the user is a Lab Administrator and the password is reset, the user ID will be demoted to a Practice Administrator level. Please email CareEvolve Support to get the user re-promoted to a Lab Administrator.

Results History Threshold: the number of days' worth of results visible in the Results Inbox.

Results Page Size: the number of results to appear on one page on the Results Inbox.

Ordering Location:

- Use Default Location: no location selection available in ordering process
- Allow Location Selection: order defaults to location the user logged into, but user may select another
- Force Location Selection: default is Select One in order, user forced to choose location before completing order

E-mail Notification: enter an email address for Order and Result status changes/notifications.

Test Email: use this to test the sending of an email to a user.

Results: use the checkboxes to determine what notifications the email account will receive

Provider Information: only necessary to complete if the user was marked as a provider.