

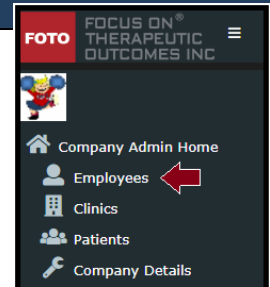
# EMPLOYEE SET UP & REGISTRATION PROCESS



One of the first tasks in implementing the FOTO system in your organization is to set up your staff in the FOTO program. The following outlines the steps to register the staff authorized to access the FOTO system and verify the logins.

## Company Admin Home

Employee Set Up is completed at **Company Admin Home**. In the navigation bar, under Company Admin Home, select Employees.

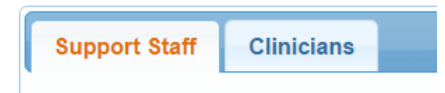


## Employees (Employee Management)

Employees may be registered as:

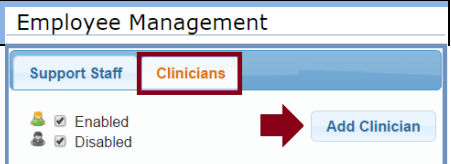
- **Support Staff Users** – have a login and are able to manage patients and episodes.
- **Clinicians** - may be selected as a clinician for the patient episode. Clinicians may not manage patients and episodes unless also registered as Support Staff. When registering a Clinician, there is an option to also register as Support Staff.

### Employee Management



1. Select **Employees** from the Navigation Menu
2. Click either **Add Support Staff** or **Add Clinician**.

## Adding a Clinician



### To register an employee as a Clinician:

1. Click Clinicians Tab and then **Add Clinician**
2. Fill in the appropriate registration information and click **Create Clinician** when finished.
  - First & Last Name
  - **Signature Suffix** – Jr., Sr., III
  - **Employee ID** – can be whatever the clinic chooses. *Keep in mind that this is the ID that will identify the Clinician on the Quarterly Profile Reports.*
  - **Clinician NPI** – Enter clinician’s NPI #
  - **Employee E-mail** – Enter the clinician’s email

**Clinician Details**

Display Name: Great Clinician, Jr.

First Name:

Last Name:

Signature Suffix:

Employee ID:

Credentials:

Clinician NPI:

Employee E-mail:

If you want the **Clinician** to have login rights as a **Support Staff User**:

1. After **Adding Clinician** by entering the appropriate information in clinician details,
2. Select the box beside “**Also create clinician as support staff.**”
  - A User Login field will appear, pre-populated with the employee ID which may be edited if needed.
3. Once you have completed the Clinician Detail screen, Click **Create Clinician** when finished.

#### Update Clinician Details

**Note:** A previously registered staff member set up as a clinician only may be added as a Support Staff User by selecting the clinician from the clinician employee list and clicking **Create as Support Staff**.

### Adding Employees as Support Staff Only


1. Click Support Staff tab and then **Add Support Staff**
2. Fill in the appropriate registration information
  - **First & Last Name**
  - **Employee ID** – can be whatever the clinic chooses.
  - **User Login** – what is entered here will be added to the admin login to create the support staff user login. (Example – the admin login is ABCPT. **The support staff login will be ABCPT/SAmerica.**)
  - **Employee E-mail** – must be entered correctly for the employee to receive the verification e-mail.

#### Employee Management

## Verification

Once an Employee is registered as a Support Staff User, a verification e-mail is sent to the registered e-mail address. The Support Staff User must click on the link within the email to verify that the email address is correct and to **create a password, security question and answer**. A Support Staff User cannot not log in to Outcomes Manager until the verification is complete. **The link in the e-mail expires after 7 days** and must be regenerated by the Administrator if it is not completed within that time frame. (See resource process for Employee Verification)

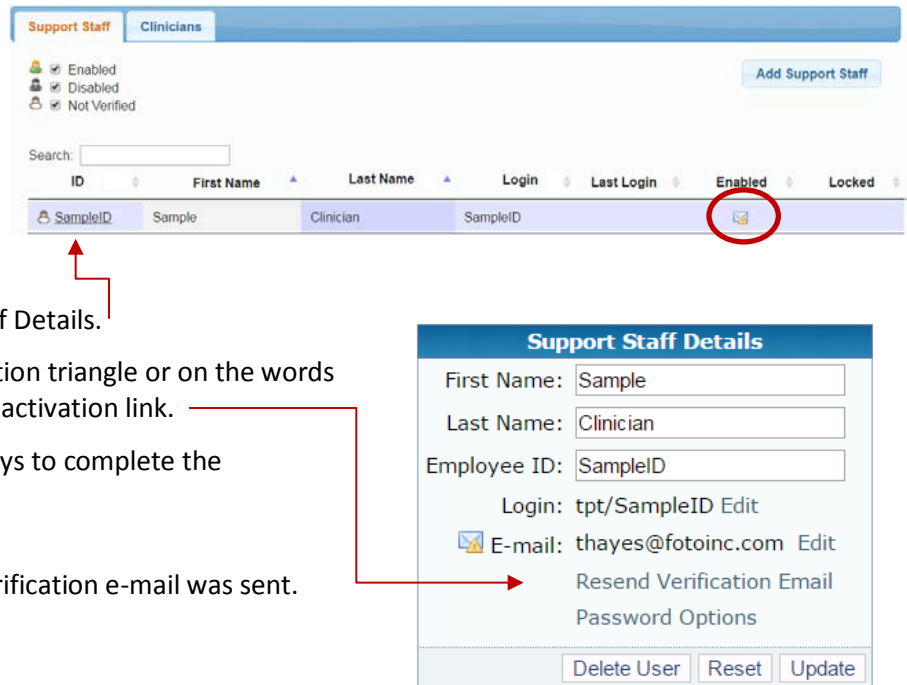
### Resending the Verification E-mail

If a Support Staff User does not complete the verification process within the initial 7-day window, the Administrator may resend the verification e-mail. The un-verified Support Staff User will show a  in the Enabled column which indicates that the user is not verified.

1. Click on the user ID to access Support Staff Details.
2. Click on the envelope with the yellow caution triangle or on the words "Resend Verification Email" to resend the activation link.
  - The staff member will again have 7 days to complete the verification process.

A notice will appear that indicates that the verification e-mail was sent.

Verification email sent.



The screenshot shows the 'Support Staff' management interface. At the top, there are tabs for 'Support Staff' and 'Clinicians'. Below the tabs are filter options for 'Enabled', 'Disabled', and 'Not Verified'. A search bar is present. The main table has columns for 'ID', 'First Name', 'Last Name', 'Login', 'Last Login', 'Enabled', and 'Locked'. A row for 'SampleID' is highlighted, with a yellow caution triangle icon in the 'Enabled' column. To the right, the 'Support Staff Details' form is shown, with fields for 'First Name', 'Last Name', 'Employee ID', 'Login', and 'E-mail'. A 'Resend Verification Email' button is visible in the details form.




## Managing Your Employee Table Once Established











You can:

- Filter Table to view only Enabled, Disabled and/or Not Verified staff
  - Enabled
  - Disabled
  - Not Verified
- Table can be sorted by any of the column headers
- Search feature to access an employee without sorting/scrolling the list
- Ability to show 10, 25, 50 or 100 staff in the table at a time and to move from page to page

Showing 1 to 10 of 31 entries      Show 10 entries

Previous   1   2   3   4   Next

- The Enabled column shows the status of your employees:
  -  The login has been verified and is active
  -  The login verification has not been completed
  -  The staff member has been deactivated and the login is no longer working (see Deleting Employees in next section).

Enabled











## Deleting Employees

### Support Staff Users

To Delete / Disable Login for a Support Staff User, select the then select **Delete User**. When asked if you would like to The user will show as deleted with the following symbol ✖ . Note that the login will be disabled 4 hours after being marked as deleted, at which time, the user will also show as unverified. This will hopefully allow enough time for an unintentional deletion to be reversed without having to go through the verification process again.

### Clinicians

To delete a Clinician, select the Clinician ID from the list and select **Delete Clinician**. Then confirm by selecting **Delete** again. Note that the clinician will show as deleted in the list and can no longer be selected when creating episodes.

**Note:**

*It is important to delete any clinicians who no longer work for your organization to prevent their names from being accidentally selected as the primary clinician for new patient episodes.*

If you deactivate an employee in error, simply click on the employee's ID in your Support Staff or Clinician table, and then

### Support Staff Details

Support Staff Details

First Name:

Last Name:

Employee ID:

Login: FOTOCO/jah Edit

E-mail: judyholder@fotoinc.com Edit

Reset Password

**Delete User** Reset Update

Support Staff User ID and proceed, select **Delete**.

### Support Staff Details

**Delete User**

This will delete the user. Proceed?

Delete

### Update Clinician Details

Update Clinician Details

Clinician Details

Display Name: judy holder

First Name:

Last Name:

Signature Suffix:

Employee ID: 1234

Credentials: N/A

Clinician NPI:

E-mail:

**Delete Clinician** Create as Support Staff Reset Update

### Update Clinician Details

**Delete Clinician**

This will delete the clinician. Proceed?

Delete

Support Staff Details

First Name:

Last Name:

Employee ID:

Login: tpt/janey Edit

E-mail: thayes@fotoinc.com Edit

Password Options

Enable User Reset Update

## Editing Employee Information

The Support Staff First & Last Name, Employee ID, Login, and E-Mail Address may be edited by selecting the Support Staff User ID from the Employee list.

- First/Last Name and ID can be edited in the field, then click **Update** to save changes.
- Login and E-mail can be changed by selecting **Edit**.
- Click the words **Password Options** to access the password reset screen for the user.

### Support Staff Details

Support Staff Details

First Name:

Last Name:

Employee ID:

Login: sutterco2pi/1 Edit

E-mail: foto@fotoinc.com Edit

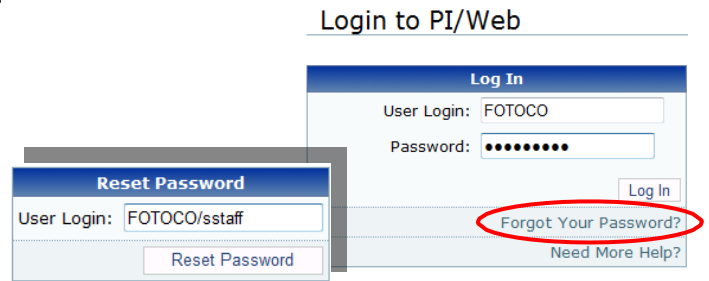
Password Options

Delete User Reset Update

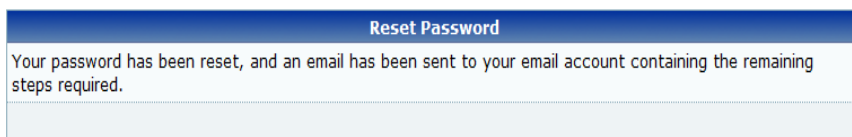
## Support Staff Password – Staff Reset

If the Support Staff User remembers the response to the security question (set up during verification), the “**Forgot Your Password?**” button can be used to reset the password.

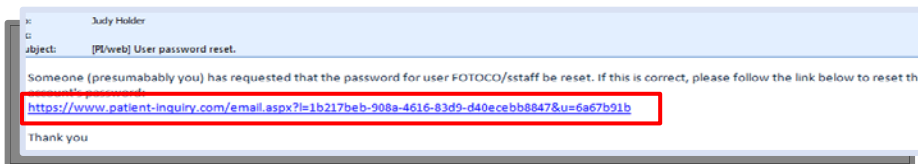
1. Select **Forgot Your Password?**
2. Input User Login and click **Reset Password**



3. If the reset is successful, the message below will appear. If the message below does not appear and nothing happens, there is an error in the User Login.



4. An e-mail is sent from [noreply@patient-inquiry.com](mailto:noreply@patient-inquiry.com). Open the e-mail and click on the link.



The “**Forgot Your Password?**” button will NOT reset the administrator password. If the administrator cannot remember the admin password, please contact:

[FOTO Support Services](mailto:support@fotoinc.com)  
800-482-3686  
[support@fotoinc.com](mailto:support@fotoinc.com)

The image shows the 'Reset Password' form. It asks the user to answer the security question: 'What is my cat's name?'. Below this are fields for 'New Password' and 'Confirm New Password', followed by an 'Update' button. A list of password requirements is shown below the form:

- ✘ Must meet at least 2 of these rules
  - At least one lower case character
  - At least one upper case character
  - At least one digit
  - At least one special character
- ✘ Must be a minimum length of 6 characters
- ✔ Must not contain user name

5. Input the security response and a new password (and confirm) and click **Update**.
  - The password requirements in red will turn green as the requirements are met.
  - If the new password contains the user name, the requirement in green will turn red and will not allow the password to be created.