





### Instructions for New Portal 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.