



Manage Users

Invite New Manager

Purpose:

Practices can add a new manager to approve appointments, deny appointments, and make other practice changes in the Everseat dashboard. Access can be customized for each manager added. Managers have limited permissions compared to administrators.

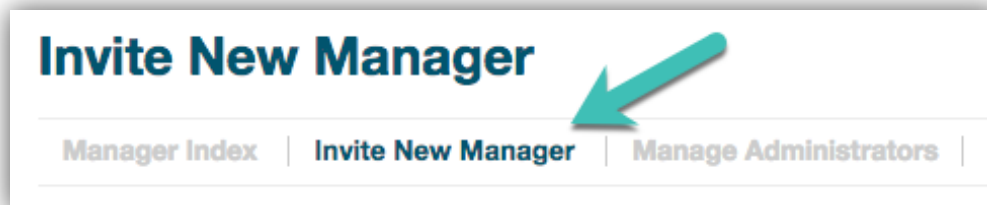
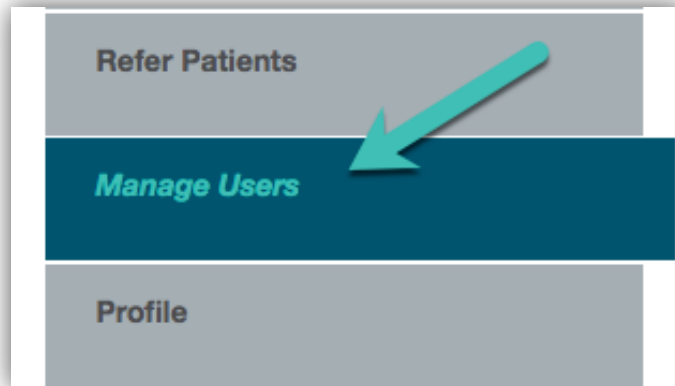
Best Practices and Examples:

Practices may add multiple managers to the Everseat dashboard to allow more users to manage appointments and features including:

- Approve and deny pending appointments for their designated providers and locations
- Add or edit provider schedules and exceptions
- Post appointments (for unintegrated accounts)
- Edit notification preferences
- Edit profile for location
- Edit profile for providers
- Disable and enable providers

Directions for Inviting a New Manager:

Step 1 – Navigate to the ‘Manage Users’ tab on the dashboard and select the ‘Invite New Manager’ page from the top navigation bar.

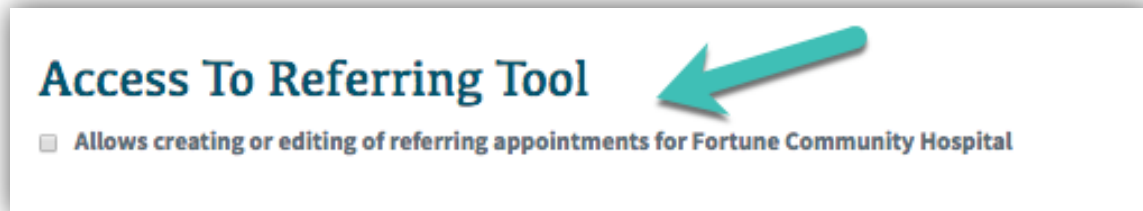


Step 2 – Begin filling out the form for inviting a new manager by providing their first name, last name, and email address. Once you create the profile, the user will be invited through the email address provided here.

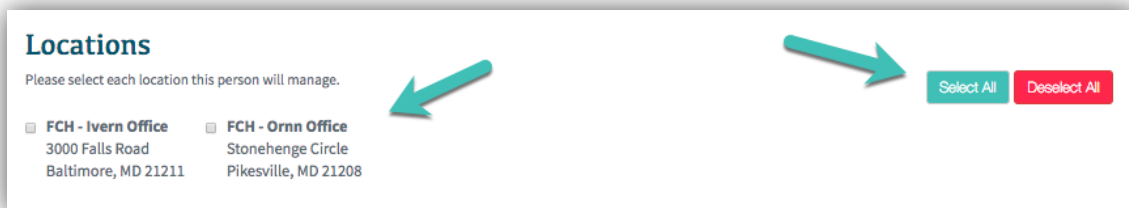
A screenshot of the 'Invite New Manager' form. The title 'Invite New Manager' is at the top. Below it is a breadcrumb trail: 'Manager Index | Invite New Manager | Manage Administrators'. The main section is titled 'Manager's Information' with a teal arrow pointing to it. It contains three input fields: 'First Name', 'Last Name', and 'Email address'.



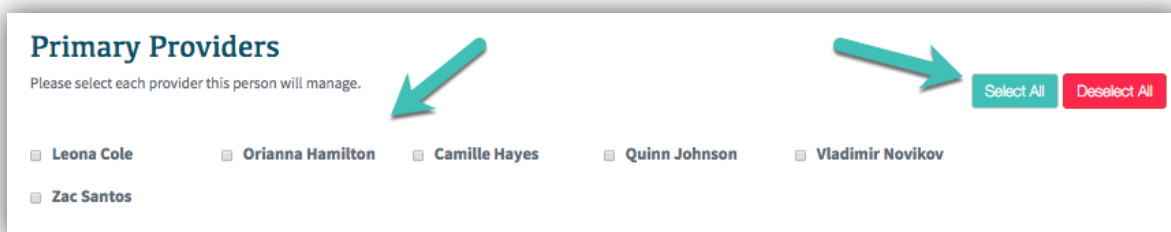
Step 3 – Next, select if you want to provide this manager with access to the referring tool. This will allow the manager to refer patients from your practice and to manage incoming referrals. Click the checkbox to provide the manager access to the tool.



Step 4 – Select the location or locations the user can manage. You may choose one or multiple locations. To choose all available locations, click ‘Select All.’



Step 5 – Select the providers for which the manager will be responsible. You may choose one or multiple providers. To choose all providers, click ‘Select All.’ If you are adding a provider as a manager, this is where you can give them permission to manage their own appointments.



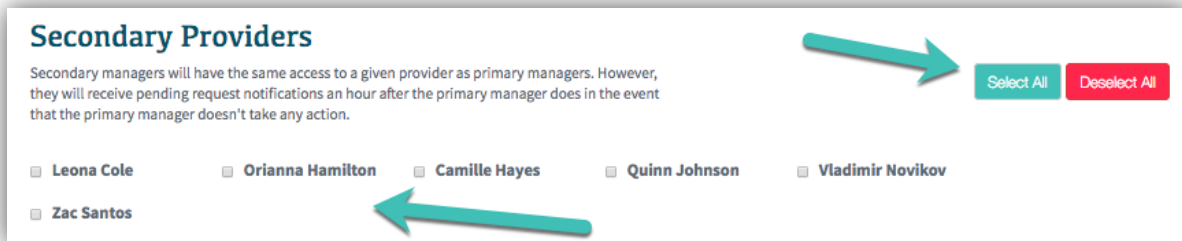
Step 6 – Select the secondary providers for which the manager will be responsible. If a manager has secondary provider permissions, they receive pending request notifications one (1) hour after the primary provider managers are alerted if the primary manager does not take

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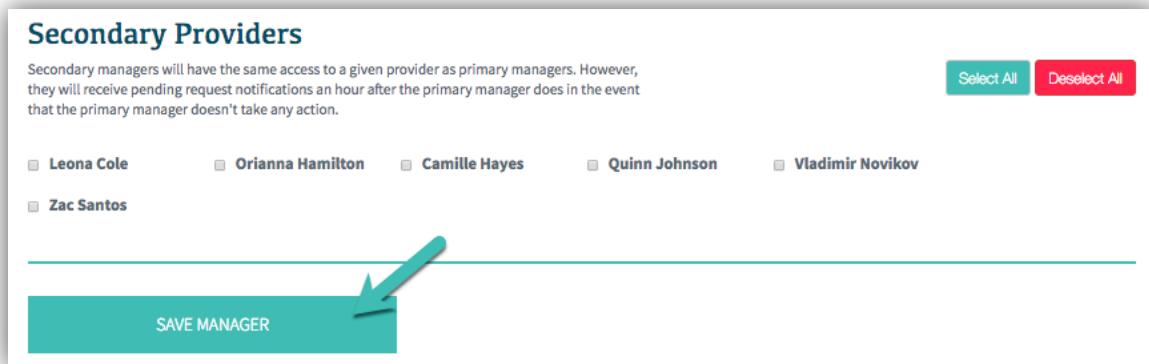


action. For example, a manager may be the primary manager for a single physician at their practice but provide secondary management for the other physicians at their practice.

Managers must have a provider selected under primary or secondary providers for the profile to save, though a manager could also be set up as both a primary and secondary manager.



Step 7 – Once you have applied all settings to the manager, click ‘Save Manager’ to save their profile and trigger the email invitation to the user.





Manager Index

Purpose:

Practices can manage existing managers by editing their permissions or removing them from the system.

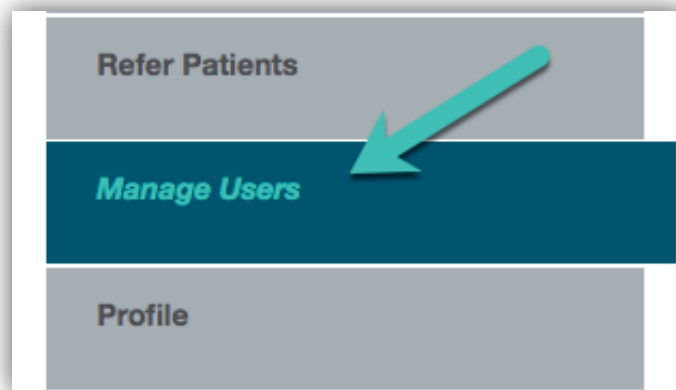
Best Practices and Examples:

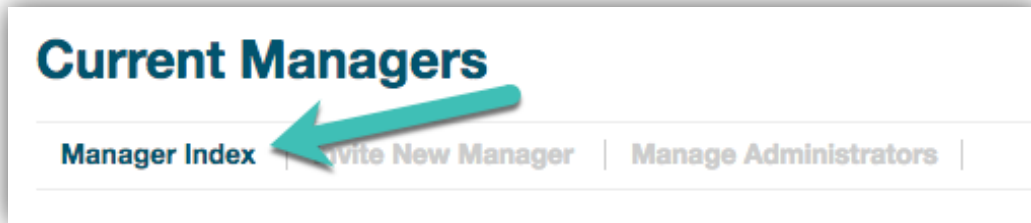
Practices may need to manage current managers in the following situations:

- Remove a manager that left the practice
- Edit which locations a manager has access to manage
- Edit which providers a manager has access to manage
- Change whether a manager is a primary or secondary manager
- Provide or remove access to the referral tool

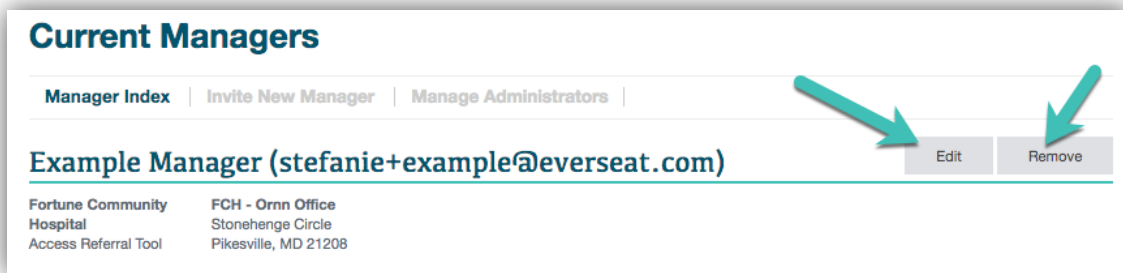
Directions for Editing Managers:

Step 1 – Navigate to the ‘Manage Users’ tab on the dashboard and select the ‘Manager Index’ page from the top navigation bar.



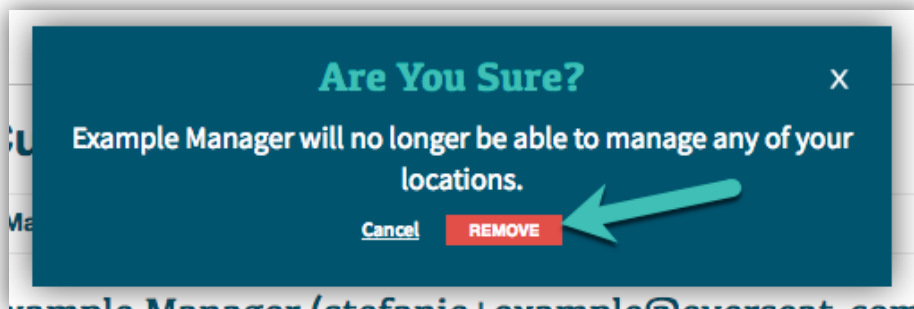


Step 2 – Locate the manager you would like to update and select either ‘Edit’ or ‘Remove’ next to their name.



If editing the profile, you will be directed to the same form as creating a new manager (see page 2 for more details). Click ‘Save Manager’ when finished.

If removing the profile, you will be prompted to confirm the removal of the manager. Click ‘Remove’ on the pop-up to confirm the removal of the manager from your Everseat account.





Manage Administrators

Purpose:

Administrators have full access to all features on the Everseat dashboard. This page allows you to add or remove administrators from the system.

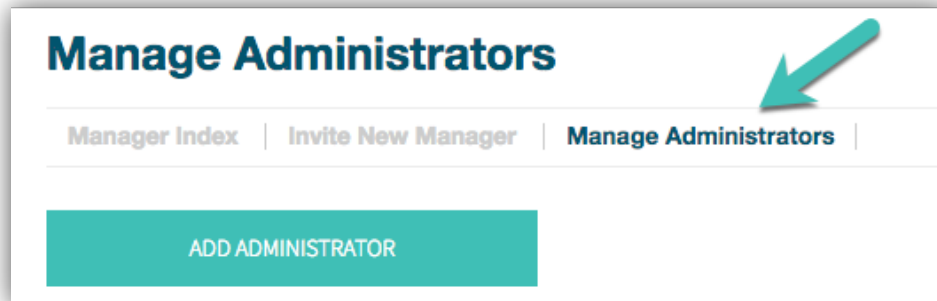
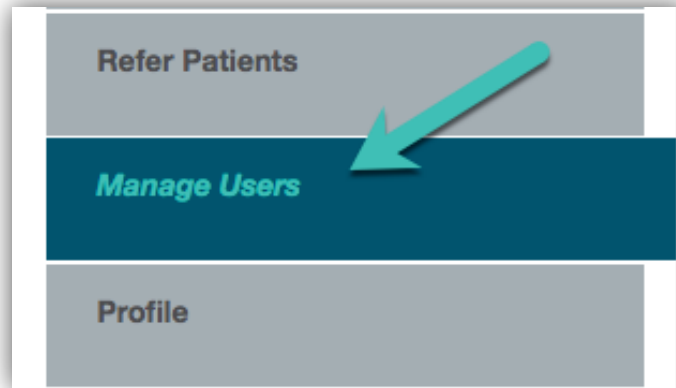
Best Practices and Examples:

Practices may have multiple administrators managing their system. This access gives users full administrative rights to the Everseat dashboard. We recommend assigning most users as managers unless they absolutely need administrative access. Administrative access includes all manager rights as well as the following:

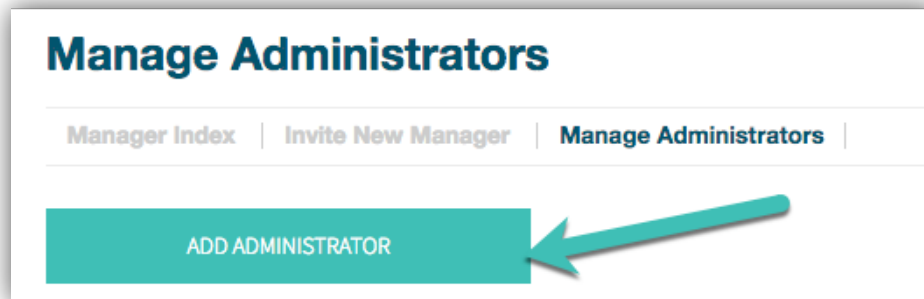
- The ability to add or edit managers
- The ability to add or edit administrators
- The ability to edit practice information
- Access to integration settings
- The ability to add a new location
- Access to editing reminder settings
- Access to editing subscription information

Directions for Adding a New Administrator:

Step 1 – Navigate to the ‘Manage Users’ tab on the dashboard and select the ‘Manage Administrators’ page from the top navigation bar.



Step 2 – Select ‘Add Administrator’ to add a new profile.





Step 3 – Provide the new administrator’s name and email address. The user will receive an invitation through the email address provided. Select ‘Save Manager’ when done.

A screenshot of a web form titled 'Manager's Information'. It contains three input fields: 'First Name', 'Last Name', and 'Email address'. A teal arrow points to the 'First Name' field. Below the fields is a teal button labeled 'SAVE MANAGER', with another teal arrow pointing to it.

Step 4 – A list of your active administrators will appear on the ‘Manage Administrators’ page. From this view, you can edit or remove existing administrators on your account.

A screenshot of the 'Manage Administrators' page. At the top, there are three navigation links: 'Manager Index', 'Invite New Manager', and 'Manage Administrators'. Below this is a list of administrators, with one entry: 'Example Manager (stefanie+example@everseat.com)'. To the right of this entry are two buttons: 'Edit' and 'Remove', both with teal arrows pointing to them. At the bottom left of the page is a teal button labeled 'ADD ADMINISTRATOR'.