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eRequest User Roles

Rachel Carmickle - 2024-05-16 - [Identity Management V2 \(NEW\)](#)

At a minimum, any user who will be creating and managing accounts in Novari Identity Management needs the IdentityAccountManager role. This role allows the user to add, edit and deactivate a user, and lock a user's account.

Note: This role does not allow the user to manage eRequest users or locations. To do that, you need the [eRequestAdministrator role](#)

Novari eRequest uses a combination of users (persons with accounts and roles) and non-users (persons with no accounts and no roles). A non-user could be, for example, a family doctor who sends referrals to Central Intake by fax. The family doctor is not using Novari eRequest to submit and manage referrals, but the family doctor needs to be added to Novari Identity Management so Central Intake can find the family doctor when processing the referral.

- All eRequest users are a Person with an account and the eRequestUser role.
- All eRequest non-users are a Person with no account and no roles.
- An eRequest user can have more than one role, for example, a Central Intake user would have eRequestUser, FaxReceiver, Router. A Tech or RAD protocol user would have eRequestUser and Protocoller. A requester would have eRequestUser and Requester.

Auditor - Read-only access to all requisitions tied to their locations.

eRequestAdministrator - Manage people/users, locations, and advanced app settings. Depending on your organization's Novari eRequest implementation, users with this role may have access to more manual transition buttons in a pathway.

eRequestUser - Access Novari eRequest and manage some user settings.

ExternalReceiver - Access specific receive-only pathways.

FaxReceiver - Access inboxes they are tied to and process external requests within them.

Receiver - Access requisitions that were routed to a location they are tied to.

Requester - Create electronic requisitions directly (without using inbox).

Router - Accept, triage, and route requisitions.

Protocoller - Access requisitions and perform pathway specific actions.

ServiceCoordinator - Complete appropriateness/eligibility (pathway specific).