

Administrator + Superuser: Maintain Users, User Roles, & Case Roles QRG

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As new staff joins your Agency, you will need to create a user profile within NextStep, assign them to a User Role, and apply permissions so that they can use the software. Individuals with access to Maintain Users can add, remove, or edit users for their Agency.

Set Temporary Password Expiration Time

Administrators can determine how long a temporary password is valid before a new temporary password is needed.

1. Navigate to the **General** section: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > General**.
2. In the **Temporary Password Expiration (in Hours)** field, enter how long a temporary password is valid. Passwords can be set to expire anywhere from 1 hour to 720 hours (30 days).
3. Click the **Update Hours** button.
4. Provide the temporary password to the user and when the password will expire.

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Add, Edit, and Remove Users

Add a New User

1. Navigate to User Maintenance: **Navigation Menu > Maintain Users**.
2. Scroll to the bottom of the page and click the **Add User** button.
3. Enter or select from the following required fields: **User Login Name, Display Name, Legal First Name, Legal Last Name, and User Role**.
4. If your Agency manages permissions by User Role (see [Manage User Permissions by User Role](#)), click the **Set Main Menu Privileges For User Role** button to apply the permissions for the selected User Role or select the appropriate checkboxes under Main Menu Privileges.
5. Select the **Location** checkbox(es), you'd like to add the user to or select the **Select All** checkbox for all Locations.
6. Click the **Create User** button. A message is displayed that the user was created.
7. Provide the username and temporary password to the staff member.
Note: The staff member will set their password after logging in with the temporary password provided.
8. Click the **OK** button.

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Edit a User

After adding a new user to the system, the user profile is displayed and you can make edits if necessary and click the Update User button. However, if you need to make edits to an existing user's profile follow the steps below.

1. Navigate to User Maintenance: **Navigation Menu > Maintain Users**.
2. The logged-in user's profile is displayed. Click the **User** drop-down and select a user.
3. Make edits as necessary.
4. Click the **Update User** button. A message is displayed that the user has been updated.
5. Click the **OK** button.

Remove a User

If a user is deleted, they are not deleted forever (as they still exist in the database) and client documentation associated with the user is still visible in the system. However, if you need to reactivate the user profile it does require involvement from NextStep Support.

1. Navigate to User Maintenance: **Navigation Menu > Maintain Users**.
2. The logged-in user's profile is displayed. Click the **User** drop-down and select a user.
3. Click the **Delete User** button.
4. A message is displayed, "Delete User." Click the **OK** button.

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Reset a User Password

1. Navigate to User Maintenance: **Navigation Menu > Maintain Users**.
2. The logged-in user's profile is displayed. Click the **User** drop-down and select a user.
3. Click the **Reset Password** button. A message is displayed asking if you are sure you want to reset the password for the user.
4. Click the **Yes** button. A message is displayed with a temporary password.
5. Provide the temporary password to the user.
6. Click the **OK** button.

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User Role Setup and Management

User Roles define the staff's function in the Agency and dictate what areas of NextStep are accessible to a specific user. A User Role is assigned to a staff member within Maintain Users. Your Agency can use User Roles to apply bulk permissions and User Roles are also used to determine which staff members show as an option in the Case Role drop-downs within the Case Assignment section of the Face Sheet.

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Add a New User Role

1. Navigate to the User Roles tab: **Main Menu > Admin Tools Menu > System Setup > User Roles tab.**
2. In the New User Role section, enter a **Role Name**.
3. Click the **Add Role** button.

View Users Assigned to a User Role

1. Navigate to the User Roles tab: **Main Menu > Admin Tools Menu > System Setup > User Roles tab.**
2. In the Users column, click the + sign to expand and view the users assigned to the User Role.

Note: This information pulls the users that are assigned to that Role within Maintain Users.

Add User Roles to Case Assignments on the Face Sheet

1. Navigate to User Roles: **Main Menu > Admin Tools Menu > System Setup > User Roles tab.**
2. In the Privileges column, click + to expand a Role.

Note: A red exclamation mark next to the expand button indicates that there are no privileges assigned to the User Role yet.

3. Select the checkbox(es) of the Case Role you want to associate the User Role with.

Note: If the **admin** option is selected here, then anyone with that User Role will have access to Maintain Users.

Remove a User Role

1. Navigate to the User Roles tab: **Main Menu > Admin Tools Menu > System Setup > User Roles tab.**
2. Select the **Remove** checkbox for the User Role you want to remove.

Note: User Roles that are grayed out cannot be removed because they are associated with users.

Manage User Permissions by User Role

While you can apply permissions from within Maintain Users, you can also manage permissions for team members in bulk through their User Role.

1. Navigate to the User Roles tab: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > User Roles tab.**
2. Click the **Select a Role** drop-down and select the User Role you want to manage permissions for.
3. Select a checkbox to add a permission or deselect a checkbox to remove a permission.
4. Click the **Save** button.
5. A message is displayed, "Apply Permissions to All Users With This Role?" Select:
 - **Append** to add the selection onto existing User Role permissions
 - **Override** to completely reset the User Role permissions previously assigned
6. Click the **Ok** button.

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Add a Case Role

There are four static Case Role drop-downs listed on the Case Assignment section on the Face Sheet. Your Agency can create additional Case Roles to show on the Face Sheet where you can assign User Roles to.

1. Navigate to Case Role Setup: **Main Menu > Admin Tools Menu > Case Role Setup.**
2. Click **New.**
3. Enter a **Team Role** name.
4. Click into the **User Roles** field and select one or more User Roles from the drop-down.
5. *(Optional)* Select the **Allow More than One on Team** checkbox if you want your staff to be able to select more than one person on the Face Sheet for that particular Case Role.
6. Click **Update.**

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