

Creating A New Data Entry Office Support User Account

IMPORTANT: These directions are only used to create Funeral Home Support Staff accounts.

1

Perform a Users search with the **Search All** button.



Users

Username Last Name Office

2

If user account does not exist, click the **New User** button to create a new user account.



3

Enter User Account information:

- Username
- Password
- Confirm Password
- Confirm **Temporary Password** is selected
- Start Date (01-01-1900)

When finished, click the **Next** button.

Username:

Password:

Confirm Password:

Temporary Password:

Login(s) Attempted:

Password Expires:

Start Date:

End Date:

4

Enter Name & Address information:

- User's Name
- Facility Address
- Mailing Address

When finished, click the **Next** button.

Note: If facility and mailing address are the same, enter the facility address and select **Same as Mailing Address** to complete the mailing address.

User Name

Prefix First Middle Last Suffix

Title Other Specify

Address

Street Number Pre Directional Street Name Street Designator Post Directional Suite Number

City or Town County State Country Zip Code

Same as Mailing Address

Mailing Address

Street Number Pre Directional Street Name Street Designator Post Directional Suite Number

City or Town County State Country Zip Code

5

Enter Contact information:

- Phone numbers
- Email address (a unique email is required)
- Preferred Method of Contact, if known

When finished, click the **Next** button.

Work Number:

Cell Number:

Home Number:

Fax Number:

E-mail:

Preferred Method of Contact:

6

Funeral home support staff are not licensed so do not enter any data on the Licenses screen.

Click the **Next** button.

7

Add your facility name to the **Office Affiliations Assigned to the user** field:

- Select **Facility Name**
- Click **Add Arrow** button

When finished, click the **Next** button.

Office Type:

Available Office Affiliations	Office Affiliations Assigned to the user
	Eternal Rest Funeral Home

Navigation buttons: >, >>, <, <<

Note: If you are the administrator for multiple facilities, you will only see the facility you selected at login. If the user requires access to your other facilities, after you create this account, log out and select the office link for the facility you need to add. Locate and open the user's account. Click the **Update Offices/Roles/Business Functions** link and complete **Steps #7 to #10** to add that facility to the user's account.

8

Select User Type of **Funeral Home User** and click the **Add** button.

When finished, click **Next**.

Please select User type for each Office Affiliation:

User Types:

Offices:

Add Remove

9

Select User Role of Default Death Funeral Home User and click **Add Arrow** button. When finished, click **Next**.

Offices:

User Types:

Available Roles	Roles Assigned to the user
Default Death Funeral Director	Default Death Funeral Home User

Navigation buttons: >, >>

10

Business Functions:

Do not make any changes. Click **Finish**.

Finish

11

Perform a Users search with the **Search Current** button to verify that the new user account can be located.

Users **Search Current**

Username: cousinitt Last Name: Office:

12

Display the User Summary to review and verify that all of the new user's information is correct.

User Id: 10248 User Name: cousinitt Password Expiration: 05/15/2016 Start Date: 01/01/1900 End Date: Logon Attempts: 0 Update Login Information	Name: Cousin Itt Title: User Address: 159 Eternal Drive Harrisburg, Pennsylvania 17110 User Mailing Address: 159 Eternal Drive Harrisburg, Pennsylvania 17110 Update User	Work Number: 717 909-9999 Ext Cell Number: - Home Number: - Ext Fax Number: - Ext E-mail: cousinitt@eternalrest.com Preferred Contact:E-Mail Update Contact Information	Medical License: NPI Number: Funeral Director License: Update Licenses
Eternal Rest Funeral Home			
User Type Funeral Home User Total records : 1	Office Eternal Rest Funeral Home Total records : 1	Roles Default Death Funeral Home User Total records : 1	Additional Business Functions No data found.