

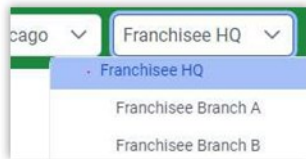
Alaya Care Marketplace -Agency Adding or Terminate Users

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 Alaya Care.

Agencies with multiple locations, select the appropriate location or Parent for access to all locations.

If you are an Agency who has multiple locations and your user needs access to all the locations, select 'Parent' 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.



- o If your user needs access to all agencies, select the parent agency to add the user to.
- o If your user only needs access to one of the agencies, select the appropriate agency.
- o **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 of Agency Coordinator (Admin), can add users**
- Click on the "Employees" icon on the left side of the screen
- Click on "+Employee" button on the upper right.
 - o Enter First Name
 - Enter First Name
 - o Enter Last Name
 - Enter Last Name
 - o Enter Email (this is necessary 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 users to use "Forgot Password" to do a reset of their password.

Add New Employee

Basic Information

First Name *

Last Name *

Date of Birth

Email

Phone Number

Start typing...

Start typing...

MM/DD/YYYY

Start typing...

Start typing...

Matching Profiles

Name	Date of Birth	Phone Number	Email	Profiles Type(s)
No data found				

Cancel

Add New Employee

Click "Add New Employee"

- The employee demographic page will open.

o Note the different categories for the next steps.

Categories

General Information

Address

Roles & Permissions

Other Fields

- Edit remaining required fields: (in the order shown)**
- General Information: **Email-this must be added as this is the username.**
- General Information: **Groups – CSI**
- General Information: **Create/Confirm Password - leave blank and do not enter any credentials here**

Email

Groups

Status

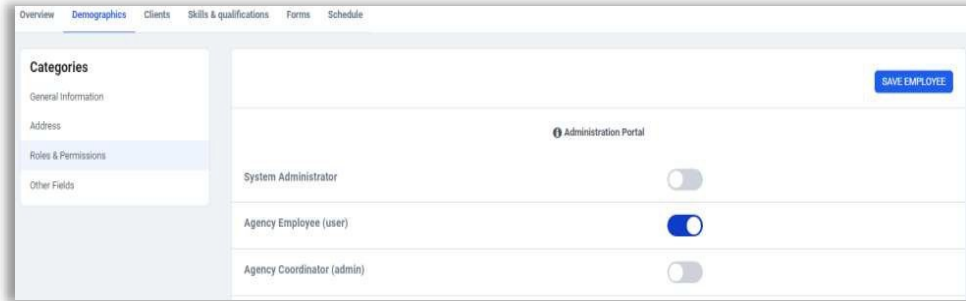
Create A Password

Confirm Password

SAVE EMPLOYEE

- 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 way to assign a System Administrator (you will get an error message if you assign any employee)

Click **"Save Employee"**

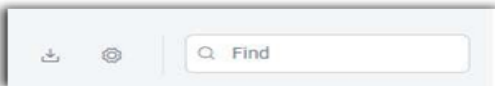


Administration Portal	
System Administrator	☐
Agency Employee (user)	☒
Agency Coordinator (admin)	☐

- **Inform your user that their account has been created and have them follow the steps from the "AlayaCare Marketplace Referrals" document on "Logging into CSI AlayaCare.com"**

Terminating a User

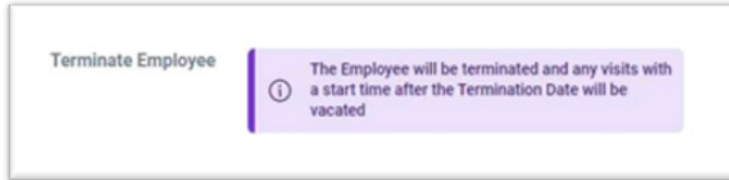
- Click on the "Employees" icon on the left.
- Find the employee in the list shown on screen or utilize the search bar to find the employee.



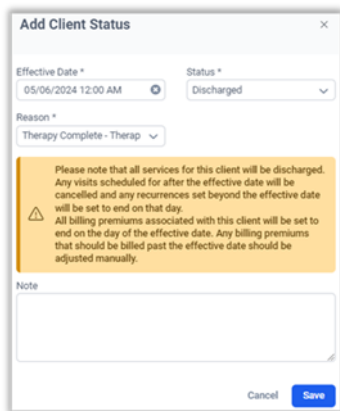
- Click on the employee's name to open the employee profile
- Click on **3 dots ...** upper right side of page, from the drop-down select "Terminate"



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

