User Management Overview:

Purpose:

This document is a quick reference guide for User Management as a Clinic Manager. This is applicable to both flu and Covid functionality.

Add and manage My Turn users such as Clinic Managers, Vaccine Administrators and Vaccine Administrator Assistants.

For the latest My Turn educational materials, please visit EZIZ- Covid, EZIZ – Flu, YouTube or the Knowledge Center tab on My Turn Clinic

My Turn Help Desk
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Add Individual Users

This process will add a user with the role of Vaccine Administrator. If applicable, update the user's role (to Clinic Manager or VA Assistant) after the user has been added (see the Update User Role section for instructions).

1.	From the **Homepage**, select the **Clinics** tab from the My Turn Clinic toolbar.
2.	Search for and select the clinic to which you wish to add a user with the role of Vaccine Administrator. The **Clinic Details** page displays.
3.	Select the drop-down arrow beside **Volunteer Manager** and select the **Add Vaccine Administrators button**. **Add Vaccine Administrators** pop-up displays.
4.	Enter user's Information in the following fields (**First Name, Last Name, Email, Mobile** (optional)).
5.	Indicate whether this user is a Volunteer or an Employee under **Work Type** by selecting one of the radio buttons.
6.	Enter user's **Licensure Number** (optional.)
7.	Click **Next** to review user details.
8.	Click the **Next** button to create contact.
9.	An email is sent to the staff member's inbox which displays their account information and a link to register. No further action is needed from the Clinic Managers to prompt this registration email.

Notes:

- Each user must have a unique email address which they are able to access.
- If the username is already taken (indicated by an error message after clicking next), please double check if the user already exists by searching in the **Contacts** tab.
- VA username will auto-populate and display as email..

Update User Role

1.	From the **Homepage**, select the **Clinics** tab.
2.	Search for and select the clinic to which you wish to update user role information. The **Clinic Details** page displays.
3.	Select the **Contacts** tab.
4.	To search a user, enter their information in the following fields (**First Name, Last Name**, and/or the **Provider Location** with which they are associated).
5.	Select the **Search** button to display a list of users matching your search criteria.
6.	Select the user's name link you wish to view. **Contact's Details** page displays.
7.	Navigate to the **Role** field and select the pencil icon to edit the user role.
8.	Indicate whether this user is a **Vaccine Administrator** or **Clinic Manager** from the **Role** drop-down menu. (See **Note**)
9.	To indicate a **VA Assistant** role, select the **Assistant** checkbox.
10.	Click the **Save** button.

Notes:

- On the contact's user details page, you can edit user information (e.g., name) by clicking the **Edit** button. Click **Save** to apply edits.
- If you are updating a user's **Role** to Clinic Manager, you will also need to update the user's **Profile** to "Partner Clinic Manager" using the Manage User button on the Contact Details page. See the User Management section for instructions.
- Always check with your site lead before adding a Clinic Manager.
- Leave the Assistant box unselected for Vaccine Administrators or Clinic Managers.

User Management

1.		Click the **more tab** from the clinic toolbar and select the **Manage users tab**.
2.		Fill in the search fields to find the user and click the users **hyperlinked name** once found.
3.		From the user's **Contact Details** page, select **Manage User** button in the upper right-hand corner. **Manage User** pop-up window displays.
4.		To indicate how you would like to manage this user, select one of the following options from the following fields (**Activate/Deactivate User, Reset Password, or Update/View User Details**)(options explained below)
	A	**Activate/Deactivate User** • The User's current active/ inactive status will display at the bottom of the box. • Users are automatically deactivated after two weeks of inactivity.
	B	**Reset Password** • The email containing password reset instructions will be sent to the email displayed at the bottom of the box
	C	**Update/ View User Details** Information • Here you can update a user's email address or profile. • If a user's **Role** is "Clinic Manager," then the user's **Profile** must be set to "Partner Clinic Manager."
5.		Select the **Next** button once the selection is finalized.

Add User to Multiple Accounts

1.	From the **Homepage**, select the **Clinics** tab.
2.	Search for and select the clinic to which you wish to update user role information. The **Clinic Details** page displays.
3.	Within the Clinic **Details** tab, select the **Contacts** tab.
4.	To search a user, enter their information in the following fields (**First Name, Last Name**, and/or the **Provider Location** with which they are associated).
5.	Click **Search** to display a list of users matching your search criteria.
6.	Select the user's name link you wish to view. **User's Details** page displays.
7.	On the User's details page, select the **Related** tab.
8.	In the Related Accounts section, select **Add Relationship** button.
9.	Search for and select the account name you wish to add the user to.
10.	Select the appropriate available role from the **Available** options by selecting the top arrow to move from **Available** to **Chosen.**
11.	Select the **Save** button.

Notes:

- Only Clinic Manager, Vaccine Administrator, and VA Assistant roles can be added to multiple provider accounts. Any other roles will yield no change from this process.
- Users can be added to additional provider accounts for a specified time period by entering a **Start Date** and **End Date** in the **Relationship Status** section of the **New Account Contact Relationship** window. From this section, you can also check/uncheck the **Active** checkbox to immediately activate/deactivate the user.

Bulk Upload Users

1.	From the navigation bar, select the **Manage Users** option from the **More** drop-down list.
2.	Select the **Bulk Upload Users** tab.
3.	Select **Download Template** button.
4.	Enter the user's information on the UploadContact.csv form in the following fields (**First Name, Last Name, Email**)
5.	Enter the user's **Role** information by indicating either Vaccine Administrator or Clinic Manager options.
6.	Enter the user's information under **Username** (optional) and **Account Name** fields.
7.	Indicate user's role information by entering it in the **Assistant** field (True or False; enter "TRUE" in the assistant field if user is a vaccine administrator assistant, enter false if they are not)
5.	Select **Choose File** button and upload the completed UploadContact.csv form and click Upload File.

Notes:
- Please work with your Clinic Operations Pod to approve new Clinic Manager access prior to submitting the bulk upload form.