



# Administrators – User Setup

Updated June 2019

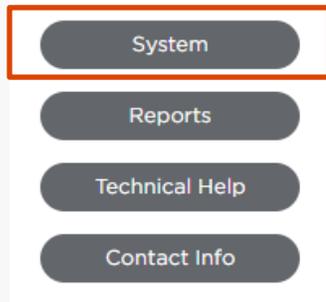
# Overview

This document is for FormFox site administrators responsible for adding new users and updating existing user profiles.

FormFox profile types include:

- Collector
- Administrator
- Collector with DOT Physical access (Medical Support Staff)
- Examiner

# Access 'System' in FormFox (\*\*Site Administrators Only\*\*)



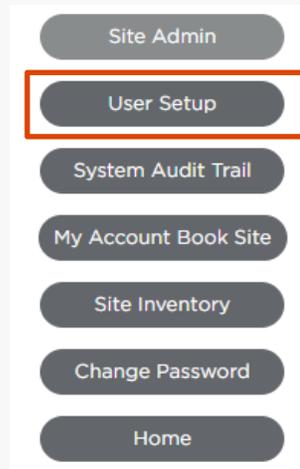
- Click the 'System' button located in the lower left-hand corner of the screen.

Please retype your password

Password

Back

- Enter your FormFox password and click 'Submit.'

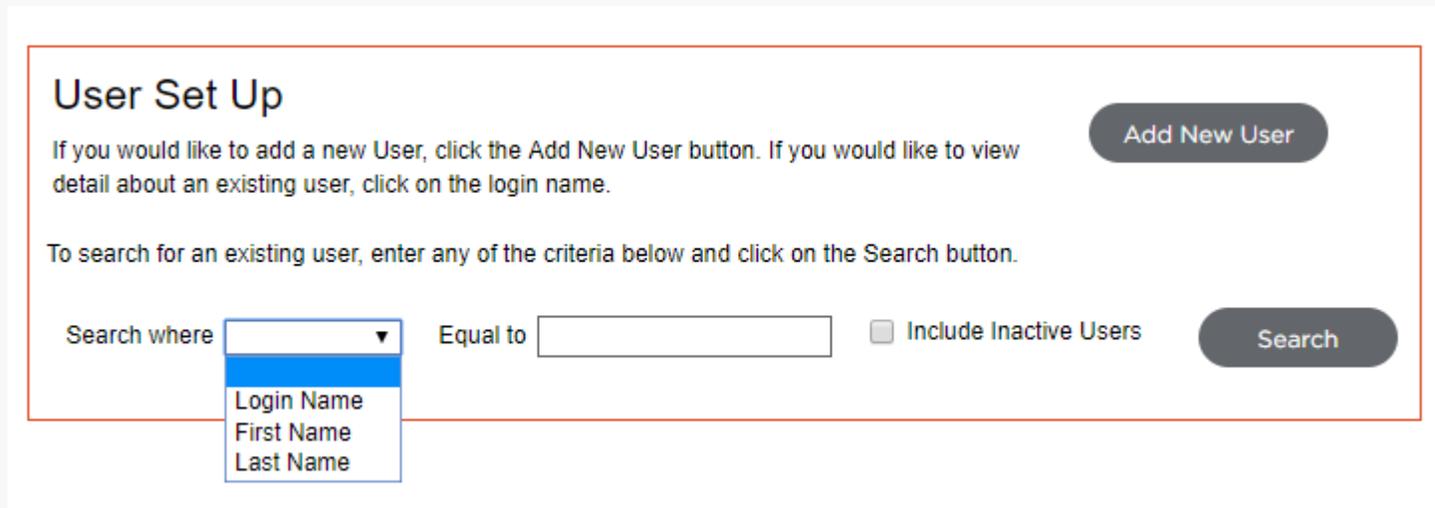


- Click on the 'User Setup' button.

# Add New Users

Before creating a new profile for your user(s), use the search functionality to ensure there isn't already an existing login for the user.

Tip: Clicking 'Search' without selecting a criterion will display a current listing of all active users. Include inactive users in this list by checking the 'Include Inactive Users' box before clicking the 'search' button.



**User Set Up**

If you would like to add a new User, click the Add New User button. If you would like to view detail about an existing user, click on the login name.

To search for an existing user, enter any of the criteria below and click on the Search button.

Search where  Equal to   Include Inactive Users

Dropdown menu options: Login Name, First Name, Last Name

# Select user permissions from the 'Profile' dropdown menu

Clicking on the 'Add New User' button will direct you to a blank 'New User Details' page. Complete the form from top to bottom, making sure all fields marked with a red asterisk has been filled out.

**NEW USER DETAILS**

Last Login: \_\_\_\_\_

\* Login Name  Availability

\* Firstname

\* Last Name

Middle Initial

Employee ID

IP restriction

\* Email

\* Language English ▾

\* Profile

FormFox Inactive

Training Mode  Expert View

Allow POCT  POCT Training

Reset Password

Disable BAT when Certificate expires

Lab Level Definitions

BAT Certification Date (MM/DD/YYYY)  BAT Certification #  Certification Expires (MM/DD/YYYY)

If you would like to assign access to a Sites, click the "Approved Sites" button

Approved Sites

Cancel Submit

**FormFox Inactive:** Administrators can deactivate user logins for employees that no longer work for the site. This box may be enabled if the user has several failed login attempts.

**Training Mode:** When enabled, users can 'play' in FormFox without any consequences. Administrators will need to remove the check mark when the user is ready to complete live collections.

**Reset Password:** Administrators can reset passwords for their employees. To reset a password, mark this box and click the 'Submit' button to get a new temporary password.

**Disable BAT when Certificate expires:** Administrators can enable this box if they would like their users to temporarily lose BAT workflow access until their BAT certifications have been updated.

# Additional FormFox user access

BAT Certification Date (MM/DD/YYYY)  BAT Certification #  Certification Expires (MM/DD/YYYY)

If you would like to assign access to a Sites, click the "Approved Sites" button

Approved Sites

Cancel Submit

FormFox users who are BAT certified can add their information into their user details. This information will appear on non-DOT BAT ATFs.

Add specific sites to the user's profile by clicking on the 'Approved Sites' button. If the collector needs access to all of your locations, mark the top box next to the 'Site' label. If there is a specific location the collector needs access to, mark the box associated with the location in the site list.

Site

[FormFox Demo Account](#)

[FormFox Mock Collection Account](#)

# For MSS (DOT ePhysicals Medical Support Staff)

- Profile Type: Collector
- 'Allow Physical Exam Access'

In addition to completing drug and alcohol collections, a **collector** profile with **physical exam access** will also have the ability to complete the health history and vitals during a DOT exam.

This type of login cannot complete the physical exam portion or assign a certification during a DOT Physical.

**NEW USER DETAILS**

Last Login: \_\_\_\_\_

\* Login Name: FormFox Availability

\* Firstname: Form

\* Last Name: Fox

Middle Initial: \_\_\_\_\_

Employee ID: \_\_\_\_\_

IP restriction: \_\_\_\_\_

\* Email: \_\_\_\_\_

\* Language: English ▾

\* Profile: Collector ▾

Reports  Site Admin  User Admin  Advanced Batch Printing

FormFox Inactive  Training Mode  Expert View

Allow POCT  POCT Training

Allow physical exam access

Reset Password  Disable BAT when Certificate expires

Lab Level Definitions

BAT Certification Date (MM/DD/YYYY)  BAT Certification #  Certification Expires (MM/DD/YYYY)

If you would like to assign access to a Sites, click the "Approved Sites" button

Approved Sites

# For Examiners (DOT ePhysicals – Must have National Registry Number)

- Profile Type: Examiner
- 'Allow Physical Exam Access'
- National Registry #
- Examiner Type
- Medical License/Certificate #
- Issuing State
- Expiration Date

Examiners/Providers will need to have the required information above in order to complete DOT exams in FormFox. If they have multiple medical licenses/certificates, please make sure they are added in the examiner's user details.

To save a new medical license/certificate # in the grid, click the 'Add New' button. Make sure to click 'submit' to save any changes.

### NEW USER DETAILS

Last Login: \_\_\_\_\_ Availability

\* Login Name: FormFox

\* Firstname: Form

\* Last Name: Fox

Middle Initial: \_\_\_\_\_

Employee ID: \_\_\_\_\_

IP restriction: \_\_\_\_\_

Phone: \_\_\_\_\_

\* Email: training@formfox.com

\* Language: English

\* Profile: Examiner

FormFox Inactive

Training Mode

Allow POCT

Reset Password

Disable BAT when Certificate expires

Expert View

POCT Training

Lab Level Definitions

National Registry #: 1234567890

\* Examiner Type: MD

DO

Physician Assistant

Chiropractor

Advanced Practice Nurse

Other Practitioner

BAT Certification Date (MM/DD/YYYY): \_\_\_\_/\_\_\_\_/\_\_\_\_

BAT Certification #: \_\_\_\_\_

Certificate (MM/DD/YYYY): \_\_\_\_/\_\_\_\_/\_\_\_\_

Delete	Medical License/Certificate#	Issuing State	Expiration Date
<input type="checkbox"/>	UT12345	UT	3/28/2025
<input type="checkbox"/>	_____	Alabama	____/____/____

Delete Add New

If you would like to assign access to a Sites, click the "Approved Sites" button

Approved Sites

# For Collectors (Doesn't complete physicals)

## □ Profile Type: Collector

A collector profile can complete drug and alcohol collections in FormFox.

Additional administrator access can be added to a collector-only profile by selecting one/all of these boxes. For example, if you would like to give a collector the ability to create/update users as well, mark the 'User Admin' box. This will be the only administrator portion in FormFox they have access to in addition to completing collections.

**NEW USER DETAILS**

Last Login: \_\_\_\_\_

\* Login Name: FormFox Availability

\* Firstname: Form

\* Last Name: Fox

Middle Initial: \_\_\_\_\_

Employee ID: \_\_\_\_\_

IP restriction: \_\_\_\_\_

\* Email: \_\_\_\_\_

\* Language: English ▾

\* Profile: Collector ▾

Reports  Site Admin  User Admin  Advanced Batch Printing

FormFox Inactive  Training Mode  Expert View

Allow POCT  POCT Training

Allow physical exam access

Reset Password

Disable BAT when Certificate expires

Lab Level Definitions

BAT Certification Date (MM/DD/YYYY)  BAT Certification #  Certification Expires (MM/DD/YYYY)

If you would like to assign access to a Sites, click the "Approved Sites" button

Approved Sites

# For Administrators

## □ Profile Type: Administrator

Administrators can access the administrator portion of FormFox (User Setup, Site Setup, and Label Inventory Access). This profile type can also complete drug and alcohol collections.

### NEW USER DETAILS

Last Login: \_\_\_\_\_

\* Login Name

\* Firstname

\* Last Name

Middle Initial

Employee ID

IP restriction

\* Email

\* Language  ▼

\* Profile  ▼

FormFox Inactive

Training Mode  Expert View

Allow POCT  POCT Training

Allow physical exam access

Reset Password

Disable BAT when Certificate expires

BAT Certification Date   BAT Certification #  Certification Expires

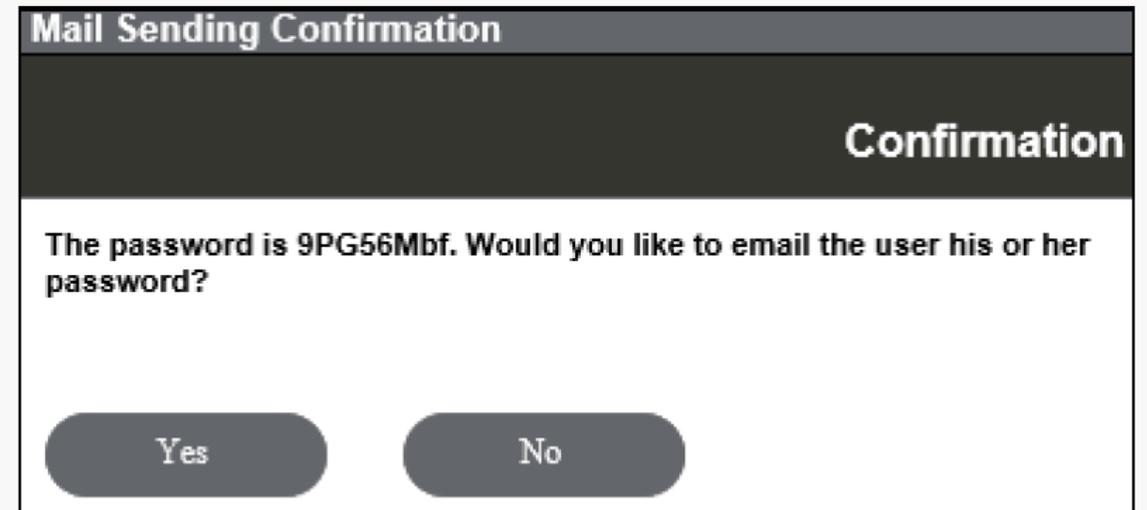
If you would like to assign access to a Sites, click the "Approved Sites" button

# Temporary Passwords

Clicking the 'Submit' button after updating the user details will display a 'Mail Sending Confirmation' with a temporary password. If you would like to send the temporary password directly to the email on file, click 'Yes.' If you will be providing the temporary password to the collector via a different method, click 'no.'

New FormFox collectors will be prompted to change their password during their initial logins.

**\*FormFox passwords are case-sensitive.\***



The image shows a 'Mail Sending Confirmation' dialog box. It has a dark grey header with the text 'Mail Sending Confirmation' on the left and 'Confirmation' on the right. Below the header, the main text asks: 'The password is 9PG56Mbf. Would you like to email the user his or her password?'. At the bottom of the dialog, there are two rounded rectangular buttons: 'Yes' on the left and 'No' on the right.

# User Setup Tips

## TRAINING MODE

Every new user profile will automatically default to 'Training Mode.' This setting allows new collectors to play around in the system without any repercussions; especially if the collection site itself is 'live' in the FormFox network. Mock collections will not be sent to downstream parties (i.e. laboratories) if 'Training Mode' is enabled for the user.

Administrators can take collectors out of 'Training Mode' by removing the check mark in the 'Training Mode' check box and clicking the 'Submit' button.

## INACTIVE USERS AND RESETTNG PASWORDS

If a collector has too many failed login attempts, the 'FormFox Inactive' box will automatically be enabled. Administrators can activate the user's account by removing the check mark from the 'FormFox Inactive' box and clicking the 'Submit' button. If the collector has forgotten the password, check the box for 'Reset Password' and click the 'Submit' button. A pop-up window with a new temporary password will appear.

- FormFox Inactive
- Training Mode
- Allow POCT
- Reset Password
- Disable BAT when Certificate expires
- Expert View
- POCT Training

Lab Level Definitions