MX Access Quick Start Guide



Admin Home Page

Manifest MedEx now provides account management tools, making it easier than ever to create, edit, and manage accounts in your organizations. The new tools also allow for an extra layer of authentication for security when users login.

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	V	Gary Front	gfront@tes	est.org	Coastal Clinic	Notify (Clinician) Access (Front Desk. Prica	, 🗆	NPI 123456789	MFA Phone 310-987-4564	
										Save

Function		Action
1.	Organization and Facility	Organization and facility fields are included on the top left side of the screen. Org admins will have their organization preselected, with all organization users listed below. To filter users by facility, select a facility from the facility dropdown menu. Facility admins will have their facility preselected.
2.	Displayed Users	User accounts are displayed on the bottom left-hand side of the screen and are view only. Account information includes the following user's info: Active status, first and last name, email address (username), facilities (all facilities associated with the user), app & roles (which role the user has in each product s/he has access to) and admin status. If users are active, there will be a checkmark in the Active column. If users are admin users, there will be a checkmark in the Admin column. The Active and Admin columns are view only. To edit a user's account, click on their name and the Details tab will be presented on the right side of the screen.
3.	User Details	The Details tab includes a user's organization, email, first name, last name, office phone, mobile phone, MFA phone, and NPI. To edit, make the necessary adjustments and click Save . A confirmation message will display, validating that the changes have been saved. User's email address is also his/her username. Therefore, it cannot be changed. If the user's email address is incorrect, disable the current account and create a new account with the proper email address.
4.	User Facilities	The Facilities tab will list all facilities associated with the user's organization. Org admins will have the ability to edit (add/remove) user's facilities, but facility admin will not. Facility admins can only create accounts for users in his/her facility and, therefore, this tab will be view only.
5.	User App & Roles	The App & Roles tab lists the applications (MX products, such as Access and Notify) and roles (e.g., clinician, secondary clinician, facility admin, front desk, privacy officer) for the user. To assign the user with a role/s, click on the checkbox next to the role and click Save . To remove a role, uncheck the box. Note: Facility admins cannot assign admin roles to other users.
6.	Hamburger icon (additional options)	The additional options (hamburger icon) only appears once an account has been created.
	 Resend Invite Email / Reset Password 	When an account is created, but the user has yet to register, Resend Invite Email will be displayed. If the user doesn't receive their invite or if they try to register after the invite has expired (7 days after the email was sent), click Resend Invite Email . Once the user has registered, this option will be replaced with Reset Password . To reset the user's password, click Reset Password and a password reset confirmation message will display. The user will then receive an email with further instructions.
	• Unlock	Unlock will only appear in additional options when a user failed to log in after several attempts. To allow the user to login, click on Unlock . A confirmation message will appear. Selecting Yes will unlock the user's account and display a successfully unlocked message. The system will send an email to the user, informing him/her that the account has been unlocked. Accounts are unlocked automatically 15 minutes from the moment the account got locked.
	Deactivate	Org and facility admins can activate and deactivate user accounts. To disable a user's account, click Deactivate and a confirmation message will appear. Selecting Yes will deactivate the user's account and display a successfully deactivated message. The Deactivate option is now changed to Activate . To enable a user's account, follow the same steps listed above, only this time select Activate .
	Enable MFA	Set up additional security by enabling MFA. Enabling MFA will require users to enter an authentication code sent to their phone when they try to login. The MFA phone number can be different than user's mobile number.
7.	Adding Users	Admins can create users accounts individually or in bulk. For individual accounts, click on Add and enter user's details. For Bulk, click on Bulk load. Minimum requirements are user's: email, first last name, and at least one facility.