Overview

As you know, we are still in the conversion stages of our journey, extracting your data from your legacy software. One of the items that we are converting is your User List, which is all your users and providers that were in your old system.

We've loaded your user list into our ***Champion*** app so you can log in, verify their data, and update or complete any missing details that are necessary.

Once your user list is completed, our conversion team can move onto their next steps: pre-loading this data into your new CareStack environment (this saves you from having to create your users from scratch when it's time to go-live).

When you are granted access, you'll receive an email from Champion confirming that your account has been created. Follow the link to set up your password, then use these credentials to login at: **champion.carestack.com**.

Getting Acquainted

Once you've created your password and logged in, you'll see your ***Workspace*** where all your work competing your user list will be done:

- In the top-right corner below your name, you'll notice your **Deadline** Date.
  This is the ideal time to have this task done by, but if you are not able to complete it by then, Champion will send you a gentle reminder every two days that your User List is still pending.
- Next to this is the button to view your current **Status**.
  Click on it and we can see an overview of our progress on this task. If you have multiple accounts or locations that are in conversion, you'll see those listed here, along with the total number of users that were found in the old system (you'll also see the number of users whose details still need to be verified, are in *Draft* status, or have already been completed and verified).
- If you'd like to enlist some help from one of your team members, click **Users** on the left side panel to grant them access to Champion. This will be especially useful since you can split this up by location and complete this task much faster.

Enlisting Help

To create a Champion login for your team member, click **Add User** at the top-right of the screen:

- **Profile**: Choose *User* if this person will only be working on the user list. Or, choose *Admin* to give them ability to add other team members here.
- **User Details**: Enter their first and last name, and email address.
- **Conversions**: You can choose one of your conversions in progress to assign this user to it, or leave this blank.
- When you are done, hit **Add User** again, and they, too, will receive an email from Champion to activate their login.

Please Note: Any information entered here will not be converted into your production environment and is solely for the benefit of granting access to help you complete your user list.

Completing Your User List

Back in your main Workspace, there are only two steps you'll need to do to complete this task:

1. Verify or complete the details for all users and providers on the grid.
2. Hit **Complete** when you are done.

Filters

- If you're splitting this task up by **Location**, you can filter the list by selecting your location at the top.
- If your Inactive Users do not need to be converted, checkmark **Exclude Inactive Users** to hide them from the grid.
- If some of the users have already been completed, you can checkmark **Exclude Completed** to hide those, too.

To complete this task, you can cherry-pick your individual users and complete their details, hitting **Save** when you are done. Or, click **Quick Fill** to complete all your users one after another, hitting **Save and Next** each time as you make your way through your User List.

If there are details that are not available to you right now, you can save the user in a **Draft** status to complete their details later (in *Quick Fill* mode, clicking *Draft and Next* will save the changes you've made, then Champion will put their file aside so you can continue on with the remaining).

As you verify your users' data, enter the details as you deem necessary, but only the fields marked with a red asterisk are mandatory.

- You'll verify their **First and Last Name**, **Username**, and **Email Address**. (this email address is where they will receive the link to setup their CareStack account).

  Alternatively, you can choose "*Do Not Wish to Provide*" -- this option is also useful for any providers that have left the practice and you no longer have or need that information.

- Enter the user's address if you wish, then select the **Default Location** they will be using in CareStack.

  Otherwise, if this user does not need to be converted, you can simply mark them as **Inactive** and they will not be carried over into your production environment.

The providers' basic information is the same as the regular users: you'll verify their name, username, email address, and their default location.

- You'll also need to map their provider data to the data fields in CareStack -- for instance, if your provider is a dentist in the ortho specialty, you'll select *Dentist* for the provider type, then *Orthodontics* for the specialty (if the user is not actually a provider, you can select *Non-Provider* and they will be converted into a regular user).

- You can even edit the provider's **Short Name** to something easily recognizable as this will appear throughout CareStack's modules.

- Enter the provider's tax and license information as needed, or again, you can select "*Do Not Wish to Provide*".

When you have finished with your user list, hit **Complete**. You'll need to select the **Default Provider** for your practice first, but be sure to hit *Complete* to submit your work.

Our team will receive a notification letting us know that your user list has been completed. When our data analysts have finished their conversion requirements, we'll move on to the next steps of the process: uploading the data into your Sandbox testing environment.

As for your user list, that's it! That's all there is to it. So, when you're ready, log-in to ***champion.carestack.com*** to get started.