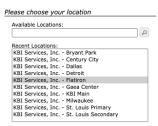
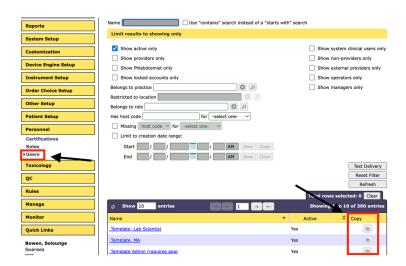
Trellis: New User Account Workflow

A Please do not manually create a account for providers.

- 1. Sign into Trellis → Link to Trellis
- 2. Select the desired location you'd like to add the user into



3. Personnel > Users > Copy the desired template



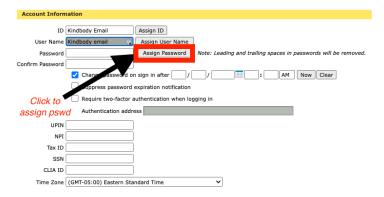
After duplicating the template , majority of the profile should be set up however if it is not please following the steps below:

- 4. Complete the User Details:
 - a. Enter the following information for the user:
 - i. First and Last Name
 - ii. Email Address → Found in "Contact Info"
 - iii. Check in the Phlebotomist checkbox
 - iv. Check in the System Clinical User
 - v. Check in Harvest LIS Tech/ Order Entry
 - b. Be sure to select the correct "User Licensing" dropdown for the desired user:
 - i. General will not have access to Work in Progress or Dashboard
 - ii. Point-of-care will have access to Work in Progress or Dashboard
 - iii. User Licensing Access Information
 - 1. Ignore Signed-In Location based Testing Facility Restrictions in Work in Progress and Dashboard (make sure box is checked in)
 - iv. Use System Default Timeout: 30 minutes

User Details	Additional Info Change Log Alerts & Comments
Last Name* _ Template	Active Locked Provider
	External Always available as ordering provider Looking up patients Show patients from any practice for whom this user has been an ordering provider Restrict to only show patients for whom this user has been an ordering provider Phiebotomist Operator Certifications Manager Manager
	User Licensing Access Information Testing Facility Restrictions Ignore Signed-In Location based Testing Facility Restrictions in Work in Progress and Dashboard State Licenses System Clinical User Access restricted practices Medical Director Lab Director Restrict patient access to only those visible through an associate Restrict associate user access to patients for whom this user has been an ordering provider Harvest LIS Tech/Order Entry Receives System Licensing Messages
	Use System Default Timeout Session Timeout 30 minutes Inactivate User After / / / Now Clear

5. Complete the Account Information:

- a. User Name- Be sure to enter the user's Kindbody work email so that they can sign in via Google
- b. Click on "Assign Password" and select "Send email with link upon save"
- c. Select the correct Time Zone based on the user's facility

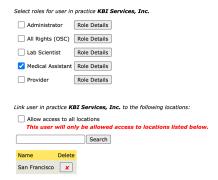


6. Complete Member of the Practices

a. Click "Add"



- b. Select KBI Services, Inc.
 - i. Based on the user's KB role you will assign them to the following:
 - ${\bf 1.\; Lab\; Scientist\; \text{-}Lab\; scientists,\; Endocrinologists,\; and\; junior\; Embryologists}$
 - 2. Medical Assistant Nurses, MA and clinic management
 - 3. Provider- Providers only should be assigned to this role
 - 4. Administrator KB Admins only should be assigned to this role
- c. If a user should only have access to a certain facility, you are able to uncheck the box "Allow access to all locations" and manually enter the desired locations users should be assigned to



7. Click "Save"



