

## Volunteer Management Setup

### Before You Start

Log into <https://edocs.hospicetools.com/>

Click MORE in the header bar and click USER MANAGEMENT

**Only Users listed as: EDOCS USER MANAGER in the field SYSTEM ACCESS can add / edit users**

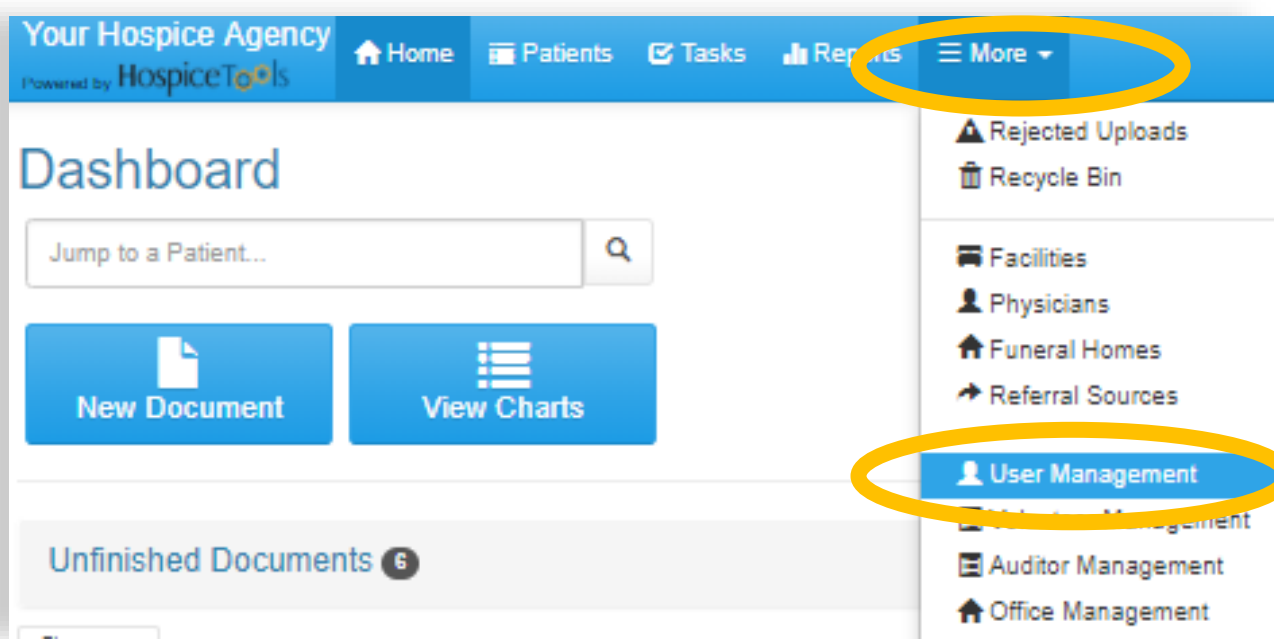
1

### How to Create a Volunteer Manager

Log in to Hospice Tools eDocs  
<https://edocs.hospicetools.com>

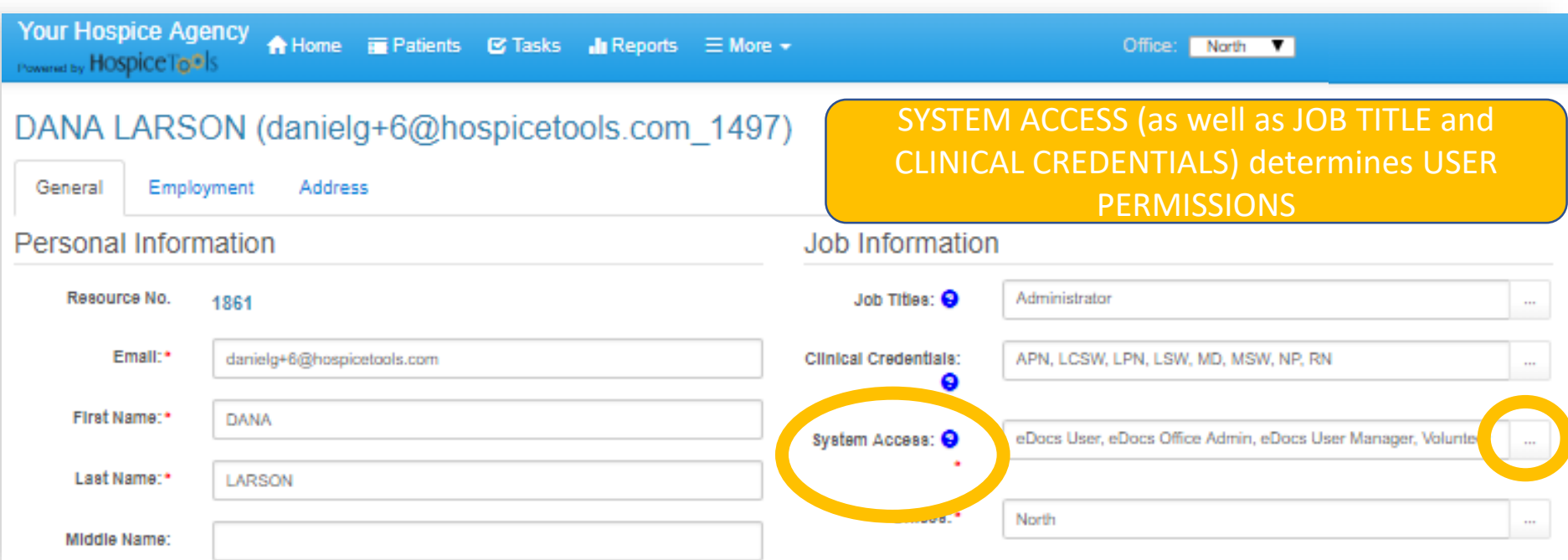
Click **MORE** in the top bar and  
Navigate to **USER  
MANAGEMENT**

From the list of **USERS** click  
**EDIT** to change/add  
permissions to an existing user  
or click **+NEW USER** to setup a  
new user



2

### Assign the Right System Access



3

### Select User / Volunteer Management

All users in the system should be marked, at minimum, eDocs User.

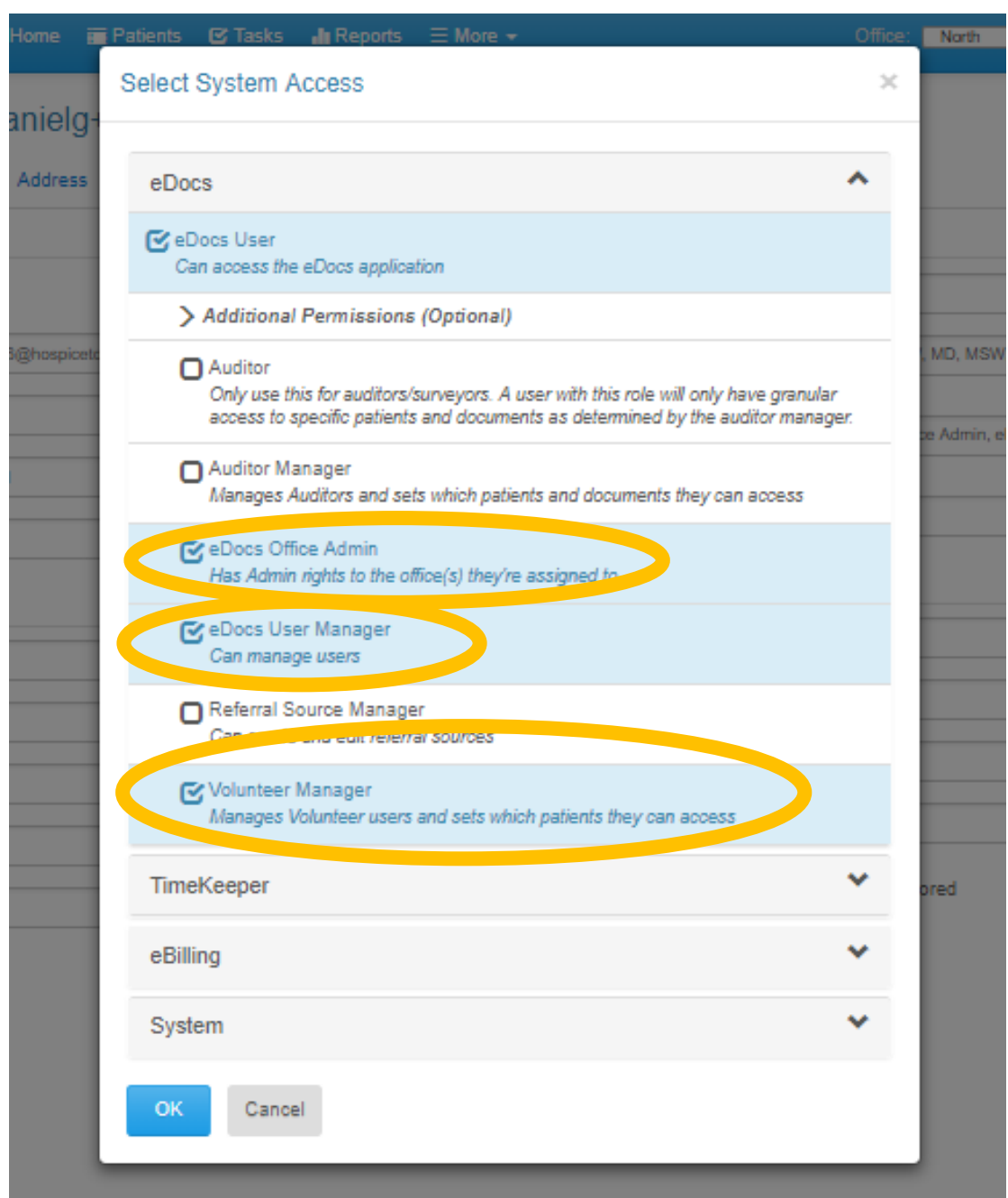
For a user to be able to create/edit other users, in this case, to set up new volunteers as users in the system, their **SYSTEM ACCESS** should have either **eDOCS USER MANAGER** or **eDOCS OFFICE ADMIN** selected.

For a user to be able to assign permissions /patients to volunteers, make sure **VOLUNTEER MANAGER** is selected.

When system access settings are selected, click OK, then UPDATE and user's permissions will be saved.

This user will now be able to:

- Create a new user/volunteer in the system
- Manage the volunteer's access to patients & documentation



### Watch the Movie (must have internet connection)

