

User Management Tool

The RubiconMD User Management Tool enables the ability to add clinicians and manage their access to the RubiconMD eConsult platform. This tool equips designated individuals to do this independently and instantly.

The User Management tool supports the following functions:



Add new user accounts



Edit existing user account information



Deactivate and reactivate accounts



Access a full list of all users within your organization

RubiconMD can assist you with the below actions that the User Management Tool does not have available today:

- Adding, editing or removing locations
- Account activation or deactivation for 20 or more users



Using the Tool

Log into RubiconMD

- 1 Go to https://rubiconmd.com/users/sign_in?
- 2 For those with User-Manager Only permissions; you will be taken directly to the tool
- 3 For those with eConsult permissions; from within the RubiconMD eConsult dashboard:
 - Select Account in the lower left-hand side of the eConsult dashboard
 - Then select **Organization Settings**

The screenshot displays the RubiconMD eConsult dashboard for user Alex Maintainer Bloch. The dashboard includes a sidebar with navigation options: Dashboard, eConsults, Account, and Logout. The main content area shows a 'Recent eConsults' table with columns for ID, status, date, and actions. A 'Create eConsult' button is located in the top right. A modal menu is open, listing options: Account, Organization Settings, Account Settings, Help, Privacy Policy, and Terms of Service. At the bottom, there are statistics for eConsults: 0 last 30 days, 4 last year, and 4 all time. A footer contains a disclaimer and copyright information.

ID	Status	Date	Action
A-8ZaM	Enc...	Aug 31	Sent To Specialist
A-EVMM	Enc...	Aug 30	Sent To Specialist
A-oEgl	Ans...	Aug 19	Sent To Specialist
A-w5BN	Car...	Jul 26	Sent To Specialist

Account

- Organization Settings
- Account Settings
- Help
- Privacy Policy
- Terms of Service

0 last 30 days 4 last year 4 all time

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Adding New Users

✕ Add New User

✕ Cancel

- 1 Once the tool has loaded select **Add User** to create a new account
- 2 Complete the fields on the detail screen. Optional fields will be indicated
- 3 Select **Select Permissions**

Details

First Name Middle Name - Optional

Last Name

Email

Location

If you don't see your location, please reach out to your RubiconMD Account Manager or support@rubiconmd.com

EHR User ID (For Integration) - Optional

National Provider Identifier - Optional

Select Permissions

- 4 Select the appropriate permission for the clinician
 - Only one permission can be assigned to one user
 - Definitions of each permission are listed within the tool for clarity
 - Details of each permission type are also listed in the attachment to this guide

✕ Add New User

✓ 1. Details

2. Permissions

3. Role

Permissions

Licensed Clinicians

- Licensed Clinician
 - Can submit and view their own eConsults
- Licensed Clinician + View All
 - Can submit eConsults
 - Can view all eConsults at their location

Team Members

Ensure the location selected for these users aligns with the clinicians they will need to support. If the user is expected to support clinicians in the entire region, be sure to create them at the region level.

- View All
 - Can view and download all eConsults at their location
- Collaborator
 - Can draft or submit eConsults on behalf of Licensed Clinicians at their location or below
 - Can access all eConsults at their location or below
 - Access to submit is dependent on organization collaboration settings



Adding New Users (continued)

- 5 Next, click the **Select Role** drop-down button
 - Available options will populate from a drop-down menu
 - Once the role has been selected click **Add User**

The screenshot shows a form titled "Add New User" with a "Cancel" button in the top right. On the left, there is a progress indicator with three steps: "1. Details", "2. Permissions", and "3. Role". The "2. Permissions" step is currently active, indicated by a green checkmark. The main content area is titled "Role" and features a dropdown menu with the text "Select Role" and a downward arrow. Below the dropdown, there is a note: "Don't see the role you're looking for? You may need to select a different permission." At the bottom of the form, there are two buttons: a grey "Previous" button and a blue "Add User" button with a white checkmark icon.

- 6 A confirmation message will display confirming the user has been successfully created
- 7 After a user is created an activation email will be sent to them to activate their account in approx 15 minutes.
- 8 If a provider needs to activate their account immediately, they can do so by using [this link](#)



Editing Existing Users

- 1 To edit an existing user, search for the user by their first name, last name, or NPI using the filter options available at the top of the tool

The screenshot shows the 'User Management' interface. At the top, there is a 'User Management' header with a search icon and a user profile icon. Below this is a 'User Accounts' section with '21 Active Accounts' and an 'Add User' button. A search bar contains filters for 'First Name', 'Last Name', 'Location', 'NPI', 'Permissions', and 'Status: Active'. Below the search bar is a table with the following data:

Name	Location	NPI	Permissions	Last Login
Lisa Romero	Region 1 Rubicon AC Test Org		User Manager + View All	11:45 AM
Danielle Williams	Region 1 Rubicon AC Test Org		User Management	--

- 2 Once their account has been located, click their name.
- 3 A pop-up form will appear with the user information.
- 4 All fields displayed within the form can be edited by a user manager
- 5 Once changes are complete select **save**

Re-Activating/Deactivating Users

- 1 Locate the user's account via the search options listed above
- 2 At the top of the user's account form select the status toggle which can update their account from active to deactivate

Status: Active



Deactivating will block their access to the platform. All their eConsults and data will be kept in the system. You can restore access anytime.

- 3 Providers can be reactivated at any time and will retain access to their previous eConsults
- 4 Once changes are complete, select **save**



Appendix

RubiconMD eConsult – Permission Types

Below is a description of each permission option featured within Organization Settings:

Licensed Clinician:

- Can submit and view their own eConsults

Licensed Clinician + View All:

- Can submit and view their own eConsults
- Can view all eConsults at their location

View All:

- Can view and download all eConsults at their location or below

Collaborator:

- Can draft or submit eConsults on behalf of Licensed Clinicians at their location or below
- Can access all eConsults at their location or below
- Access to submit is dependent on organization collaboration settings
- Must have eConsult collaboration turned on to access this permission type

User Manager:

- Can administer and manage user accounts.

User Manager + Collaborator:

- Can submit eConsults on behalf of Licensed Clinicians at their location or below
- Can access all eConsults at their location or below
- Can administer and manage user accounts

User Manager + View All:

- Can view and download all eConsults at their location
- Can administer and manage user accounts

User Manager + Licensed Clinician:

- Can submit and view their own eConsults
- Can administer and manage user accounts

User Manager + Licensed Clinician + View All:

- Can submit eConsults
- Can view all eConsults at their location
- Can administer and manage user accounts