The User Groups feature makes managing a large number of users easier because administrators can grant sets of permissions to users who perform the same roles in CAREWare.



In Central Administration, user groups can be managed for Central Administration as well as providers. In addition to user groups, *Provider Permissions Groups* are available to organize permissions for providers.

Administrative Options > Provider User Manager > Manage User Groups		
Back		
Manage User Groups		
Central User Groups	Central User Groups can be assigned to users who log into Central Administration	
Provider User Groups	Provider User Groups can be assigned to users who log into a provider	
Provider Permission Groups	Provider Permission Groups are assigned to the providers themselves and limit what any user can do when logged into the provider	

**Central User Groups** – Grants permissions for users in Central Administration. **Provider User Groups** – Grants permissions for users in providers. **Provider Permission Groups** – Grants permissions for providers.

Note: Permissions must be granted to the provider in order to grant access to those permissions to users in that provider. If a permission is revoked for the provider, that permission is revoked for the user even if that permission is granted to the user by a user group.

To create a Central User Group, follow these instructions:

- 1. Click Central User Groups.
- 2. Click New Group.



## 3. Enter the User Template Name.

Administrative Options > Prov	ider User Manager > Manage User Groups > Central User Groups > Central User Groups
Save Back	
New Group	Central Group
4. Click Save.	
Administrative Options > P	rovider User Manager > Manage User Groups > Central User Groups > Test Central Group
Back	
Test Central	Group
Edit User Group Name	Test Central Group
Assign Users	No users assigned
Change Permissions	0 / 266 permissions granted

- 5. Click Change Permissions.
- 6. Select each permission that should be granted (If the permission is not in the list, try typing the name of the feature in the search field.)

Note: Select All checks all of the permissions on this page.

- 7. Click Grant Selected Permissions.
- 8. Click Back.

Note: The number of permissions granted has changed for Change Permissions.



- 9. Click Assign Users.
- 10. Check each user that should be assigned to the group.

Administrative 0	Options > Provider U	Jser Manager > Manage User Groups > Central User Gro
Save Back	Print or Export	
Assign	Users for	Group: Test Central Group
Search:		
Select	Username	
	CWTEMP	
11. Click 12. Click	Save. Back.	

Note: Users assigned to the group are now listed.

Administrative Options > P	rovider User Manager > Manage User Groups >
Back	
Test Central	Group
Edit User Group Name	Test Central Group
Assign Users	CWTEMP
Change Permissions	3 / 266 permissions granted

At this point, users assigned to this group have the permissions granted under Change Permissions for Central Administration.

To create a Provider User Group, follow these instructions:

- 1. Click Provider User Groups.
- 2. Click New Group.



3. Enter the User Template Name.

Administrative Options > Prov	vider User Manager > Manage User Groups > Provider User Groups > Provider User Groups
New Group	User Group
4. Click Save.	
Administrative Options > P Back	rovider User Manager > Manage User Groups > Provider User Groups > Test User Group
●Test User G	roup
Edit User Group Name	Test User Group
Assign Providers	No providers assigned
Change Permissions	0 / 358 permissions granted

- 5. Click Change Permissions.
- 6. Select each permission that should be granted (If the permission is not in the list, try typing the name of the feature in the search field.)

Note: Select All checks all of the permissions on this page.

- 7. Click Grant Selected Permissions.
- 8. Click Back.

Note: The number of permissions granted has changed for Change Permissions.



- 9. Click Assign Providers.
- 10. Check each *Provider* that should be assigned to the group.



Test User Group
Edit User Group Name
Test User Group
Assign Providers
Default
Change Permissions
3 / 358 permissions granted

Note: Providers assigned to the group are now listed.

At this point, providers assigned to this group can now grant access to this group for users; however, permissions still have to be granted to the provider before users can be granted access.

To create a permission group for the provider, follow these instructions:

- 1. Click Provider Permission Groups.
- 2. Click New Group.

Administrative Options >	Provider User Manager > Manage User Groups > Provider Permission Groups
Manage New Group	Delete Back Print or Export
Provider Per	mission Groups
Search:	
User Group Name	Number Providers
All Permissions Providers	1

3. Enter the User Template Name.

Administrative Options > Provider User Manager > Manage User Groups > Provider Permission Groups > Provider Permission Groups
Save Back
New Group
User Template Name: Test Provider Permissions
4. Click Save.
Administrative Options > Provider User Manager > Manage User Groups > Provider Permission Groups > Test Provider Permissions

Back	
Test Provide	er Permissions
Edit User Group Name	Test Provider Permissions
Assign Providers	No providers assigned
Change Permissions	0 / 358 permissions granted

- 5. Click Change Permissions.
- 6. Select each permission that should be granted (If the permission is not in the list, try typing the name of the feature in the search field.)

Note: Select All checks all of the permissions on this page.

- 7. Click Grant Selected Permissions.
- 8. Click Back.

Note: The number of permissions granted has changed for Change Permissions.



- 9. Click Assign Providers.
- 10. Check each *Provider* that should be assigned to the group.



- 11. Click Save.
- 12. Click Back.



Note: Providers assigned to the group are now listed.

At this point, providers assigned to this group now have access to the permissions granted under *Change Permissions*.

Now that the User Group has been assigned to the provider and the provider has been granted those permissions, the user can be granted those permissions for that provider, either individually or via one or more User Groups.

To grant the user access to the *Provider User Group* permissions, follow these instructions:

1. Click Administrative Options.

2. Click Provider User Manager.

Administrative Options > F	Provider User Manager
Back	
Provider Us	er Manager
	<b></b>
Manage User Groups	Work with user permission groups that can be assigned to users. 9 total user groups
Manage Providers	Select a provider and manage users and permissions. 1 total providers
User Notices	Manage user notices

- 4. Select the Provider.
- 5. Click Manage.
- 6. Click Manage User Groups.

Administrative Options > Provider Us	er Manager > Manage Providers > Default
Back	
Operault	
Manage Users	Select a user and manage access to features within the provider. 1 user
Manage User Groups	Work with user permission groups that can be assigned to users. 2 total user groups
Manage Permissions	358 / 358 permissions granted
Deactivate Provider	Provider currently active
Change Cross-Provider Report Fields	207 / 332 permissions granted

## 7. Select the User Group.

Administrative Options > Provider User Manager > Manage Providers > Default > Groups for Provider: Default Manage New Group Delete Back Print or Export

## Groups for Provider: Default

Search:			
User Group Name	Created By	Number Users Assigned	
All Permissions	Default	0	
Test User Group	Central Administration	0	

- 8. Click Manage.
- 9. Click Assign Users.

Administrative Options > P	rovider User Manager > Manage Providers
Back	
●Test User G	roup
Edit User Group Name	Test User Group
Assign Users	No users assigned
Change Permissions	3 / 358 permissions granted

## 10. Select the user.

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earch:			
S	elect	Username	
	-	CWTEMP	

Administrative Options > P Back	rovider User Manager > Manage Providers
●Test User G	roup
Edit User Group Name	Test User Group
Assign Users	CWTEMP
Change Permissions	3 / 358 permissions granted

At this point, the user group has been created, the provider has been granted access to the same permissions as the user group, and the user has been granted access to the user group. The user now has the access to those permissions in that provider.