

# Set Up an External User

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## About

In NextStep, you have the ability to set up a user and restrict what they can see at the Clinical level and at the Document Center level. This type of restriction is typically used for auditors to access a customer's software or to allow non-employees who do limited clinical work to access the software.

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## Set Up a User Role for External User

If a Role for this type of user has not already been created by your Agency, start by creating it.

1. Navigate to User Roles: **System Setup > User Roles**.
2. Enter in a **Role Name**.
3. Click the **Add Role** button.

NEW USER ROLE:

Role Name:

4. The Role will be displayed in the list. Select the **External Group** checkbox.

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
⊕	Administrator:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	⊕
⊕	Admission:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	⊕
⊕	Case Manager:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	⊕
⊕	Clinician:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	⊕
⊕	Doctor:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	⊕
⊕ !	External Auditor:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	⊕

5. Click the **Save Changes** button.

## Create a User Login for an External User

The user account can be a generic account (e.g. State Auditor), or you can set it up by using the person's real name.

1. Follow the steps to set up **a new user** in conjunction with the steps below.
2. Select the **User Role** that you created for the External User from the drop-down menu. In the Set Up a User Role for External User section above, we added External Auditor.
3. External User Privileges are displayed as options. This is driven by the External Group checkbox being selected in User Roles from the previous section. Select the checkboxes for the permissions you want to grant to the user.

**EXTERNAL USER PRIVILEGES**

View Document Center Forms
  View Document Center Notes
 View Document Center PCPs

4. Under Main Menu Privileges, select the **Document Center** checkbox so the user will have that menu option.

## Add External User Access Field to Face Sheet

1. Navigate to Form Builder: **Main Menu > Admin Tools Menu > Form Builder**.
2. From the **Select Form** drop-down menu select the **Face Sheet**.
3. Click the **Add New Field** button.
4. In the **Field** drop-down menu, select **External User Access**. This adds the option below to the Face Sheet. External users can only see information for clients who have the External Auditor (our example) checkbox selected.

### External User Access

Allow external users from the following groups to access this Client's information but only if the appropriate consent forms have been signed:

- External Auditor**

1. Click the "Add This Client" button to add the data entered on this form.
2. Click the "Cancel" button to cancel this form.

5. *(Optional)* Click the **Add New Alias** button if your Agency uses this.
6. *(Optional)* Enter a **Prompt** to give directions to your staff.
7. *(Optional)* Select the **Required** checkbox to make this a required field.
8. *(Optional)* Select the **Disable Print** checkbox if you do not want this field to print when printing the Face Sheet.
9. Click the **Add This Field** button.