



**Georgia Department of
Behavioral Health and Developmental Disabilities**

CheckPT Provider Administrator User Guide

January 21, 2025

Contents

- Overview..... 3
- Adding a New User 3
- Searching for an Existing User..... 7
- Enabling/Disabling a User Account 8
 - Enabling a User Account..... 8
 - Disabling a User Account 9
- Editing an Existing User's Account Information 10
- Resend New User Notification 11
- Resetting a User's Password 13

Overview

This guide is for CheckPT provider administrator users to view and manage user accounts associated with your agency and to create new user accounts for your agency.

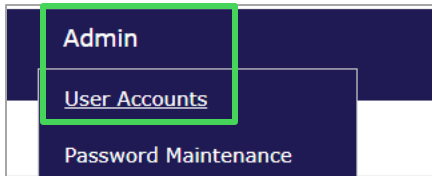
DBHDD encourages every provider to have at least two administrator accounts to ensure CheckPT access if someone leaves your agency.

From the **User Accounts** screen, you may:

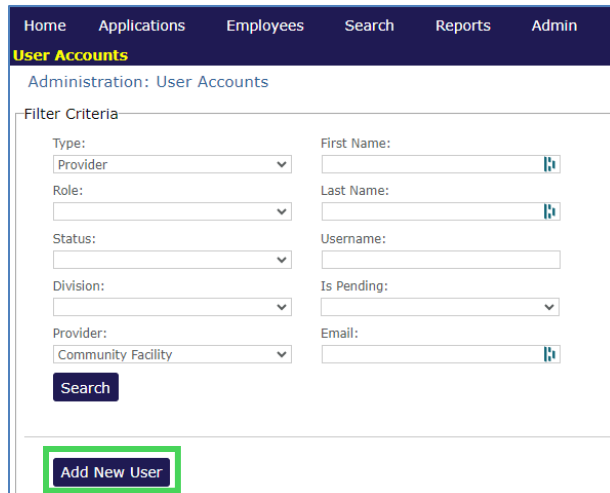
- Add a New User
- Search for an Existing User
- Enable/Disable a User Account
- Edit an Existing User's Account Information
- Reset a User's Password

Adding a New User

Go to **Admin > User Accounts** on the navigation bar.



The **Administration: User Accounts** screen appears. Select **“Add New User”**.

A screenshot of the 'Administration: User Accounts' web interface. At the top, there is a navigation bar with links for 'Home', 'Applications', 'Employees', 'Search', 'Reports', and 'Admin'. Below this, the page title is 'User Accounts' and the sub-header is 'Administration: User Accounts'. A 'Filter Criteria' section contains several input fields: 'Type' (dropdown menu with 'Provider' selected), 'Role' (dropdown menu), 'Status' (dropdown menu), 'Division' (dropdown menu), 'Provider' (dropdown menu with 'Community Facility' selected), 'First Name' (text input), 'Last Name' (text input), 'Username' (text input), 'Is Pending' (dropdown menu), and 'Email' (text input). A 'Search' button is located below the filter criteria. At the bottom left of the main content area, there is a button labeled 'Add New User', which is highlighted with a green rectangular box.

The **User Accounts** screen appears. Enter the user's information. Required information is indicated by the red asterisk (*).

In the **Username** text box, enter the user's personal business email address containing at least the person's first and/or last name.

Other required information includes the user's **First Name**, **Last Name**, and **Email** address.

Home Applications Employees Search Reports Admin

Administration: User Accounts

* Required

User Account

Status: Enabled

* Is Pending: No

* Username:

* First Name:

* Last Name:

* Email:

* Phone:

* User Type: Provider

* Roles

Role	Selected	Grantable
Provider Admin	<input type="checkbox"/>	<input type="checkbox"/>
Provider User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

* Providers:

[Assign Providers](#) [Select all my Providers](#)

Position Title:

Comment:

Address Line 1:

Address Line 2:

City:

State:

Zip:

Division:

Back to Search Save

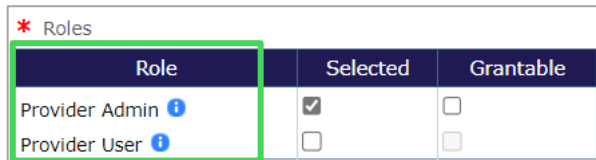
“**User Type**” will be set to **Provider**.

The “**Is Pending**” field will always default to **No**.

“**Role(s)**”, select the role(s) for the user. User roles control what a user can see and do in CheckPT. It is possible for a user to have more than one role. When this occurs, the user will have access to all functions for the roles they are assigned.

Provider users have two roles:

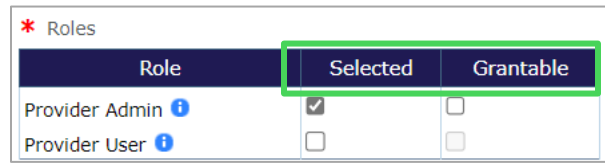
- **Provider User:** This user can resume/approve an application, review eligibility determinations, review and verify rosters, and review/download documents, including eligibility letters.
- **Provider Admin User:** In addition to the Provider User functions above, the Admin User can add new users for your agency, manage user accounts, including enabling and disabling accounts and resetting passwords. Every agency should have at least one Provider Admin user. DBHDD recommends you have a second Provider Admin user as a back-up.



Role	Selected	Grantable
Provider Admin i	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Provider User i	<input type="checkbox"/>	<input type="checkbox"/>

Each user role has two functions:

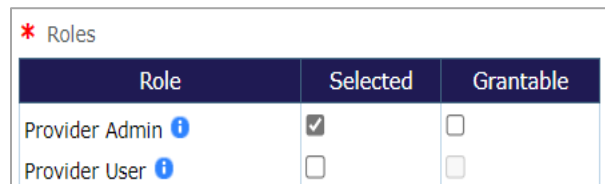
- **Selected** means you are giving the person this role.
- **Grantable** means you are giving the person the ability to grant (give) that role to other users.



Role	Selected	Grantable
Provider Admin i	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Provider User i	<input type="checkbox"/>	<input type="checkbox"/>

Check the **Selected** checkbox for each role that you want to give the user. If the user account you are creating has permission to create additional user accounts, click the **Grantable** checkbox to enable them the ability to grant the user role to other users.

For example, you might create an account for Sally who needs a Provider Admin user role, but you do not want her to be able to give that user role to anyone else. You would click the **Selected** checkbox next to Provider Admin and leave the **Grantable** checkbox unselected.



Role	Selected	Grantable
Provider Admin i	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Provider User i	<input type="checkbox"/>	<input type="checkbox"/>

Select **Assign Providers** to connect the user account to your agency.

* Roles		
Role	Selected	Grantable
Provider Admin ⓘ	<input type="checkbox"/>	<input type="checkbox"/>
Provider User ⓘ	<input type="checkbox"/>	<input type="checkbox"/>

* Providers:

[Assign Providers](#) [Select all my Providers](#)

The **Assign Providers** dialog box appears. Type part of your provider name in the **Search for Provider** text box and select **Search**.

Assign Providers

Search for Provider - Enter at least 2 characters

Select Provider(s)

Providers Assigned to User

Your provider name will appear below **Select Provider(s)**.

Assign Providers

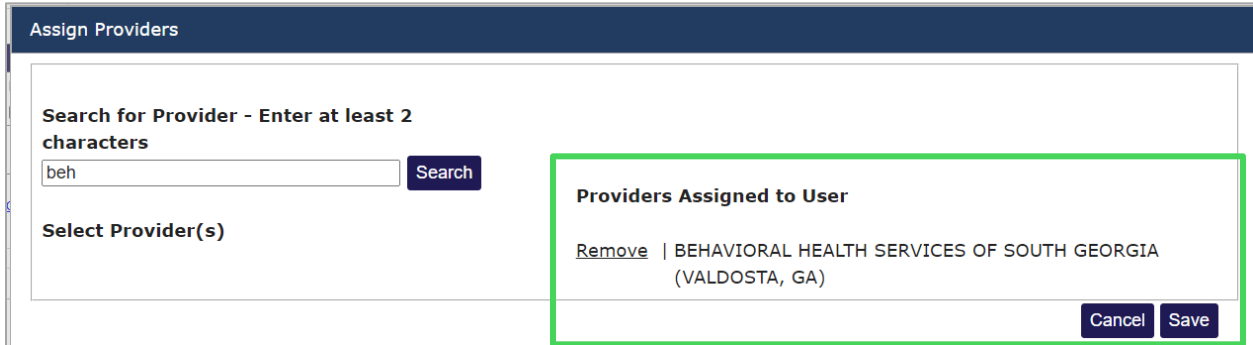
Search for Provider - Enter at least 2 characters

Select Provider(s)

BEHAVIORAL HEALTH SERVICES OF SOUTH GEORGIA

Providers Assigned to User

Click on the link for your provider name and the name will move under **Providers Assigned to User**. Select **“Save”**.



Assign Providers

Search for Provider - Enter at least 2 characters

beh Search

Select Provider(s)

Providers Assigned to User

[Remove](#) | BEHAVIORAL HEALTH SERVICES OF SOUTH GEORGIA (VALDOSTA, GA)

Cancel Save



Note: At any time, you may remove an assigned provider from a user account by returning to the **Assign Providers** dialog box and clicking **Remove** next to the provider name you want to remove.

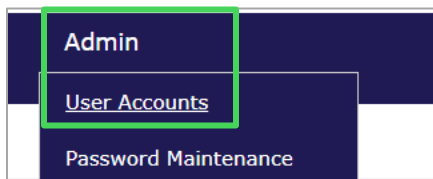
After assigning a provider to the user, select **“Save”** on the **User Accounts** screen to add the user to the system. The system will auto-generate a password for the user and send it to the user at the email address entered.



Note: As an administrator, you will need to communicate the username to the user. For security reasons, CheckPT does not email usernames.

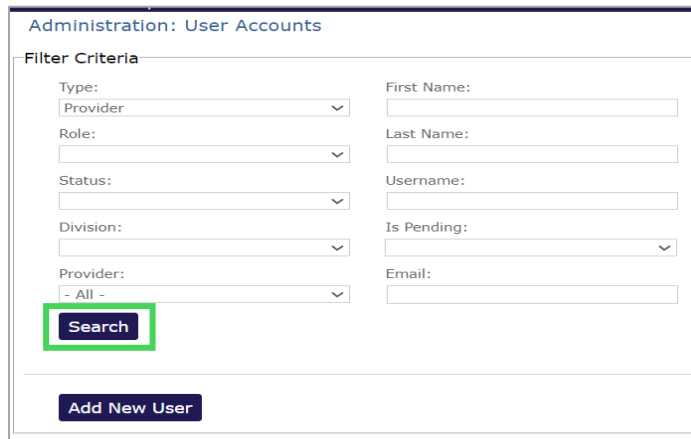
Searching for an Existing User

Go to **Admin** on the navigation bar and select **“User Accounts”**.



This opens the **Administration: User Accounts** page.

Select “**Search**” for a list of all user accounts for your provider or select search criteria (for example, enter a username) and then select **Search**. User Search Results will show all possible matches for your search criteria.



The screenshot shows the 'Administration: User Accounts' interface. It features a 'Filter Criteria' section with several dropdown menus: 'Type' (set to 'Provider'), 'Role', 'Status', 'Division', and 'Provider' (set to '- All -'). To the right of these are text input fields for 'First Name', 'Last Name', 'Username', and 'Email', and a dropdown for 'Is Pending'. A blue 'Search' button is highlighted with a green box. Below the filter section is an 'Add New User' button.



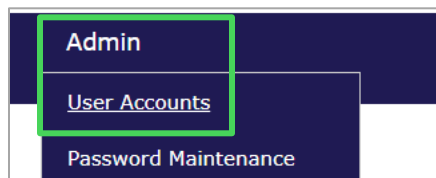
Note: Any portion of a username or email address may be entered to perform the search.

Enabling/Disabling a User Account

If a user has been locked out of CheckPT due to too many incorrect password attempts, an administrator will need to **enable** the user’s account. If a user is no longer with the provider, an administrator will need to **disable** the user’s account.

Enabling a User Account

Go to **Admin > User Accounts** on the navigation bar.



The **Administration: User Accounts** screen appears. Select **"Locked"** or **"Disabled"** from the **Status** dropdown list and select **"Search"**. A list of accounts with the selected status will display.

The screenshot shows the 'Administration: User Accounts' search interface. Under 'Filter Criteria', there are fields for Type (set to 'Provider'), Role, Status (with a dropdown menu open showing 'Enabled', 'Locked', and 'Disabled'), Username, Last Name, First Name, Is Pending, and Email. A 'Search' button is located at the bottom left of the form.

Select **"Enable"** in the **Actions** column for the user, and the system will change the status of the user account to **"Enabled."** The user will be allowed to log in.

User Search Results							
UserName	Name	Email	Type	Status	Is Pending	Last Login Date	Actions
TrainingUser1	User, Training	test@example.com	Provider	Disabled	No	05/28/2024	<ul style="list-style-type: none"> Edit Enable Notes (3) Add Note Upload Document



Note: Enabling a user will not reset their password. The user can use the **Forgot Password** link on the login screen to reset his or her password.

Disabling a User Account

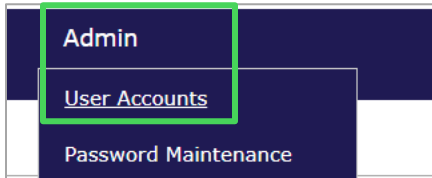
To disable a user account, select **"Enabled"** in the **Status** drop down list and select **"Search"**. A list of all enabled accounts will display.

Select **"Disable"** in the **Actions** column for the user, and the system will change the status of the user account to **"Disabled"**. The user will **NOT** be allowed to log in. Select **"Add Note"** in the **Actions** column to add a note for the account.

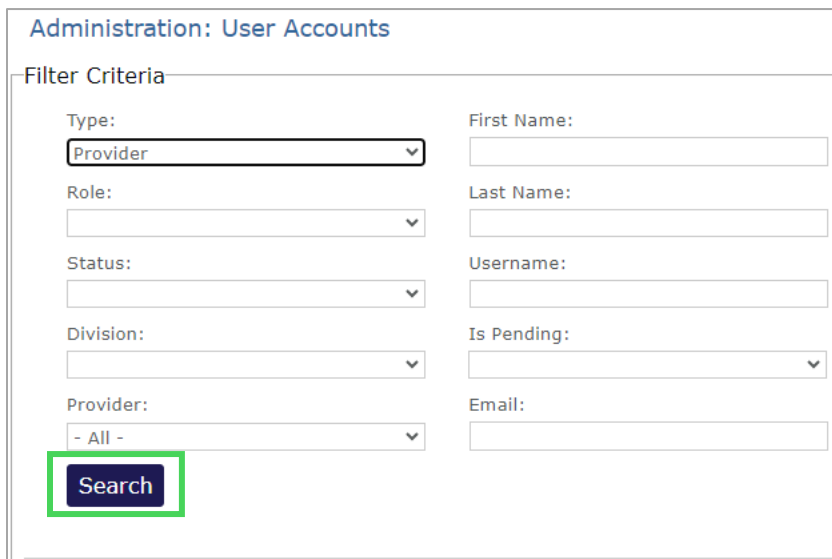
User Search Results							
UserName	Name	Email	Type	Status	Is Pending	Last Login Date	Actions
TrainingUser1	User, Training	test@example.com	Provider	Enabled	No	05/28/2024	<ul style="list-style-type: none"> Edit Disable Notes (4) Add Note Upload Document

Editing an Existing User's Account Information

Go to **Admin > User Accounts** on the navigation bar.

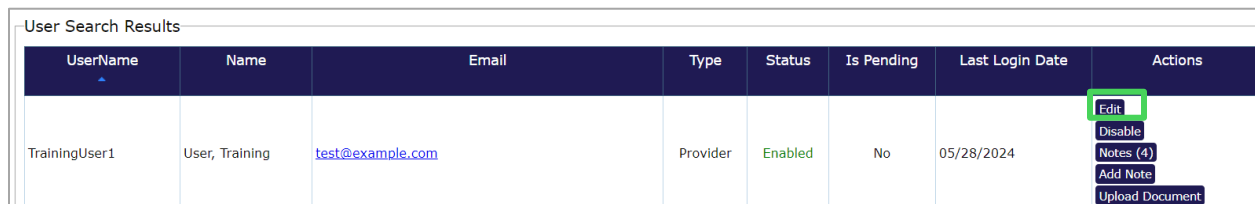


The **Administration: User Accounts** screen appears. Select **“Search”** for a list of all user accounts for your provider or enter search criteria (for example, enter a username) and then select **“Search”**.



The image shows the 'Administration: User Accounts' search form. It has a title 'Administration: User Accounts' and a section 'Filter Criteria'. The form contains several dropdown menus and text input fields: 'Type:' (set to 'Provider'), 'First Name:', 'Role:', 'Last Name:', 'Status:', 'Username:', 'Division:', 'Is Pending:', 'Provider:' (set to '- All -'), and 'Email:'. A 'Search' button is located at the bottom left of the form and is highlighted with a green rectangular box.

In the **User Search Results**, select **“Edit”** in the **Actions** column for the user whose information you wish to edit.



The image shows a table titled 'User Search Results'. The table has the following columns: 'UserName', 'Name', 'Email', 'Type', 'Status', 'Is Pending', 'Last Login Date', and 'Actions'. The first row of data is for a user named 'TrainingUser1' with the name 'User, Training' and email 'test@example.com'. The 'Actions' column for this user contains a list of buttons: 'Edit', 'Disable', 'Notes (4)', 'Add Note', and 'Upload Document'. The 'Edit' button is highlighted with a green rectangular box.

UserName	Name	Email	Type	Status	Is Pending	Last Login Date	Actions
TrainingUser1	User, Training	test@example.com	Provider	Enabled	No	05/28/2024	Edit Disable Notes (4) Add Note Upload Document

The **User Account** screen appears. Edit the user information and select **“Save”**. (You cannot edit the **Username**.)

Administration: User Accounts

* Required

User Account

Last Login: 5/28/2024 12:21:26 PM

Status:

Is Pending:

Username: TrainingUser1

* First Name:

* Last Name:

* Email:

* Phone:

User Type:

Provider:

* Roles

Role	Selected	Grantable
Provider Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Provider User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

* Providers: TrainingProvider1

[Assign Providers](#)

Position Title:

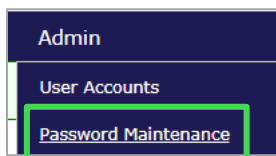
Comment: Disabled by admin (see note).

Resend New User Notification

If a New User has not received their new user notification, they should check their junk/spam email boxes.

If the email is not in junk/spam, the Provider Administrator User can resend the user's New User Notification.

Go to **Admin > Password Maintenance** from the navigation bar.



Select **“Search”** for a list of all user accounts for your Provider/Division or enter filter criteria, like a username, and select **“Search”**.



Any portion of a username or email address may be entered to perform the search.

Select **“Resend New User Notification”** under **Actions** for the user who needs this information resent.

User Search Results

Resetting a user's password will also activate that user if they are currently Pending.

Select	UserName	Name	Email	Type	Status	Is Pending	Action
<input checked="" type="checkbox"/>	nathaniel@northcentral.org	Nathan Mann	nathaniel.mann@northcentral.org	Applicant	Enabled	No	Resend New User Notification
<input type="checkbox"/>	nathaniel@northcentral.org	Nathan Mann	nathaniel.mann@northcentral.org	Applicant	Enabled	No	Resend New User Notification
<input type="checkbox"/>	nathaniel@northcentral.org	John Mann	nathaniel.mann@northcentral.org	Applicant	Enabled	No	Resend New User Notification
<input type="checkbox"/>	nathaniel@northcentral.org	John Mann	nathaniel.mann@northcentral.org	Applicant	Enabled	No	Resend New User Notification
<input type="checkbox"/>	nathaniel@northcentral.org	John Mann	nathaniel.mann@northcentral.org	Applicant	Enabled	No	Resend New User Notification

5 Total Results

Select All Send New User Email Reset Passwords

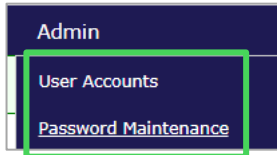


If multiple users need their new user notification, you can check the box next to the respective users and select **“Send New User Email”**. The New User Email will be sent to each user you selected.

Resetting a User's Password

The Provider Administrator User can reset a user's password.

Passwords can be reset from either the User Accounts or Password Maintenance page from the Admin menu.



From the User Account page, select **“Reset Password”** on the **User Account** edit screen. An email will be sent to the user with a new temporary password.

Administration: User Accounts

* Required

User Account

Last Login: 5/28/2024 12:21:26 PM

Status:

Is Pending:

Username:

* First Name:

* Last Name:

* Email:

* Phone:

User Type:

* Roles

Role	Selected	Grantable
Provider Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Provider User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

* Providers:

TrainingProvider1

[Assign Providers](#)

Position Title:

Comment:

From the Password Maintenance page, select the box next to the user and select **“Reset Passwords”**. You can reset multiple users’ passwords at once by checking multiple users and selecting **“Reset Passwords”**.

User Search Results

Resetting a user’s password will also activate that user if they are currently Pending.

Select	UserName	Name	Email	Type	Status	Is Pending	Action
<input checked="" type="checkbox"/>	mlb@georgia.gov	Michael Blum	mlb@georgia.gov	Applicant	Enabled	No	Resend New User Notification
<input type="checkbox"/>	mlb@georgia.gov	Michael Blum	mlb@georgia.gov	Applicant	Enabled	No	Resend New User Notification
<input type="checkbox"/>	mlb@georgia.gov	Michael Blum	mlb@georgia.gov	Applicant	Enabled	No	Resend New User Notification
<input type="checkbox"/>	mlb@georgia.gov	Michael Blum	mlb@georgia.gov	Applicant	Enabled	No	Resend New User Notification
<input type="checkbox"/>	mlb@georgia.gov	Michael Blum	mlb@georgia.gov	Applicant	Enabled	No	Resend New User Notification

5 Total Results

Select All Send New User Email **Reset Passwords**



NOTE: Users that are Disabled will **NOT** be Enabled from this screen when you reset a password. You must enable the user from the **Admin>User Account** page.

Users can reset their own password using the **Forgot Password / Unlock** link on their login page.

Username:

Password:

[Login](#) **[Forgot Password / Unlock](#)**

Or by going to **My Account** on the **Home** page.

Help **[My Account](#)** | Logout

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User should select “**Change My Password**” and enter their previous password, enter new password, and confirm new password. Select “**Submit**”. Password Rules are on the right-hand side of this screen.

Change My Password

* Current Password:

* New Password:

* Confirm New Password:

Cancel Submit

Password Rules

- Must be 8 - 16 characters.
- One or more uppercase letters.
- One or more lowercase letters.
- One or more numbers.
- One or more special characters.
- Cannot reuse prior passwords.
- Cannot contain a '<' or '>'.

The system requires users to change their passwords **every 45 days**.