

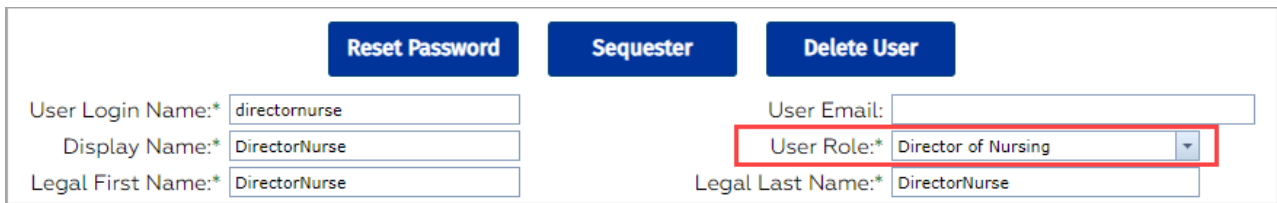
# User Role Setup

Last Modified on 03/28/2022 8:44 am EDT

**Path: Main Menu > Admin Tools Menu > System Setup > User Roles**

## About

User Roles define the staff's function in the Agency and dictate what areas of NextStep are accessible to a specific user. A User Role is assigned to a staff member within Maintain Users. Your Agency can use User Roles to bulk apply permissions and User Roles are also used to determine which staff members show as an option in the Case Role drop-down menus within the Case Assignment section of the Face Sheet.



Reset Password    Sequester    Delete User

User Login Name:\*     User Email:

Display Name:\*     User Role:\*

Legal First Name:\*     Legal Last Name:\*

*User Role is selected in Maintain Users for a specific user*

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## Add a New User Role

1. Navigate to User Roles Setup by following the path above.
2. Under the New User Role section, enter in a **Role Name**.



NEW USER ROLE:

Role Name:     Add Role

Save Changes    Main Menu

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3. Click the **Add Role** button.

## View Users Associated to a User Role

1. Navigate to User Roles: **Main Menu > Admin Tools Menu > System Setup > User Roles**.
2. For the role you want to see which users are associated with, click **+** under the Users column to display the users associated with that role.

USER ROLES TO BE USED FOR THIS INSTITUTION:					
User Roles that are grayed-out in the Remove column may not be removed because they already have associated users. Similarly, the External Group option may not be changed if the Role is already in use.					
Privileges	Role	Remove	External Group	Reset Passwords	Users
<input type="checkbox"/>	Administrator:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Admission:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Case Manager:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Clinician:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Remove a User Role

1. Navigate to User Roles: **Main Menu > Admin Tools Menu > System Setup > User Roles.**
2. Select the **Remove** checkbox for the User Role you want to remove.

USER ROLES TO BE USED FOR THIS INSTITUTION:					
User Roles that are grayed-out in the Remove column may not be removed because they already have associated users. Similarly, the External Group option may not be changed if the Role is already in use.					
Privileges	Role	Remove	External Group	Reset Passwords	Users
<input type="checkbox"/>	Administrator:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Admission:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. Click the **Save Changes** button.



**Note:** User Roles that are grayed out in the Remove column may not be removed because they are associated with users.

## Add User Roles to Case Assignment Roles

The Privileges section of User Role setup allows you to select which Case Role drop-down menus you would like the staff members that are a part of that User Role to be displayed in. For example, you might want the User Role of Administrator associated with every Case Role drop-down menu under the Case Assignment section of the Face Sheet, so you would select each of those Case Roles from the Privileges column for the Administrator User Role.

1. Navigate to User Roles Setup: **Main Menu > Admin Tools Menu > System Setup > User Roles.**
2. Click **+** under Privileges to expand.

Privileges	Role	Remove	External Group	Reset Passwords	Users
<input type="checkbox"/> !	Specialty Therapist:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



**Note:** A red exclamation point next to the Privileges expand button indicates that there are no Privileges assigned to the User Role yet.

3. Select the checkbox(es) of the Case Roles you want to associate the User Role with.

! **Specialty Therapist:**

admin

Doctor

Nurse

Psychiatrist

Provider

Primary Therapist

Supervisor

Intake Specialist

*What you choose above is the trigger for what users are shown in these drop-down menus on the Face Sheet.*

Primary Therapist:	Supervisor:	Psychiatrist:	Intake Specialist:
NextStep Solutions ▼	None ▼	None ▼	None ▼



**Note:** Select the **admin** option under Privileges if you want the User Role to have access to **Maintain Users** within the Navigation Menu, to be able to manage staff.

4. Click the **Save Changes** button.