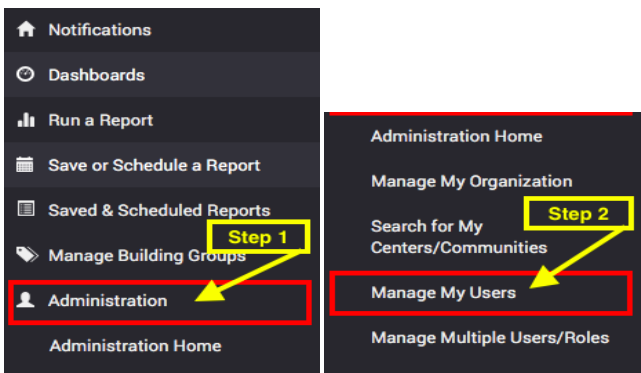**Objective:**

This document will outline how the Account Administrator can delete users and make changes to a user's profile within LTC Trend Tracker. Changes include what building(s) a user is attached to as well as which granular permissions a user can have within the LTC Trend Tracker system.
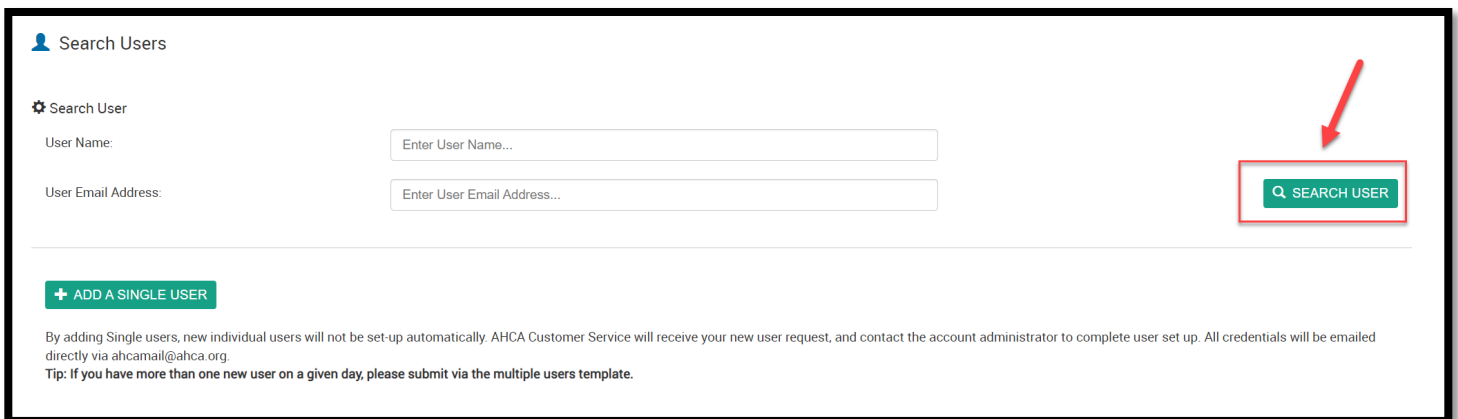
EDITING USERS

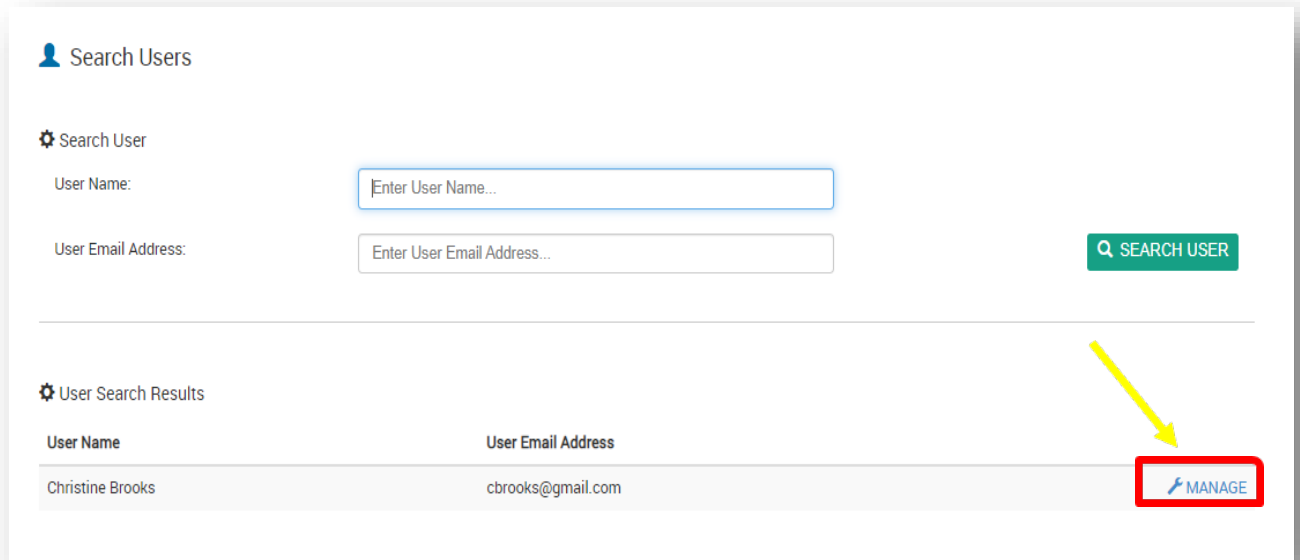1. Within the left-hand corner of the screen, click on "Administration" then on "Manage My Users"

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!

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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.

NOTE: If the user is not in the system, the following message will be displayed, and you will need to follow the steps outlined in the "*Adding Users*" help document located here.

4. Once you're on the "**Manage Roles and Centers for Users**" screen, you can edit the permissions for that user.

   a. "**Assign User Role**" Each user **must** be assigned **one** primary role. There are two types of user roles that an organization may choose for its individual users:

      i. "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.

      ii. "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.

   b. To remove a user, click "**detach**".

   c. The "**(Optional) Additional Access**" section lists optional permissions for access to specific reports that can be selected or de-selected for each user. These additional options are not listed as selections for any user in the Account Administrator role because all permissions are automatically active for users in that role.

      i. **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. To do so, the Account Administrator must go to the "**Manage My Users**" tab and search for the user by name or by the user's email address. When the user is found, click "**Manage**" to make changes to permissions.

      ii. To assign optional permissions, select each of those desired by marking the check box. When all desired permissions for the user have been selected, click "**Save.**" Permissions can be modified for a
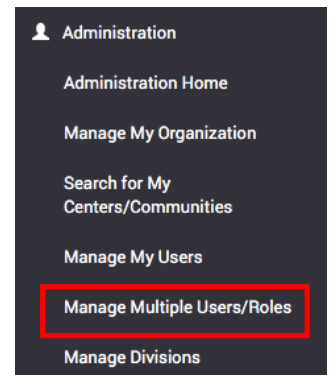
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user by the Account Administrator at any time by returning to the "*Manage Roles and Centers for Users*" page.

d. "**Select Centers that Users can access**" section allows you to edit the selection of centers within a user's existing profile.

     i. The "Status" indicator Next to the Center Name will display the access status of that specific center to a user. Click "Detach" to remove access to a center's information from a given user.

     ii. 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.
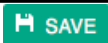

EDITING MULTIPLE USERS

If you would like to edit user roles, assign upload permissions, turn on access to specific reports, or add additional facilities to multiple users, please reference the following steps:

a. Under the Administration Tab, click "Manage Multiple Users/Roles".

b. Select a Primary Role.

c. In the box, select the permissions that you would like to add to your users.

d. In this box, select each individual user that you would like to assign the previously selected user role and permissions too.

e. If you would like to manage the profile a specific user or remove a user from your organization, click "Manage" next to the users name.

f. If you would like to see a snapshot of which centers or communities the user is attached to, click the sign next to the number ratio.

ProviderOrg LTCTTAASNF	snf_provorgltcttaa	mkhanna@synaptitudeconsulting.com	+ 6/6	🔧 MANAGE

g. Once all selections have been made, click

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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