HCS Patient Tracking: Create a New Non-Admin User

Job Aid

This Job Aid will walk you through step-by-step instructions on how to create a new Non-Admin user in the HCS Patient Tracking System.

**NOTE:** Because this is a training document, your view may be slightly different than what is shown in the screenshots.

<table>
<thead>
<tr>
<th>Steps</th>
<th>Screen</th>
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</thead>
<tbody>
<tr>
<td><strong>STEP 1:</strong> Open a <strong>web browser</strong> (e.g., Google Chrome, Internet Explorer, etc.), and enter TEMARR into the <em>search</em> field. <strong>Result:</strong> TEMARR – TN.gov should be first link listed in the results. Click on it, and you will be taken to the TEMARR home page. Alternatively, you may click <a href="#">here</a>.</td>
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<tr>
<td><img src="image1" alt="Google Search for TEMARR" /></td>
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<tr>
<td><strong>STEP 2:</strong> Scroll down the page and click on the <strong>TNCRN - Inventory Management and Patient Tracking</strong> link. <strong>Result:</strong> This section expands downward and reveals links to both the Inventory Management and HCS Patient Tracking systems.</td>
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<tr>
<td><img src="image2" alt="TNCRN Links" /></td>
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<tr>
<td><strong>STEP 3:</strong> Click on the <strong>HCS Patient Tracking</strong> link. <strong>Result:</strong> The login screen for the HCS Patient Tracking system displays.</td>
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<tr>
<td><img src="image3" alt="HCS Patient Tracking" /></td>
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</tbody>
</table>
STEP 4:
1. Log into the HCS Patient Tracking system by typing your Username and Password into the respective Username and Password fields.
2. Click on the Sign In button.

Result: The home page for the HCS Patient Tracking system displays with a welcome message and your name.

HELP: If you need help with your Username or Password, contact your facility admin or RHC, or visit the TEMARR Customer Service Portal here.

STEP 5:
1. Click on your profile silhouette in the upper right hand corner of the page.
2. Click on Admin mode.

Result: The Admin home page displays.
STEP 6:
Click on the **Users and Permissions group icon** on the left.

*Result: The Users and Permissions page displays.*

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STEP 7:
Click on the **Users section**.

*Result: The Users Data Results grid displays.*

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STEP 8:
Click on the **Create New User button**.

*Result: The New User Profile page displays.*
STEP 9:
Fill out the following **required fields** (marked with a **red asterisk** - *):

- **Name** (Enter the user's First and Last Name or facility's name, e.g. John Doe, Saint Luke's Memorial)
- **User Name** (use the standard format firstname.lastname, e.g. John.Doe, SaintLukes.Memorial)
- **Password** (use Password1!)
- **Confirm Password** (Password1!)
- **Password Question** (type in Q)
- **Password Answer** (type in A)
- **Email** (type in the user's email address. If you don't know it, you can enter your own email address, as it can be updated later)

**TIP:** Do **not** check the **Administrator box**, as this is not an Admin account.

*Check the **Must Reset Password box** only if the user is an individual user, not a group. This allows the user to change their password. Since the example here is a facility, you would not check the box.*
**TIP:** If you try to click the **Save** button without filling out a required field, the box around the required field will highlight in red and denote that the field is required.

**STEP 10:**
1. Click on **Groups**.
2. Click on the **Add Groups** button.

Now you will need to add the Non-Admin User into four groups: See Maps and Charts, Reports Access, TDH Mobile Users, and their Facility's group.

**STEP 11:**
1. Type **See Maps and Charts** into the Search box.
2. Select the **radio** button to the left of See Maps and Charts.
3. Click the **Add Selected** button.

*Result:* The See Maps and Charts group is added under the Groups column to the right.
### STEP 12:
1. Type **Reports Access** into the Search box.
2. Select the radio **button** to the left of Reports Access.
3. Click the Add Selected **button**.

Result: The Reports Access group is added to the right.

### STEP 13:
1. Type **TDH Mobile Users** into the Search box.
2. Select the radio **button** to the left of TDH Mobile Users.
3. Click the Add Selected **button**.

Result: The TDH Mobile Users group is added to the right.

### STEP 14:
1. Type **the Facility name** into the Search box.
2. Select the radio **button** to the left of the facility name.
3. Click the Add Selected **button**.

Result: The Facility name group is added to the right.
STEP 15:  
Select the Save button.

Result: A green popup message with Saved Successfully will display at the bottom of the screen, and you will be returned to the Users Data Results grid.

IMPORTANT NOTE: Users won't be able to sign into the HCS Patient Tracking system unless they are assigned to a group.