

medEbridge[®]

Customer User Guide

User Management



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For any further enquiries, please email **support@medEbridge.com.au**



What is the medEbridge® User Manager role?

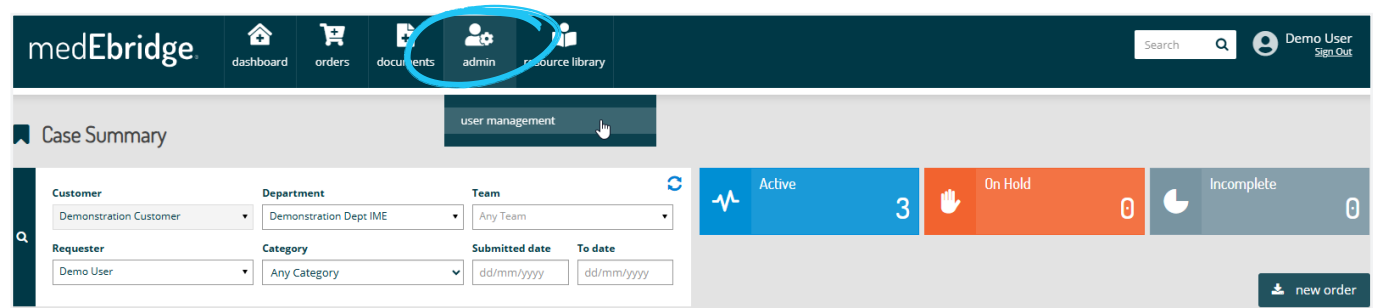
There is a role in medEbridge® which allows Customer users to do the following actions:

- Create new users for the Department and/or Team they are permissioned to work within
- Assign/remove roles for existing users (user will only see a list of the user roles they themselves are enabled for)
- Deactivate users for the Department the user has access to view
- Send login reminders to users who have not yet logged in to medEbridge®
- Send password reset emails for users requiring them
- Reassign cases to users within the same Department and/or Team



The User Management role does not include the ability to reset MFA. If an MFA reset is required due to a user having changed their mobile device, this will need to be raised with support@medEbridge.com.au

If you have the User Management permission, you will see an 'admin' tile in medEbridge®.



This role is appropriate for a user who accesses the platform regularly and has the authority to make system access updates on behalf of the customer.

Creating, editing, and deactivating users

Customer users who have the 'medEbridge® User Manager' permission can create, edit or make inactive a user with the same or less than the same permissions as themselves.

medEbridge® recommend a User Manager be someone enabled with the following permissions, as seen in example below:

- Full medEbridge® access (can order, track, and download evidence)
- Private and confidential permission
- Department or multi-department access

The screenshot displays the 'Users' management interface. It is divided into two main sections: 'User Details' and 'Roles'.

User Details:

- Status:** Active (dropdown menu)
- User Type:** Customer (dropdown menu with an asterisk)
- Customer Organisation:** Demonstration Customer (dropdown menu)
- Departments:** A list of checkboxes for 'Demonstration Dept IME', 'CTP', 'Workers Compensation', and 'HR', all of which are checked.
- Team:** All Teams in selected Departments (dropdown menu)
- Given Name:** Staff (text input with an asterisk)
- Family Name:** User (text input with an asterisk)
- Email Address:** staff.user@demo.com (text input with an asterisk and an email icon)
- Business Phone:** (text input with a phone icon)
- Job Title:** (text input)
- Employee Number:** (text input)
- Manager:** None (dropdown menu)
- Send registration complete email:** (checked checkbox)

Roles:

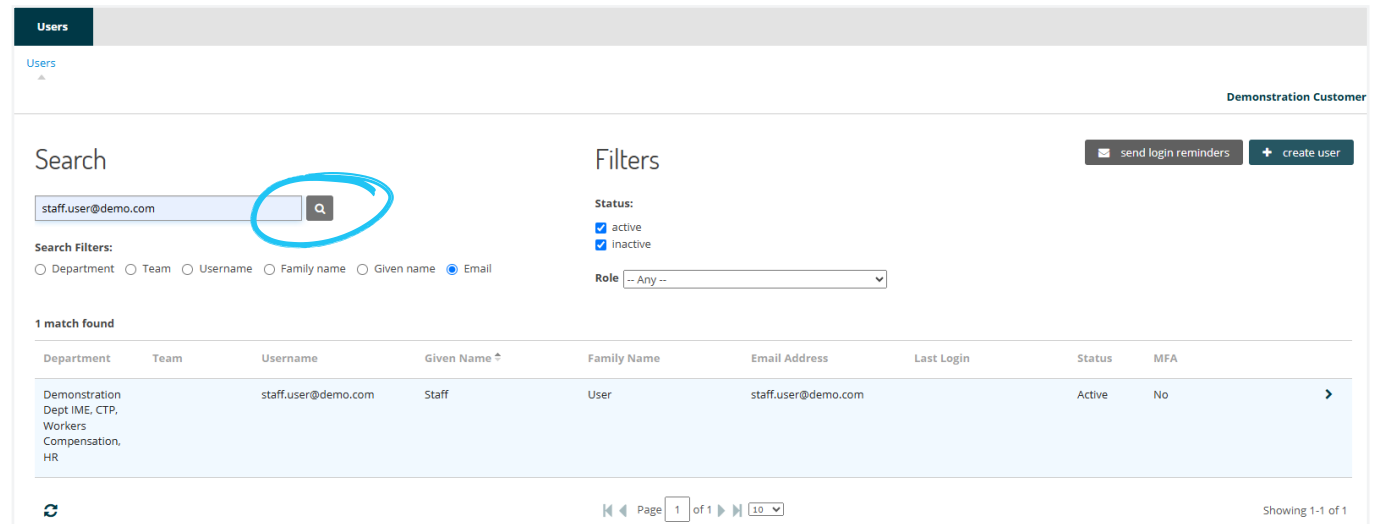
Assigned Roles:

- ☒ Customer - Case Manager & On Hold responder
- ☒ Customer - Evidence downloader
- ☐ Customer - medEbridge user manager
- ☒ Customer - Orderer
- ☒ Customer - Private & Confidential Recipient

Note: First and last names must be provided for security purposes. Email/usernames must be unique.

Searching for active or inactive users

On the search page, simply enter the name or email address of the user you are looking for, ensure you check both the 'active' and 'inactive' status in your search, and click the search icon.



Users

Users

Demonstration Customer

Search

staff.user@demo.com

Search Filters:

☐ Department ☐ Team ☐ Username ☐ Family name ☐ Given name ☒ Email

Filters

Status:

☒ active ☒ inactive

Role: -- Any --

1 match found

Department	Team	Username	Given Name	Family Name	Email Address	Last Login	Status	MFA
Demonstration Dept IME, CTP, Workers Compensation, HR		staff.user@demo.com	Staff	User	staff.user@demo.com		Active	No

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Note: Please consider whether a user may have had a name or email change and ensure you are using the appropriate search parameters. Eg. when a user has an inactive account under a previous name or email address.



If you have any issues, contact
medEbridge® Solutions at
support@medEbridge.com.au

Create a new user

1/3

1 Click on the '+ create user' button.

- Enable the Department/s or Department/Team you want the user set up against
- Enter the new users first name, last name and email address
- Select the role/s you want the user permissioned with
- Click the 'create' button



The user will be sent their activation email notification and will be able to access medEbridge®.

Create a new user

2/3

Example of the set up of a user with access to Multiple Departments

User Details		Roles
Status	Active	Assigned Roles
User Type	Customer	<input checked="" type="checkbox"/> Customer - Case Manager & On Hold responder
Customer Organisation	Demonstration Customer	<input checked="" type="checkbox"/> Customer - Evidence downloader
Departments	<input type="checkbox"/> Demonstration Dept IME <input checked="" type="checkbox"/> CTP <input checked="" type="checkbox"/> Workers Compensation <input type="checkbox"/> HR	<input type="checkbox"/> Customer - medEbridge user manager
Team	All Teams in selected Departments	<input checked="" type="checkbox"/> Customer - Orderer
Given Name	New User	<input type="checkbox"/> Customer - Private & Confidential Recipient
Family Name	Multi Department	
Email Address	new.user1@demo.com	
Business Phone		
Job Title		
Employee Number		
Manager	None	
Send registration complete email	<input checked="" type="checkbox"/>	

Create a new user

3/3

Example of the set up of a user with access to one department and 1 Team

User Details		Roles
Status	Active	Assigned Roles <input checked="" type="checkbox"/> Customer - Case Manager & On Hold responder <input checked="" type="checkbox"/> Customer - Evidence downloader <input type="checkbox"/> Customer - medEbridge user manager <input checked="" type="checkbox"/> Customer - Orderer <input type="checkbox"/> Customer - Private & Confidential Recipient
User Type	Customer	
Customer Organisation	Demonstration Customer	
Departments	<input type="checkbox"/> Demonstration Dept IME <input type="checkbox"/> CTP <input checked="" type="checkbox"/> Workers Compensation <input type="checkbox"/> HR	
Team	Team 5 - Workers Compensation	
Given Name	New User	
Family Name	1 Department and 1 Team	
Email Address	new.user2@demo.com	
Business Phone		
Job Title		
Employee Number		
Manager	None	
Send registration complete email	<input checked="" type="checkbox"/>	

Deactivate a user

1/2

- 1
- Search for the user and select their account by clicking the '>'

Users

Users

Demonstration Customer

Search

staff.user@demo.com

Search Filters:

Department

Team

Username

Family name

Given name

Email

Filters

Status:

active

inactive

Role

-- Any --

1 match found

Department	Team	Username	Given Name	Family Name	Email Address	Last Login	Status	MFA	
Demonstration Dept IME, CTP, Workers Compensation, HR		staff.user@demo.com	Staff	User	staff.user@demo.com		Active	No	>

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Deactivate a user

2/2

2

Click 'Deactivate user.'

The screenshot shows the 'Users' management interface. On the left, under 'User Details', the user 'staff.user@demo.com' is shown with status 'ACTIVE', user type 'Customer', and organisation 'Demonstration Customer'. The user is assigned to 'Demonstration Dept', 'IME', 'CTP', 'Workers Compensation', and 'HR'. The 'Team' is set to 'All Teams in selected Departments'. The 'Username' is 'staff.user@demo.com'. The 'Given Name' is 'Staff' and the 'Family Name' is 'User'. The 'Email Address' is 'staff.user@demo.com'. On the right, under 'Roles', the user has the following assigned roles: 'Customer - Case Manager & On Hold responder', 'Customer - Evidence downloader', 'Customer - medEbridge user manager', 'Customer - Orderer', and 'Customer - Private & Confidential Recipient'. In the top right corner, under 'Actions', the 'Deactivate User' option is circled in blue.

If the user has any inflight cases, the system will identify these and request you to nominate another user to allocate the cases to before you can make them inactive.

The 'Deactivate User' dialog box is shown. It contains the following text: 'Please be advised that this user is listed as the requester for 1 or more in-flight orders. In order to proceed, please select a user(s) to reassign these orders to for the below departments:'. Below this, there is a dropdown menu labeled 'Demonstration Dept' with 'IME' selected. To the right of the dropdown is a button labeled 'Select a requester'. Below the dropdown, the text reads: 'Deactivating this user will prevent them from being able to login to the system. Are you sure you want to deactivate 'Staff User?'. At the bottom right, there are 'ok' and 'cancel' buttons.

Note: If these cases need to be reassigned to different users you can do this via a different method below 'Reassign cases to users within the same Department and/or Team.'

Issue a password reset email for a user

- 1 Search for the user and select their account by clicking the '>'

Users

Search

staff.user@demo.com

Search Filters:

Department Team Username Family name Given name Email

Filters

Status:

☒ active
☐ inactive

Role: -- Any --

1 match found

Department	Team	Username	Given Name	Family Name	Email Address	Last Login	Status	MFA
Demonstration Dept.IME, CTP, Workers Compensation, HR		staff.user@demo.com	Staff	User	staff.user@demo.com		Active	No

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- 2 Click 'Send Password Reset Email'. If the user has never activated their account this will issue a new email with an 'Activate' link, if the user has activated their account, then this will send an email with a password reset link.

Users

User Details

Status: ACTIVE

User Type: Customer

Organisation: Demonstration Customer

Departments:

- ☒ Demonstration Dept
- ☒ IME
- ☒ CTP
- ☒ Workers Compensation
- ☒ HR

Team: All Teams in selected Departments

Username: staff.user@demo.com

Given Name: Staff

Family Name: User

Email Address: staff.user@demo.com

Roles

Assigned Roles

- ☒ Customer - Case Manager & On Hold responder
- ☒ Customer - Evidence downloader
- ☐ Customer - medEbridge user manager
- ☒ Customer - Orderer
- ☒ Customer - Private & Confidential Recipient

Actions

- Deactivate User
- Send Password Reset Email

Reassign cases to users within the same Department and/or Team

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This is referred to as changing the Requester on a case in medEbridge® and is done on the 'orders' page.

1

Enter the Order ID in the top search field, or go to 'all orders' and enter the Case or Order ID.

The screenshot shows the medEbridge dashboard. At the top, there is a navigation bar with icons for dashboard, orders, documents, admin, and resource library. A search bar in the top right corner contains the text 'M21069596-1' and is highlighted with a blue circle. Below the navigation bar, there is a 'Case Summary' section. It includes filters for Customer (Demonstration Customer), Department (Any Department), Team (Any Team), Requester (Any Requester), Category (Any Category), Submitted date, and To date. To the right of the filters, there are three status boxes: 'Active' with a count of 6, 'On Hold' with a count of 0, and 'Incomplete' with a count of 0. A 'new order' button is located at the bottom right of the filters section.

2

On the Overview page click on the 'Order Requester' field and select the new requester's name from the list displayed (you can also start typing their first name to see matches).

The screenshot shows the medEbridge Overview page for order # M21069596. The order is marked as 'Active' and was lodged 0 days ago on 30/06/2025 at 09:32 AM. The customer is 'Demonstration Customer'. The page has tabs for Overview, Cases, Participant Details, and Attachments. Under the Overview tab, there are sections for Participants (Capulet, Juliet), Products (Independent Medical Examination (IME)), Order Information, and Recent Notes. In the Order Information section, the 'Order Requester' dropdown menu is open, showing a list of users: Demo User, Customer Case Manager, Demo User, Demonstration IME User, and Staff User. The 'Staff User' is highlighted with a blue bar and a mouse cursor.

Select the new requester and the order will update.

Reassign cases to users within the same Department and/or Team

2/2

- 3 The previous requester will become the Order Creator on the case and the new requester will be the Order Requester.

order #
M21069596

Active

clone order

Lodged 0 days ago
30/06/2025
09:32 AM

Demonstration Customer

Overview

Cases

Participant Details

Attachments

Participants

Products

Order Information

Recent Notes

Capulet, Juliet

Independent Medical Examination (IME)

Order Requester

Staff User

Order Creator

Demo User

- 4 Alternatively, if you are in the 'case' view, you can click on the 'case #' to take you to the order where you can update the Requester.

medEbridge

dashboard

orders

documents

admin

resource library

Search

Demo User
Sign Out

Capulet, Juliet

Independent Medical Examination (IME)

Participant Details

DOB: 02/06/1995
Mobile Phone: [0455555555](#)
Appointment Date: 16/07/2025
Appointment Time: 01:00 PM (Sydney)

Demonstration Customer

Demonstration Dept IME
Claim Number: 777777

Demonstration Provider Clinic
1 Maples Lane, Prahran VIC 3181 Australia
Professor Demonstration Specialist (Cardiologist)

Appointment Date: 16/07/2025
Appointment Time: 01:00 PM

Demonstration Service Provider
(1300 000 000)

reschedule

Active

Service Provider Days

Business

Calendar

Provider

On Hold

Total On Hold

-1

-1

-1

0

0

case #

M21069745-1

clone order

cancel the case

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Restrictions to the medEbridge® User Manager role

A user manager cannot:

- Access or make any changes for Departments they are not a member of
- Reset the Multi Factor Authentication for any user
- Create, edit, or remove Departments or Teams



If any of the above changes are required, please raise this with your Service Provider Account Manager or contact medEbridge® Solutions at support@medEbridge.com.au

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