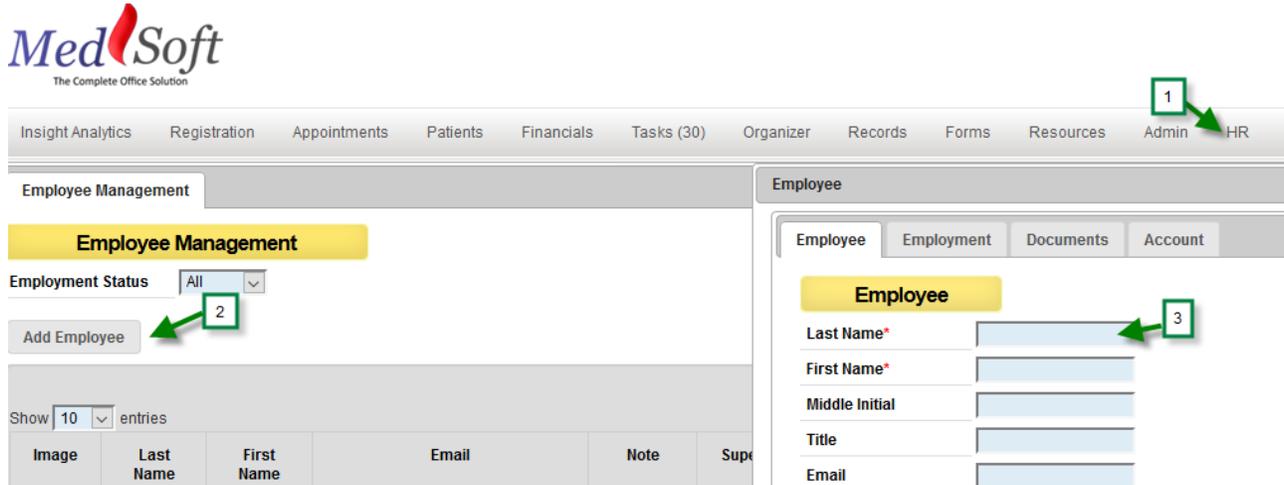


PTA User Account Creation

This guide outlines how to create a new user for licensed Physical Therapist Assistants (PTAs) within MedSoft. Please note this role should only be used for Licensed PTAs, not Aides.

Creating a PTA User within MedSoft

To create a new PTA User in MedSoft, an Admin User should (1) access the Employee screen, located under the HR tab on the Main Menu, then (2) click 'Add Employee.' This will open the New Employee Window (3), where all employee demographics are entered.



After filling in the Employee Data on the “Employee” tab,” click the “Account” tab to create MedSoft access for the employee. Check the “Create User” checkbox (1) to begin the account creation process. The MedSoft User Name (2) should always be the employee’s email address; this will auto-populate from the email address filled in on the “Employee” tab. The employee’s password should be entered, and a User Group (3) can be selected from the drop-down list. More details about User Groups can be found in the **User Group Guide**. The “PTA” access level (4) must be selected for PTA employees; please also select at least one other access level (Employee, Supervisor, etc) as needed. Access Levels are explained in more detail in the **User Roles Guide**.

The screenshot shows a web application window titled "Employee" with a close button in the top right. Below the title bar is a navigation bar with tabs for "Employee", "Employment", "Documents", and "Account". The "Account" tab is selected and highlighted in yellow. The main content area is titled "Account" and contains the following form fields:

- Create User**: A checkbox that is checked, with a green arrow and a box labeled "1" pointing to it.
- User Name***: A text input field containing "newemployee@meds", with a green arrow and a box labeled "2" pointing to it.
- Password***: An empty text input field.
- Confirm Password***: An empty text input field.
- Group***: A dropdown menu showing "Supervisor1 Group", with a green arrow and a box labeled "3" pointing to it.
- Access Level***: A dropdown menu with a list of options: "Employee", "Billing", "Admin", "FrontOffice", "Financial", and "PTA". The "Employee" option is selected, with a green arrow and a box labeled "4" pointing to it.

CAVU Support

PTA employees require two additional steps for user account creation: a completed signature page and calendar resource creation. The PTA must fill out the **CAVU Healthcare Therapist Signature Form**.

An email should be sent to support@getcavu.com with "PTA Employee Access" in the subject line. Please attach the **Signature Form** to the email. If the PTA should also have his/her name displayed as a Calendar Resource on the Appointment Calendar, please provide the user login name as well as the PTA's name for calendar display within the email. Requests will receive a response within 24 hours.