

Medisolv User Management

System Administrator Training Guide

Introduction

Welcome to the Medisolv User Management Platform.

This platform provides organizations with direct control over managing user access to Medisolv applications. System Administrators can grant, modify, and remove access for end users while ensuring compliance with their organization's security and privacy requirements.

The User Management Platform is designed to provide a streamlined and intuitive experience, making user administration easier and more efficient.

System Administrator Responsibilities

System Administrators are responsible for:

- Managing end-user access to Medisolv applications
- Granting and modifying user permissions
- Activating and deactivating user accounts
- Managing access to Personally Identifiable Information (PII)
- Maintaining appropriate access levels within their organization

Important: System Administrator privileges are granted exclusively by Medisolv and require organizational approval through a submitted support ticket.

Standardized Access Levels

Medisolv applications utilize standardized access levels across the product suite for consistency and ease of administration.

1. Super User

Super Users have access to:

- All administrative functions within an application
- Organizational-level configuration settings
- Administrative management capabilities

Exception: Super Users cannot manage user access permissions. User management remains restricted to designated System Administrators.

2. User This access level is intended for employees who actively work within the platform.

Users can:

- Enter data
- Edit data

- Manage data
 - Run reports
 - Perform standard application functions
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3. Read-Only User

Read-Only users can:

- View dashboards
- View reports
- Review records

Read-Only users cannot:

- Add data
 - Edit data
 - Delete information
 - Modify configurations
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Personally Identifiable Information (PII) Access

PII access is managed separately from application access levels.

Organizations can choose whether a user should have access to sensitive information regardless of their application role.

Example

An IT administrator may require application administration capabilities but may not need access to sensitive patient or user information.

The platform allows System Administrators to grant or restrict PII access independently, helping organizations meet security and privacy requirements.

Accessing the User Management Platform

- **Step 1: Open a Medisolv Application**

Navigate to any Medisolv application.

- **Step 2: Open the Application Launcher**

Select the **9-dot menu** located in the upper-right corner of the application.

- **Step 3: Select User Management**

Choose **User Management** from the launcher menu.

The User Management Dashboard will open.

Note: Users without System Administrator permissions will see the User Management option disabled and will not be able to access the platform.

User Management Dashboard Overview

The dashboard provides a consolidated view of all users and their access.

Dashboard Columns

The dashboard displays:

- User
- Sub-Organization
- Product
- Access Level
- Date Access Granted
- Last Activity Date
- Status
- Available Actions

Available Actions

System Administrators can:

- Edit user information
- Modify application access
- Activate users
- Deactivate users
- Delete users (when appropriate)

Search, Sort, and Filter

Administrators can:

- Sort by any dashboard column
- Filter by organization
- Search for users by name or organization

Example

To view users with access to the sub-organization **Canary General**, type "Canary General" into the search bar or filter by the sub-organization field.

Users with Access to Multiple Organizations

When a user has access to more than one sub-organization:

- A caret (▼) will appear beside the organization name.
- Selecting the caret displays:
 - Additional organizations
 - Product access
 - Associated access levels

Adding New Users

The platform provides two methods for adding users:

1. Basic Access Assignment
2. Advanced Access Assignment

Basic User Creation

The **Basic** option allows administrators to grant identical permissions to multiple users at once.

Step 1: Select "Add New User"

From the dashboard, select **Add New User**.

Step 2: Enter Email Addresses

Enter one or more email addresses.

Example:

- john.doe@organization.org
- jane.doe@organization.org

Step 3: Select Product Access

Choose one or more Medisolv products.

Examples shown during training included:

- Encore A
- Encore EC/EH

Hovering over the product provides a description of the application.

Step 4: Select Sub-Organizations

Choose the organizations or facilities the user should access.

Examples from training:

- Canary General
- Harris Hawk

Step 5: Grant Organization-Level Product Access (Optional)

- Selecting **Grant Product Access at the Organization Level** allows automatic access inheritance when additional facilities are added in the future.

Benefit

- If your health system acquires a new facility, users automatically receive access without requiring manual updates by the System Administrator.

Step 6: Select Access Level

Choose one access level that applies to:

- All selected users
- All selected organizations
- All selected products

Available options:

- Super User
- User
- Read Only

Step 7: Configure PII Access

Decide whether users should have access to Personally Identifiable Information (PII).

Step 8: Send Setup Email

By default, the system sends a setup email containing account registration instructions.

Important

SAML users do not receive setup/registration emails.

Step 9: Complete User Creation

Select **Add to Users**.

The dashboard will display:

- Assigned organizations
- Product access
- Access level
- User status

New users will display:

Invitation Status: Pending until they complete registration.

Advanced User Creation

The **Advanced** option allows administrators to assign different permissions across multiple organizations and products.

Use Advanced mode when:

- Users require access to multiple facilities
 - Different products require different access levels
 - Granular permission control is needed
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Advanced Configuration Process

- **Step 1: Enter User Email Addresses**

Add one or more users.

- **Step 2: Add Sub-Organizations**

Configure each organization independently.

- **Step 3: Assign Product Access**

Select products within each sub-organization.

- **Step 4: Assign Access Levels**

Choose different access levels for each product.

Example:

Organization	Product	Access Level
Canary General	Encore A	User
Canary General	Encore EH	Super User
Harris Hawk	Encore A	Super User

Example based on training demonstration.

Multiple Organization Access

The Advanced option allows a user to have:

- Access to multiple organizations
- Access to multiple applications
- Different permission levels within each application

This provides maximum flexibility for healthcare systems with complex organizational structures.

Bulk User Upload

Administrators can upload multiple users simultaneously using a CSV file.

CSV import is available within the Advanced user creation workflow and is recommended for large onboarding efforts.

User Statuses

The platform tracks user activity and onboarding status.

Common statuses include:

- Pending Invitation
- Active
- Inactive

Administrators can monitor user engagement and activation directly from the dashboard.

Getting Help

If you have questions or require assistance with user access management:

1. Submit a ticket through the [Customer Care Hub](#)
 2. A member of the Medisolv Support Team will respond and assist with your request
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Key Takeaways

- ✓ System Administrators manage user access for their organization.
- ✓ Access levels are standardized across all Medisolv applications.
- ✓ PII permissions are managed separately from application access.
- ✓ The dashboard allows searching, filtering, editing, activating, and deactivating users.
- ✓ Basic mode applies identical permissions to multiple users.
- ✓ Advanced mode supports granular access control across organizations and products.
- ✓ Organizations can simplify future administration by granting organization-level product access.
- ✓ Customer Care is available for assistance through the Customer Care Hub.