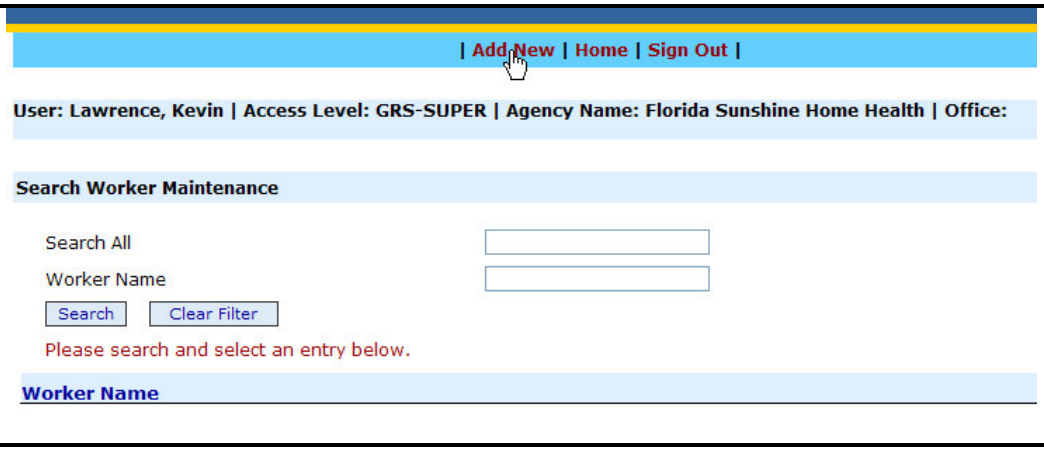
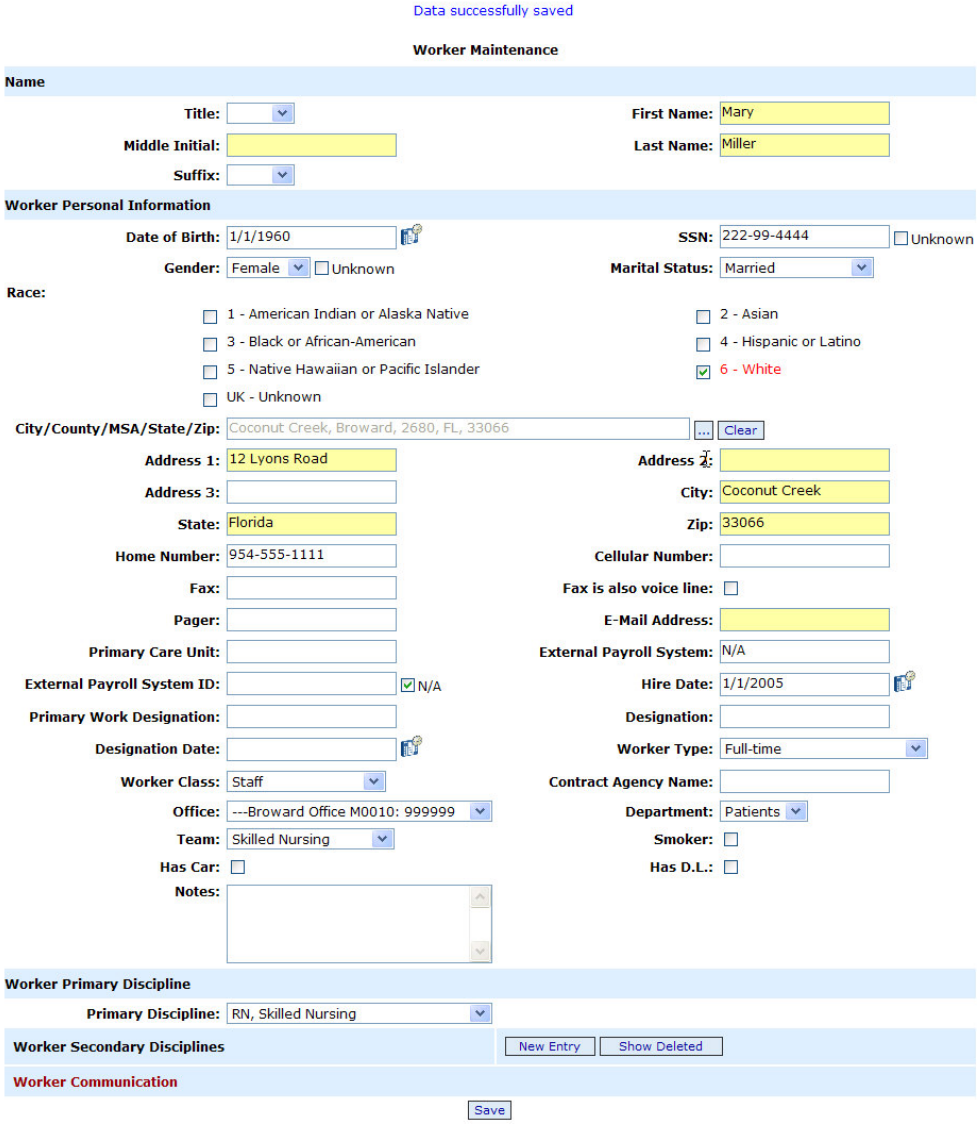
Instructions to …

Action / Instruction	Screen Shot
Scenario: Adding a new user login account for Care Portal™	
1. ADMINISTRATIVE – Clinical Maintenance – Worker: Click **Add New** link at top of form.	
2. Complete required fields on new worker form and click [Save] button.	

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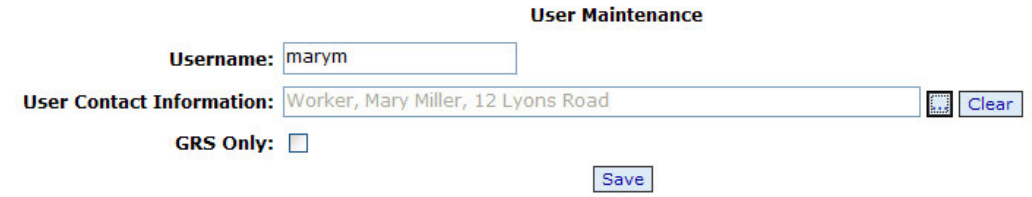
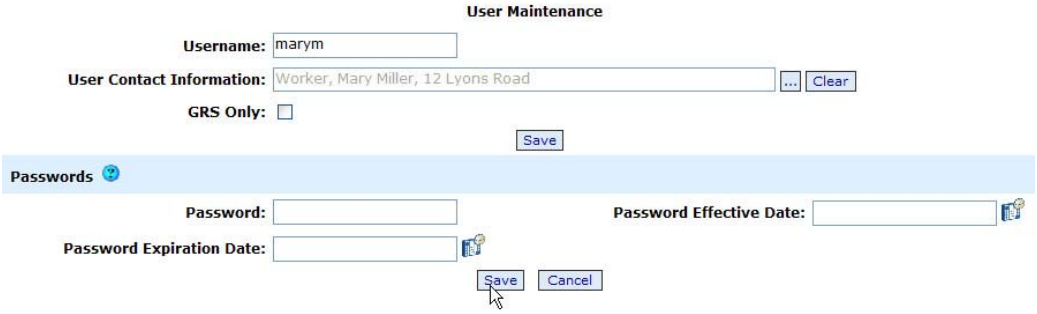
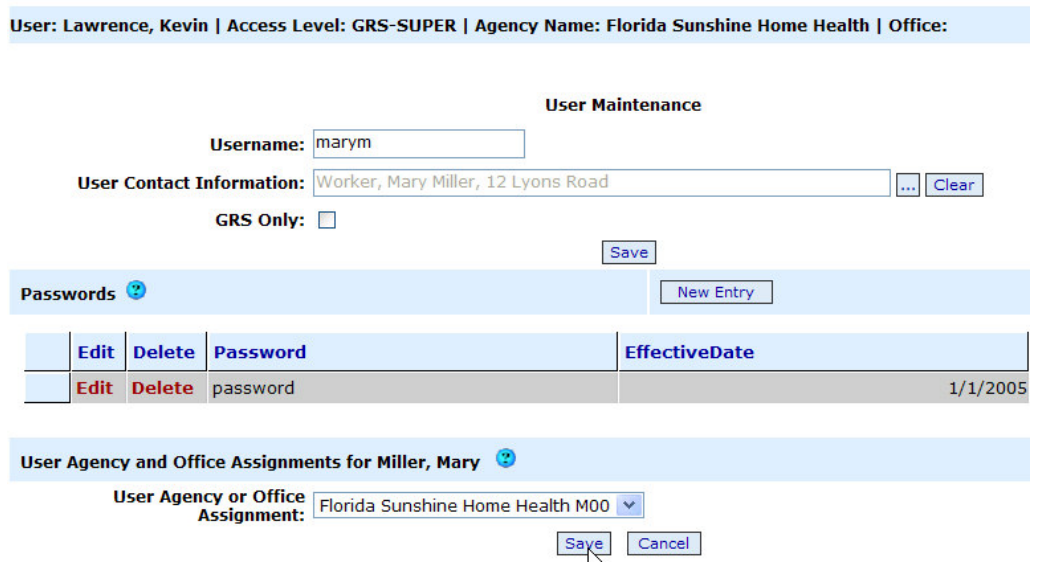
3. ADMINISTRATIVE – User Menu – Add User: Enter 'unique' username for new account and search/select to associate user account with existing external contact then click [Save] button. In this example, to associate with worker Mary Miller.	
4. In Passwords section, click [New Entry] button. Enter password for user and an effective date. Expiration date is optional. Click [Save] button.	
5. In User Agency and Office Assignments section, click [New Entry] button. Select Agency from drop-down list for user and click [Save] button.	

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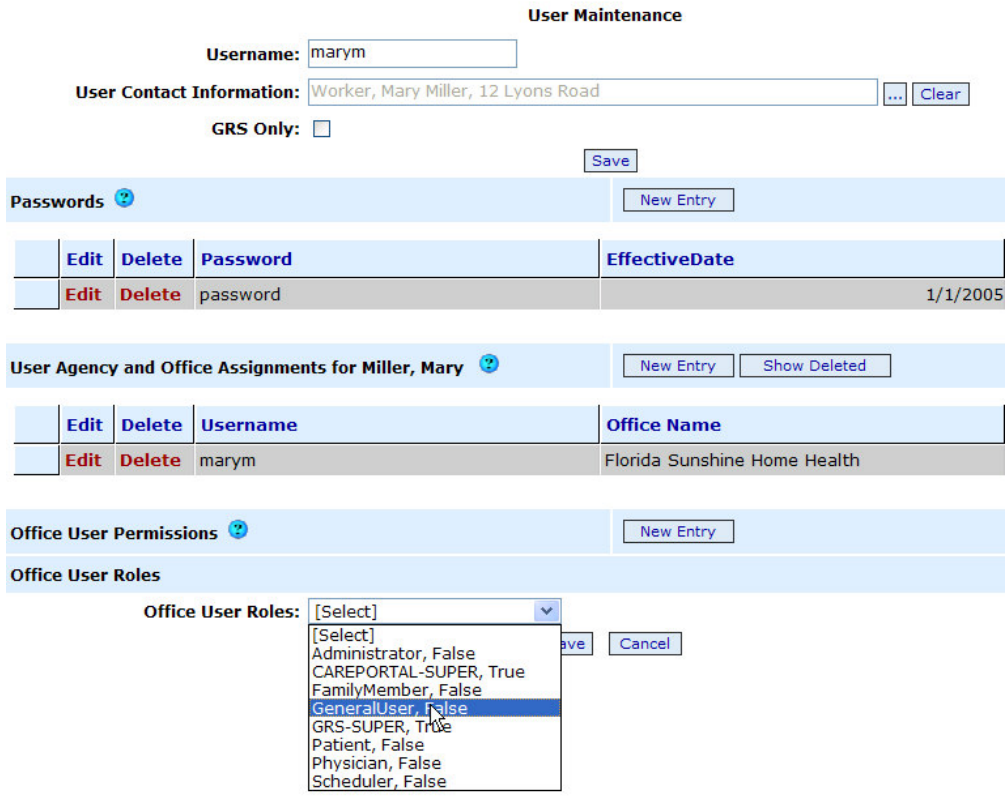
6. In Office User Roles section, click [New Entry] button. Select Role from drop-down list for user and click [Save] button.	
7. You have completed user account entry process and can now log into Care Portal™ using the newly created account.	