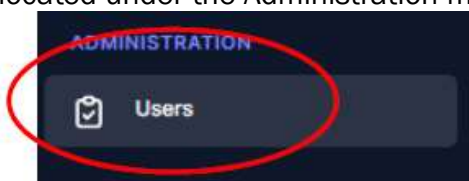


Crisis Call Center Data Platform

How to Add/Update Your Users

1. On the left navigation menu within the system scroll and select the 'Users' tab located under the Administration module as depicted below.



2. Conduct a search for the user first, by entering their name, email, or phone number.
3. If no records for the user is found, select the 'Add' button to add them.
4. Enter the user's information into each of the RED highlighted fields.
5. Select a role for the user from the drop list:
 - **Provider Lead:** This role can view all their provider's cases, and create, update, and attach docs to a service request.
 - **Provider Agent:** This role can view their cases and create, update, and attach docs to a service request.
 - **Provider Billing:** This role can view their provider's cases and download any associated service request documents.
 - **Care Navigator:** This role can conduct a follow-up for their provider's cases.
6. Hit 'save' at the bottom right corner of the page. If this was a new user, they will receive a system-generated email to login. Advise them to sign in using their email address as the username and select 'forgot password' to set up a new password.

If the user needs a role that is **NOT** on this list, then it requires the DBHDS' system administrator to make the necessary addition/update. Please submit a user access request form to the DBHDS' crisis_supports@dbhds.virginia.gov mailbox for processing.