



SVMS Tip Sheet #11: Request to Terminate Analytics Dashboard User Access

Terminating user requests will be prioritized and responded to as immediately as possible.

Instructions for Organization Point of Contact to Request Analytic Dashboard User's Access to be Terminated

1. Go to the SacValley MedShare (SVMS) website, For Members page. <https://sacvalleyms.org/index.php/members>
2. Download the form: SVMS-FORM-138-001-TerminateAnalyticsDashboardUserRequest.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. All of the areas of the system to have access removed
 - 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 SVMS**

This will open your email, place the SacValley MedShare support email address in the TO field, provide the proper subject line, instructions to SacValley MedShare 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; and SacValley MedShare will submit the User's access termination within the Analytics Dashboard system(s).

