

How to Add a User

THIS CAN ONLY BE DONE BY AN ADMINISTRATOR

- Log in
- Select Providers

ACME CLIENT MANAGEMENT SYSTEM				Clients B	illable Items Folders Resource	es Session	Notes Tasks	Tax Invoices	My account	Logout
Management	Providers									
Clients	Name	Email			Level		Provider ID			
Add a Client		0								
Wait List	Gender	Contracted for	Populations served	Can travel	TLA			Profession		
Claims	Female Male	Precover Services Treatment	 0-5 years 6-11 years 	Yes No	Far North District (TLA 1)		^	- Any -		~
Purchase Orders	Other Declined	Supported Assessment Impairment Assessment	□ 12-15 years		Kaipara District (TLA 3) Whangarei District (TLA 2)					
Case Managers	Decimed	Group Work	Adults Older adults		Auckland City (TLA 7) Franklin District (TLA 10)					
Client Documents					Manukau City (TLA 8)					
Folders					North Shore City (TLA 5) Papakura District (TLA 9)					
Notes	New referrals									
Provider Access	Any Search Addition View All licers									
Providers	- Arly - 🔹	Jearch (Josef) View	All USEIS							

• Click on Add User

ACME CLIENT MANAGEMENT SYSTEM	Clients Billable Items Folders Resources Session Notes Tasks Tax Invoices My account Log out
Management	This web page allows administrators to register new users. Users' email addresses and usernames must be unique.
Clients Add a Client Wait List	Add user
Claims	Given * Middle name(s) Family *
Purchase Orders	Email address
Case Managers	
Client Documents	A valid email address. All emails from the system will be sent to this address. The email address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or
Folders	notifications by email.
Notes	Roles
Provider Access	C Admin
Providers	CMS Admin
Tasks	Username *
System Settings	Several special characters are allowed, including space, period (), hyphen (-), apostrophe (), underscore (.), and the @ sign.
	Password *

- Enter Name
- Check Provider Box if user is a provider (a provider will only see information for clients to whom they are linked to in the CMS)
- Enter user's email address (must be unique within CMS)
- Enter username eg. Joe.Bloggs
- Enter user's email address (must be unique within CMS)
- Enter temporary password
- Re-enter temporary password

rassword strength.	passworu.	usemame.	
Confirm password *	General Fail - Password length must be at least 8 characters.	Password character length of at least 8	
Passwords match: Provide a password for the new account in both fields.		characters	
□ Notify user of new account			
Password Expiration The password will expire based on the number of days defined in the policy			
Provider ID	□ No GST #		
	Provider GST #		
Provider ID is internal *			
ACC assigned Internal	Provider Pay Rate		
evel	%		
	Provider Withholding Rate		
Office Phone	%		
	Bank Account Number		
Makila Dhaaa			

- Check Notify User of new account (optional-this will send an email link to your new provider to log in)
- Add provider ID
- Check Admin if user is an Admin (note Admin will see all client information on the CMS)
- Check ACC assigned Provider ID
- Add Provider Level This is the ACC pay level, not the provider education level will always be numbers 1-6
- Add in provider GST info and pay rate. (eg. If deducting 10%, payrate is 90%)
- Provider withholding rate is only to be used if you are deducting withholding tax for IRD.
- Add optional provider details

	lime zone
	Auckland
	Select the desired local time and time zone. Dates and times throughout
1	Create new account

• Click on Create New Account