Table of Contents

Account Administration.............................................................................................................. 4
Troubleshooting Account Administration..................................................................................16
Creating Access Schedules.......................................................................................................18
Checking Access History.........................................................................................................19
Learning Resources..................................................................................................................20
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.
Admin-level users also have access to other user-related features, including Access Schedules and Access History.

<table>
<thead>
<tr>
<th>Practice Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Users</strong></td>
</tr>
<tr>
<td><strong>Logo</strong></td>
</tr>
<tr>
<td><strong>Vouchers</strong></td>
</tr>
<tr>
<td><strong>Access Schedules</strong></td>
</tr>
<tr>
<td><strong>Access History</strong></td>
</tr>
<tr>
<td><strong>Custom Reports</strong></td>
</tr>
<tr>
<td><strong>About</strong></td>
</tr>
</tbody>
</table>
To Self-Register

Users can register themselves and create their own passwords. However, they will not be able to access the practice database until the practice administrator adds the user and assigns him/her role.


2. Click Create a new account? (under Login button). The Sign up for an account dialog box opens.

3. Enter the information and click Sign up. An email is sent immediately to you to confirm that you successfully created a user account.

4. The user should then notify the practice administrator that they have registered in SureSmile and are now ready to be assigned a role per the following procedure.

Once the user has been assigned a role, they are able to access the practice database.
To 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. 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 each.)

Users entered under the “Doctors” role will appear on the Patient Profile page in the drop-down list for “Orthodontists.” 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 Add Multiple Users at Once

Instead of asking users to self-register, the practice administrator may enter users and assign their passwords.

1. Collect the email addresses for the users to be entered.

2. Click the settings icon and select Administration.

3. Under Practice Settings, select Users. (This option is available to Administrators only.)

4. Click the Add User button. The Add User dialog box opens.

5. Enter the user’s email address, select a role and click Apply.
   - If the user has already registered in SureSmile (see the To self-register procedure above): 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.
   - If the User has not already registered in SureSmile, the Create User dialog box opens.
     Call the user over and have the person enter their username and password. (If the person is not available, enter a user name 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.)
6. Click **Create** on the Create User dialog box after you or the user are finished.

The user is now listed under each tab for which he or she was assigned a role. The user is now able to log into the practice database.
To Verify Your Email Address

The first time you login to SureSmile, you will see a notice to inform you that your email address must be verified as a valid address. If you ignore this screen, a reminder continues to display at the top of the screen. You can click the “X” to close it, but it will appear every time you switch pages until you:

- If you are not using a valid email address, click **update** to go to the Profile page. Enter a valid email address and click **Save Changes**. (Next, verify your email address.)
- If you have a valid email address, click **verify** to send an email to your address associated with your user account. In the email, click the verify link.

In the software, you will see a notification that your email address is now verified. You can close this message, and it will not reappear the next time you login.
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, patient records assigned to this “owner” are automatically reassigned to the first user entered.

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. Select the Password tab.

3. Type your current password.

4. Type your new password in the “Password” textbox and again in the “Password Confirmation” textbox.

5. Click Update Password.
To Reset Your Password

If you forget your password, you can reset it using the Forgot your password? link on the Login page. However, your roles are suspended and your practice administrator must re-associate your account to each role before you can access patient information again.


2. Click Login.

3. Click Forgot your password?

4. Type your email address in the box and click Reset my password!.

   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.

5. Once you have changed your password, notify your practice administrator so that she or he can re-associate your account to your roles.
To Reactivate a User’s Account

When a user resets their password, their user roles are suspended. The practice administrator must reactivate the user’s roles.

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 as shown.

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., 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 practice 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 login 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 Practice Administrator.

1. Click the settings icon and select your username from the menu.
2. Under the General tab, 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 Practice Administrator.

1. Click the settings icon and select your username.
2. Under the General tab, type a new email address.
3. Click Save Changes.

Use this new email address the next time you log into SureSmile.

NOTE: When you change your email address, SureSmile will prompt you to verify it the next time you login.
Troubleshooting Account Administration

We self-registered; however, we still can’t log in. What happened?

Before users can log into your practice database, the practice administrator must assign the user to a role.

Can the practice administrator assign a staff member to the Administrator role?

Yes. A practice 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. If the user leaving the practice is assigned to numerous patient records, contact Customer Care to request a database update to reassign these patients to another user. When the update is completed, proceed to the next step to remove the user.

2. Find the user’s name under EACH role tab.

3. 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. However, even though you get a new password, resetting your password suspends your user roles. Let your Admin know you have been locked out due to a password reset. You will not be able to access patient information with your new password until your Admin reactivates your roles.

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

NOTE: Resetting your password does NOT affect the association of your username with your patients’ records, once your admin reactivates your role or roles.

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.

When I enter patient notes, the time stamp is incorrect. How can I correct the time stamp for the next time I enter a note?

1. Click the settings icon and select your username.
2. Select the Language & Time zone tab.
3. Click the Time zone drop-down and choose the time zone for your location.
4. Click Save Regional Settings.
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.
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.

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 orange settings icon and select *Administration*.
3. Select *Access History*.
4. You have several options for checking history:
   - Type text in the Search box to filter the list. You may search by text listed in any of the columns: Name, Activity, When.
   - Select page numbers in the lower-right corner to move through the entries.
   - Click the Show...Entries drop-down and select 10, 25, 50 or 100 rows to display.

When you are finished viewing this information, simply navigate away from this page as needed.
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](http://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**.