

Enable and Use Forms Whitelist by User Role Functionality

Last Modified on 03/18/2022 10:41 am EDT

Path: Main Menu > Admin Tools Menu > System Setup (Supplemental) > User Roles tab

About

You can enable the Forms Whitelist by User Role functionality within System Setup (Supplemental). This feature is used to designate which User Roles are able to see **only** the Forms added in this tool when viewing the Document Center. User Roles with **no** Forms added here, are able to see **all** Forms when viewing the Document Center.

[Table of Contents](#)

Enable the Forms Whitelist by User Role Feature

This is pre-release documentation. All content is subject to change.

1. Navigate to the User Roles tab by following the path above.
2. Click the **Enable feature: Forms Whitelist by User Role** toggle to turn it on.
3. The change is autosaved.

Add Forms to Forms Whitelist by User Role

1. Navigate to the User Roles tab: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > User Roles tab.**
2. In Forms Whitelist By User Role, click **+** to expand the Role you'd like to add Forms to.

FORMS WHITELIST BY USER ROLE		
	ID	Role
+	1	Administrator
+	2	Admission
+	3	Case Manager

4. Click **New**.

User Role Forms Viewable	
New	Form
	No data to display

5. From the **Form** drop-down, select a Form.
6. Click the **Save Changes** button.

Delete Forms from Forms Whitelist by User Role

1. Navigate to the User Roles tab: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > User Roles tab.**
2. In Forms Whitelist By User Role, click **+** to expand the Role you'd like to remove Forms from.

FORMS WHITELIST BY USER ROLE		
	ID	Role
<input type="checkbox"/>	1	Administrator
<input type="checkbox"/>	2	Admission
<input type="checkbox"/>	3	Case Manager

3. Click **Delete** next to the Form you want to remove from the User Role.

FORMS WHITELIST BY USER ROLE		
ID	Role	
<input type="checkbox"/>	1 Administrator	
User Role Forms Viewable		
<input type="button" value="New"/>	Form	
<input type="button" value="Delete"/>	Billing Form	
		<input type="button" value="Preview changes"/> <input type="button" value="Save changes"/> <input type="button" value="Cancel changes"/>



Note: If you accidentally clicked Delete, you can click **Recover** to recover the Form.

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