



SureSmile[®] Advanced

Staff Level 1 - Module 4
Managing User Accounts

Table of Contents

Account Administration	2
Troubleshooting Account Administration.....	7
Creating Access Schedules.....	8
Checking Access History	9
Learning Resources.....	12

Account Administration

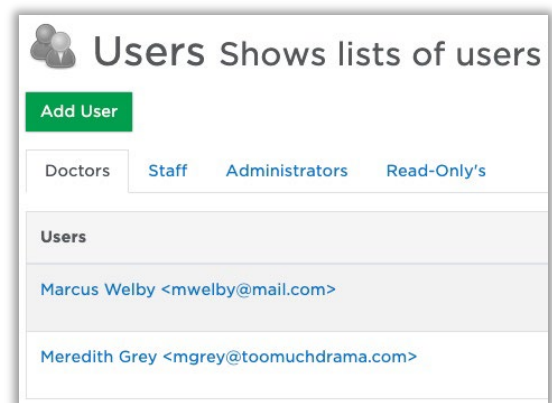
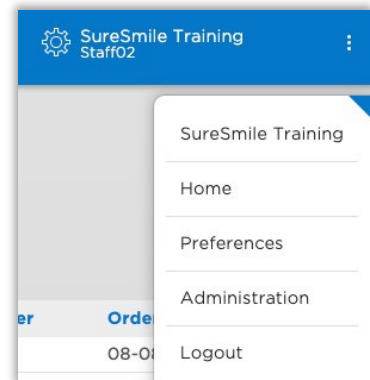
This module covers the steps and frequently asked questions about creating and managing user accounts.

In SureSmile, each user has a username and password with a corresponding role or roles. There are three roles:

- Doctor
- Staff
- Administrator (also known as Practice Administrator)

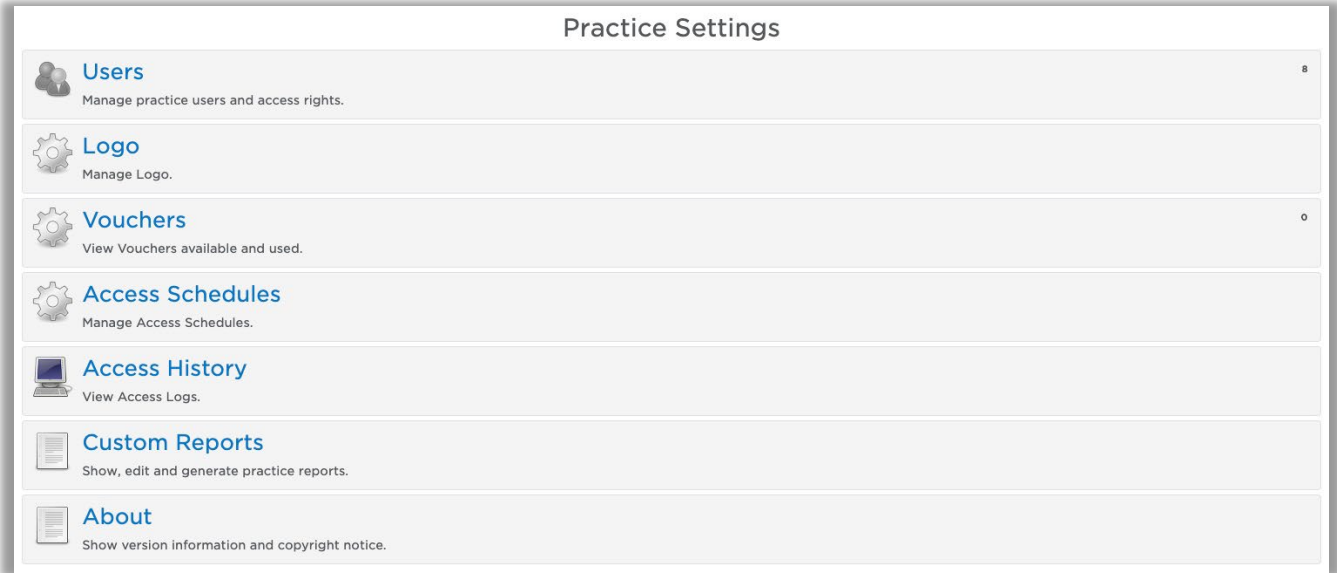
Any user in the system can be assigned to one or more of these roles. Users with the Practice Administrator role are responsible for adding and removing users.

When your database is set up initially, Customer Care will assist you to ensure that at least one doctor in your practice is assigned to both the doctor and admin roles. We recommend that this doctor assign a key staff member to the admin role as soon as possible to take care of administrative functions.




Practice Settings

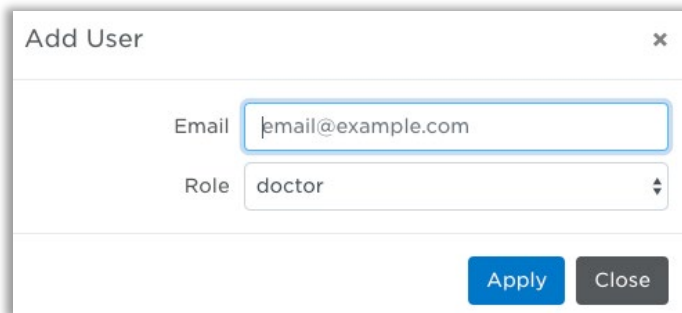
Admin-level users also have access to other user-related features, including Access Schedules and Access History.



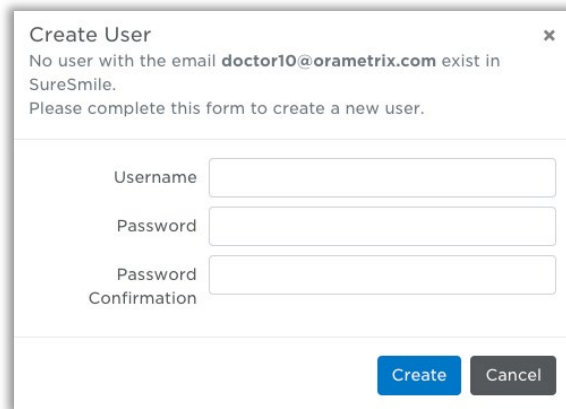
To create a new user account and/or assign users to roles:

A user must be assigned to at least one role to access the practice database. Users may also be assigned to multiple roles.

1. Click the settings icon  and select **Administration**.
2. Under **Practice Settings**, select **Users**. (This option is available to Administrators only.)
3. Click the **Add User** button. The **Add User** dialog box opens.



4. Enter the user's email address exactly as it was registered, select a role and click **Apply**. (A user may have multiple roles if you enter them under each tab.)
 - a. If the user already has a SureSmile account the user is added to your practice database with the role you selected, and no additional steps are required, unless you want to give a user multiple roles.
 - b. If the user does not already have a SureSmile account, the **Create User** dialog box opens.




5. Have the person enter their username and password. If the person is not available, enter a username and password for them. Make a note of the username and password you just entered for them and provide them this information later. Advise them to change this password as soon as they log in for the first time.

Note: Users entered under the "Doctors" role will appear on the Patient Profile page in the drop-down list for "Doctor" or "Orthodontist." Users entered under the "Staff" role will appear on the Patient Profile page in the drop-down list for "Staff." Usernames will also be listed in the "Tasks for..." filter and elsewhere in the software.

To remove users:

Remember your users can access your practice database from home through the web. If a team member leaves the practice, you **MUST** remove the user from every role where he/she is listed to prevent unauthorized access. To remove a user:

1. Find the user's name under each role tab.
2. Click the trash can icon  under the "Actions" heading. (Notice an **Undo** button is available if needed.)

NOTE: When the user is removed, you will be prompted to assign patients assigned to this user to a different user.

To change your password:

A user may select the profile option to change his or her password. Users MUST know their current password to change it.

1. Click the settings icon and select your username.
2. Type your current password, then your new password, then the new password again in the “Password confirmation” textbox.
3. Click **Save Changes**.

To reset your password:

If you forget your password, you can reset it using the **Forgot your password?** link on the Login page.

1. Go to <https://login.suresmile.com>.
2. Click **Forgot your password?**
3. Type your email address in the box and click **Reset**.

Make sure you use the same email you used to register in SureSmile.

You will be sent an email with a link to create a new password. This link is only good for 24 hours. If you are not able to finish this process in 24 hours, you will need to start the process over.

To reactivate a user's account:

When a user resets their password, their user roles are suspended for up to 15 minutes. The administrator can reactivate the user's roles, or the user can wait for the system to reset the roles. To reactivate manually:

1. Click the settings icon and select **Administration**.
2. Under **Practice Settings**, select **Users**. (This option is available to Administrators only.)
3. Any user who has reset their password is listed at the top of the page.
4. Click the small refresh button to approve the user's password reset and allow them access to the practice database.
5. The user will now be able to access the practice database with the same role or roles they were assigned previously.

To unlock a user's account:

If a user has 10 failed login attempts (e.g., if a hacker is trying to break in or they forget their password and have tried to log in by guessing their password), the user is locked or prevented for making any additional login attempts for 60 minutes. However, the administrator can unlock their account to allow the user to try again before the 60 minutes have expired.

1. Click the settings icon and select **Administration**.
2. Under **Practice Settings**, select **Users**. (This option is available to Administrators only.)
3. Any user who has more than 10 failed log-in attempts and whose account is locked is indicated with (user locked) in red text as shown.
4. Click the gear button to unlock the user's account and allow them to log in before the 60-minute lock out period has expired.

To change your username:

If you notice your username has been entered incorrectly or your name has changed, you may update your username at any time without any action needed by the administrator.

1. Click the settings icon and select your username from the menu.
2. Under **Full name**, type a new username.
3. Click **Save changes**.

If your username does not update when you change to another SureSmile screen, refresh your browser.

To change your email address:

You can update your email address at any time without any action needed by the administrator.

1. Click the settings icon and select your username.
2. Under **Email address**, type a new email address.
3. Click **Save changes**.

Use this new email address the next time you login.

Troubleshooting Account Administration

Can the administrator assign a staff member to the Administrators role?

Yes. An administrator can add a user to the Administrators role. The next time this user accesses SureSmile, the user will notice the **Users** section is available within the “Administration” (Practice Settings) page.

What do I do if a team member (SureSmile user) leaves my practice?

Remember your users can access your practice database from home through the web. If a team member leaves the practice, you **MUST** remove the user from every role where he/she is listed to prevent unauthorized access.

To remove a user:

1. Find the user’s name under each role tab.
2. Click the trash can icon under the “Actions” heading. (Notice an **Undo** button is available if needed.)

What if I forget my password?

If you forget your password, you will have to reset it. See the procedure “To reset your password” above.

To reset your password, click **Login**, then click the **Forgot your password?** link.

I have an admin role, what if I forget my password?

If there are other admins in the practice and they know their passwords, it is safe to follow the same instructions above to reset your password.

If you are the only admin in the practice, please be aware that you have the “master” key. If you click the **Forgot your password?** link you will be directed to contact Customer Care, who will work to manually restore your access.

Creating Access Schedules

One of the Administration options allows you to restrict when your users can access SureSmile. For example, the doctor may prefer that staff access patient records during in-office hours only and not in the evening. Access hours can be controlled per user.

Before you can assign an access schedule, you must create it.

To create an access schedule:

1. Logon using your username with an *Admin* role.
2. Click the settings icon and select **Administration**.
3. Select **Access Schedules**.
4. Click **New**. A list opens with the days of the week.
5. Type a descriptive name for the schedule.
6. Select your time zone.
7. For each day, select the start and stop time for SureSmile accessibility.

TIP: If you want a day to be completely closed, select the same start and stop time for that day of the week.

8. Click **Save** when you are finished.

Repeat steps 4-8 to add more schedules.

The screenshot shows the 'Create Access Schedule' form. At the top, there is a breadcrumb trail: 'Home / Access Schedules / Create Access Schedule'. The form contains several fields:

- Name:** A text input field with the placeholder 'Name'.
- Timezone:** A dropdown menu currently set to 'Central Time (US & Canada)'.
- Start and Stop Times:** For each day of the week (Sunday through Saturday), there are two dropdown menus: 'start hour' and 'stop hour'. All start times are currently set to '12:00 am' and all stop times are set to '11:00 pm'.
- Buttons:** At the bottom left, there are two buttons: 'Save' (highlighted in blue) and 'Cancel'.

To assign a schedule to a user:

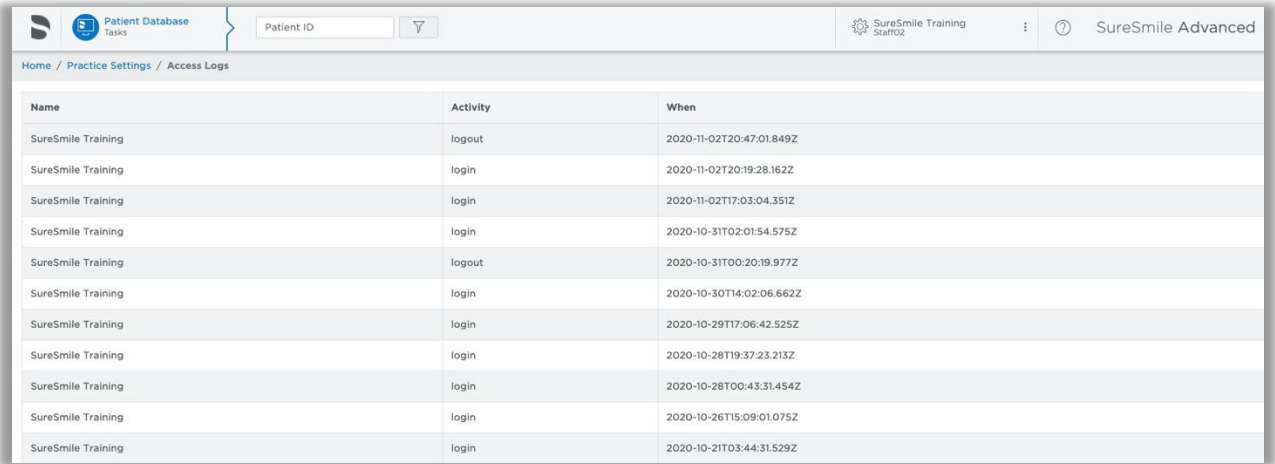
1. Go back to practice settings and select **Users**.
2. For each user, click the **Access Schedule** drop-down and select a schedule. (If you leave the default of "None" selected, the user will have 24/7 access.)

Checking Access History

SureSmile tracks the logon history of your users for the past 90 days.

To check access history:

- 1. Logon using your username with an *Admin* role.
- 2. Click the settings icon and select **Administration**.
- 3. Select **Access History**.



The screenshot shows the SureSmile Advanced interface. At the top, there is a navigation bar with 'Patient Database Tasks' on the left, a search box for 'Patient ID', and 'SureSmile Training Staff02' on the right. Below the navigation bar, the breadcrumb path is 'Home / Practice Settings / Access Logs'. The main content area displays a table with three columns: 'Name', 'Activity', and 'When'. The table contains 12 rows of logon history for 'SureSmile Training'.

Name	Activity	When
SureSmile Training	logout	2020-11-02T20:47:01.849Z
SureSmile Training	login	2020-11-02T20:19:28.162Z
SureSmile Training	login	2020-11-02T17:03:04.351Z
SureSmile Training	login	2020-10-31T02:01:54.575Z
SureSmile Training	logout	2020-10-31T00:20:19.977Z
SureSmile Training	login	2020-10-30T14:02:06.662Z
SureSmile Training	login	2020-10-29T17:06:42.525Z
SureSmile Training	login	2020-10-28T19:37:23.213Z
SureSmile Training	login	2020-10-28T00:43:31.454Z
SureSmile Training	login	2020-10-26T15:09:01.075Z
SureSmile Training	login	2020-10-21T03:44:31.529Z

When you are finished viewing this information, simply navigate away from this page as needed.

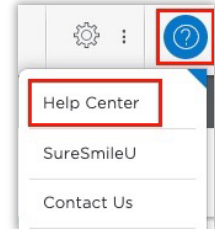
NOTES


NOTES

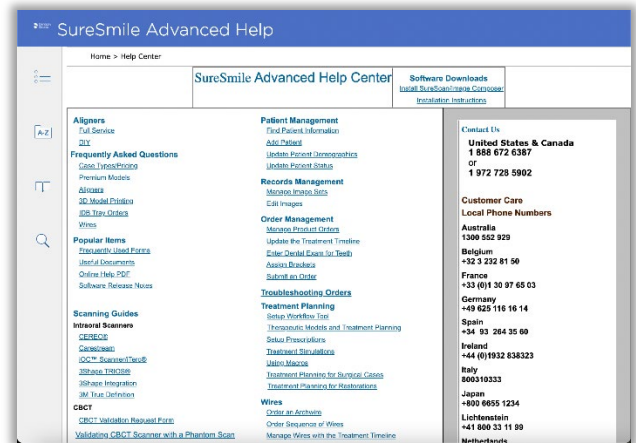
Learning Resources

Search the **Help Center** in SureSmile® for:

- Online help topics with step-by-step instructions
- Downloads including forms and reference documents
- Video demonstrations of software features

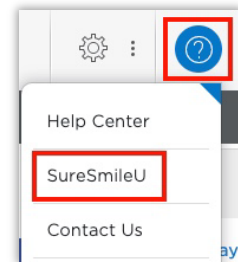



To open the Help Center, click the question mark  button and select **Help Center**.



Visit www.suresmileu.com for online learning resources including:

- Archived SureSmile webinars
- Recordings of presentations from events
- Class materials



To open SureSmileU from the SureSmile software, click the question mark  button and select **SureSmileU**.

