

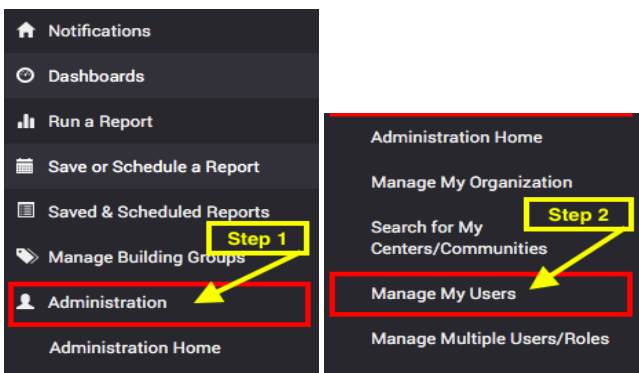
Objective:

The new and improved way to add users into LTC Trend Tracker allows account administrators to complete user set-up of building(s) or entire organization attachment, and the assignment of granular permissions to new users in one sitting, versus having to make repeated logins and additional steps. This new process also provides new users with the ability of getting quicker access to LTC Trend Tracker.

ADDING A SINGLE USER

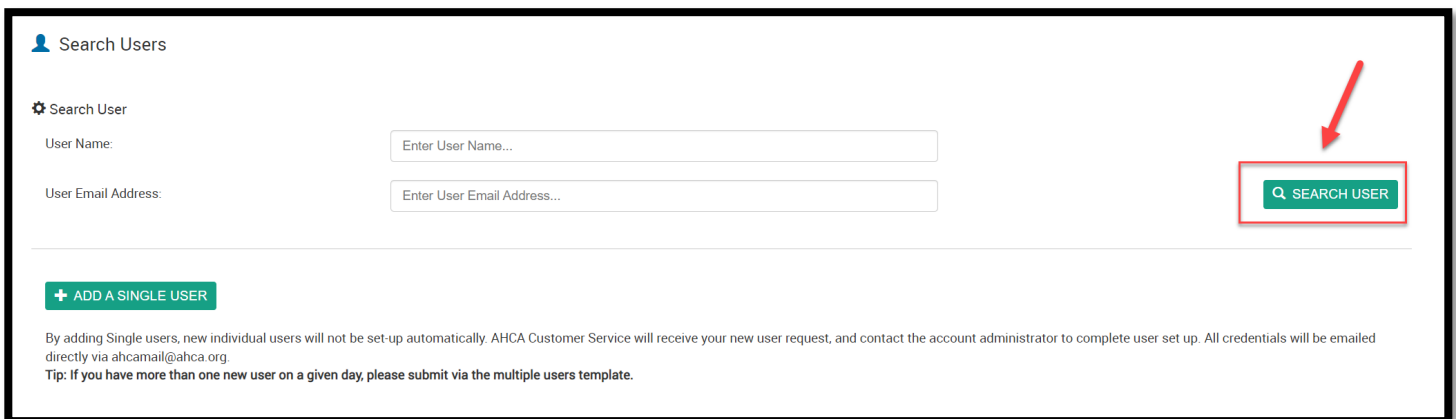
NOTE: We recommend all new users complete the [New User Form](#) on the main website.

1. Within the left-hand corner of the screen, click on “Administration” then on “Manage My Users”



2. On the “Manage my Users” page, you can search for users by their name or email address. Users will not automatically be displayed until information is entered into the search bar and you click “Search User”.

TIP: Email Address is the fastest way to search!



3. If the user **is** already in the system, by name or email, they will yield a result in the “**User Search Results**” section. Once you have identified the individual you wish to add or delete in your user search results, click “**Manage**” next to the name of the correct individual. Once you click “**Manage**”, you will skip down to the **Managing Roles and Centers for Users** section on page 4 of this document.

Search Users

Search User

User Name:

User Email Address:

SEARCH USER

User Search Results

User Name	User Email Address	
Christine Brooks	cbrooks@gmail.com	MANAGE

4. If the user **is not** in the system, the following message will be displayed, and you will need to follow steps 4-6.

User Search Results


User Name	User Email Address
-----------	--------------------

Unable to find your user? Please complete these steps:

1. Contact your prospective new user, and have them complete the [New User Form](#)
2. Once the form has been completed, log in with your Account Administrator credentials to LTC Trend Tracker.
3. Visit the Manage my Users screen to search for your new user, and finalize their profile. (NOTE: It can take up to 15 minutes for your new user to appear in LTC Trend Tracker).

5. To add a new user that cannot be found using the search function, please click the “**+ Add a Single User**” button.

⚙️ User Search Results

User Name	User Email Address
<p>Unable to find your user? Please complete these steps:</p> <ol style="list-style-type: none"> 1. Contact your prospective new user, and have them complete the New User Form 2. Once the form has been completed, log in with your Account Administrator credentials to LTC Trend Tracker. 3. Visit the Manage my Users screen to search for your new user, and finalize their profile. (NOTE: It can take up to 15 minutes for your new user to appear in LTC Trend Tracker). 	
<p>+ ADD A SINGLE USER </p>	

By adding Single users, new individual users will not be set-up automatically. AHCA Customer Service will receive your new user request, and contact the account administrator to complete user set up. All credentials will be emailed directly via ahcmail@ahca.org
 Tip: If you have more than one new user on a given day, please submit via the multiple users template.

NOTE: The “+ Add Single User” button should only be used if the desired user cannot be found after searching by User Name and User Email Address in Step 1.

6. Enter the First Name, Last Name, Email Address and Job Title of the user. Then, click “Submit New User Request”.

New Org User

[← BACK](#)

(* indicates a required field)

First Name: *


Last Name: *


Email Address: *

Title: *

[▶ SUBMIT NEW USER REQUEST](#)

7. Once the request has been successfully submitted, you will be taken to the “Manage Roles and Centers for Users” screen where you will receive the following on-screen message. It is on this screen where you will be able to attach the user to the relevant org/center(s) and assign a primary role and additional granular permissions.

 **Manage Roles and Centers for Users**

 The user has been conditionally attached to your organization. Please assign the user role and buildings this user should have access to below. Once the user has been successfully created by AHCA Staff, you will be notified with next steps.

⚙️ Display User Details

MANAGING ROLES AND CENTERS FOR USERS

1. If this a new user, assign the user a primary role and click save.

Manage Roles and Centers for Users

Display User Details

User Name: Christine Brooks

User Email Address: cbrooks@gmail.com

Detach User From Organization

Organization Name: ABC Organization **Detach User**

Assign User Role

Select a Role for the User (required):

Account Administrator
This role allows the user to have access to all listed facilities within their organization. This person, also known as the account administrator, manages both centers and all users that are attached to the entire organization. This includes assigning permissions to other users attached to the whole organization.

Account User
This role allows the user to have access to one or more of the listed facilities within their organization. The user will have access to data for one or more centers attached to the organization. This role does not have account management privileges.


SAVE

- a. **NOTE:** User role titles have been updated. The Provider Org Administrator is now the **Account Administrator**. The Provider Org Org Unrestricted User and Provider Org Center Unrestricted User roles have been combined and now have the title, **Account User**. Please see the last page of this document for user role descriptions.

2. Assign the user any (Optional) Additional Access roles you would like for them to have in the system and click save. **Note:** By default, all user types have access to all reports **except** the Turnover and Cost Reports. To allow permission to view these reports, the Account Administrator must turn these additional permissions on.

⚙️ (Optional) Additional Access

User Role	Permission
<input checked="" type="checkbox"/> Allowed to list and report on SNF centers	<ul style="list-style-type: none"> Can list and report on SNF centers Can view dashboard View AHCA QMs View CASPER NHC View Covid Report View Five-Star Measures Report View NHC QMs View Quality Measures Report View Resident Characteristics Report View Staffing Measures Report View Survey Measures Report View Value Based Purchasing (VBP) Report
<input checked="" type="checkbox"/> Allowed to list and report on AL centers	<ul style="list-style-type: none"> Can list and report on AL centers Can view dashboard View AL Quality Measures (report, data download, dashboard metrics) View Turnover (report, data download, dashboard metrics)
<input type="checkbox"/> Allowed to View the Turnover Report	View Turnover (report, data download, dashboard metrics)
<input type="checkbox"/> Allowed to View the Cost Report	View Medicare Cost Report Info
<input type="checkbox"/> Allowed to Upload Turnover Data	Upload Edit Turnover Data
<input type="checkbox"/> Allowed to Upload NCAL Measures Data	Can upload AL Quality Measures data
<input type="checkbox"/> Allowed to Edit Organization Building Goals	Create and Edit Organization Building Goals




3. Next, attach the user to the facility (or facilities) they should have access to under the **Select Centers That Users Can Access** section of this [Manage Roles and Centers for Users] page and click save.

- At the bottom of the list of centers, the  button will allow for the Account Administrator to assign all centers at once to a user with one click.

NOTE: By default, all users are opted into receiving all LTCTT publications for the building(s) the user is attached to in the system. If you would like to make changes to which publications the user receives, make the changes under the “**Global Subscription Options for this User**” section, and click save.

ADDING 2 OR MORE USERS

1. Download the Multiple Users/Buildings Template

 Search Users


⚙ Search User

User Name:

User Email Address:

By adding Single users, new individual users will not be set-up automatically. AHCA Customer Service will receive your new user request, and contact the account administrator to complete user set up. All credentials will be emailed directly via ahcmail@ahca.org.

Tip: If you have more than one new user on a given day, please submit via the multiple users template.



Instructions for adding Multiple Users

1. Download the Multiple Users/Buildings Template.
2. After the download is complete, open the file in Excel.
3. Populate all fields in the file EXCEPT column H, "CRM ORG ID". Note: Each user can ONLY be assigned to one specific center/community by FPN/NCAL ID, or the entire organization. For custom center permissions, please access the users profile page.
4. Once you have completed the file, please send the updated file to help@ltctrendtracker.com for processing.
5. Users will be added within 2-3 business days.

2. Fill out one row for each user and choose the correct options for columns E & F. **Note: DO NOT FILL OUT THE CRM ORG ID COLUMN.**

	A	B	C	D	E	F	G	H
	Org Name	Email Address	First Name	Last Name	Job Title	Assigned to Individual Center or entire organization	If assigned to Individual, what is the FPN of the center?	CRM_ORG_ID
1								
2								
3								

Tip: If you need the Medicare Provider Number for your SNF facility, or the NCAL ID for your AL Community, please visit www.ltctrendtracker.com and click "REGISTER".

3. Email the completed spreadsheet to help@ltctrendtracker.com. If there are any errors in your file and/or when the upload has been completed, the LTC Trend Tracker Team will be in touch within 2-3 business days.
4. Once your users have been uploaded to the system, they will **immediately** have access. If you would like to edit user roles, assign upload permissions, turn on access to specific reports, or add additional facilities to a singular user, please reference the steps starting on **page 4** of this document.

User Roles	Definition
Account Administrator	Sets the user privileges and facilities for the organization, has access to information for the entire organization
Account User	Has access to information for one or more individual center(s)
Default Functions/Permissions By User Role	Definition
Account Administrator:	
Create/edit centers and profiles	The ability to create/edit facility profiles
Create/edit center groups (sub orgs)	The ability to create/edit sub organizations
Create/edit users & their permissions	The ability to create/edit user permissions
Create/Edit org focus tags (F & K tags)	The ability to edit and change the organization-wide focus tags visible on CASPER Citation reports for the organization and all associated centers
Account User:	
Edit Own Dashboard, Report and Peer Group selections, run all reports except Turnover and Cost Reports	The ability to select report & dashboard options and peer groups, run reports (except Turnover) for all centers assigned.
Additional (Optional) Permissions (Assigned to Users by Account Administrator)	Definition
Edit Center and Profile Information	Permission to modify, delete, and add facilities to organization (subject to AHCA customer service approval), edit facility profiles (name, contact info).
Edit Turnover data	Permission to upload, edit & download Turnover data
View Cost Report	Permission to see the Medicare cost report data
View Turnover Report	Permission to view & download Turnover report, upload/edit turnover data ,and view Turnover dashboard metrics
Allowed to list and report on SNF centers	View SNF related reports for associated facilities
Allowed to list and report on AL centers	View AL related reports for associated facilities
Allowed to Upload NCAL Measures Data	Can upload AL Quality Measures data
Allowed to Edit Organization Building Goals	Create and Edit Organization Building Goals