

User/Provider Build

Galen Healthcare Solutions

Empowering Extraordinary Patient Care

Questions and Answers

- **You will be muted**
- **Please save your questions for Q+A at the end of the presentation**
- **Feel free to submit questions via the Q+A panel to the left**
- **We will try to get to them all at the end of the presentation**

Today's Agenda

- **Learn to read a cheatsheet**
- **User/Provider Setup**
 - TWUser Admin
 - Work Def Admin
 - Task Admin
 - Security Admin
 - Provider Admin
 - Charge Admin
 - Group Admin
 - Scan Setup

Things We Will Need

- **To build a provider, we need a few pieces of information**
 - NPI
 - DEA number and expiration date
 - State license number and expiration date
 - Sites the provider will be working
 - Primary Specialty

 - PMS code

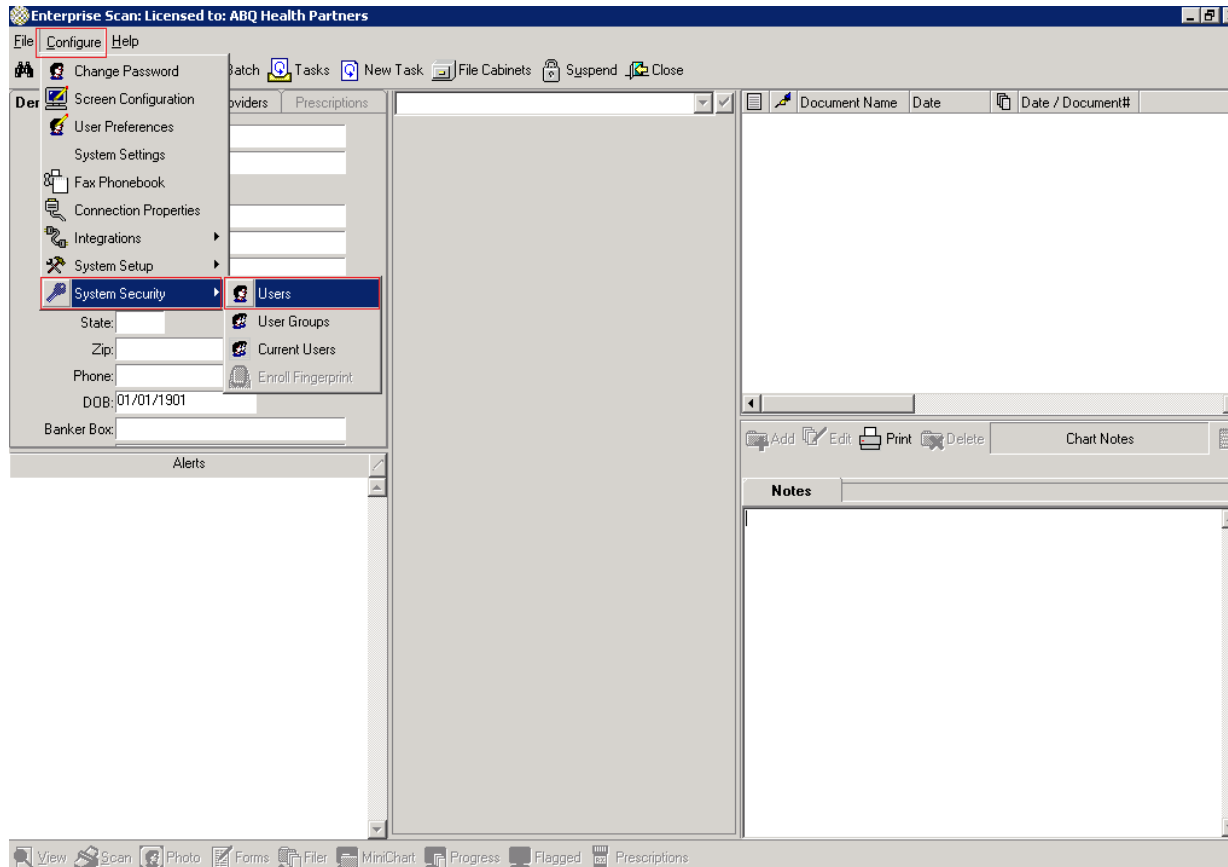
Hands On

- **Let's head into the application and get to building!**

Setting Up Users in Scan

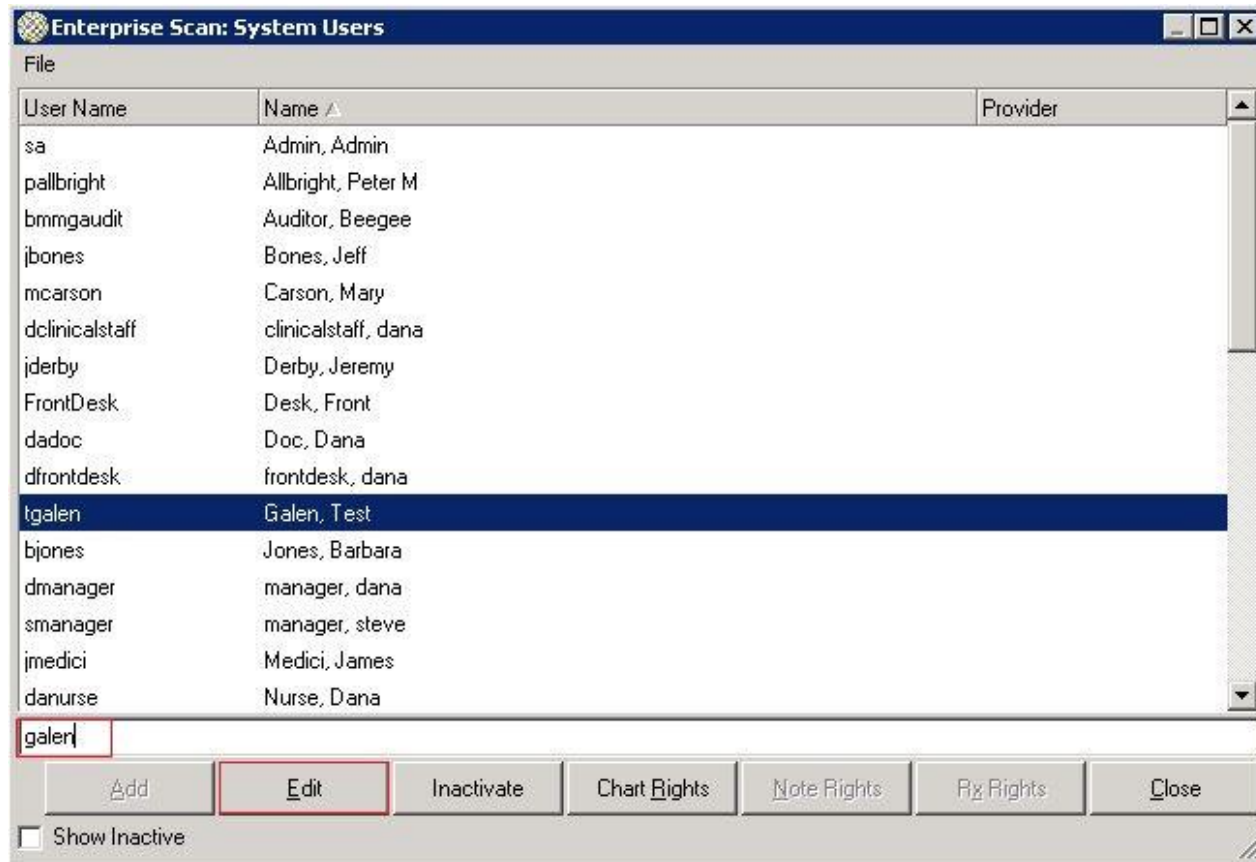
- **Set Password**
- **Select Security Group**
- **Set Default Task Basket**
- **Link Task Basket to Self**

Set Password, Select Security Group, and Set Default Task Basket



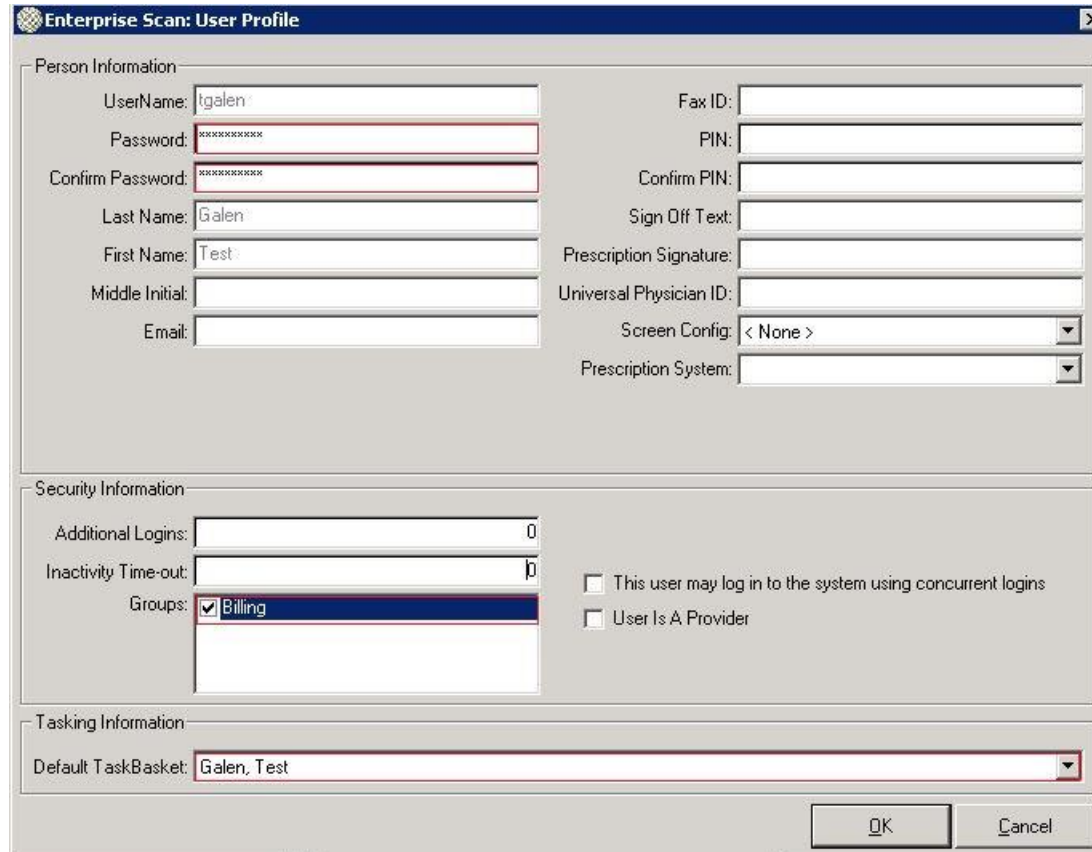
Step 1: Configure > System Security > Users

Set Password, Select Security Group, and Set Default Task Basket



Step 2: Search for user by last name, highlight user, and click 'Edit' button

Set Password, Select Security Group, and Set Default Task Basket

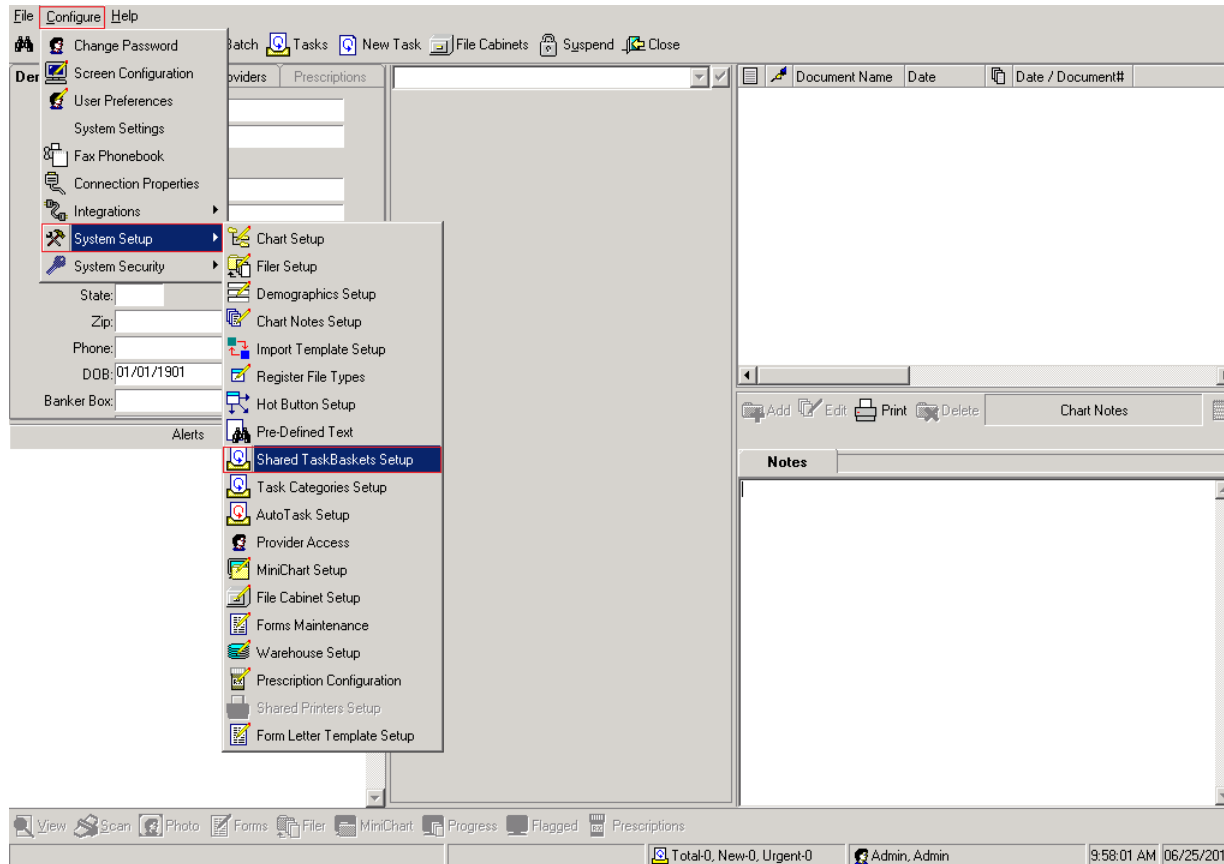


The image shows a screenshot of the "Enterprise Scan: User Profile" dialog box. It is divided into three main sections: Person Information, Security Information, and Tasking Information. In the Person Information section, the Username is "tgalen", Password and Confirm Password are masked with asterisks, Last Name is "Galen", First Name is "Test", and Middle Initial is empty. In the Security Information section, Additional Logins is 0, Inactivity Time-out is 0, and the Groups list has "Billing" selected. In the Tasking Information section, the Default TaskBasket is "Galen, Test".

Section	Field	Value
Person Information	UserName	tgalen
	Password	*****
	Confirm Password	*****
	Last Name	Galen
	First Name	Test
	Middle Initial	
	Email	
	Fax ID	
	PIN	
	Confirm PIN	
Security Information	Additional Logins	0
	Inactivity Time-out	0
	Groups	Billing
	This user may log in to the system using concurrent logins	<input type="checkbox"/>
Tasking Information	Default TaskBasket	Galen, Test
	User Is A Provider	<input type="checkbox"/>

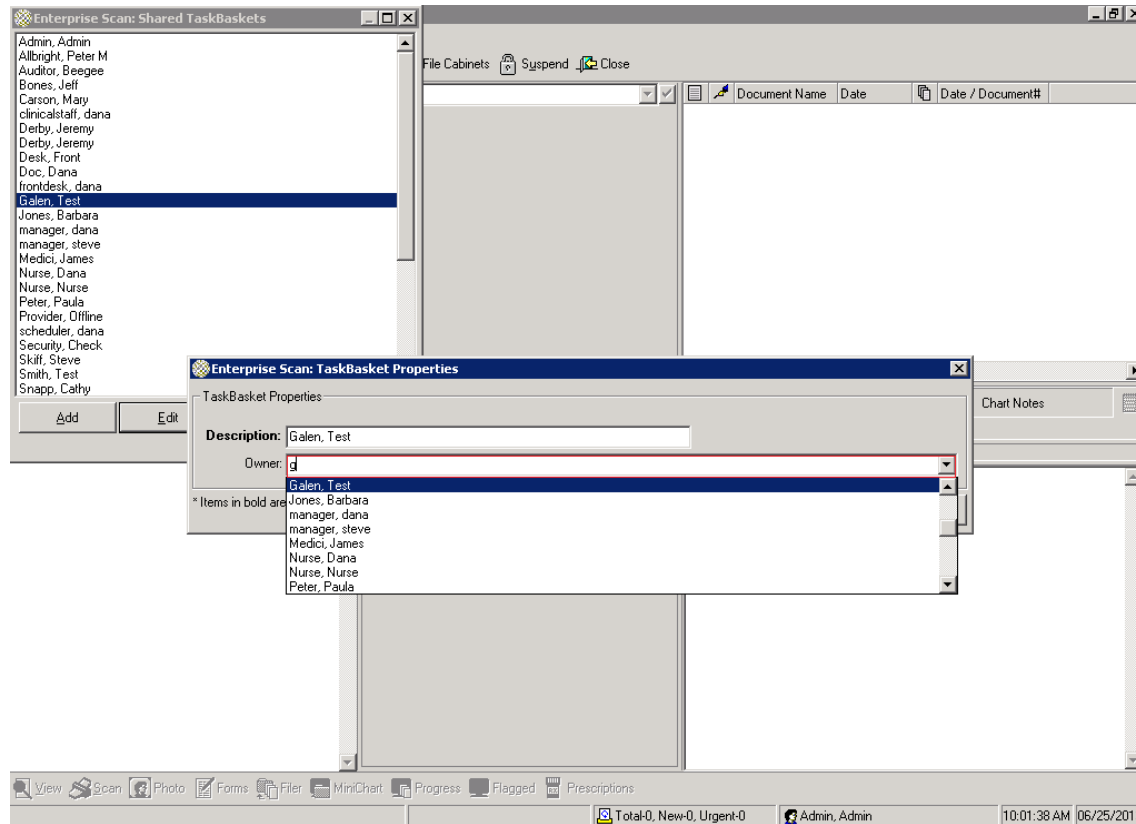
Step 3: Set password, confirm password, select security group, and set default task basket

Link Task Basket To Itself



Step 1: Configure > System Setup > Shared TaskBaskets Setup

Link Task Basket To Itself



Step 2: Find user from dropdown, highlight user, click 'Edit' button, search for user in 'Owner' dropdown, and click 'OK' button

Questions and/or Comments?



Galen Resources

- If you have any questions regarding this webcast or any other educational materials from Galen, please e-mail education@galenhealthcare.com
- Visit galenhealthcare.com to check out our wiki, blogs, and services/products

