Associating Your Facility with an Active User or Data Provider Account

> **NOTE:** This is the same process that is used to restore terminated user accounts with other current facility associations.

1 Perform a User or Data Provider search using the **Search All** button.

Search All

Data Providers

Last Name	License Number	Data Provider Type
Reaper	FD082016	Funeral Director

2 Click the **Last Name** or **User Name** link in the search results to display the user summary.

Last Name	First Name	Facility
Reaper	Grim	6 Feet Under Funeral Home

3 Click the **Update Offices/Roles/Business Functions** link.

User Id: 10226
User Name: grimreaper
Password Expiration: 04/30/2016
Start Date: 01/01/1900
End Date:
Logon Attempts: 0

Update Login Information

Name: Grim Reaper
Title: FD
User Address:
666 Depression Drive
Enola, Pennsylvania 17025
User Mailing Address:
666 Depression Drive
Enola, Pennsylvania 17025

Update User

Work Number:
- Ext
Cell Number:
-
Home Number:
- Ext
Fax Number: - Ext
E-mail:
grimreaper@6ftunder.com
Preferred Contact:

Update Contact Information

Medical License:
NPI Number:
Funeral Director License:
FD082016

Update Licenses

6 Feet Under Funeral Home
Grim Reaper is authorized to sign for the following events: Death

User Type	Office	Roles	Additional Business Functions
Funeral Director	6 Feet Under Funeral Home	Default Death Funeral Director	No data found.
Total records : 1	Total records : 1	Total records : 1	

Update Offices/Roles/Business Functions

4 Select your **Facility Name** from the **Available Office Affiliations** field and click the **Add Arrow** button to add your facility to the **Office Affiliations Assigned to the user** field.

5. Office Affiliations   Step 5 of 9

Office Type: Funeral Home, Cemetery, and Crematory

Available Office Affiliations
Eternal Rest Funeral Home

> >> < <<

Office Affiliations Assigned to the user
6 Feet Under Funeral Home

Cancel   << Back   Next >>

5 Your facility has been added to the **Office Affiliations Assigned to User** field. Click the **Next** button.

Note: If you are the administrator for multiple facilities, you will only see the facility you selected at login. If the user or data provider 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 data provider's account. Click the **Update Offices/Roles/Business Functions** link and complete **Steps #4 to #10** to add that facility to the data provider's account.

6 Confirm the correct **User Type** is selected, and click the **Add** button.

7 The **User Type** is associated to the new **Office Affiliation**.

User Type	Office Affiliation
Funeral Director	6 Feet Under Funeral Home
Funeral Director	Eternal Rest Funeral Home

☑ Death Confirm that the Death checkbox is selected **only** for FD accounts.

Click the **Next** button.

8 Select the appropriate **Role** for the user and click the **Add Arrow** button.

9 The **role** is now assigned to the user. Click the **Next** button.

10 Do not make any changes to the Business Functions screen. Click the **Finish** button.

11 When finished, you should be able to locate the account information by performing a user search. If the account is for a licensed funeral director, you should be able to locate them through a data provider search.

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

6 Feet Under Funeral Home
Grim Reaper is authorized to sign for the following events: Death

User Type	Office	Roles	Additional Business Functions
Funeral Director	6 Feet Under Funeral Home	Default Death Funeral Director	
	Eternal Rest Funeral Home		
Total records : 1	Total records : 2	Total records : 1	No data found.