



Adding Users

Users may be added individually or through a bulk roster upload.

Bulk User Upload

For instructions on uploading multiple users at once, please refer to the [Bulk Roster Upload Guide](#).

Adding an Individual User

1. Navigate to the **Users** tab. You will see a list of all users currently associated with your program.
2. Select **Add User**.

The screenshot shows the 'Users' tab interface. At the top, there is a navigation bar with links: Home, To Complete, New Assessment, Assessments, Programs, Dashboard, and Help. Below this, there are two buttons: 'Add User' (highlighted with a yellow box) and 'Import Roster'.

3. Enter the user's program email address and select **Next**.

The screenshot shows the 'Add User' form. It has a label 'User's Email' above a text input field containing the placeholder 'Enter user's email'. Below the input field is a green 'Next' button.

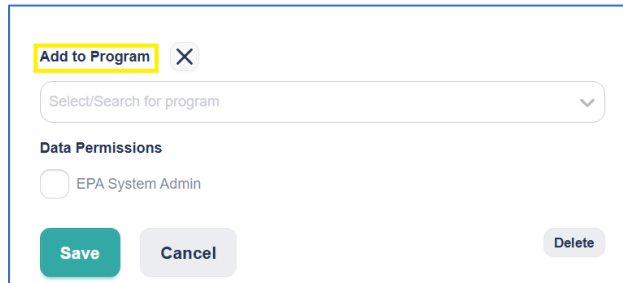
4. Complete the user information form.

Demographic information is optional and is not required for account setup. Please make sure the following information is entered accurately:

- Email address
- First and last name
- Phone number

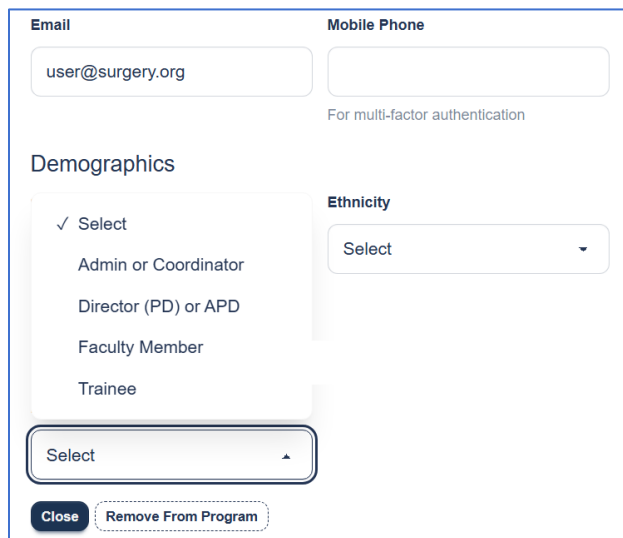
The screenshot shows the 'User' information form. It has two columns of input fields. The first column contains 'First name', 'Email' (highlighted with a yellow box), and 'Gender'. The second column contains 'Last name', 'Mobile Phone', and 'Ethnicity'. Below the 'Email' field, there is a note 'For multi-factor authentication'. At the bottom, there are two dropdown menus for 'Gender' and 'Ethnicity'.

5. In the **Programs** section, select the correct program.



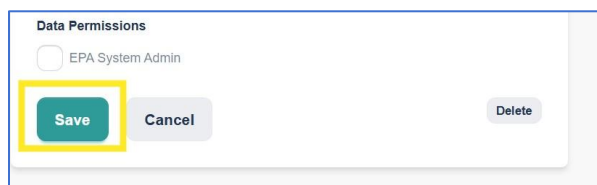
The screenshot shows a dialog box titled 'Add to Program' with a close button (X). Below the title is a search bar labeled 'Select/Search for program'. Underneath is a section titled 'Data Permissions' with a checkbox labeled 'EPA System Admin'. At the bottom are three buttons: 'Save' (highlighted with a yellow box), 'Cancel', and 'Delete'.

6. Choose the appropriate **Program Role** for the user.



The screenshot shows a user profile form. It has fields for 'Email' (containing 'user@surgery.org') and 'Mobile Phone'. Below these is a section titled 'Demographics' with a dropdown menu for 'Program Role' (currently showing 'Select' and a list of roles: Admin or Coordinator, Director (PD) or APD, Faculty Member, Trainee). To the right is an 'Ethnicity' dropdown menu (also showing 'Select'). At the bottom are buttons for 'Close' and 'Remove From Program'.

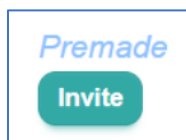
7. When finished, close the **Programs** section of the form and select **Save**.



The screenshot shows the 'Data Permissions' section of the form. It has a checkbox labeled 'EPA System Admin'. At the bottom are three buttons: 'Save' (highlighted with a yellow box), 'Cancel', and 'Delete'.

8. Return to the **Users** page. The new user should now appear in your program's user list.

9. When you are ready for the user to receive their welcome email and complete account activation, select the **Invite** button next to their name.



Adding an Existing Active User to Your Program

Some users may already have an active account in the ABS EPA App. You can locate and update active accounts rather than creating a new account and losing data connected to a previous account.

To add an existing active user to your program:

1. Navigate to the **Users** tab and select **Add User**.
2. Enter the user's program email address and select **Next**.
3. If the user already has an active account, their account information will automatically populate. Review the information for accuracy and update it if needed.
4. In the **Programs** section, add the correct program and select the appropriate program role.
5. Close the **Programs** section and select **Save**.

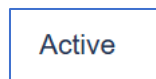
Once an active user is added to your program and the profile is saved, they will automatically become active in your program.

Understanding User Statuses

The **Users** page will show the status of each user in your program.

Active Users

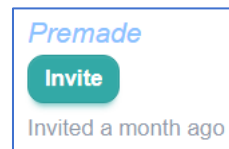
Active users will show **Active** next to their names.



Invited or Incomplete Users

Users who have been invited but have not completed account activation will still show the **Invite** button.

Under the **Invite** button, you will see a light gray note that says **Invited**, along with how long ago the welcome email was sent.

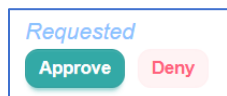


Requests to Join Program

Users may request to join your program. These requests will appear automatically in your program's user list.

Next to the user's name, you will see a blue **Requested** status with **Approve** and **Deny** buttons beneath it.

Please review each request and select the appropriate option.



Managing Users

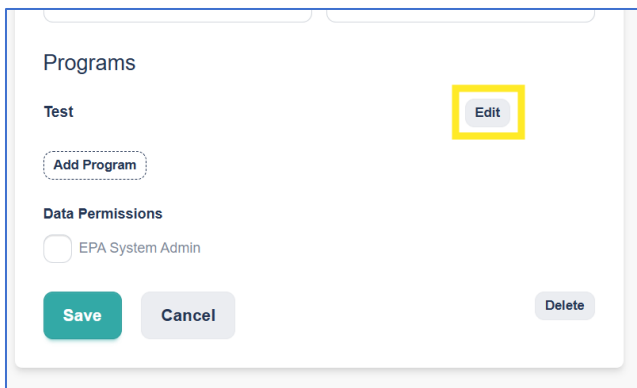
Program Administrators and Program Directors can add, edit, and remove users from a program.

Editing a User

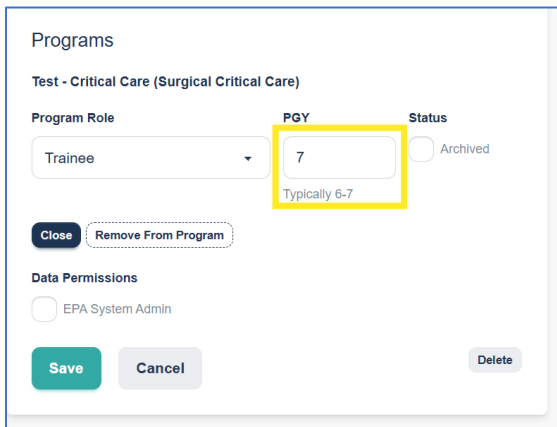
1. Navigate to the **Users** page and locate the user you need to update.
2. Select **Edit** next to the user's name.
3. Make the necessary corrections.
4. Select **Save**. Changes become effective immediately after saving.

Updating a User's PGY

1. Navigate to the **Users** page and locate the user you need to update.
2. Select **Edit** next to the user's name.
3. Scroll down to the **Programs** section.
4. Select **Edit** next to the program from which the user's PGY must be updated.



5. Enter the appropriate PGY in the provided text box.



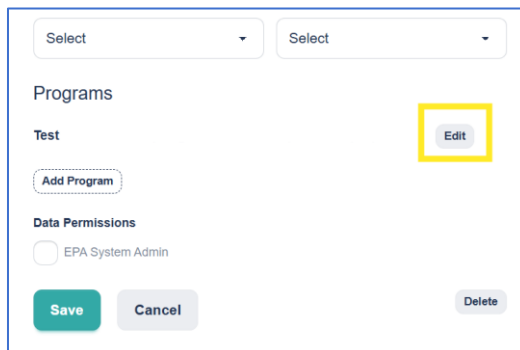
6. Close the programs section by clicking on the **Close** button.

7. Save all changes completely by clicking **Save**.

Archiving Users

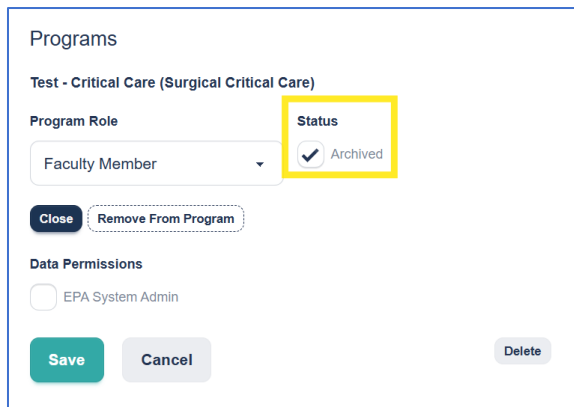
Follow these steps to archive users who have left your program.

1. Navigate to the **Users** page and locate the user you need to remove.
2. Select **Edit** next to the user's name.
3. Scroll down to the **Programs** section.
4. Select **Edit** next to the program from which the user should be archived.



This screenshot shows the 'Edit User' form. At the top, there are two 'Select' dropdown menus. Below them is the 'Programs' section, which includes a table with one row labeled 'Test'. To the right of this row is an 'Edit' button, which is highlighted with a yellow box. Below the table is an 'Add Program' button. Further down is the 'Data Permissions' section with a checkbox for 'EPA System Admin'. At the bottom are 'Save', 'Cancel', and 'Delete' buttons.

5. Select the **Archived** button, ensuring that it is checked.



This screenshot shows the 'Edit User' form with the 'Programs' section expanded. The 'Test - Critical Care (Surgical Critical Care)' program is selected. The 'Program Role' dropdown is set to 'Faculty Member'. The 'Status' dropdown is highlighted with a yellow box and set to 'Archived', which has a checkmark next to it. Below the dropdowns are 'Close' and 'Remove From Program' buttons. The 'Data Permissions' section and 'Save', 'Cancel', and 'Delete' buttons are also visible.

6. Close the Programs section by clicking the **Close** button.
7. Save changes by clicking **Save**.

Removing a User from a Program

Removing users will remove their data completely from your program's records

1. Navigate to the **Users** page and locate the user you need to remove.
2. Select **Edit** next to the user's name.
3. Scroll down to the **Programs** section.
4. Select **Edit** next to the program from which the user should be removed.

5. Select **Remove From Program**.

6. Save your changes.

Please note that some users may be associated with more than one program. Before removing a user, confirm that you are removing them from the correct program. Removing a user from a program does not delete the user's account. It only removes their access to that specific program.

How Users Can Request to Join a Program

Users may request to join a program from their own account settings.

To request access to a program, users should:

1. Select their initials in the upper-right corner of the screen.
2. Select **Settings**.

3. Scroll down to the **Programs** section.
4. Select **Add Program**.
5. Choose the correct program from the drop-down list.

6. Close the **Programs** section.
7. Select **Save**.

Once the request is submitted, a notification will be sent to the Program Administrator's email. Program Administrators and Program Directors can also view and manage requests from the program's **Users** page.

Moving Users from One Program to Another

Users may need to be moved from one program to another if they were added to the incorrect program or if their program affiliation has changed.

1. Navigate to the **Users** page.
2. Locate the user you would like to move and select **Edit** next to their name.
3. Scroll down to the **Programs** section of the user's profile.
4. Select **Add Program**.
5. Select the appropriate program from the drop-down list.
6. Select the user's correct position or role in the program.
7. Once you have confirmed that the program and position are correct, close the **Programs** section.
8. Before saving, you may also review the rest of the user's profile to make sure all information is correct.
9. Select **Save**.

After the user has been added to the correct program, you may remove them from the incorrect program.

1. Navigate back to the **Programs** section of the same user's account.
2. Locate the program you wish to remove.
3. Select **Edit** next to that program.
4. Select **Remove From Program**.
5. Select **Close**, then select **Save**.

Please be sure to add the user to the correct program before removing them from the incorrect program. If a user is removed before being added to the correct program, they may be temporarily lost in the system. Their data will not be lost, but this can create an unnecessary inconvenience until corrected.

* *Do not delete users unless specifically instructed. Deleting a user permanently deletes their account and all attached data. While Firefly backs up data and deleted users can be recovered, we want to*

avoid that scenario whenever possible. Removing a user from a program only removes their access to that program.

Repeat these steps for each user until all affected programs have the correct users listed.

Important Notes

*** Maintenance and accuracy of program rosters and user information is the responsibility of program leadership. All updates should be made as soon as possible. If assistance is required at any time, please contact epas@absurgery.org.**

- * Required account information includes the user's correct email address, name, and phone number. Demographic information is optional.
- * Users must be assigned to the correct program and program role. If a user belongs to more than one program, confirm that you are editing or removing the correct program before saving changes.
- * Always close the **Programs** section before saving.
- * For more information, resources, and answers to most questions, please review the EPAs section of the American Board of Surgery website at: <https://www.absurgery.org/get-certified/epas/>.