Managing Your Profile and Your Users' Profiles

Rachel Carmickle - 2024-05-28 - Identity Management V2 (NEW)

All users can manage their user profile. If you are a Novari Support Coordinator, you can manage your user profiles as well.

The user profile is divided into sections: Person details, Account, Locations, eRequest User Settings. Depending on your permissions and the Novari applications at your workplace, you may see all the sections or just the first two.

Non-support coordinator users see only their Person details or Person details and Account. (Not all persons have accounts.)

There are two ways of navigating around User profile: select an item to jump to the section or use the scrollbar at the right of the browser window.

Person details

- Change the person's first or last name

- Both first and last names are mandatory

- Change the person's designations

- Select all that apply

Account

- Enable or lock a person's account

- Locking a person's account stops the person from signing in to their Novari applications

- See when a user last signed in

- Edit a user's associated clients

- Manage an eRequest user's roles

- Change your password or assign a temporary password to a user

- If a user is unable to sign in due to a forgotten password, that password can be reset. In Change password, enter a temporary password. You must provide the user with the temporary password. The user will be prompted to create a new password on their next sign-in.

Change password

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The user will be prompted to change their password on their next sign-in. You must provide them with the temporary password.

Temporary password *

	Show

Change Password   Cancel

Novari Health will not send this password to the user.

- Enable or disable if partner sign-in is required

- Identify if the user is a health information custodian

Locations (for eRequest Admins only)

- Add a location to a person

- Remove a location from a person

- View a person's locations

- Navigate to a location to view or edit its settings

eRequest User Settings (for eRequest Users and eRequest Admins)

- Enable side-by-side viewing

- Enable inbox auto-return

- Upload fax templates

- Manage the dashboards a user has access to (eRequest admins only)

- Manage the inboxes the user has access to (eRequest admins only)