eVital:

User Enrollment Administrators Guide

New York City Department of Health and Mental Hygiene
Division of Epidemiology

Bureau of Vital Statistics



Table of Contents

1.	How to Regenerate an EVERS Migration Key	3
	1.1. The Evers Migration Key	3
	1.2. The Steps to Regenerating an EVERS Migration Key	3
2.	Creating an NYCID/eVital Profile With an Existing EVERS Profile	7
3.	Creating an NYCID/eVital Account With No Previous EVERS Profile	13
4.	Approving New User Profile Requests	21
5.	Conducting the Facial Enrollment Process	25
	5.1. Using the Department of Health's BLU Handheld Device for Facial Enrollment	27
	5.2. Setting up Your Personal Handheld Device for Facial Enrollment	30
	5.3. Completing the Facial Enrollment Photo Steps as a New User	33
	5.4. Facility Administrator Completing the Facial Enrollment Photo Steps for a Deputy Administrator and Certifiers	36
6.	Managing Facial Enrollment Approvals From Certifier Pending Queue	38
7.	How to Activate Additional EVERS Accounts	40
	7.1. Multiple EVERS Accounts and Their eVital Consolidation	40
	7.2. The Steps to Activate an EVERS Account	40
8.	Existing Users Requesting Access to a New Facility	44
9.	Modifying User Profile Roles	48
10.	Approving Facility Requests From the Preferred Queues	50

1. How to Regenerate an EVERS Migration Key

1.1. The Evers Migration Key



EVERS Migration Keys can only be generated by Facility Administrators or their deputies.

Note: Only use this section if you have an Electronic Vital Events Registration System (EVERS) profile(s) created prior to December 31, 2016. Any profile created prior to December 31, 2016, is searchable in the eVital system. However, if the EVERS profile was created after January 1, 2017, continue to the "Creating a NYCID/eVital Account With No Previous EVERS Profile" section.

- An EVERS account contains personal, facility and role information associated with an EVERS
 ID. The EVERS migration key profile information transfers from EVERS to eVital.
- Migration keys are generated by the Facility Administrator or Deputy Administrator. The migration key information is sent to the user's personal or work email address. It is important to confirm that a user's personal or work email address is a current valid email account. The user will receive two emails from either @eVital.com or @health.nyc.gov.
- If an EVERS user has not received a migration key, or if it was lost or deleted, please follow the steps below to generate and send a new migration key:

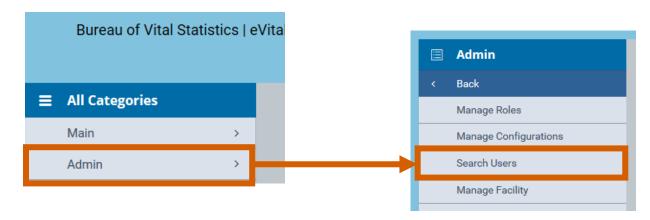
1.2. The Steps for Regenerating an EVERS Migration Key

1. From the eVital home page, click the **menu icon** (follow the steps indicated in orange in this guide).

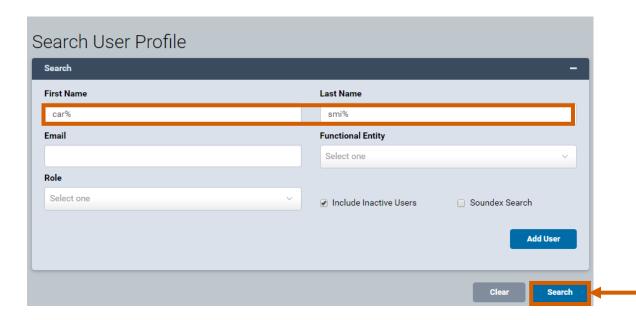


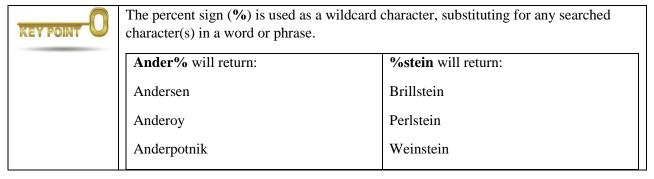
NYC DOHMH eVital Page **3** of **53**

2. Select Admin and then choose Search Users.

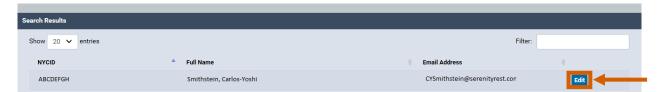


- 3. Enter the first three characters of the **First Name** followed by a percent sign (%).
- 4. Enter the first three characters of the **Last Name** followed by a percent sign (%).
- 5. Click **Search**.

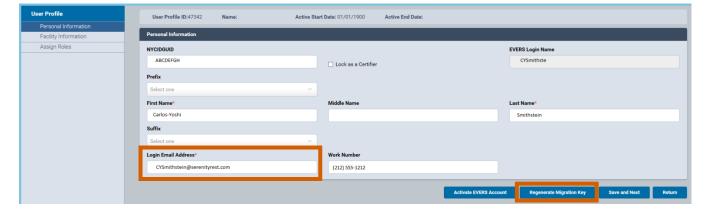




6. From the search results screen, choose the desired name and click the **Edit** button.



7. From the Personal Information screen, confirm that the **Login Email Address** is currently valid and click **Regenerate Migration Key.** *Note*: The user will receive two emails providing the migration key from either @eVital.com or @health.nyc.gov in their personal or work email inbox.



NYC DOHMH eVital Page **5** of **53**

Note: If the user has not received the migration key, inspect the spam/junk email folder and ensure that the recipient's information technology department is aware of the following:

- If all the individuals in an organization are not receiving migration keys:
 - a. Have the IT department place evital.com and health.nyc.gov on the safe domain list. This would be configured on the organization's firewall or router.
 - b. Have the IT department place the email addresses <u>administrator@evital.com</u> and <u>evitalsystem@health.nyc.gov</u> on the safe senders list. This would also be configured on the organization's firewall or router.
- If some but not all individuals in an organization receive migration keys, request that the IT department desktop support group configure the following desktop settings:
 - a. Inspect the desktop email client settings and remove evital.com and/or health.nyc.gov from any blocked domain list. The blocked domains could also reside on any antivirus program loaded on the desktop.
 - b. Inspect the desktop email client settings and remove <u>administrator@evital.com</u> and/or <u>evitalsystem@health.nyc.gov</u> from any blocked senders list. The blocked senders could also reside on antivirus programs loaded on the desktop.
 - c. Place the two domains evital.com and health.nyc.gov on the email client's safe domain list. The safe domain list can also reside in desktop antivirus applications. Be sure to check both areas.
 - d. Place the email addresses <u>administrator@evital.com</u> and <u>evitalsystem@health.nyc.gov</u> on the email client's safe senders list. The safe email sender list can also reside on desktop antivirus applications. Be sure to check both areas.

NYC DOHMH eVital Page **6** of **53**

2. Creating an NYCID/eVital Profile With an Existing EVERS Profile

1. To access the new eVital Vital Events Registration System, open an Internet Explorer browser and type **nyc.gov/evers** in the URL address bar.

- 2. From the EVERS page, scroll down to the eVital section: "Are you already enrolled as an eVital administrator? To enroll your users, please click here."
- 3. Click the displayed word **here**. This is a hyperlink that will bring you to the eVital Vital Events Registration System **Login** page.



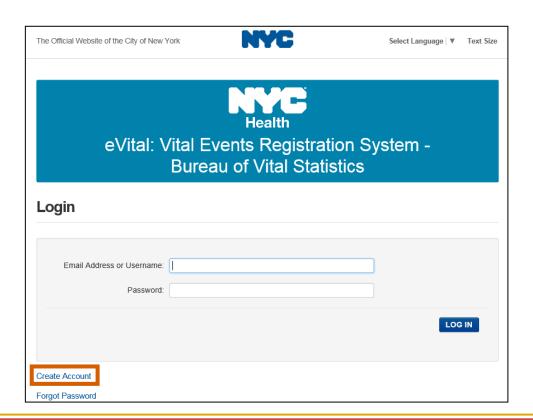
eVital

Starting October 2, the new eVital system will replace EVERS, which will shut down permanently at 2 AM on September 30.

For more information on how to use eVital and prepare for the system update, please see our eVital Information page.

Are you already enrolled as an eVital administrator? To enroll your users, please click here.

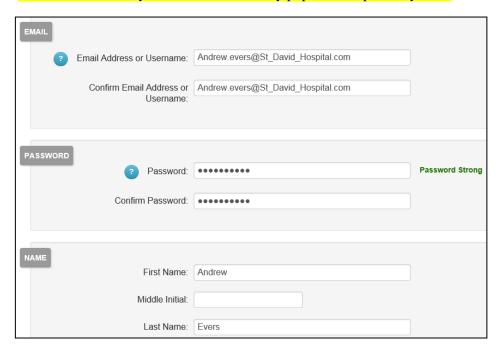
4. On the **Login** page, click **Create Account**.



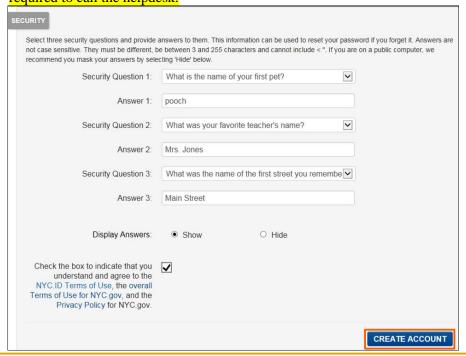
NYC DOHMH eVital Page **7** of **53**

5. On the **Create Account** screen, enter your work or personal email address and password. Passwords must include a combination of uppercase and lowercase letters, numbers and/or special characters, with at least one in each category for a strong password.

6. Enter your first name, middle initial and last name. *Note*: Do not enter a period after your middle initial as the eVital system will automatically populate the period symbol.



7. Select three security questions and enter an answer for each question. Select the check box associated with the **Terms of Use** and **Privacy Policy** and click **Create Account**. *Note*: The security questions will allow a user to reset their password in the future. Users will no longer be required to call the helpdesk.



NYC DOHMH eVital Page 8 of 53

8. When a **Confirmation Email Sent** message is displayed, close the browser tab. An email from the sender, NYC. gov, will have been sent to the user's personal or work email address (whichever was used to create the NYCID login ID/eVital account) with a verification link.

Confirmation Email Sent

Welcome! Your account was created. You cannot log in until your email address is confirmed. To confirm your email address, click on the link in the email that was sent to you. If you have not received the email, check your spam/junk folder.

9. The user will log in to the email account that was used to create the NYCID login ID/eVital account. From the email inbox, open the NYC.gov email confirmation message and select **Click this link** to verify the user's email address.

You have just created a user account with City of New York. If this was not authorized, report the incident.

Click this link to confirm your email address.

If the above link does not work, paste the following address into your browser:

 $\frac{https://nyc-stg-web.csc.nycnet/account/validateToken.htm?token=fbe3d7ef5a234ccdb04cfe5a6b48846e\&target=aHR0cHM6Ly9sb2dpbi1zdGcubnljaWQubnljbmV0L29zcHVpLw==\&emailAddress=an.drew.evers1234%40gmail.com$

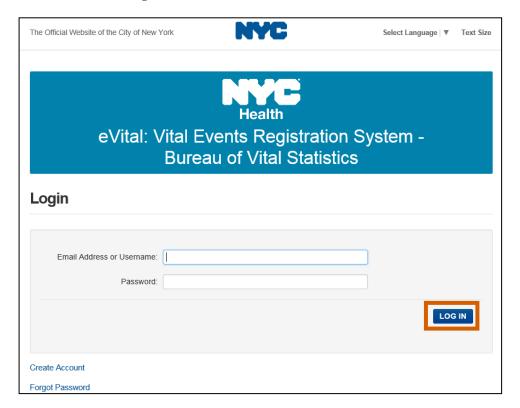
10. When the **Email Address Confirmed** screen appears, click **Continue**. Close the browser tab.

Email Address Confirmed

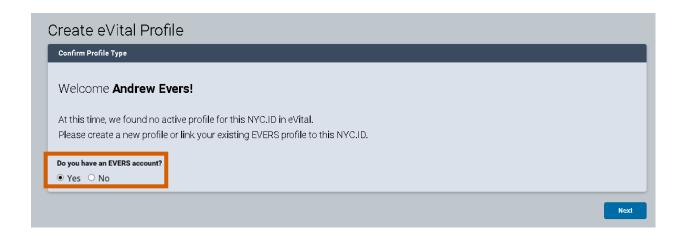
Congratulations, we successfully confirmed your email address. You may now log in.

NYC DOHMH eVital Page **9** of **53**

11. You will return to the eVital **Login** screen. Enter the **Email Address** and **Password** created earlier and click the **Log In** button.

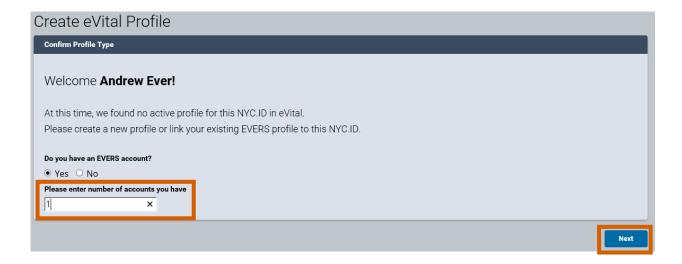


12. From the eVital Profile screen, the system will ask if an EVERS profile already exists. If you have a previous EVERS account, select **Yes.**



NYC DOHMH eVital Page **10** of **53**

13. Enter the number "1" in the field requesting the number of EVERS accounts the user currently has. Then click **Next** to migrate the account settings and roles. **Note**: Due to system functionality, enter the number "1" regardless of how many EVERS accounts the user has. Later, a System Administrator or Deputy Administrator will link the remaining EVERS accounts. See Section 7: How to Activate Additional EVERS Accounts



- 14. On the **EVERS Account Validation** page, the user will enter the EVERS Username and migration key information from the two emails received from either <u>administrator@evital.com</u> or <u>evitalsystem@health.nyc.gov.</u> *Note*: It is important that you copy and paste the migration key information instead of entering the migration data manually. After three attempts, the Facility Administrator will need to regenerate a new migration key.
- 15. Click Validate.



NYC DOHMH eVital Page **11** of **53**

16. An **Activated** ✓ message will appear to indicate the EVERS account data was successfully integrated. Click **Next**



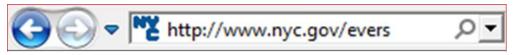
- 17. The Welcome to eVital page will appear with the user's assigned facilities and roles.
- 18. If a user's eVital account needs to be linked to multiple EVERS accounts, go to Section 7 "**How to Activate Additional EVERS Accounts**" to link the remaining EVERS accounts.
- 19. If a new facility needs to be added to a user's profile, go to Section 8 "Existing Users Requesting Access to a New Facility" to add a new facility.
- 20. Continue to Section 5 "Conducting the Facial Enrollment Process" to begin Facial Enrollment.

NYC DOHMH eVital Page 12 of 53

3. Creating an NYCID/eVital Account With No Previous EVERS Profile

Note: A migration key is not required for users with no previous EVERS profile and users who had an EVERS profile created after January 1, 2017.

- 1. To access the eVital Vital Events Registration System, open an Internet Explorer browser and type **nyc.gov/evers** in the URL address bar.
- 2. From the EVERS page, scroll down to the eVital section, "Are you an eVital administrator? To enroll your users, please click here."
- 3. Click the displayed word **here**. This is a hyperlink that will bring you to the eVital Events Registration System **Login** page.



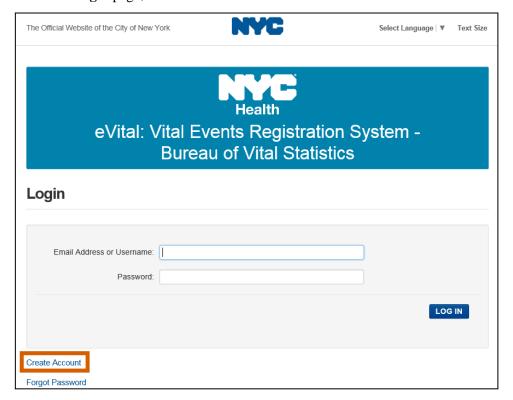
eVital

Starting October 2, the new eVital system will replace EVERS, which will shut down permanently at 2 AM on September 30.

For more information on how to use eVital and prepare for the system update, please see our eVital Information page.

Are you already enrolled as an eVital administrator? To enroll your users, please click here.

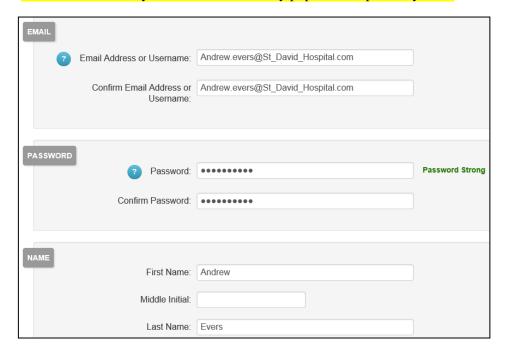
4. On the **Login** page, click **Create Account**.



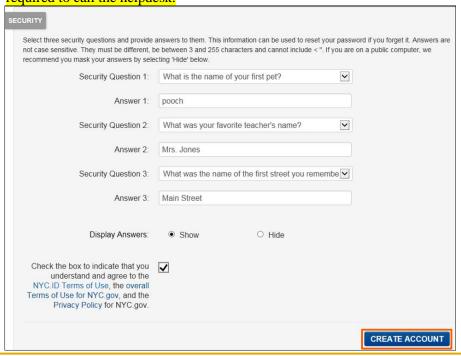
NYC DOHMH eVital Page **13** of **53**

5. On the **Create Account** screen, enter your entire work or personal email address and password. Passwords must include a combination of uppercase and lowercase letters, numbers and/or special characters with at least one in each category for a strong password.

6. Enter the first name, middle initial and last name. *Note*: Do not enter a period after your middle initial as the eVital system will automatically populate the period symbol.



7. Select three security questions and enter an answer for each question. Select the check box associated with the **Terms of Use** and **Privacy Policy** and click **Create Account**. *Note*: The security questions will allow a user to reset their password in the future. Users will no longer be required to call the helpdesk.



NYC DOHMH eVital Page **14** of **53**

8. When a **Confirmation Email Sent** message is displayed, close the browser tab. An email from the sender, NYC. gov, will be sent to the user's personal or work email address (whichever was used to create the NYCID login ID/eVital account) with a verification link.

Confirmation Email Sent

Welcome! Your account was created. You cannot log in until your email address is confirmed. To confirm your email address, click on the link in the email that was sent to you. If you have not received the email, check your spam/junk folder.

9. The user will log in to the email account that was used to create the NYCID login ID/eVital account. From the email inbox, open the NYC.GOV email confirmation message and select **Click this link** to verify the user's email address.

You have just created a user account with City of New York. If this was not authorized, report the incident.

Click this link to confirm your email address.

If the above link does not work, paste the following address into your browser:

https://nyc-stg-web.csc.nycnet/account/validateToken.htm?token=fbe3d7ef5a234ccdb04cfe5a6b48846e&target=aHR0cHM6Ly9sb2dpbi1zdGcubnljaWQubnljbmV0L29zcHVpLw==&emailAddress=an.drew.evers1234%40gmail.com

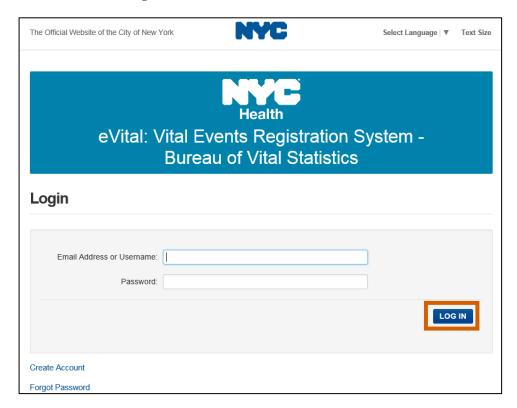
10. When the **Email Address Confirmed** screen appears, click **Continue**. Close the browser tab.

Email Address Confirmed

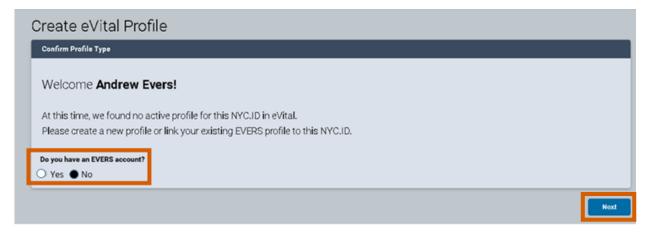
Congratulations, we successfully confirmed your email address. You may now log in.

NYC DOHMH eVital Page **15** of **53**

11. You will return to the eVital **Login** screen. Enter the **Email Address** and **Password** created earlier and click the **Log In** button.

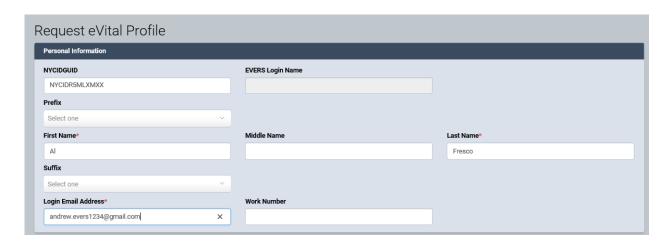


12. From the **Create eVital Profile** screen, the system will ask if an EVERS profile already exists. If you have an existing EVERS account, select **No.** Then click **Next**.

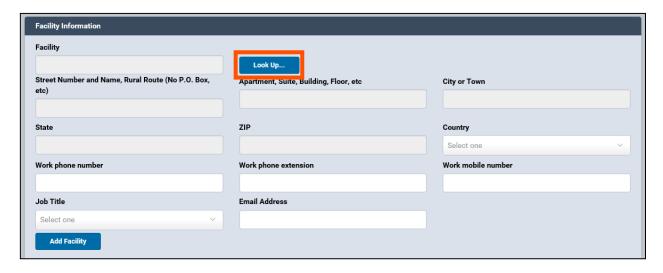


NYC DOHMH eVital Page **16** of **53**

13. From the **Request eVital Profile** page, complete the personal information section.

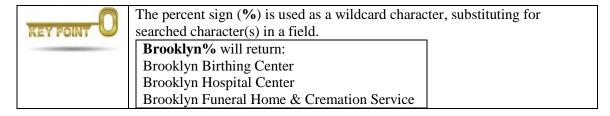


14. From the **Facility Information** page, click **Look Up...**.

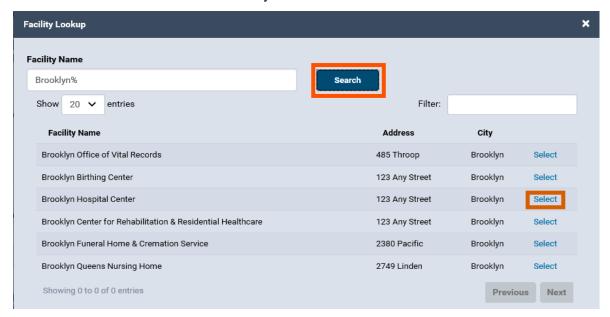


NYC DOHMH eVital Page **17** of **53**

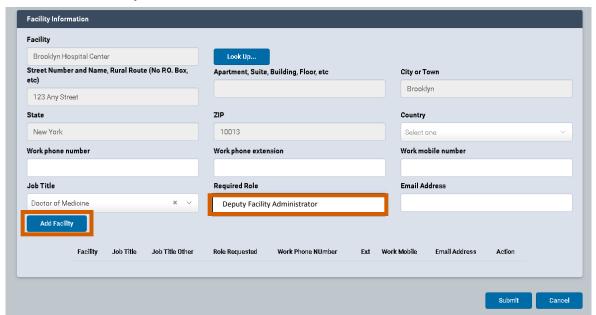
15. Enter partial facility name followed by the percent sign (%). Then click the **Search** button.



16. Click **Select** to add the desired facility.

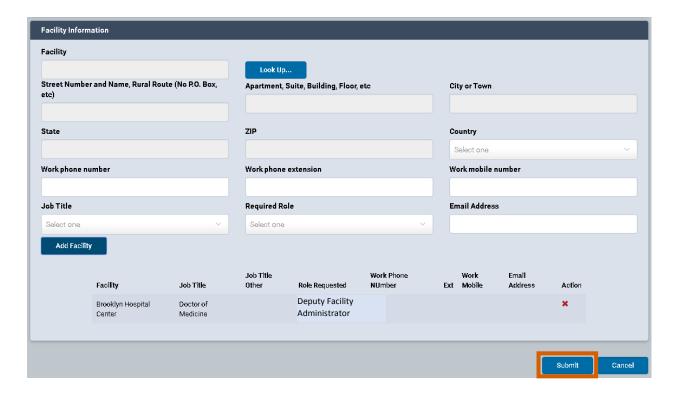


17. The facility name and address will appear in the appropriate fields. Select the **Required Role** and click **Add Facility.**



NYC DOHMH eVital Page **18** of **53**

18. The facility and role will appear on the bottom of the screen. Click the **Submit** button. Repeat steps 15-18 to add additional facilities.



19. The **User Profile Status** screen will display a "Pending" status. **Note**: The User Profile Status will remain Pending until the request is approved by the Facility Administrator or Deputy Facility Administrator.





- **Facility Administrators** are approved by the Department of Health's Bureau of Vital Statistics Constituent Services Unit.
- **Deputy Facility Administrators** are approved by the local main Facility Administrator.
- Certifiers and other Facility Users are approved by the local main Facility Administrator or Deputy Administrators.
- Deputy Facility Administrators are not able to create or approve other Administrators.

NYC DOHMH eVital Page **19** of **53**

20. Facility Administrators and Deputy Facility Administrators continue to the "Approving New User Profile Requests" section to approve the User Profile Request. *Note*: If the User Profile Request is not approved by the Facility Administrator or Deputy Facility Administrator, the user will not be able to access the eVital system.

Profile Request Status

User Profile Request Status: Pending Approval

Your user profile request is still pending with us. Please check for the email with approval decision or check back later.

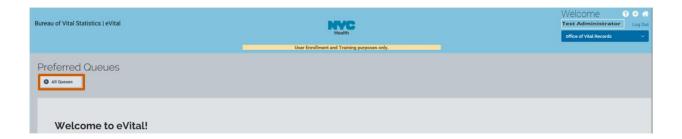
Note: If you had requested access for more than one facility, then atleast access to one facility has to be approved to successfully use eVital system.

NYC DOHMH eVital Page **20** of **53**

4. Approving New User Profile Requests

Note: A new User Profile Request must be approved by the Facility Administrator or the Deputy Administrator.

- 1. A Facility Administrator or Deputy Administrator can approve a new User Profile Request by logging in to eVital.
- 2. Under Preferred Queues, click the All Queues button.



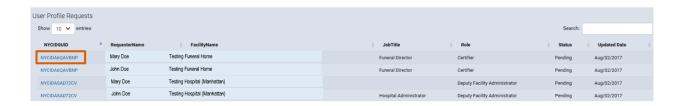
3. To view the new User Profile Requests queue in your facility, click either the blue **Authorization** banner or click the plus sign (+) at the end of the banner to expand the **Queue List**.



4. Click the **User Profile Requests** hyperlink to view the list of requesters.

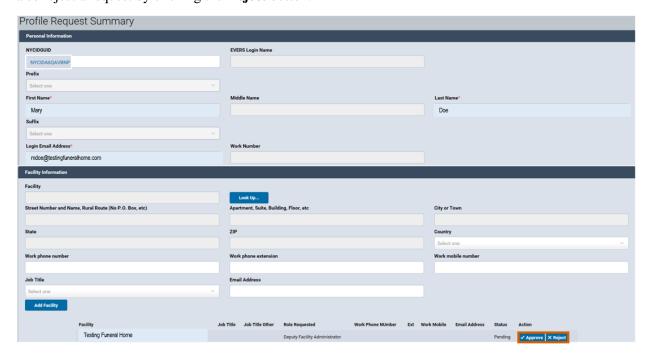


5. Click the **NYCIDGUID** hyperlink beside the requester name to identify a request, view the **Facility Name, Job Title, Role** and **Date** information. **Note:** In this section you will see all users at this facility who have pending profile requests.



NYC DOHMH eVital Page **21** of **53**

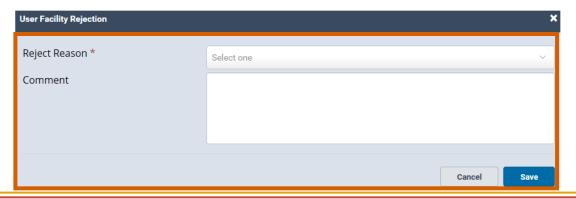
6. From the **User Profile Request Summary** page, scroll to the bottom of the screen and review the completed profile information. Then, click the **Approve** button to approve the request. You can also reject a request by clicking the **Reject** button.



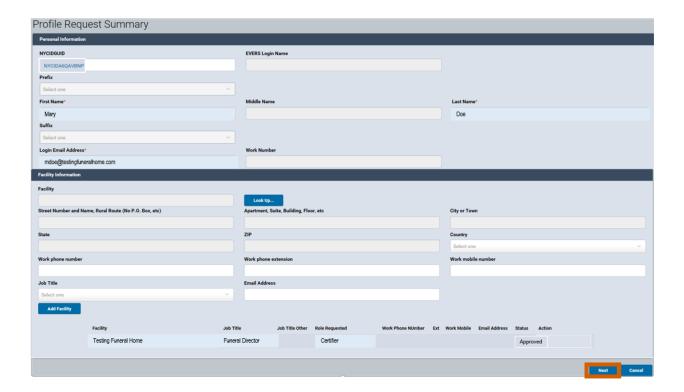
7. Click **OK** to approve the request.



8. If you click the **Reject** button, the **User Facility Rejection** screen appears. You must enter a **Reject Reason** in order to proceed. Click **Save** to store any **Comment** information.



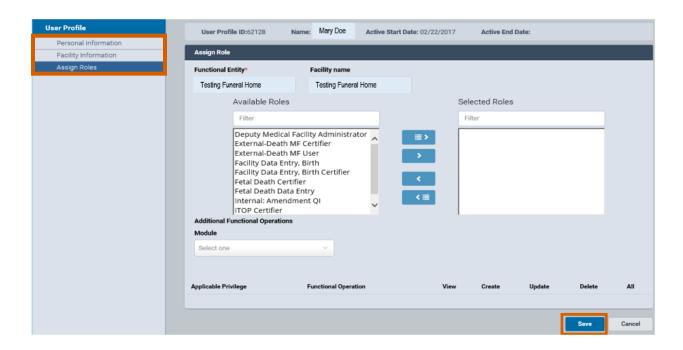
9. Click **Next** to proceed to the **Personal Information**, **Facility Information** and **Assign Roles** screens.



NYC DOHMH eVital Page **23** of **53**

10. Modify **Personal Information**, **Facility Information** and **Assign Roles** screens as needed.

11. Click **Save** to continue.

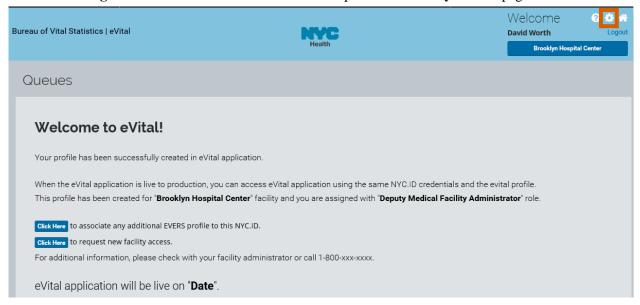


NYC DOHMH eVital Page **24** of **53**

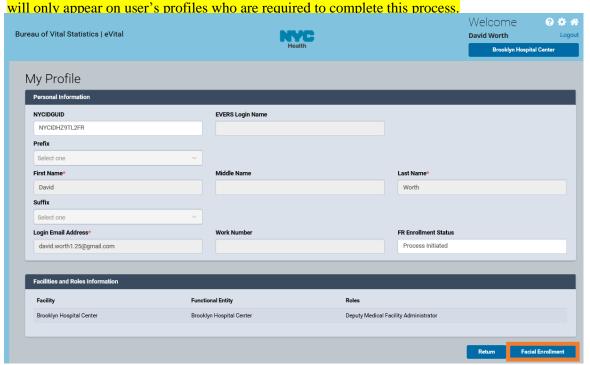
5. Conducting the Facial Enrollment Process

Note: Only Certifiers, Facility Administrators and Deputy Administrators must participate in the Facial Enrollment process. Data entry users are not required to participate in the Facial Enrollment process.

1. Click the **gear icon** on the user's dashboard to proceed to the **My Profile** page.

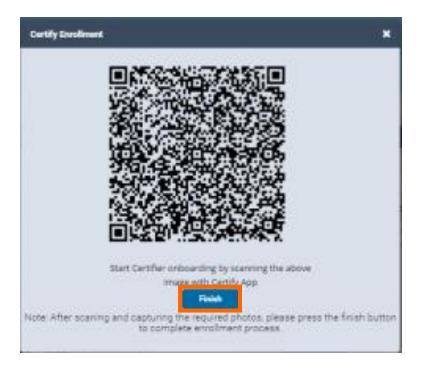


2. Click the **Facial Enrollment** button located on the bottom right hand corner of the **My Profile** page. This will generate a Quick Response (QR) code on the screen. **Note:** The **Facial Enrollment** button



NYC DOHMH eVital Page **25** of **53**

3. A QR code that is associated with the current eVital user will appear on the screen. Continue to Section 5.1, "Using the Department of Health's BLU Handheld Device for Facial Enrollment," if you have a BLU handheld device. If you wish to install the NYC eVital Certify app on your personal mobile device, go to Section 5.2, "Setting up Your Personal Handheld Device for Facial Enrollment."



NYC DOHMH eVital Page **26** of **53**

5.1. Using the Department of Health's BLU Handheld Device for Facial Enrollment



The Department of Health's BLU handheld device comes pre-installed and preconfigured with the Certify app needed for the facial recognition process.

1. Tap the **NYC Health icon**.



2. Tap the **blue QR code icon** to activate the facial recognition application camera. **Note**: A blue scan code signifies that only a single user can use the **CERTIFYME** application. A red scan code signifies the device is in Shared Mode. For more information about setting your device to Shared Mode, go to Section 5.2 "**Setting up Your Personal Handheld Device for Facial Enrollment**."



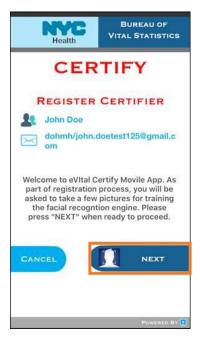
3. Hold the mobile device between 6" and 24" from the computer screen and point it at the QR code.



4. When the QR code on the computer screen is recognized by the mobile device, a notification message will appear with the enrollee's name and email address.



5. Click the **Next** button located on the bottom right hand corner of the screen. This step will begin the facial recognition process. Continue to Section 5.3, "**Completing the Facial Enrollment Photo Steps**."



NYC DOHMH eVital Page **29** of **53**

5.2. Setting up Your Personal Handheld Device for Facial Enrollment

Note: The following operating systems are supported:

- Apple Operating System IOS v8 and later
- Android Operating System v4.4 and later
- 1. Go to:
 - a. App Store for Apple devices
 - b. Play Store for Android devices
- 2. **Search** for "eVital." The NYC Health CERTIFYME application will appear. Install the application on your device.



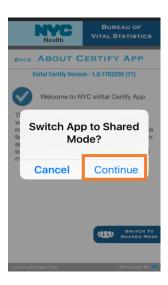
3. Open the application on your mobile device and tap the CERTIFYME About button located on the lower right-hand corner of the screen.



4. **Tap** the **Switch to Shared Mode** button located on the lower right-hand corner of the screen. *Note*: Shared Mode allows more than one user to share the Certifyme application.



5. **Tap** the **Continue** button. *Note*: the QR code will turn from blue to red when it switches to Shared Mode.



NYC DOHMH eVital Page **31** of **53**

6. **Tap** the **red QR code icon** to activate the camera within the application.



5.3. Completing Facial Enrollment for a New User



Posing instructions appear each time the CERTIFYME application accepts a photo. Red, blinking **guidance messages** appear at the bottom of the CERTIFYME app to assist users in distance and motion issues.

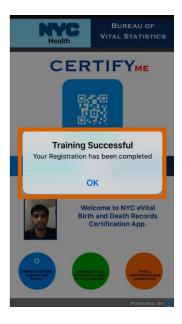
Things to Know Before you Begin:

- There are a total of 10 pictures that are required for the Facial Enrollment process.
- Align your face inside the **yellow frame**.
- Follow the **posing instructions** and **stand still** while posing for the pictures.
- Monitor the **progress counter** on the mobile device.
- Do not press any buttons on the mobile device as the facial recognition application automatically takes each picture by counting down (3, 2, 1), then advances to the next pose.
- After taking five pictures, the application will prompt you to move for different background lighting. It is imperative that you change your background lighting in order to take the next 5 pictures.
- If you see your phone's dimming light come on, tap the screen lightly and make sure the phone doesn't lock.
- If you purchase a new mobile device, you do not have to re-take your photos.

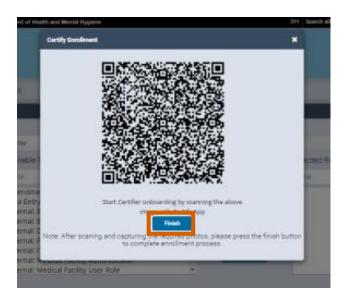


NYC DOHMH eVital Page **33** of **53**

1. When all 10 images have been taken, the **Training Successful** message will appear on the handheld device. Tap **OK** and return to the computer screen. *Note:* If you receive a message that says "Training Failed," you must retake the 10 pictures.



2. On the computer, laptop or iPad the user will click the **Finish** button on the **Certify Enrollment** QR code window.



NYC DOHMH eVital Page **34** of **53**

3. The **My Profile** screen re-appears with the **Approval Pending** message located under the **FR Enrollment Status** field. Once an Administrator or Deputy Administrator approves the 10 photos, the status will updated to "Approved." At this point, the enrollee will be granted all rights in accordance with their profile. **Note**: If the "Approval Pending" status does not appear under the FR Enrollment Status field, press F5 on the keyboard to refresh the screen.





- All eVital Administrators and Certifiers must complete the Facial Enrollment process.
- Facial recognition images for **main Facility Administrators** must be approved by the **Constituent Services Unit** at DOHMH.
- Images for **Deputy Administrators** must be approved by the **main Facility Administrator**.
- Images for **Certifiers** must be approved by the **main Facility Administrator** or **Deputy Facility Administrators**.
- One set of enrollment images can be used for one user with multiple facilities and roles.
- Facial Enrollment Pending requests awaiting approval can be accessed by clicking the All Queues button. Then selecting the Authorization blue banner.
- 4. Facility Administrators or Deputy Facility Administrators, continue to the "Managing the Facial Enrollment Approvals" section.

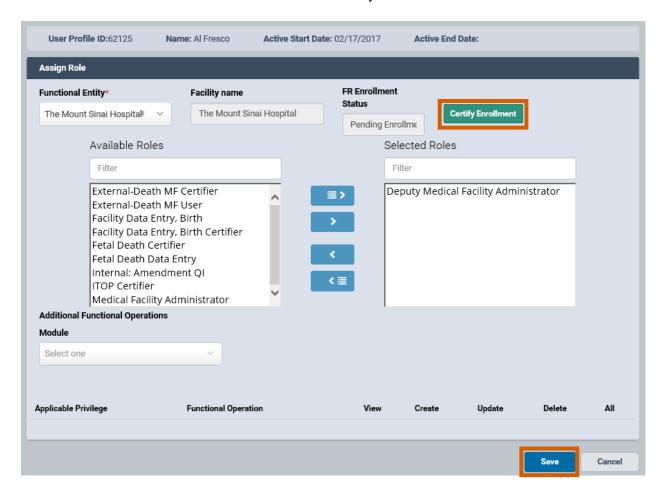
NYC DOHMH eVital Page **35** of **53**

5.4. Facility Administrator Completing the Facial Enrollment Photo Steps for a Deputy Administrator and Certifiers



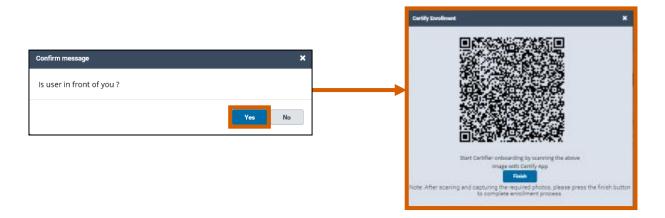
If the role selected is a Deputy Administrator or Certifier, the **Certify Enrollment** button will be displayed.

- 1. From the Deputy Administrators and Certifiers User Profile Page, go to the **Assign Role** screen.
- 2. Click the **Certify Enrollment** button to initiate the facial recognition process. *Note*: The Deputy Administrators and Certifiers must be in front of the Facility Administrator.



NYC DOHMH eVital Page **36** of **53**

3. If the user is in front of you, click **Yes** to generate a QR code.



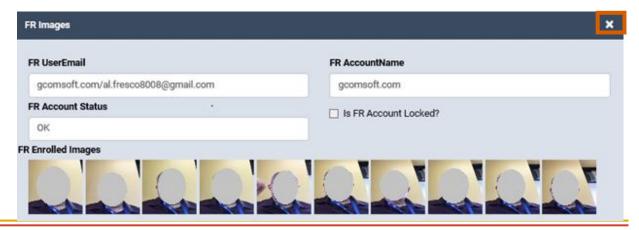
4. Continue to Section 5.1 "Using the Department of Health's BLU Handheld Device for Facial Enrollment" or if you wish to install the NYC eVital CERTIFYME app on your personal mobile device, go to Section 5.2 "Setting up Your Personal Handheld Device for Facial Enrollment."

Note: When the enrollment is done in person the Facility Administrator will not be required to approve the photos from the Certifier Pending Queue as the eVital system will automatically approve the pictures. No additional approval is required since the Facility Administrator enrolled the Deputy Administrators and Certifiers in person.

5. From the **Assign Role** screen, Current images can be viewed by clicking the **View FR Images** button.



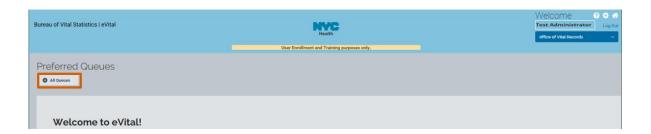
6. If the **FR Images** screen is open, click **X** to close the **FR Images** window.



NYC DOHMH eVital Page **37** of **53**

6. Managing Facial Enrollment Approvals From Certifier Pending Queue

1. When a Facility Administrator or a Deputy Administrator logs in to the eVital system, the eVital Dashboard screen appears. Under **Preferred Queues**, click the **All Queues** button.



2. Click the blue Authorization banner or the plus sign (+) to expand the Authorization Queue List.



3. **Click** the **Certifier Enrollment Pending Queue** hyperlink. The number of enrollees appear next to the queue name.



4. **Click** the enrollees' **NYCIDGUID** hyperlink to view their Facial Enrollment images.



NYC DOHMH eVital Page **38** of **53**

5. You have the option to Approve, Reject or Back out of the FR Enrolled Images pane.



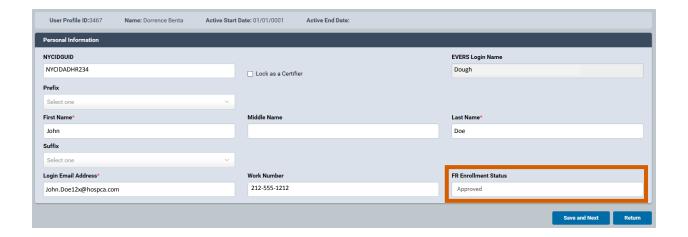
6. To approve the photos, click the **Approve** button, a Confirm Certifier Enrollment Approval message will appear, click **Yes** to approve the photos.



7. If one or more of the photos are blurry, click the **Reject** button, a Confirm Certifier Enrollment Rejection message will appear, click **Yes** to Reject the photos. *Note*: The user will have to re-take all 10 photos.



8. Once the FR images are approved, the FR Enrollment Status is updated to "Approved." The enrollee has completed the user enrollment process.



7. How to Activate Additional EVERS Accounts

7.1. Multiple EVERS Accounts and Their eVital Consolidation

An EVERS account contains personal, facility and role information associated with an EVERS ID. Users may have multiple EVERS accounts granting privileges across multiple facilities. eVital consolidates a user's multiple EVERS profiles into a single log-in ID.

After an authenticated eVital Certifier and Deputy Administrator has had Facial Enrollment images approved by an Administrator, remaining EVERS profiles for those users can be activated and transferred over to the user's eVital ID.

7.2. The Steps to Activate an EVERS Account

There are two ways that an existing user with an EVERS profile can request to have an additional EVERS accounts transferred to their eVital ID.

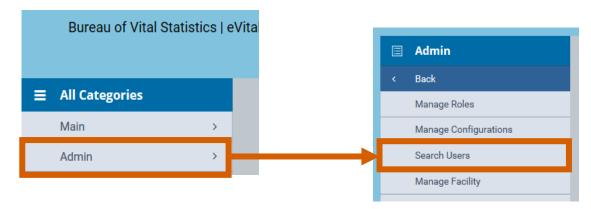
- 1. First option: Select the **Click Here** button to associate any additional EVERS profile to this NYC-ID from the **eVital Dashboard** home screen.
- 2. From the **Link Existing EVERS Profile** screen, enter the user's EVERS username and migration key, which can be obtained from the Facility Administrator. *Note*: Please refer to the "**How to Regenerate an EVERS Migration Key**" section.
- 3. Click the Validate and Link Account button.



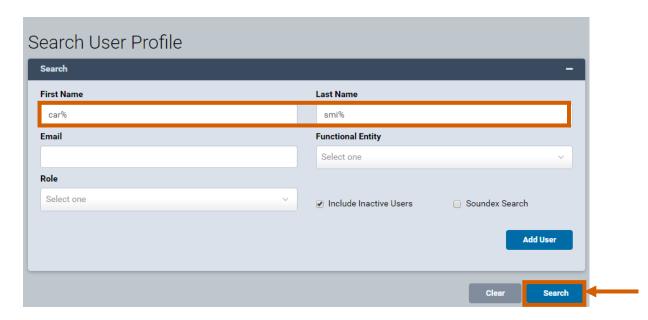
4. Second option: From the eVital Dashboard home screen, click the **menu icon**.

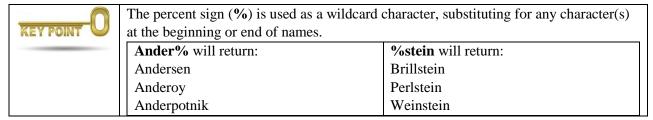


5. Choose **Admin** and then choose **Search Users**.



- 6. Enter the first three characters of the **First Name** followed by a percent sign (%).
- 7. Enter the first three characters of the **Last Name** followed by a percent sign (%).
- 8. Click Search.





9. From the search results window, **copy the NYCID** next to the user's full name.

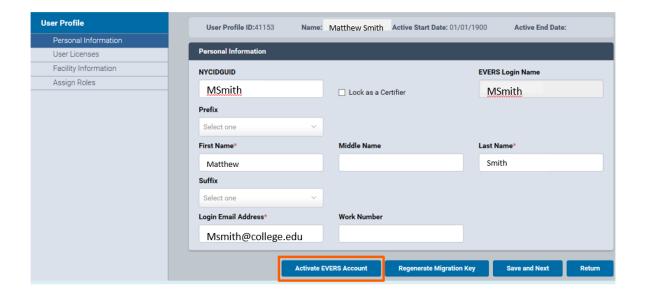
NYC DOHMH eVital Page **41** of **53**



10. Click the **Edit** button.



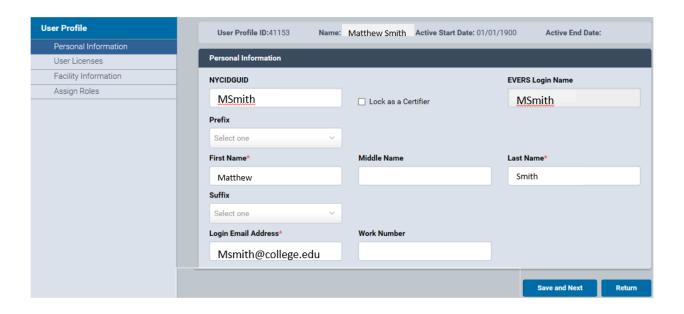
11. From the User Profile window, click the Activate EVERS Account button.



12. From the **Link EVERS Profile** screen, paste the **NYCID** in the **NYCIDGUID** field and click the **Activate** button.



13. The options to "Activate your EVERS Account" and "Regenerate your Migration Key" are no longer available.

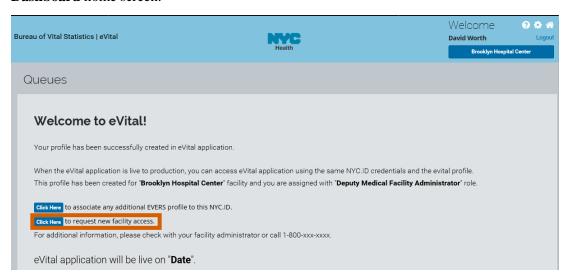


NYC DOHMH eVital Page **43** of **53**

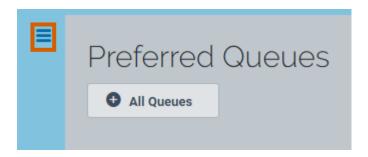
8. Existing Users Requesting Access to a New Facility

1. There are two ways that an existing user with an EVERS profile can request access to a new facility.

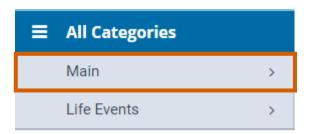
2. First option: Select the **Click Here** button to request New Facility Access from **the eVital Dashboard** home screen.



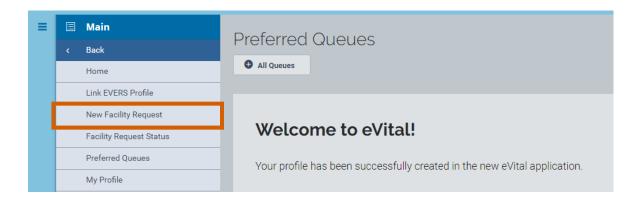
1. Second option: Click the **menu icon** from the **Dashboard** home screen.



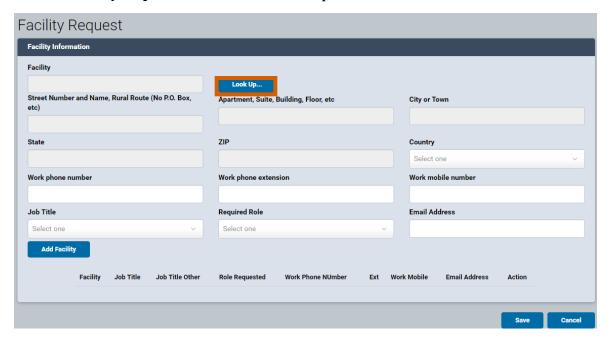
2. Select Main.



3. Select New Facility Request.



4. From the **Facility Request** screen, click the **Look Up...** button.



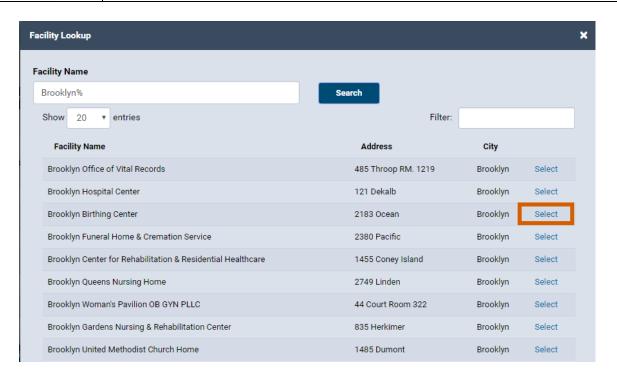
NYC DOHMH eVital Page **45** of **53**

5. Enter the partial facility name followed by the percent sign (%) and click **Search**.

6. Click the **Select** hyperlink.



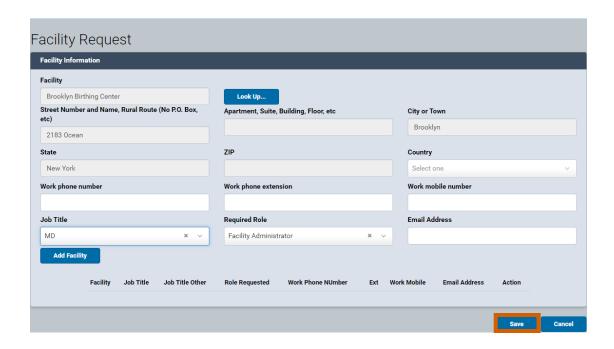
The percent sign (%) is used as a wildcard character, substituting for any additional character(s) in a word or phrase.



7. The facility name and address will appear in the corresponding fields. Select the **Required Role** and click the **Add Facility** button. The facility name will appear at the bottom of the screen. Repeat steps 4-7 to add additional facilities.

NYC DOHMH eVital Page **46** of **53**

8. Click **Save** when all required facilities have been added.



9. The User Profile Status screen will display a listing of the pending facility request statuses.

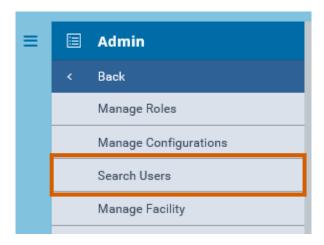


- 10. The Facility status will remain "Pending" until the request is approved by the Facility Administrator or Deputy Facility Administrator.
- 11. Facility Administrators or Deputy Facility Administrators continue to the "Approving New User Facility Requests" section.

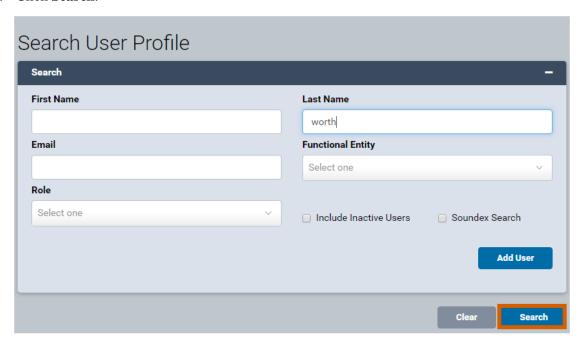


9. Modifying User Profile Roles

1. From the Admin menu, select **Search Users**.



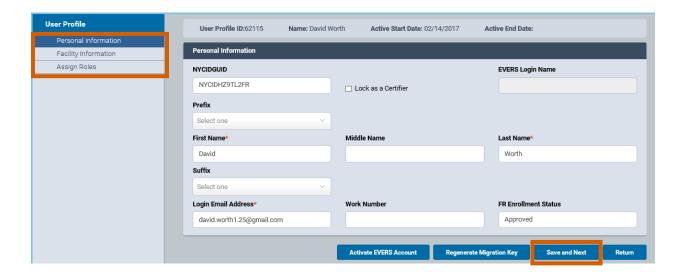
- 2. Enter search criteria into any of the four fields.
- 3. Click **Search**.



4. From the **Search Results** screen, click the **Edit** button located beside the user record you want to modify.



5. Select any of the screens listed under the User Profile (**Personal Information**, **Facility Information** and **Assign Roles**) and make any necessary changes. Click **Save and Next** to save the changes.

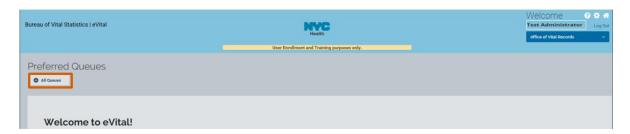


NYC DOHMH eVital Page **49** of **53**

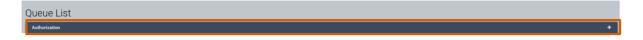
10. Approving Facility Requests From the Preferred Queues

User Facility requests can be approved by the Facility Administrator and Deputy Administrators. Requests are listed in three queues.

- The **All Queues** button will display all request types hyperlinks in your facility.
- The User Facility queue will contain new facility requests.
- The **User Profile** queue will contain new user profile or account requests.
- The **Certifier Enrollment Pending** queue will contain new Facial Enrollments.
- 1. Under Preferred Queues, click the All Queues button.



2. Click the **blue Authorization** banner or the plus sign (+) to expand the Authorization Queue List.



3. Select the request type hyperlink based on the type of request you are approving.

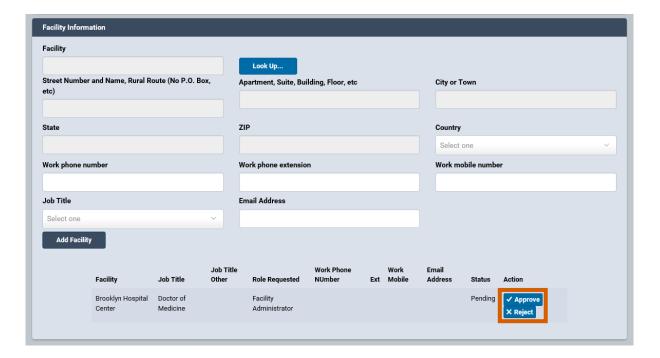


NYC DOHMH eVital Page **50** of **53**

4. Click the **NYCIDGUID** hyperlink beside the requestor name. You can also identify a request by the **Facility Name**, **Job Title** and **Date** information.

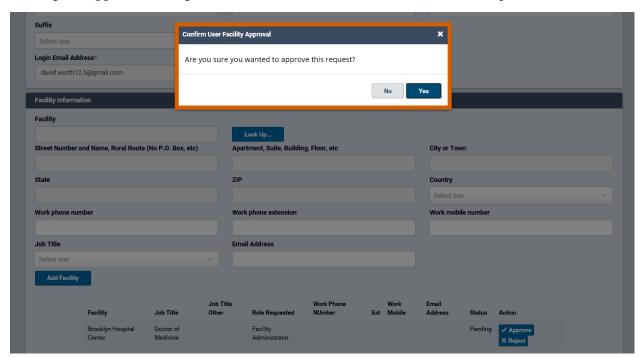


5. For the **User Facility** or **User Profile** queues, scroll to the bottom of the screen and click the **Approve** button to approve the request or the **Reject** button to reject the request.



NYC DOHMH eVital Page **51** of **53**

6. Clicking the **Approve** button generates a Yes/No confirmation. Click **Yes** or **No** to proceed.



7. Clicking the **Reject** button requires a **Reject Reason** in order to proceed. Click **Save** to store any **Comment** information.

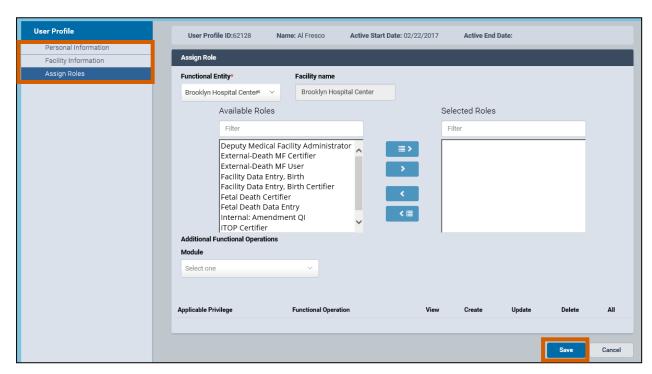


NYC DOHMH eVital Page **52** of **53**

8. Click **Next** to proceed to the **Personal Information**, **Facility Information** and **Assign Roles** screens.



9. Modify **Personal Information, Facility Information** and **Assign Roles** screens as needed. Click **Save** to continue.



NYC DOHMH eVital Page **53** of **53**