

Adding New Staff Users

Quick Reference Guide



Add a user

- 1 Sign in to U-Sleep.
- 2 Click the three-bar menu (☰) on the right of the screen.
- 3 In the **Tasks** area, click **Add User**.
A boarding dialog box appears.
- 4 In the **Account Role** section, select the check box for the role that you want to assign to the staff user:
 - **Manager:** Can only view/manage patients assigned directly to them using relationships.
 - **Assessor:** Can add and manage patients but not staff users.
 - **Administrator:** Can add patients and staff users, as well as update patient and company information.

Note: These roles may differ based on your account setup.

- 5 In the **Account Information** section, enter the required user information and select the user's time zone.
- 6 Do not edit the **Relationships** and **Notification Preferences** sections. These sections do not apply to staff user roles.
- 7 Click **Save** at the top of the screen.

Give users access to multiple locations

If you need to add the staff user to multiple locations in your organization, complete the following steps.

- 1 Find the user:
 - a Click the **People** tab.
 - b Search for the user.
 - c In the results, click the user's name to open their profile.
- 2 Add the user to a new location:
 - a On the user's profile page, go to the **Tasks** menu on the right side of the page and click **Add User to Location**.
 - b In the pop-up menu, select the location that you want to give the user access to.
 - c Select a **Role** for the user by clicking the appropriate check box and click **Next**.
 - d Do not edit the **Relationships** section. This section does not apply to staff user roles.
 - e Click **Finish**.