


Trellis: New User Account Workflow

 Please do not manually create an account for providers.

1. Sign into Trellis → [Link to Trellis](#)
2. Select the desired location you'd like to add the user into

Please choose your location

Available Locations:

Recent Locations:

- KBI Services, Inc. - Bryant Park
- KBI Services, Inc. - Century City
- KBI Services, Inc. - Dallas
- KBI Services, Inc. - Detroit
- KBI Services, Inc. - Flatiron
- KBI Services, Inc. - Gaea Center
- KBI Services, Inc. - KBI Main
- KBI Services, Inc. - Milwaukee
- KBI Services, Inc. - St. Louis Primary
- KBI Services, Inc. - St. Louis Secondary

3. Personnel > Users > Copy the desired template

Reports

System Setup

Customization

Device Engine Setup

Instrument Setup

Order Choice Setup

Other Setup

Patient Setup

Personnel

Certifications

Roles

Users

Toxicology

QC

Rules

Manage

Monitor

Quick Links

Bowen, Soloung
Swansea

Name ☐ Use "contains" search instead of a "starts with" search

Limit results to showing only

☒ Show active only

☐ Show providers only

☐ Show Phlebotomist only

☐ Show locked accounts only

Belongs to practice

Restricted to location

Belongs to role

Has host code for

☐ Missing host code for

☐ Limit to creation date range:

Start AM

End AM

☐ Show system clinical users only

☐ Show non-providers only

☐ Show external providers only

☐ Show operators only

☐ Show managers only

Test Delivery

Reset Filter


Refresh

0 rows selected: 0

Show 10 entries

Showing 1 to 10 of 390 entries

Name	Active	Copy
Template_Lab_Scientist	Yes	<input type="button" value="Copy"/>
Template_MA	Yes	<input type="button" value="Copy"/>
Template_Admin (requires aoor)	Yes	<input type="button" value="Copy"/>

 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
 First Name MA
 Middle Name
 Prefix
 Professional Suffix
 Degree
 Suffix
 Name Type
 Full Name .Template, MA
 Local Name
 User Signature
 Associated Locations
 Testing Section
 Contact Info
 User Licensing Point-of-Care Info

☒ 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
☒ Phlebotomist
☐ 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:

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

Account Information

ID Kindbody Email Assign ID
 User Name Kindbody email Assign User Name
 Password Assign Password Note: Leading and trailing spaces in passwords will be removed.
 Confirm Password
☒ Change password on sign in after / / : AM Now Clear
☐ Suppress password expiration notification
☐ Require two-factor authentication when logging in
 Authentication address
 UPIN
 NPI
 Tax ID
 SSN
 CLIA ID
 Time Zone (GMT-05:00) Eastern Standard Time

6. Complete Member of the Practices

- Click **"Add"**

Member of These Practices

☒ Show active only Create Practice and Location System-level Roles Add

Practice	Roles	Account #	Linked Locations	Restricted	Delete
KBI Services, Inc. Provider click to add lab accounts			No	No	X

- Select KBI Services, Inc.

- Based on the user's KB role you will assign them to the following:

- Lab Scientist** -Lab scientists, Endocrinologists, and junior Embryologists
- Medical Assistant** - Nurses, MA and clinic management
- Provider**- Providers only should be assigned to this role
- Administrator** - KB Admins only should be assigned to this role

- 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

Select roles for user in practice **KBI Services, Inc.**

- ☐ Administrator
- ☐ All Rights (OSC)
- ☐ Lab Scientist
- ☒ Medical Assistant
- ☐ Provider
- Role Details
- Role Details
- Role Details
- Role Details
- Role Details

Link user in practice **KBI Services, Inc.** to the following locations:

- ☐ Allow access to all locations


This user will only be allowed access to locations listed below.

Search

Name	Delete
San Francisco	

7. Click “Save”

Save

 Reference:

 TO-2265: SOP: Update Trellis New User SOP **TICKET RESOLVED**

[Link to Orchard Trellis Release Notes](#)

[Release 10.0.230215](#)