RubiconMD

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:

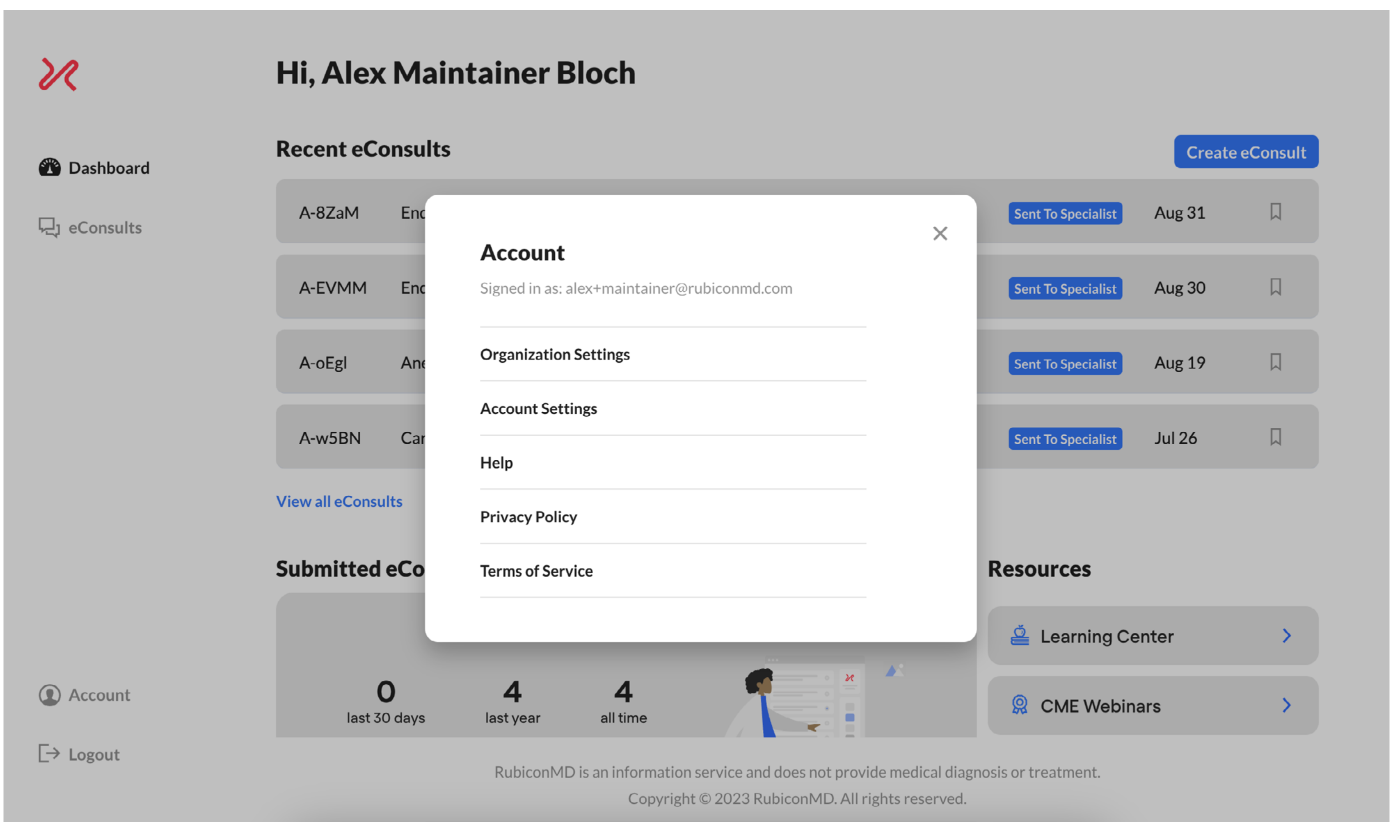
- Adding, editing or removing locations
- Account activation or deactivation for 20 or more users

For questions or issues please contact support@rubiconmd.com

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**

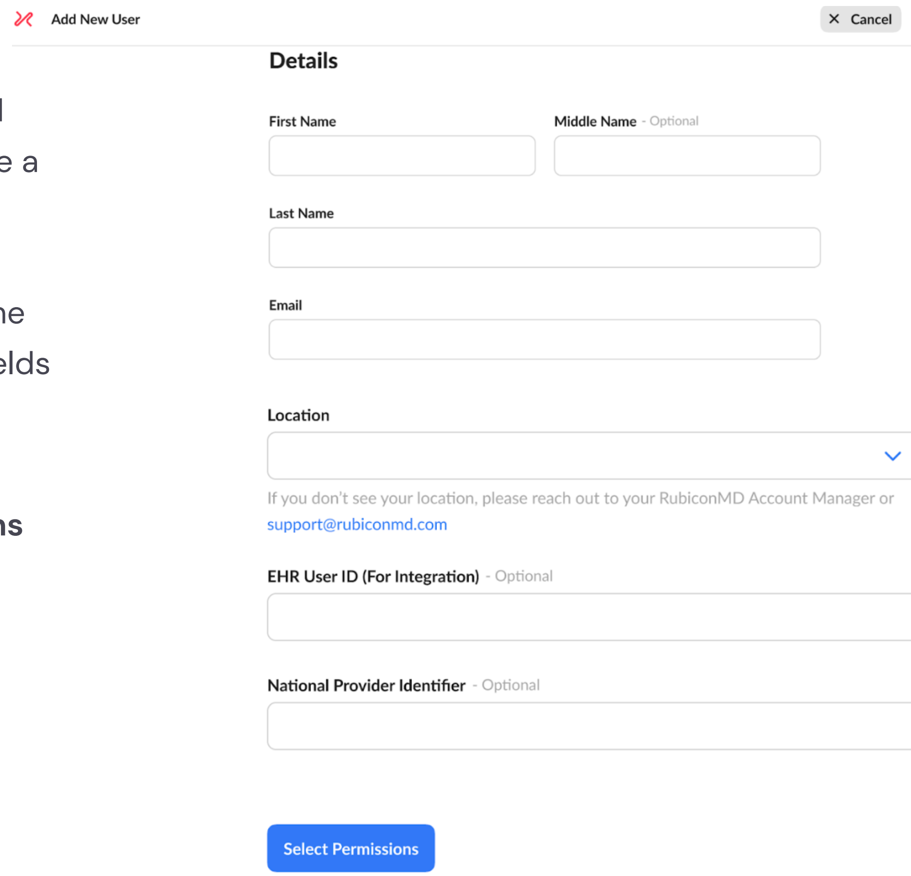


Adding New Users

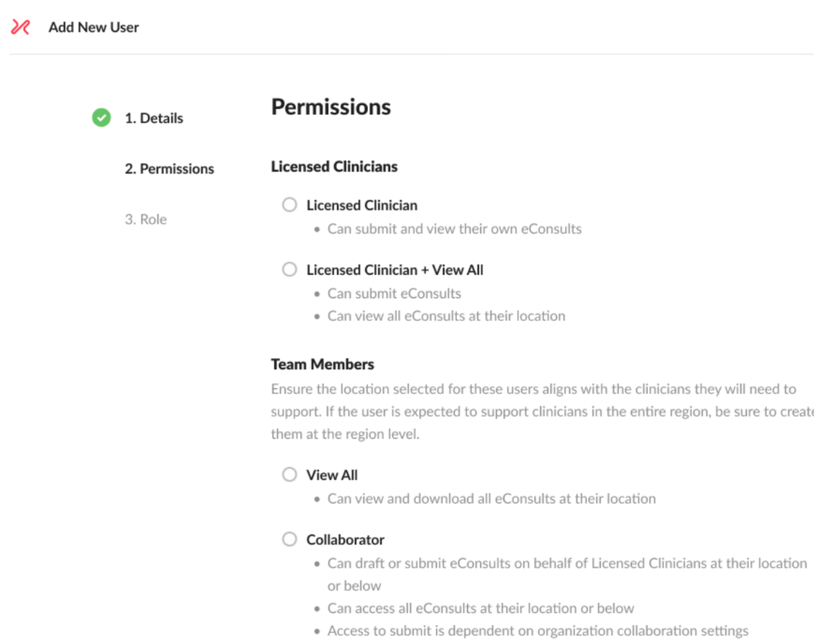
1. Once the tool has loaded select **Add User** to create a new account

2. Complete the fields on the detail screen. Optional fields will be indicated

3. Select **Select Permissions**

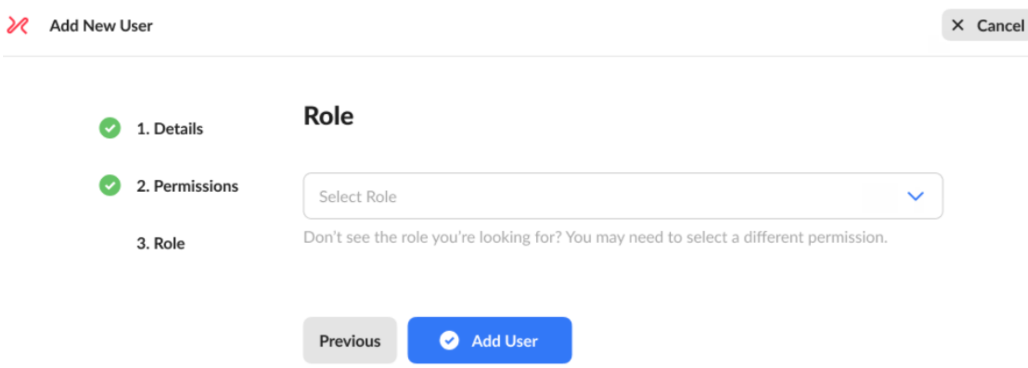


4. Select the appropriate permission for the clinician
   - Only one permission can be assigned to one user
   - Definitions of each permission are listed within the tool for clarity
   - Details of each permission type are also listed in the attachment to this guide



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**



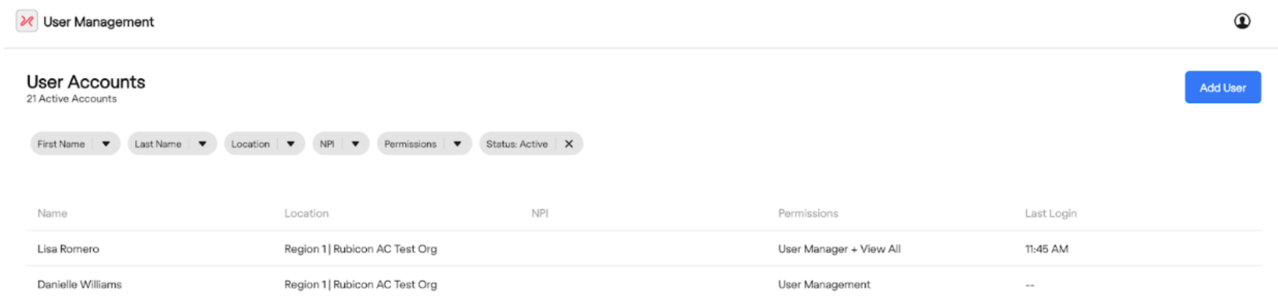
6. A confirmation message will display confirming the user has been successfully created

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

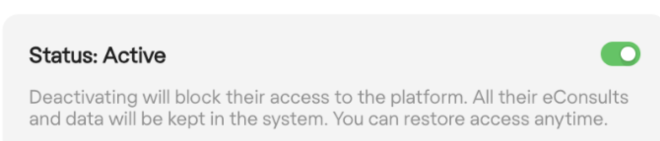
1. To edit an existing user, search for the user by their first name, last name, or NPI using the filter options available at the top of the tool



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



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