Customer User Guide

User Management

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

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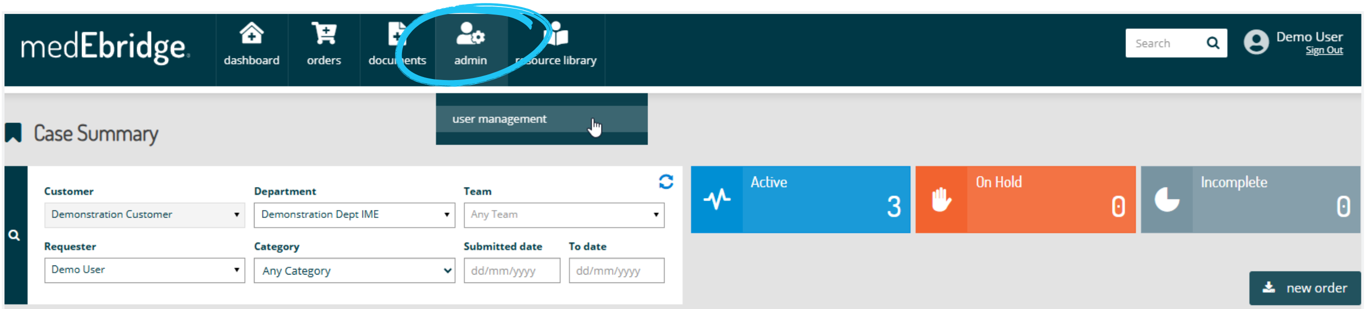
What is the medEbridge® User Manager role?

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®.



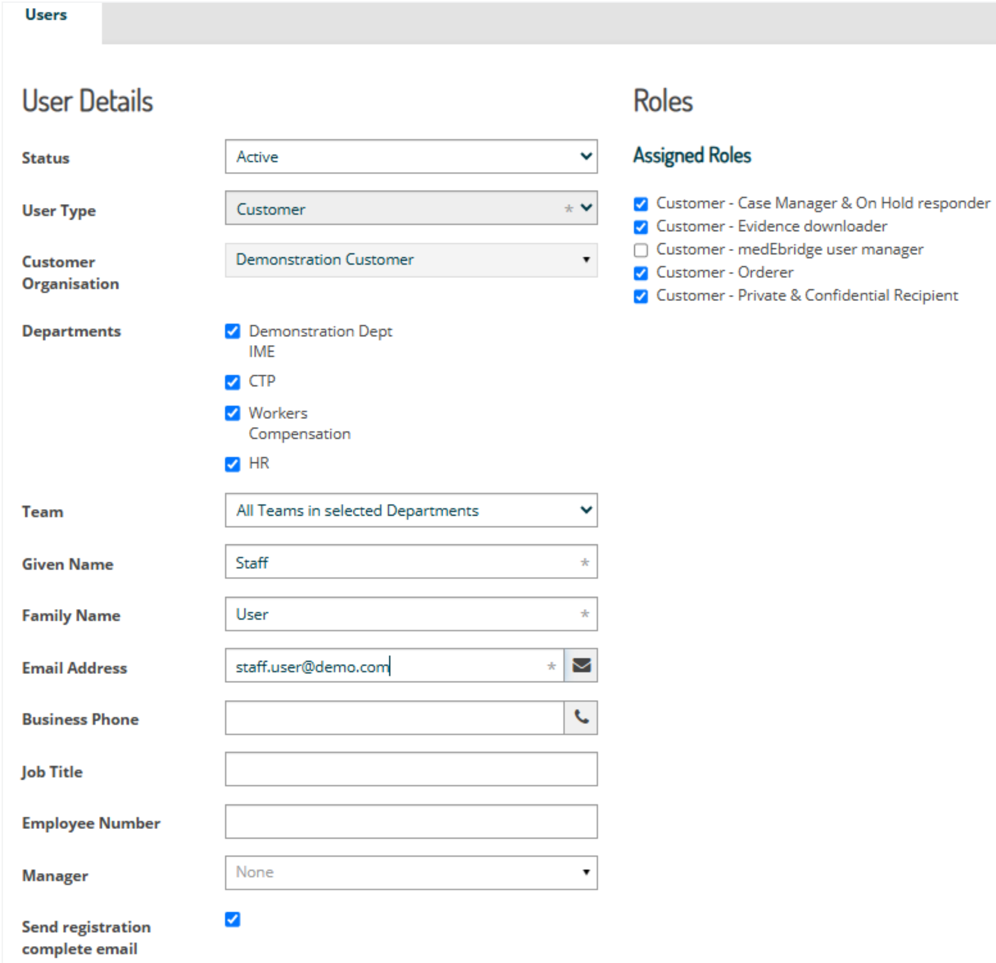
This role is appropriate for a user who accesses the platform regularly and has the authority to make system access updates on behalf of the customer.

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:

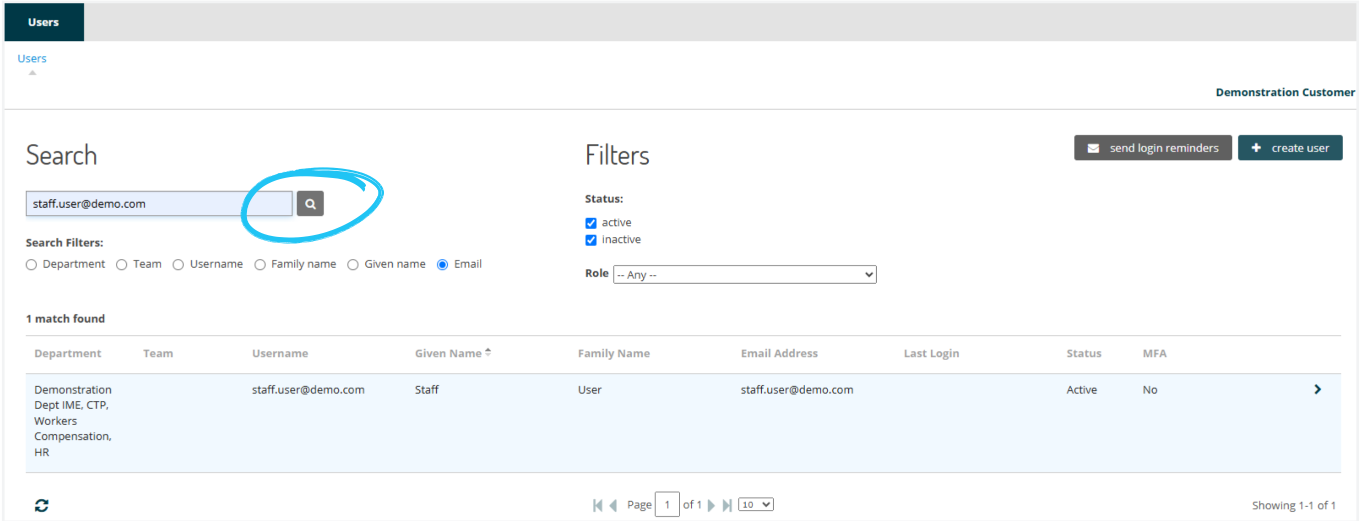
- Full medEbridge® access (can order, track, and download evidence)
- Private and confidential permission
- Department or multi-department access



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.



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

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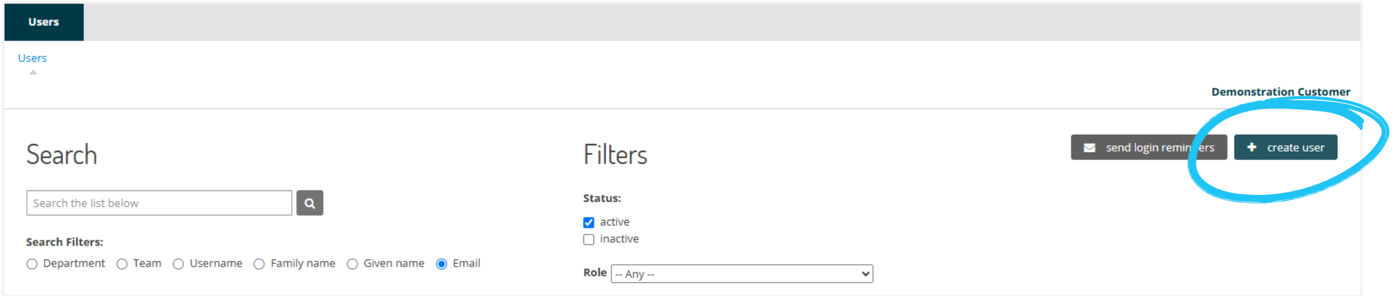
1 Click on the *'+ create user'* button.



- 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®.

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Create a new user

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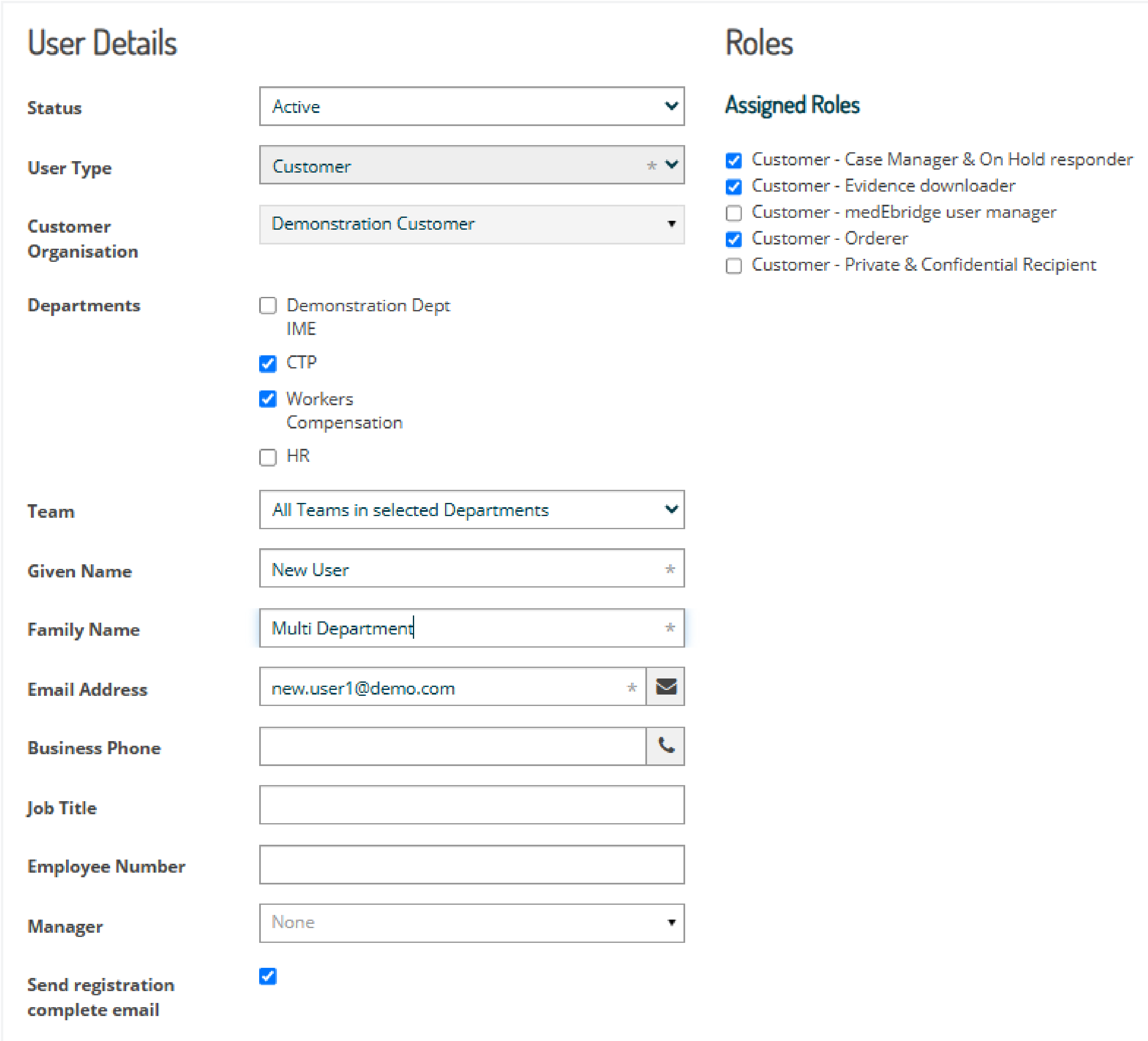
Example of the set up of a user with access to Multiple Departments



User Details

Status	Active
User Type	Customer *
Customer Organisation	Demonstration Customer
Departments	[ ] Demonstration Dept IME [x] CTP [x] Workers Compensation [ ] HR
Team	All Teams in selected Departments
Given Name	New User *
Family Name	Multi Department *
Email Address	new.user1@demo.com *
Business Phone	
Job Title	
Employee Number	
Manager	None
Send registration complete email	[x]

Roles

Assigned Roles

- [x] Customer - Case Manager & On Hold responder
- [x] Customer - Evidence downloader
- [ ] Customer - medEbridge user manager
- [x] Customer - Orderer
- [ ] Customer - Private & Confidential Recipient

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Create a new user

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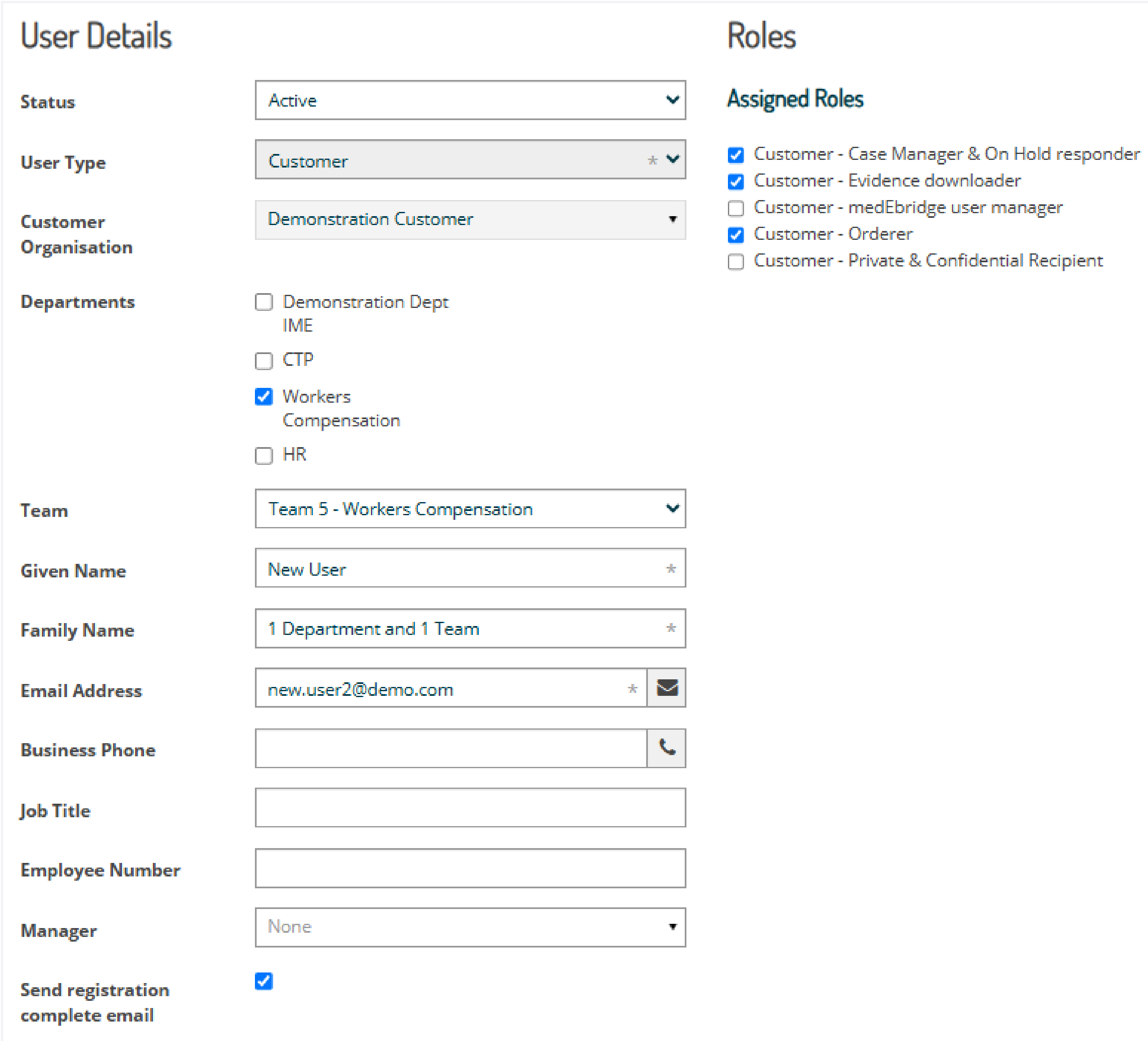
Example of the set up of a user with access to one department and 1 Team



User Details

Status	Active
User Type	Customer *
Customer Organisation	Demonstration Customer
Departments	☐ Demonstration Dept IME ☐ CTP ☑ Workers Compensation ☐ 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	☑

Roles

Assigned Roles

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

Deactivate a user

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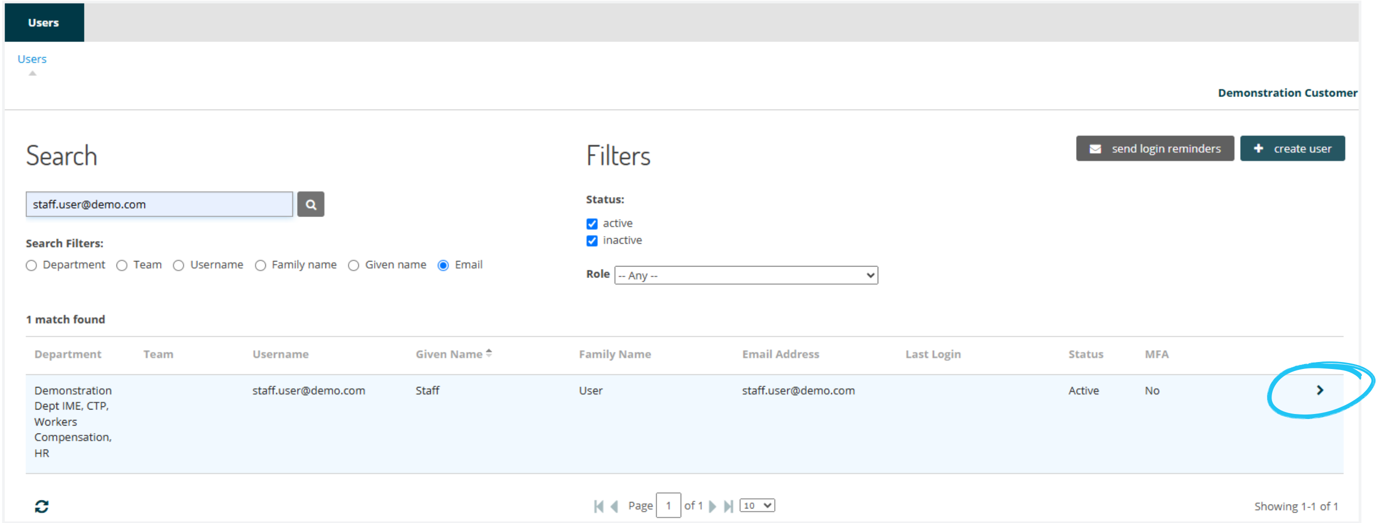
1. Search for the user and select their account by clicking the '>'



Deactivate a user

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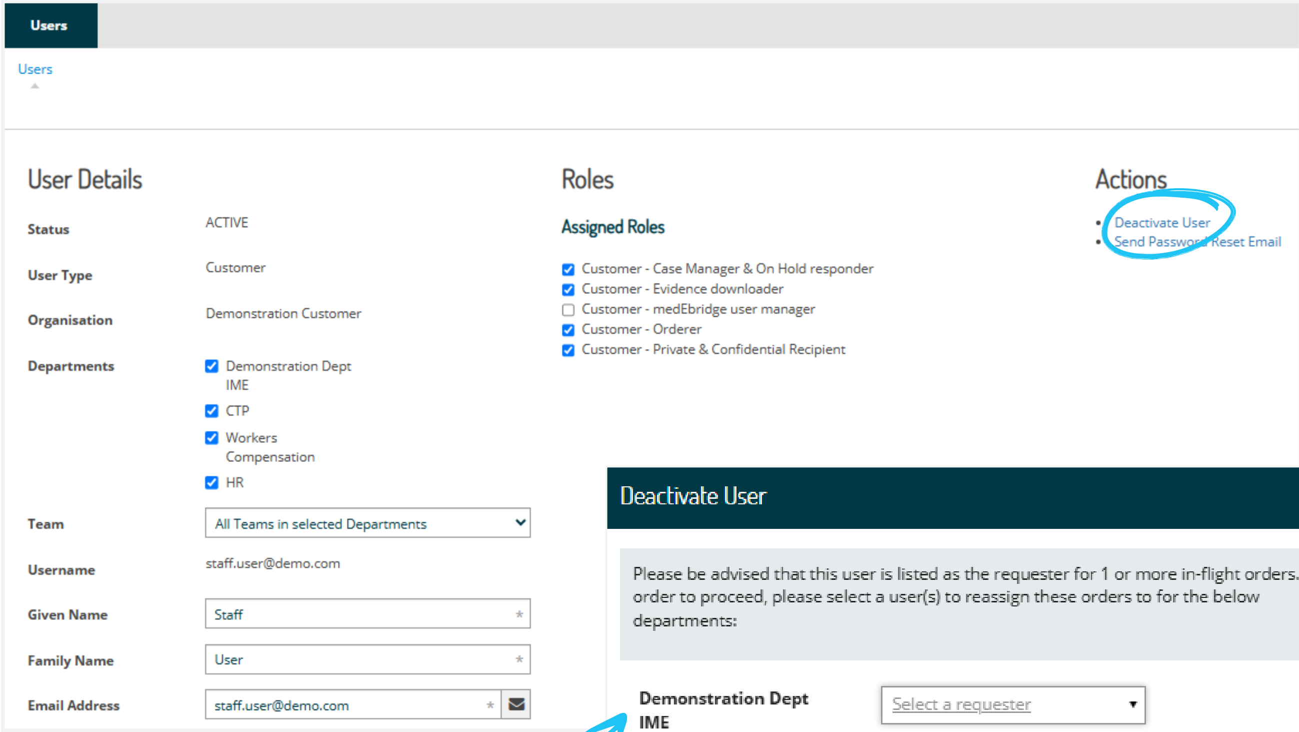
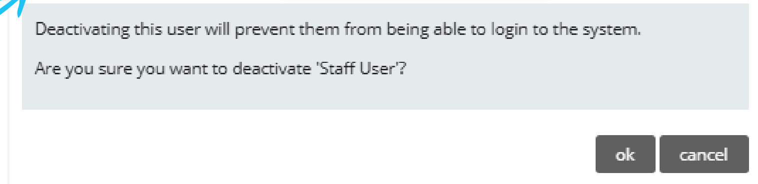
2 Click *'Deactivate user.'*



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.



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.'

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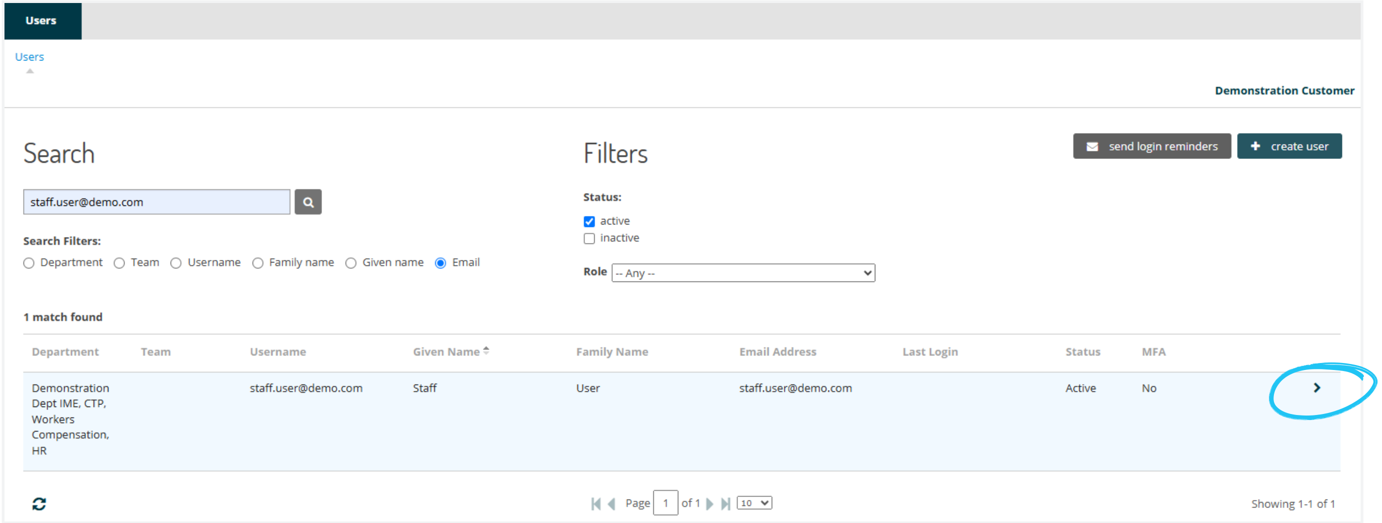
Issue a password reset email for a user

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



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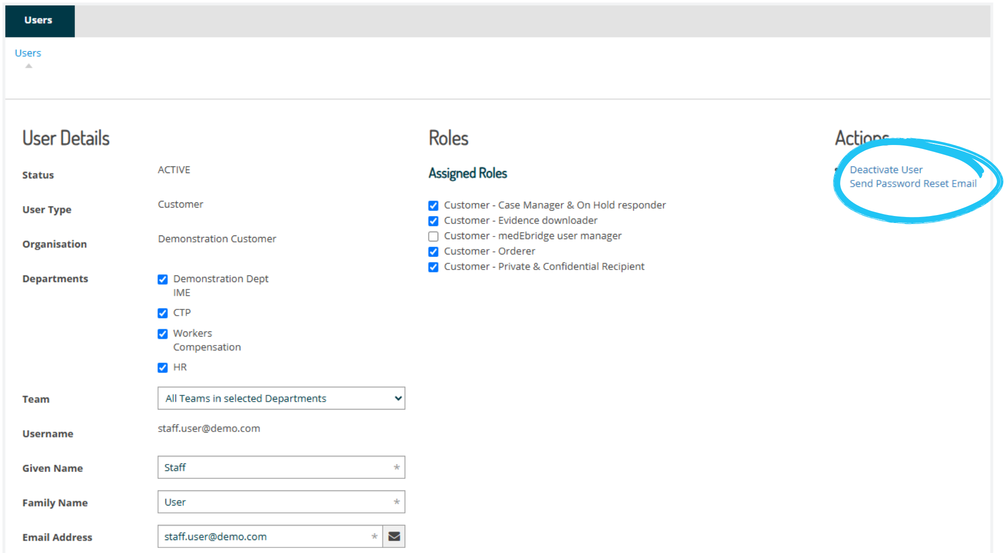
Click *'Send Password Reset Email'*. If the user has never activated their account this will issue a new email with an *'Activate'* link, if the user has activated their account, then this will send an email with a password reset link.



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

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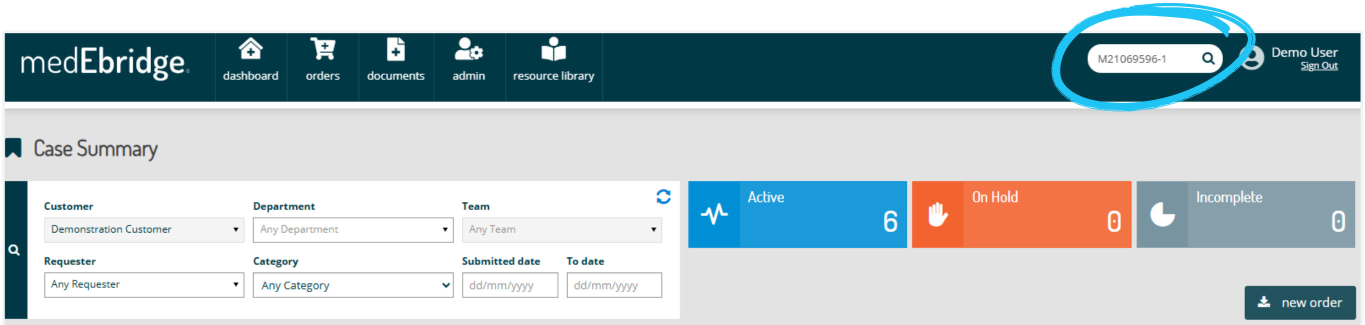
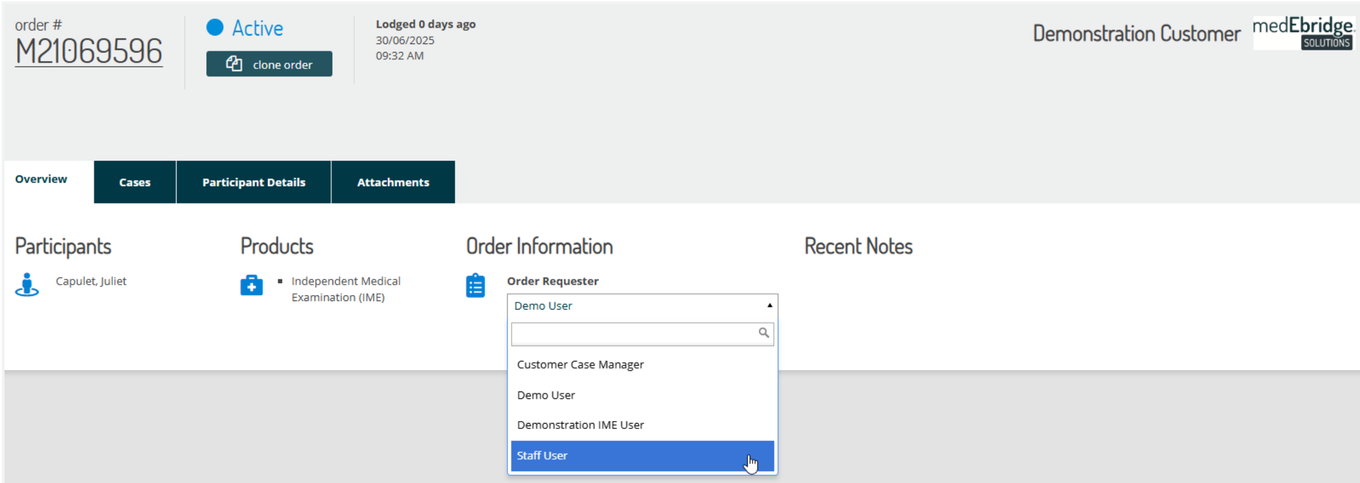
This is referred to as changing the Requester on a case in medEbridge® and is done on the *'orders'* page.

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



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).



Select the new requester and the order will update.

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

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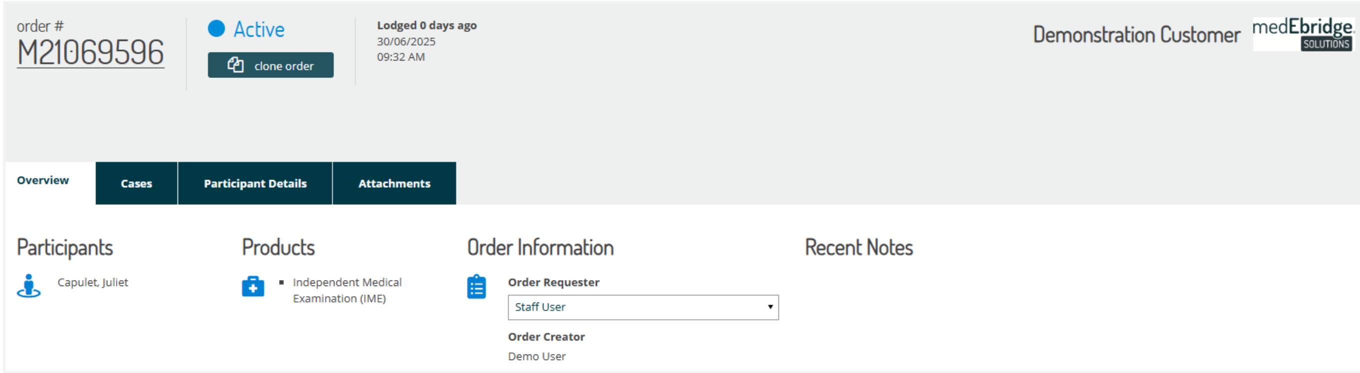
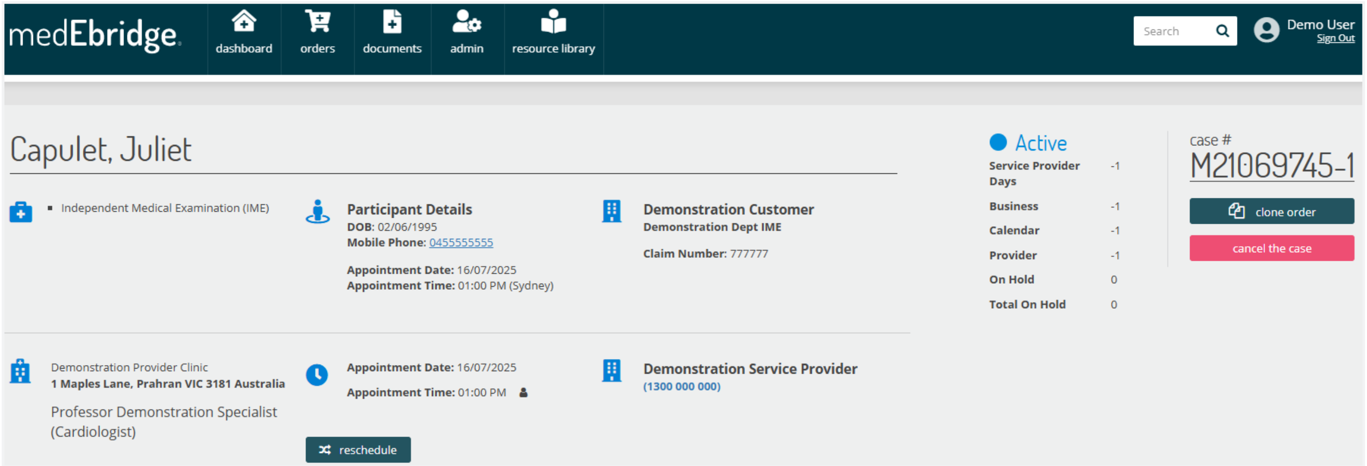
3. The previous requester will become the Order Creator on the case and the new requester will be the Order Requester.



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.



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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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