



## Proprietary Notice

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## User Creation

MediNotes e™ 5.2.40 introduced a new way of adding users to the program. Practices can now add the names for all non-provider level users directly in the program via the User Manager. Once a user name has been created it must have a license assigned to it in order for the new user to be able to log into MediNotes e™. The license assigned can either be an available un-assigned license or transferred from another user name. Provider licenses will still need to be managed by the registration file (.xrg) that is obtained from Eclipsys.

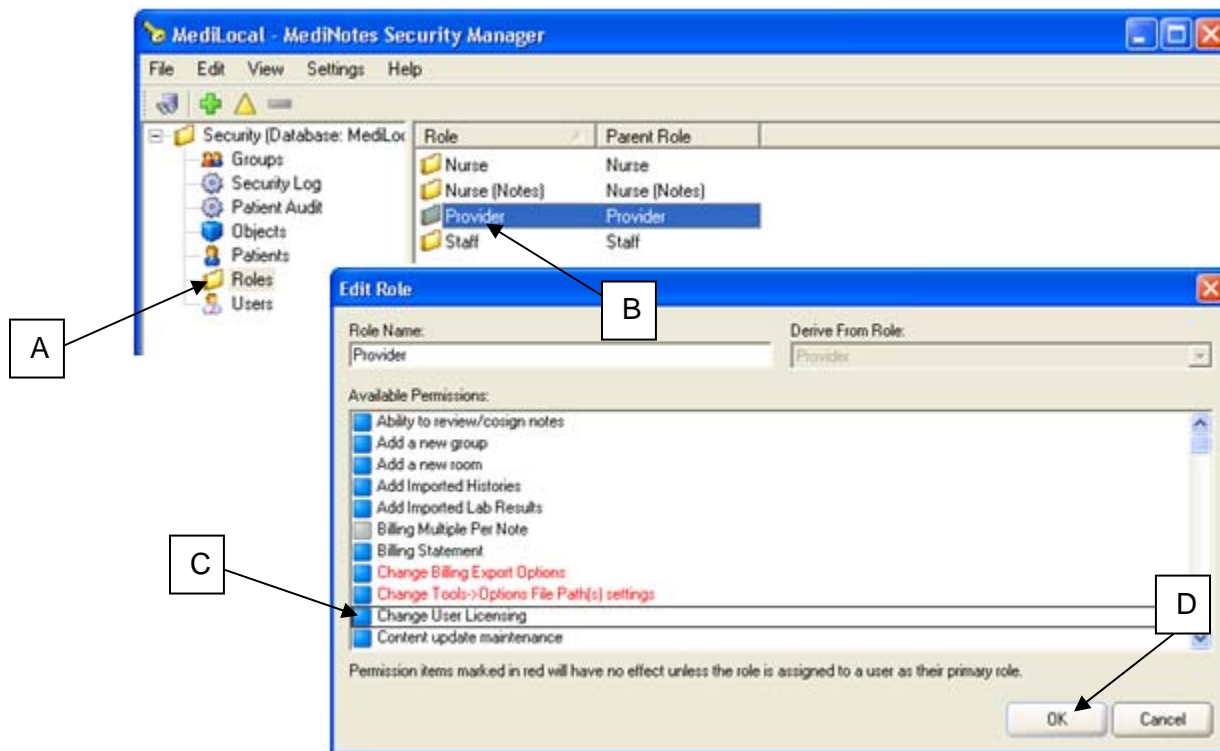
### Security Manager Permission

The first step to adding new users is to turn on the permission to do so in Security Manager.

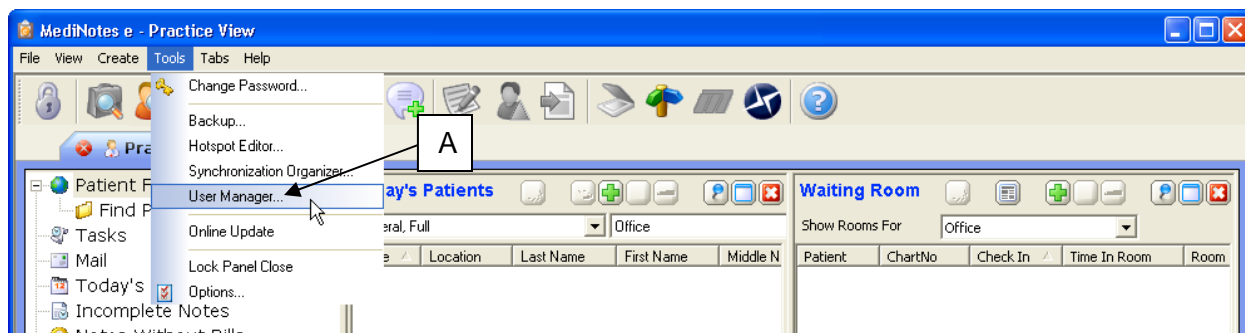
1. Log into the Security Manager and click on the **Roles** section (A) in the tree on the left.
2. On the right side of the screen, double click the Role that will be allowed to create users and assign licenses (B).

*Note: If all users with this Role should not be allowed to manage licenses, a custom role will need to be created. If help is needed with this process, please refer to the Security Manager help document. Contact Eclipsys Implementation at 877-633-6683 ext. 505 for a copy if needed.*

3. Click the box next to **Change User Licensing** (C) to turn on the permission (box will be blue when permission is turned on).
4. Click **OK** (D) to save the changes to the Role.
5. Close Security Manger and re-start MediNotes e for changes to take effect.



## Create User

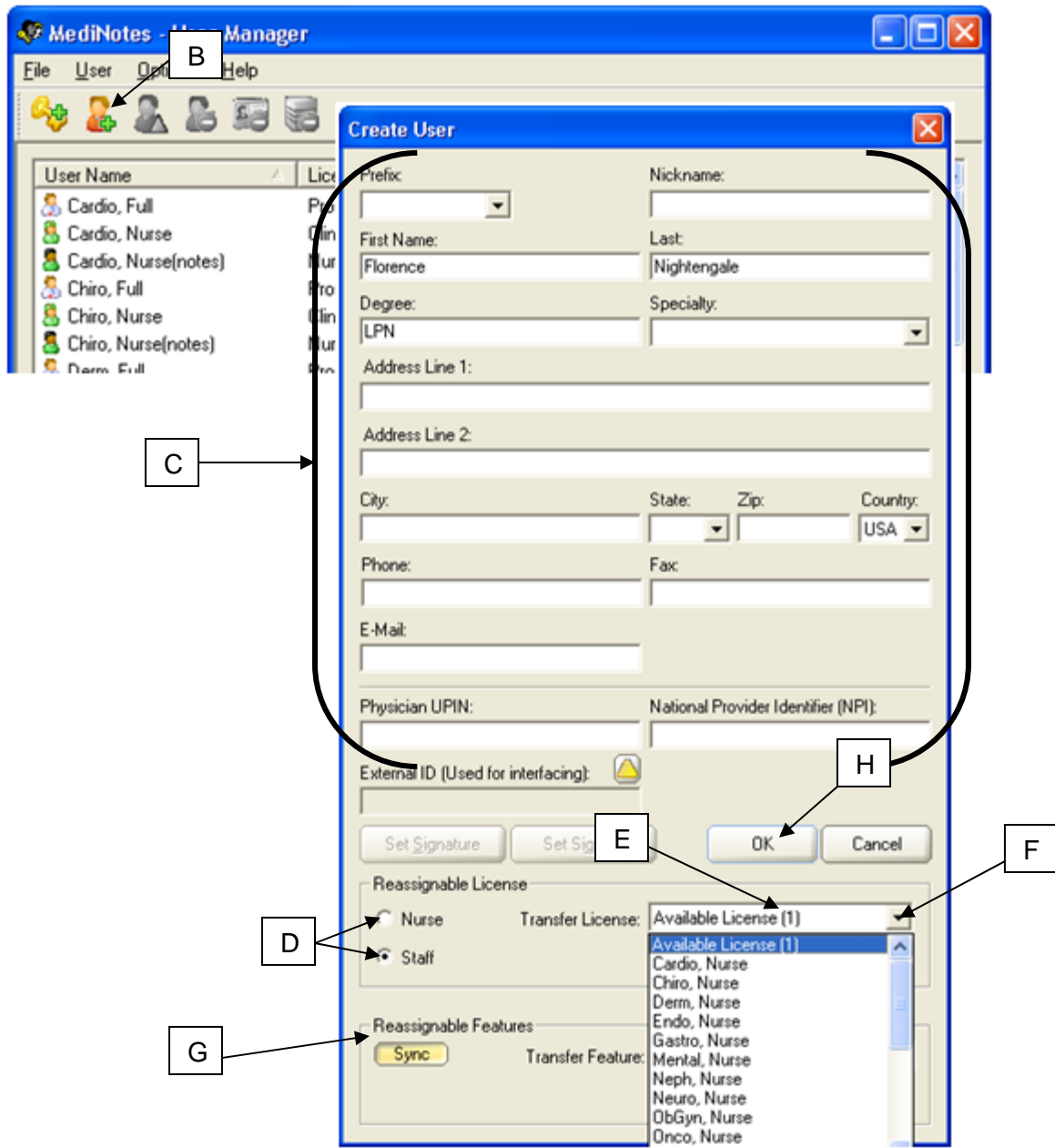


1. Log into MediNotes e as a user who has permission to manage licenses.
2. Click **Tools->User Manager (A)** and enter your password to open the User Manager window.

<<see image on next page>>

3. Click the **Create User** button (B).
4. In the **Create User** window, enter all appropriate information for the new user (C).
5. In the **Reassignable License** section, select either **Nurse** or **Staff** (D) to designate the type of license the user will have.
  - Nurse – this option represents a nurse license with signing rights.
  - Staff – this option represents a nurse/clinical staff license with no signing rights.
6. In the **Transfer License** dropdown (E), the number of available un-assigned licenses for the selected type will be displayed. If there is at least 1 license available, this field does not need to be clicked.
7. If there are no un-assigned licenses available, click the drop down arrow (F) to display a list of all current users who have this license type. Click the name of the user whose license you wish to transfer to the new user name.
8. Repeat this process for the **Reassignable Features** section (G), if **Sync** is being utilized by the practice and the new user should have this feature.
9. Click **OK** (H) to save the new user.
  - Once a new user entry is saved, the name of the user can NOT be edited.
    - If a mistake is made or a name needs to be changed **prior** to the first time the user logs into the program, the user entry can be deleted and a new one entered.
    - If the change is needed **after** the user has logged into the program even once, then a new user entry will need to be created and the old one will remain on the list as an “inactive” user.
  - A newly created user’s password will automatically be set to “medi”. The first time the user logs in they will be required to set a new password.

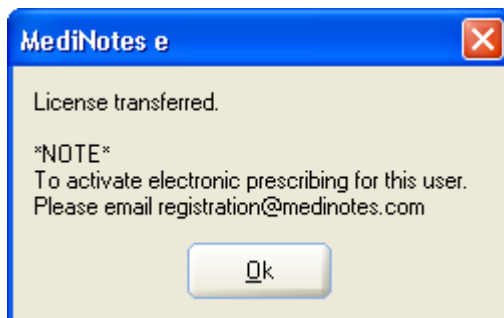
*Note: a new user name can be created without assigning a license to it... but the user would not be able to log into the MediNotes e program until a license is assigned.*



## MediNotes Rx Users

If this practice utilizes e-prescribing, there are a couple of additional steps that will need to be done when creating new users and/or reassigning licenses.

If transferring a license from a user that has e-prescribing enabled (Clinical Staff or Nurse w/signing), to another user, a message will pop up when the new user entry is saved.



If the new user needs access to DrFirst medications and pharmacies for patient data entry, or the user should have Provider Agent capability, one of two steps will have to be taken:

- If using MediNotes e version 5.2 build 40-46:
  - An email will need to be sent to [registration@medinotes.com](mailto:registration@medinotes.com) listing the Previous Users name and the New Users name, so that a new registration file can be generated and sent to the practice to install in the program.

*Note: If the previous user was registered with DrFirst as a Provider Agent... and the new user should also have this capability, specify this in the details of the email, and then go to <http://www.medinotes.com/service/pst/pdf/rx-provider-agent-agreement.pdf> to fill out the form needed to register the new user with DrFirst as a Provider Agent. Fax the completed form to 515-327-8856, Attn: MediNotes Rx Registration.*

- If using MediNotes e version 5.3 build 10->:
  1. The new user will need to log into MediNotes e and go to **Tools->Options->Electronic Prescribing**.
  2. In the **\*Rx License** field, click the drop down arrow to choose either **Clinical Staff** or **Provider Agent**.

*Note: the Provider Agent option will only show for users with a Nurse(notes) license.*

3. Click **OK** to save the settings.
- Note: If **Provider Agent** is selected in this field, it does NOT turn on this capability for the user. The new user must also be registered with DrFirst in order for this to function properly. Go to <http://www.medinotes.com/service/pst/pdf/rx-provider-agent-agreement.pdf> to fill out the form needed to register the new user with DrFirst as a Provider Agent. Fax the completed form to 515-327-8856, Attn: MediNotes Rx Registration.*