



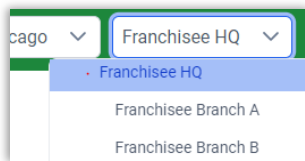
## AlayaCare Marketplace – Agency Adding or Terminate Users

The Agency will add their own users once the designated Admin for the agency has been provisioned. It is up to the Agency Admin to monitor and control access to AlayaCare.

### Select appropriate agency (if applicable)

If you are an Agency who has multiple locations and have access to all of the locations, ensure you are selecting the appropriate agency or ‘Parent’ agency when applicable.

- Select the appropriate agency in the upper right corner.
  - For example: “Franchisee HQ” is the Parent agency. Determine whether the user you are adding needs access to the Parent agency vs. a single agency.

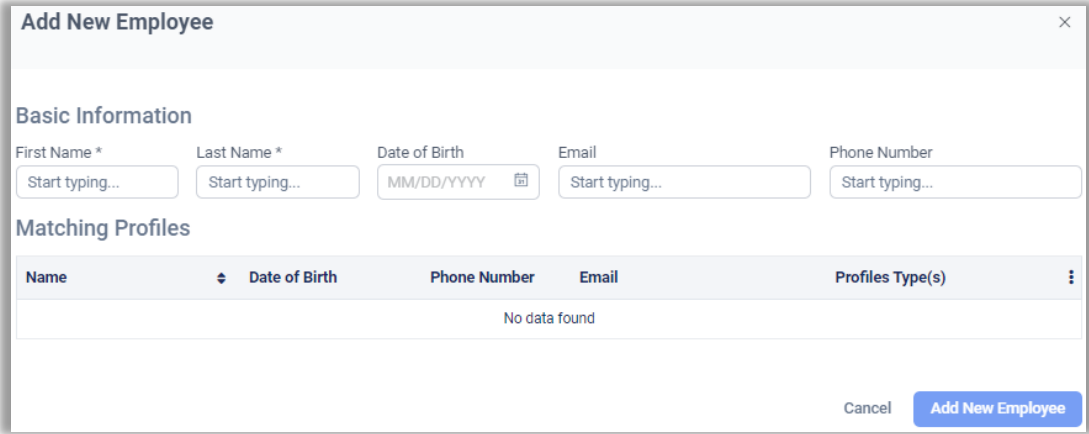


- If your user needs access to all agencies, select the parent agency to add the user to.
- If your user only needs access to one of the agencies, select the appropriate agency.
- **Note:** You cannot add a user to Agency A *and* Agency B, the user will receive an error and they will not be able to log in. Please reach out to your CSI contact for assistance.

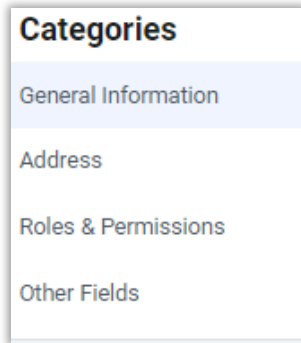
### Add a User

- Only a user with the role, Agency Coordinator (Admin), can add users
- Click on the “Employees” icon on the left.
- Click on “+Employee” button in the upper right.
  - Enter First Name
  - Enter Last Name
  - Enter Email (this is a must so the user can reset password to log in)
- Check for Matching Profiles, do not proceed to add the employee if there is a matching profile. This means they already have an account created. Advise user to use “Forgot Password” to do a reset of their password.

## AlayaCare Marketplace – Agency Adding or Terminate Users



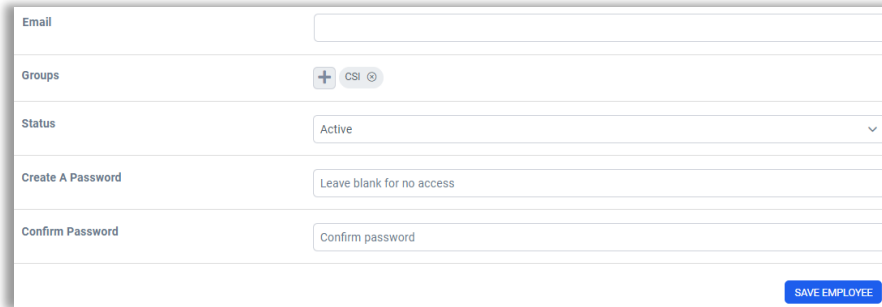
- Click “Add New Employee”
- The employee demographic page will open.
  - Note the different categories for the next steps.



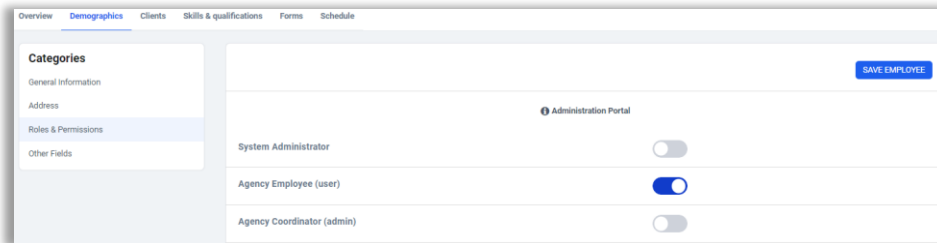
- Edit remaining required fields: (in the order shown)
  - General Information: Email - this must be added as this is the username.
  - General Information: Time Zone: Use one of the below time zones as applicable.
    - PST – America/Los Angeles
    - MST – America/Denver
    - CST – America/Chicago
    - EST – America/New York
    - HST – Pacific/Honolulu
    - AKST – America/Anchorage
  - General Information: Groups - CSI

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- General Information: Create/Confirm Password - leave blank and do not enter any credentials here.



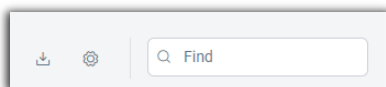
- Roles & Permissions: Assign role-only one role per user.
  - Agency Employee (user)-This role allows the user to do all necessary functions for the referral process.
  - Agency Coordinator (Admin)-This role has access to create employees and all necessary functions for the referral process.
  - There is no access to assign a System Administrator (you will get an error message if you assign to any employee)



- Click “Save Employee”
- Inform your user that their account has been created and have them follow the steps from the “AlayaCare Marketplace Referrals” document on “Logging into AlayaCare.”

## Terminating a User

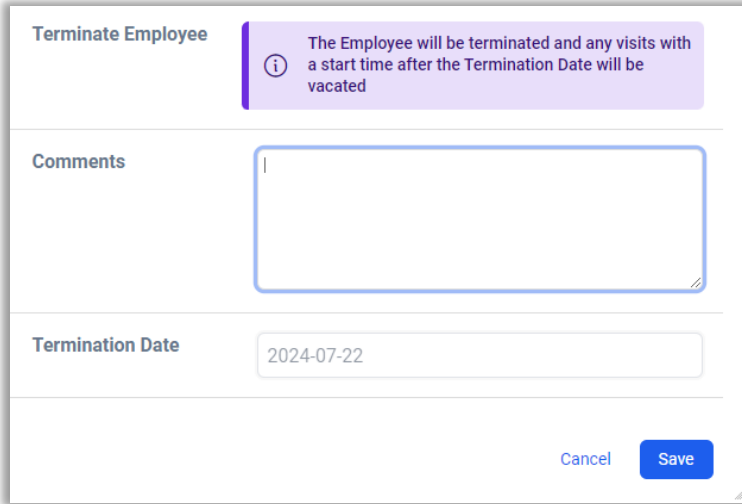
- Click on the “Employees” icon on the left.
- Find the employee in the list shown on screen or utilize the search bar to find the employee.



- Click on the employee name to open the employee profile
- On the Overview tab, Click on “Terminate”

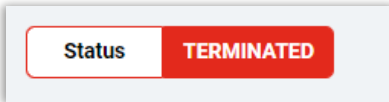
## AlayaCare Marketplace – Agency Adding or Terminate Users

- Disregard the top statement (shown in the screenshot below), your agency is not doing any visits within AlayaCare so this is irrelevant.
- Enter a comment, like the actual termination date or whatever else comment you feel necessary. A comment is required.
- Termination Date is auto completed with “today’s” date, you cannot change that date. If the termination date is something other than the date showing, then you can enter the actual termination date in the comments.
- Click Save



The screenshot shows a form titled "Terminate Employee". At the top, there is a purple information box with an 'i' icon and the text: "The Employee will be terminated and any visits with a start time after the Termination Date will be vacated". Below this is a "Comments" section with a large text input area. Underneath the comments is a "Termination Date" field containing the date "2024-07-22". At the bottom right of the form are two buttons: "Cancel" and "Save".

- The user will now show as terminated. You will need to refresh the page to see the change in status.



The screenshot shows a dropdown menu for "Status". The word "Status" is on the left, and the word "TERMINATED" is highlighted in a red box on the right.