

Creating Users in the Ohio Aggregator

Creating a user means to create another user in the Sandata Aggregator who will have access to create users, view data, or run reports, depending on the access granted to the user.

Fields Used to Create Users

Field	Description
CREATE USER	Click this button to save the user’s profile.
USERNAME EMAIL	Use this field to enter a user’s email address, which will also be the username. A user’s email can’t be changed once the profile is saved. The email address entered must be unique and can only be used once within the account.
CONFIRM USERNAME/EMAIL	Use this field to confirm a user’s email address, which will also be their username.
LAST NAME	Use this field to enter a user’s last name.
FIRST NAME	Use this field to enter a user’s first name.
LOCKED	Select this checkbox to prevent a user from logging into the system. Uncheck the box to allow access. <ul style="list-style-type: none"> The Locked checkbox is used to temporarily restrict the users access to Sandata EVV. Deselect this checkbox to restore access.
AVAILABLE ACCESS GROUPS	The items in these fields are available for assignment.
ASSIGNMENT BUTTONS	Use these buttons to move items between the Available and Assigned fields.

Note: An Access Group is an individual EVV account. Users will see the Access Groups, or EVV accounts, that they have been granted access to and are able to assign to other users in the “Available Access Groups” box.

Field	Description
ASSIGNED ACCESS GROUPS	The items in these fields are assigned to the user.
USER GROUPS	Use this dropdown to select an access group from a list of access groups assigned to the user.
PRIVILEGES/USER ROLES	Use these radio buttons to display a list of either system privileges or user roles from the access group displayed to be displayed in the AVAILABLE ACCESS GROUP field. Depending on the button selected above, these fields will either display a list of system privileges or user roles that can be assigned to the user groups. Move items between the AVAILABLE and ASSIGNED fields by using the buttons between them.
AVAILABLE PRIVILEGES/USER ROLES	The items in these fields are available for assignment. <ul style="list-style-type: none"> Each system begins with a standard set of roles that can be updated and changed as required. Privileges should be assigned to roles rather than individual users, whenever possible.
ASSIGNED PRIVILEGES/USER ROLES	The items in these fields are assigned to the user.

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Creating a New User

1. Navigate to the Manage Users screen. (**Security > Manage Users > Create Users**).



Note:

To prevent duplicate user profiles, search to ensure there is not an existing profile before creating a new user profile.

2. Enter and confirm the new user's email address, this is also the username for this user.
3. Enter the user's **Last Name** and **First Name**.

A screenshot of the 'Create User' web form. The form has a title 'Create User' and a 'CREATE USER' button in the top right. It contains four input fields: 'USERNAME/EMAIL *', 'CONFIRM USERNAME/EMAIL *', 'LAST NAME *', and 'FIRST NAME *'. Red boxes and numbers '2' and '3' highlight the email and name fields respectively. A 'LOCKED' checkbox is visible at the bottom left.

Create New User

4. Click on an Access Group and use the assignment buttons to move access groups between the **AVAILABLE ACCESS GROUP** and **ASSIGNED ACCESS GROUP** fields.
The Access Groups in the Available Access Groups field represent all access groups that can be assigned to a user. The access groups in the Assigned Access group field represent which access groups are assigned to the user. All Access Groups assigned to the user display in the **USER GROUPS** dropdown field.
5. Select a User Group.
The user group selected is the only one assigned privileges and user roles. These assignments must be made individually for each user group assigned to the user.
6. Select **PRIVILEGES** or **USER ROLES** to assign a privileges or user roles to a user group. Privileges and User Roles are assigned to user groups individually.
7. Click on a role/privileges and use the assignment buttons to move access groups between the **AVAILABLE USER ROLES/PRIVILEGES** and **ASSIGNED USER ROLES/PRIVILEGES** fields.
The roles/privileges in the Available User Roles/Privileges fields represent all roles/privileges that can be assigned to a user. The roles/privileges in the Assigned User Roles/Privileges fields represent which access groups are assigned to the user. All Access Groups assigned to the user display in the **USER GROUPS** dropdown field.
8. Click **CREATE USER**.

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Note: User roles are a grouping of privileges, pre-determined by Sandata. We recommend that providers utilize the roles to assign to users, instead of assigning individual privileges.

Here are the roles available for Ohio providers:

- **Provider Security Administrator** – Creates and manages users and has all provider data access.
- **Provider Office Coordinator** – Has access to view all the provider's data, including SSNs.
- **Provider Assistant Office Coordinator** – Has access to view all the provider's data, except SSNs.

The screenshot shows the user creation interface in the Sandata Aggregator. It is divided into several sections:

- AVAILABLE ACCESS GROUPS**: An empty list on the left.
- SELECTED ACCESS GROUPS**: A list containing "Test p1 to p2 Agency - 25090".
- Navigation**: A central column of buttons: a right-pointing double arrow (4), a right-pointing single arrow (5), a left-pointing single arrow (6), and a left-pointing double arrow (7).
- USER GROUPS**: A dropdown menu showing "Test p1 to p2 Agency - 2".
- PRIVILEGES / USER ROLES**: Two radio buttons. "PRIVILEGES" is unselected, and "USER ROLES" is selected (6).
- User Roles**: A section header.
- AVAILABLE USER ROLES**: A list containing "PROVIDER ASST OFFICE COORD" and "PROVIDER SECURITY ADMINISTRATOR".
- ASSIGNED USER ROLES**: A list containing "PROVIDER OFFICE COORDINATOR".
- Navigation**: A second set of navigation buttons (right-pointing double arrow (7), right-pointing single arrow (8), left-pointing single arrow (9), left-pointing double arrow (10)).
- CREATE USER**: A blue button at the bottom right (8).