# theSource - Profile Settings Reference Guide (Personal Settings)

[theSource - Profile Settings](#_Toc66109352)

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**Description:** The purpose of this document is to assist users with personalizing profile settings in **theSource**.

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| theSource - Profile Settings |

**Profile Settings** are used to:

* Make sure to receive the appropriate acknowledgments for the area(s) you support.
* Change **theSource** content view to assist with different clients or business areas.

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| **Step** | **Action** |
| **1** | Click the applicable link below to view a reference guide to decide which business area, department, line of business, position, and facility to choose.   * [theSource Profile Settings Reference Guide](TSRC-PROD-002066) * [CarelonRx - theSource Profile Settings Reference Guide](TSRC-PROD-019443)   **Note:** If “All” is listed in the reference guide, it means your business department has decided not to specify that particular setting. |
| **2** | Create a new profile or update the existing profile as needed. It is recommended to save a default profile on the **Manage** tab.   * Refer to **Establishing a Profile** section of [theSource- Feature User Guide](TSRC-PROD-000828) for detailed steps for setting up a profile.     C:\Users\cwolf5\AppData\Local\Temp\SNAGHTML1a8d0af.PNG |

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| Example Scenario |

Let’s set up a profile in the Product Selection area of the Back End Pharmacy in Chicago.

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| **Step** | **Action** |
| **1** | Access the spreadsheet linked above and find the work area located in the far left column. Then read across the row to determine which choice to make for each setting in theSource, as highlighted in yellow below.  **Note:** When presented with multiple options for Facility (Chicago, San Antonio, or Wilkes Barre),  simply select the location where you work (in this example, it’s Chicago). |
| **2** | Access theSource and click on the profile settings icon. |
| **3** | Click on **Manage** and the pencil icon next to an empty profile option.  C:\Users\cwolf5\AppData\Local\Temp\SNAGHTML1af254a.PNG |
| **4** | Click on each setting as shown in Step 1, and then choose the options listed in the reference guide for Product Selection.  **Profile 1 Example:** |
| **5** | Choose Mail Pharmacy Operations – Back End for the Business Area.   * Repeat for each profile setting option as needed (Business Area, Department, Line of Business, Position, and Facility).      * When completed, set the profile as default, and then activate it. The profile is set! |

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| Related Documents |

**Parent SOP:** [DOC-048962 Learning & Development Document Management Policy and Procedure](https://policy.corp.cvscaremark.com/cs/groups/public/@pnp/@nu/@all/@all/@6700/documents/sop/b2mt/mdq4/~edisp/doc-048962.pdf)

**Abbreviations / Definitions:** [Training and Delivery Abbreviations, Definitions, and Terms](C:UsersC071417DocumentsL&D%20SubcommitteeMarch%202021TSRC-PROD-011253)

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