SVMS Tip Sheet #10: Request a New Analytics Dashboard User

New user requests will be prioritized and responded to within one business day unless otherwise requested.

Instructions for Organization Point of Contact to Request a New Analytics Dashboard User

1. Go to the SacValley MedShare (SVMS) website, For Members page. https://sacvalleyms.org/index.php/members
2. Download the form: SVMS-FORM-137-001-NewAnalyticalDashboardRequest.pdf and save it to your computer, network drive or other approved location.
3. Open the form from where it was saved.
4. Complete the fields in the section "To be Completed by Authorized Organization's Point of Contact" (POC).
    a. The following fields are required:
        i. Practice/Organization/Facility
        ii. Last Name
        iii. First Name
        iv. Middle Initial
        v. At least one of the choices in the "User Access Requested" list
            1. Access for County users would be first and second choices as well as Alerts.
            2. Provider/Hospital can also have Alerts and/or Controlled Substances.
            3. Payers can also have Alerts.
        vi. Date the form is signed
        vii. POC Full Name
        viii. POC eMail Address
5. Click in the "Point of Contact Signature" field. *The first time that you sign the form, you will have to setup your digital signature. After that, your signature will be stored for future use.*
    a. Click Continue to sign the form
    b. Ensure that your digital signature is listed
    c. Click SIGN
6. Save the form signed form to your computer, network drive or other approved location, and add the user's "LastName-FirstName" to the filename. *This will also lock the fields so that no information that you have submitted can be changed on the form.*
7. Click **Submit to User**
    This will open your email, place the user's email address in the TO field, provide the proper subject line, instructions to the user in the body of the email, and add the form as an attachment.
8. Click SEND in your email program to send the form to the user to complete their section.
9. Close the form without saving.
10. When the form is received by SacValley MedShare from the user, the POC who submitted the form will be verified against SVMS records.

Instructions for the user on the following page.

530-487-4997   info@sacvalleyms.org   www.sacvalleyms.org

2485 Notre Dame Blvd. Suite 370-20 Chico, CA 95928

Instructions for New Analytical Dashboard User

1. Receive the emailed form from your organization's POC.
2. Open the form.
3. In the "To be Completed by User" Section, input the required information:
    a. Month of birth – two digits
    b. Day of birth – two digits
    c. Place of Birth or Mother's Maiden Name or another passphrase
    d. Date form is signed
    e. User's Full Name
4. Click in the "User Signature" field. *The first time that you sign the form, you will have to setup your digital signature. After that, your signature will be stored for future use.*
    a. Click Continue to sign the form
    b. Ensure that your digital signature is listed
    c. Click SIGN
5. Save the form signed form to your computer, network drive or other approved location, and add today's date to the end of the filename. *This will lock the fields so that no information that you have submitted can be changed on the form.*
6. Click **Submit to SVMS** *This will open your email, place the SacValley Support email address in the TO field, provide the proper subject line, instructions to SacValley in the body of the email, and add the form as an attachment.*
7. Click SEND in your email program to send the form to the SacValley to setup the login.
8. Close the form without saving.
9. SacValley MedShare will setup your login and securely email you your login information and instructions, as well as provide training as needed and/or requested.

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