

Add, Edit, and Deactivate Users

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Path: Navigation Menu > Maintain Users

About

As new staff joins your Agency, a user profile will need to be created in NextStep, which includes the assignment of User Roles and permissions so that they can use the software. Individuals with access to Maintain Users can add, deactivate, or edit users for their Agency.

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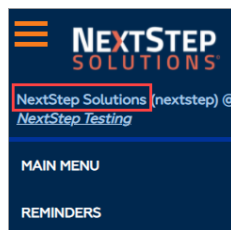
Set Temporary Password Expiration Time

Administrators can determine how long a temporary password is valid before a new temporary password is needed.

1. Navigate to the General section: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > General**
2. In the **Temporary Password Expiration (in Hours)** field, enter how long a temporary password is valid. Passwords can be set to expire anywhere from 1 hour to 720 hours (30 days).
3. Click the **Update Hours** button.
4. Provide the temporary password to the staff member and when the password will expire.

Add a New User

1. Navigate to User Maintenance by following the path above. The currently logged-in user's profile is displayed.
2. Scroll to the bottom of the page, and click the **Add User** button.
3. Enter a **User Login Name**. This will be the login that the staff member uses to log in to NextStep Solutions.
4. Enter a **User Email** address. This is important if you utilize DrFirst for ePrescribing and MOST.
5. Enter a **Display Name**. This is what the user will see at the top of the Navigation Menu when logged in.



6. Click the **User Role** drop-down and select a Role from the list. This determines the user's permissions and what the user is responsible for within the EHR.
7. Enter the **Legal First Name** and **Legal Last Name** of the user.
8. *(Optional)* If the user requires Emergency Access to client records, select the **Emergency Access** checkbox.



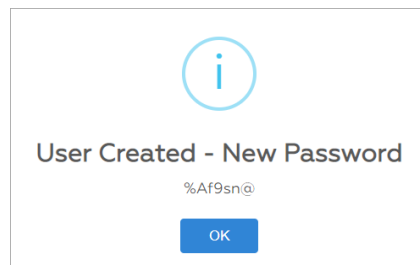
Note: When the Emergency Access checkbox is selected, the user will have access to all clients and client records when the Enable Emergency Mode button is selected. To turn off Emergency Mode, click the **Disable Emergency Mode** button.

9. If your Agency **manages permissions by User Role** click the **Set Main Menu Privileges For User Role** button to apply the

permissions for the selected User Role. Or, to add individual permissions, select the appropriate checkboxes under **Main Menu Privileges**.

MAIN MENU PRIVILEGES		SET MAIN MENU PRIVILEGES FOR USER ROLE
Admissions:		
<input type="checkbox"/> Face Sheet	<input type="checkbox"/> Client Locations	<input type="checkbox"/> Transfer Forms-Discharge Forms
<input type="checkbox"/> Case Assignments	<input type="checkbox"/> Patient List	<input type="checkbox"/> Enrollment
<input type="checkbox"/> Payment Center	<input type="checkbox"/> Client Search	

- Under Locations, select the **checkbox(es)** for the Location(s) the user should have access to, or select the **Select All** checkbox to select all Locations.
- Click the **Create User** button. A pop-up is displayed showing the user was created and a temporary password is provided.
- Provide the User Name and Password to the staff member to log in. The staff member will set their password after logging in with the temporary password you provide to them.



- Click the **OK** button. The user profile is saved and displayed.

Notes:

- If you need to make any other changes to the user profile at this time (with the exception of Scheduler Access), you can do so by making your changes and clicking the **Update User** button.
- If the new user needs access to the Scheduler, you must create the user profile above first and then refresh the page by selecting another user from the user drop-down and then reselecting the user you just added or navigating away and back to Maintain Users.



User Login Name:* hollytest	User Email:
Display Name:* holly test	User Role:* Administrator
Legal First Name:* holly	Legal Last Name:* test
User Credentials:	Emergency Access: <input type="checkbox"/>
NPI Number:	Scheduler Access: <input checked="" type="checkbox"/>

Edit a User

- Navigate to User Maintenance: **Navigation Menu > Maintain Users**
- The logged-in user's profile is displayed. From the **User** drop-down, search for and select a user.
- Make edits as necessary for the user.



Note: When in edit mode for a user profile, you can manage what Groups the user belongs to. See [Add Users To and Remove Users From Multiple Groups](#) for more details.

- Click the **Update User** button to save the changes. Once the user has been successfully updated, the following message is displayed:

User Updated

OK

5. Click the **OK** button.

Deactivate a User

If a user is deactivated, they will be unable to log into NextStep or be assigned new Case Assignments. They still exist in the database, and client documentation associated with the user is still visible in the system. Deactivated users will display at the bottom of the list of users in gray, with (Deactivated) next to their name in Maintain Users.

1. Navigate to User Maintenance: **Navigation Menu > Maintain Users**
2. The logged-in user's profile is displayed. From the **User** drop-down, search for and select a user.
3. Click the **Deactivate User** button.

Add User

Update User

Deactivate User

4. You will get a warning stating that "By deactivating (user's Full Name) they will be unable to log into NextStep or be assigned new Case Assignments." Click the **Confirm** button to deactivate the user.

Note: If your agency has the **Scheduler** enabled, and the Deactivated user is associated with appointments, an additional warning will display (along with the warning from Step 4), "**Please determine what should happen with the current and future scheduler appointments associated with this user's Resource:**" Select from the one of following options:

- **Reassign to:** Select from the Scheduler Resource drop-down.
- **Delete:** Selecting this option will cause the following to happen to the user's appointments:
 - If an appointment has **only the deactivate user associated to it as a Resource** all current and future scheduler appointments which are associated with ONLY that Resource will be deleted.
 - If an appointment has **multiple Resources**, the deactivated user will be remove from those appointments, but the appointments will not be deleted.
- **Do Nothing:** The appointments that have that user associated as a Resource will have no changes.

When you have made your selection,click the **Confirm** button.

5. The user will be deactivated.
 - If you need to Reactivate a user, navigate back to **Maintain Users**, select the deactivated user, then click the **Reactivate** button.