

<u>Knowledgebase</u> > <u>Identity Management V2</u> > <u>Adding a Person</u>

### **Adding a Person**

Rachel Carmickle - 2024-09-19 - Identity Management V2

# Adding a Person

Login to ATC:



Security Module.Manage Users.

Security Health Center: Novad	Health Center 💌	(here Beards	
	Mariana Users	(Active in the past 2 weeks)	
Cross Hanagement	Manages Drawer	Active Users:	
	Macana Maara in Orave	Active Super Administrators:	1
	San Group Membership		12.1
Provider Crosp Hanageree	Create a New Provider Group		
Post Group Hanagement	Create a New Stal Group		

• Manage User List.





It is recommended that you do a search for the person to ensure no duplication of users. Search both Active and Inactive users.

In Identity:

• Navigate to People.

🔗 novari Identity Man	agement"			RC RC
은 User profile	PEOPLE		+ Add pe	rson
😤 People	$\overline{\forall}$ Search by first/last name, usernam	Designations $\lor$	Active 🗸	×

• Select Add person in the People list.

🔗 novari Identity Man	agement™	# RC
🐣 User profile	PEOPLE	+ Add person
😤 People	$\bigtriangledown$ Search by first/last name, usernam	Designations $\lor$ Active $\lor$ $\times$

• In Add new person, enter the person's first name and last name. Add now norcon

Add new person		X
Enter the details below	to add a person.	
First name *		
Rachel		
Last name *		
Carmickle		
Create account		
Add person Can	ncel	
Permissions can be modifie	ed once the person has been added.	

- Optionally, select Create account. You can create an account now or later. Accounts are required for signing in to Novari Health applications and for assigning roles to a person.
- Select Add Person

### Add new person

First name \* Rachel Last name \* Carmickle Create account Add person

 $\times$ 

Enter the details below to add a person.

Permissions can be modified once the person has been added.

If you chose to create the account, the panel expands and displays the necessary fields.



#### Account details

Email *	
Partner sign-in required ⑦	
Temporary password *	
	Show
You must provide the temporary password to the user	
Associated clients   Shared Health	
Account roles	
Select	$\sim$
Is Health Information Custodian (HIC) ⑦	

• Enter the person's email address. This is the person's username when signing in to Novari.

IMPORTANT - Ensure the email address entered is correct. You will not be able to edit this once you save this information.

## IMPORTANT - There is only one email address/username per account. Multiple persons cannot be created using the same email address.

If your organization has implemented partner sign-in, select this check box. When enabled, a user must sign in with their workplace credentials by selecting their organization on the sign-in page.
Create account

Account details	
Email *	
Partner sign-in required	
Temporary password *	
	Show
You must provide the temporary password to the user	
Associated clients	
Shared Health	
Account roles	
Select	~
Is Health Information Custodian (HIC)	
If your or your users are experiencing issue group.	es with partner sign-in, please contact your organization's

- If your organization has not implemented partner sign-in, enter a temporary password. You must provide this password on to the user; Novari Identity Management doesn't.
  - Passwords must be at least 8 characters long and contain at least an upper-case character, a lower case character, a number, and a special character like @, ! or \$.
  - All users will be prompted upon initial sign-in to change their password using the same criteria.
- Optionally, select the client(s) this user is associated with.
- Select a Role, this user role grants the user access to Novari ATC

#### Update roles

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Roles give users access to Novari Access to Care Platform<sup>™</sup> applications, as well as permission to perform certain actions.



- Select if the user is a Health Information Custodian (HIC)
  - A Health Information Custodian has custody or control of personal health information, typically a physician (not their agents or employees)
  - $\circ\;$  When enabled, a user will be prompted to accept additional terms and conditions on first signin.

Go back to ATC and on the Manage Users page, click the checkbox "Include users without health centres assigned (highlighted in red)" this will highlight the user or any users that have been setup but have no ATC settings applied, etc.

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Click the email of the user to open their account details/edit user page.

The top section is where you can add access to health center(s), add them to have the correct access, etc.

Edit a User	Menage Account Details		
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can be added to a group. This is required for sign in.

Once the user permissions have been updated, they