



# **Permissions Manager User's Guide**

Release 1.15

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## Introduction

Permissions Manager is a new functionality that makes it simpler and easier to manage user permissions for Mayo Clinic Laboratories across all your registered sites.

Select users at your site, called Client Administrators (CAs), manage these permissions across all sites to which the CAs have access. The Permissions Manager functionality gives CAs the flexibility to update permissions and make them effective immediately for any registered staff member, expediting user access and ultimately giving you a better overall client experience.

CAs can use Permissions Manager to:

- Add users to an account they have access to.
- Add or remove permissions, managing access to features for their users.
- Remove users from that account.

Permissions Manager now includes inactive accounts. Inactive accounts are generally no longer used for orders and results, but they may remain accessible for billing purposes to enable access to invoices.

## Access

To receive CA access to Permissions Manager, work with your Regional Service Representative, Regional Service Specialist, or Lab Resource Coordinator; or contact [Customer Service](#).

**Note:** Acceptable browsers include Chrome, Edge, Firefox, and Safari.

## Logging into Permissions Manager

To access Permissions Manager once you have been granted CA access:

1. On [MayoClinicLabs.com](https://www.mayocliniclabs.com), at top right, click **My Dashboard**.



If you have not already logged in, the login window appears.

2. Enter your **Professional Username** (email address) and **Password**.

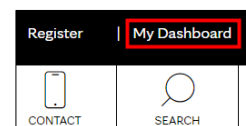
**Notes:**

- Passwords are case sensitive.
- To help ensure you type your password correctly, you can click the **SHOW** link at the right end of the **Password** field. Your password becomes fully visible, and the link text changes to **HIDE**.

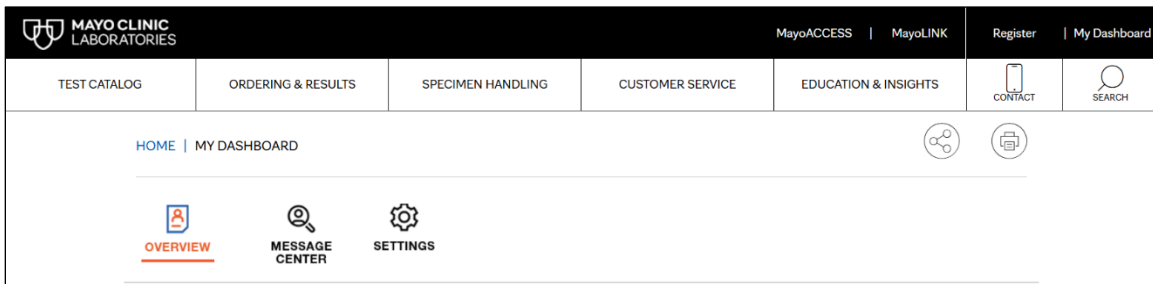
To hide your password again, click the **HIDE** link. Your password is represented again by a series of dots, and the link text reverts to **SHOW**.

3. Click the **Log in** button.

4. Once you have logged in, at top right, click **My Dashboard** (right).



Your **Dashboard** appears.



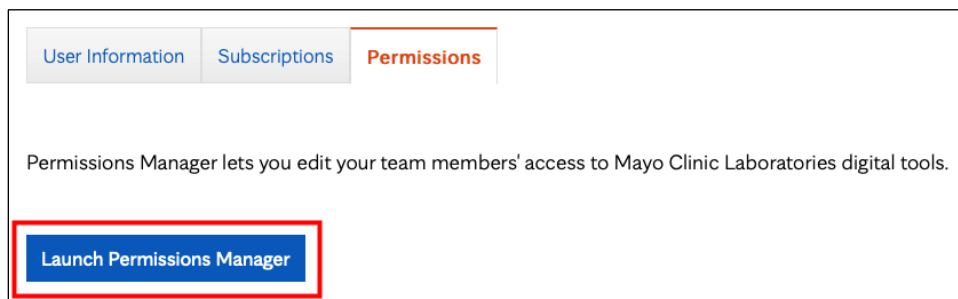
5. Click the **SETTINGS** icon (right).



The **SETTINGS** landing page appears, with the **User Information** tab selected by default.



6. Click the **Permissions** tab.



7. Click the **Launch Permissions Manager** button.

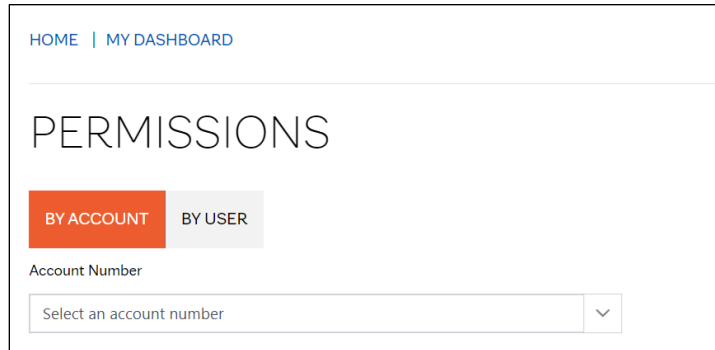


## Selecting accounts

In Permissions Manager, you can make changes for only one Mayo Clinic Laboratories account at a time.

## First login

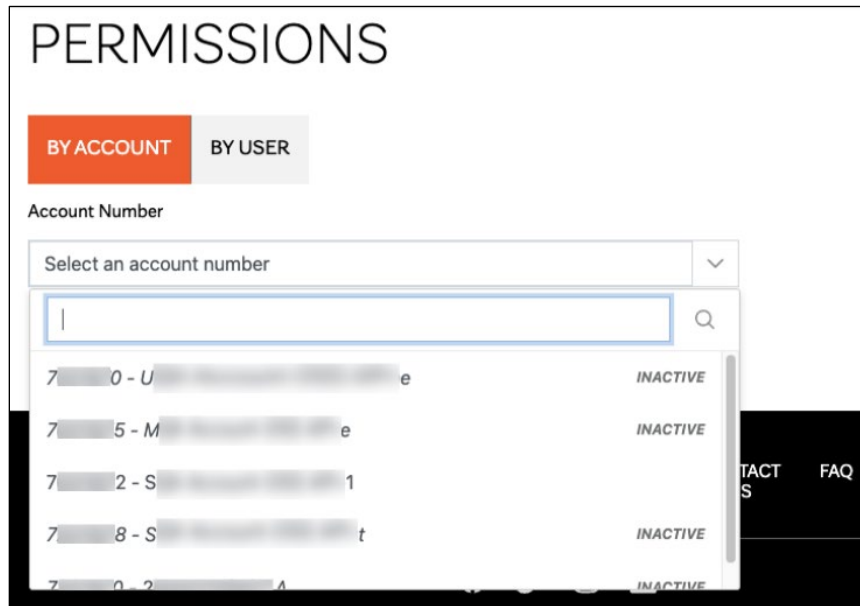
If this is your first time logging in to Permissions Manager and you have multiple accounts, you will be asked to select one account only.



If you have access to multiple accounts:

1. Do one of the following:
  - Click the **Account Number** drop-down arrow.

A list of accounts to which you have access appears, specifying both the account numbers and names. Inactive accounts are in *italics*, and the word **INACTIVE** appears to the right of the name.



Select the desired account.

Once an account is selected, its name and number appear in the **Account Number** field.

- In the **Account Number** field, begin to type any part of either an account number or name, and then select it from the autopopulated list below.

Once you have selected the desired account, click on the screen anywhere outside of the **Account Number** field.

The full **PERMISSIONS** landing page appears. (If you have access to only one account, it appears as soon as you log in.)

HOME | MY DASHBOARD ?

# PERMISSIONS

BY ACCOUNT
BY USER

Account Number

7 2 - S 1 7 2 - S ...

**ACCOUNT** Active

EDIT
ADD REGISTERED USER
REGISTER NEW USER

STATUS KEY

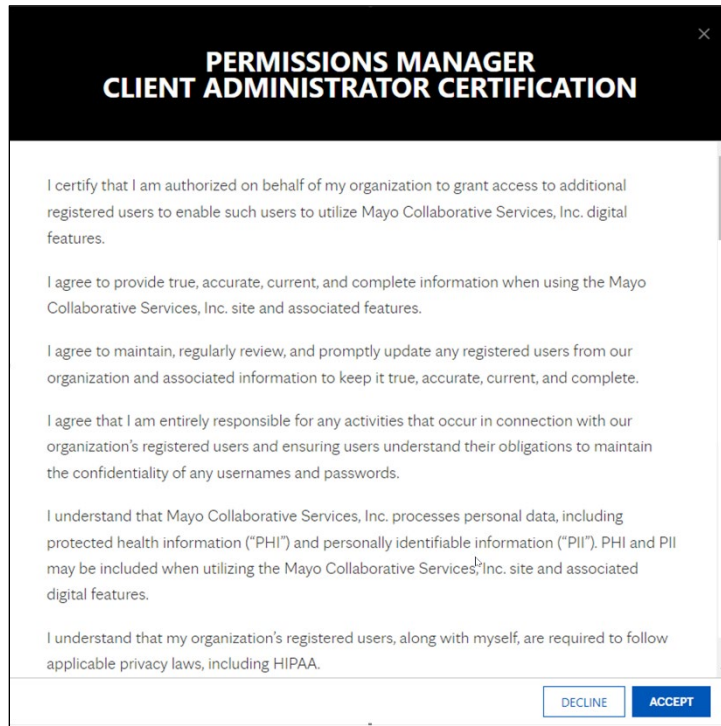
- Ⓜ Signed on within 90 days
- Ⓜ No sign on within 90 days
- ! Incomplete registration

Only Display Active Users

Export to Excel
Export to PDF

	Name	Contact	Permissions	
<input type="checkbox"/>			Any	
<input type="checkbox"/>	<span style="color: red;">Ⓜ</span>		Activity Metrics - Access, Email Notifications Results - View, Invoi...	REMOVE
<input type="checkbox"/>	<span style="color: red;">Ⓜ</span>		Message Center Access, Message Center Account Preferences, Te...	REMOVE
<input type="checkbox"/>	<span style="color: green;">Ⓜ</span>		Email Notifications Results - View, Notification Rules Access: Last ...	REMOVE
<input type="checkbox"/>	<span style="color: red;">Ⓜ</span>		Email Notifications Results - View, Message Center Access, Messa...	REMOVE
<input type="checkbox"/>	<span style="color: red;">Ⓜ</span>		Message Center Access	REMOVE
<input type="checkbox"/>	<span style="color: red;">Ⓜ</span>		Email Notifications Results - View, Notification Rules Access	REMOVE
<input type="checkbox"/>	<span style="color: red;">Ⓜ</span>		Activity Metrics - Access	REMOVE
<input type="checkbox"/>	<span style="color: green;">Ⓜ</span>		Activity Metrics - Access, Daily Charge Reports - Access, Daily Ch...	REMOVE
<input type="checkbox"/>	<span style="color: orange;">!</span>		Activity Metrics - Access	REMOVE
<input type="checkbox"/>	<span style="color: red;">Ⓜ</span>		Message Center Access	REMOVE

On your first login to Permissions Manager, the first time you attempt to save changes you have made, the following disclaimer pop-up appears, displaying the terms and conditions of use.

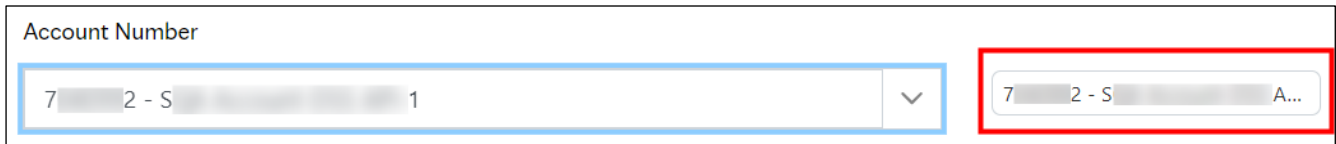



Click the **ACCEPT** button. 

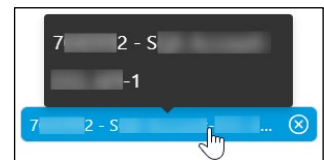
**Notes:**

- If you do not click the **ACCEPT** button, you will be unable to save your changes.
- Once you click the button, you are signed up to receive an email twice a year reminding you to keep your users' permissions current.
- On May 1 and November 1 of each year, you will receive an email notification reminding you to keep permissions current in the Permissions Manager application.

To the right of the **Account Number** field, a rectangular tile for the selected account appears, displaying the number and as much of the name as possible, followed by an ellipsis (...) if the name is long.

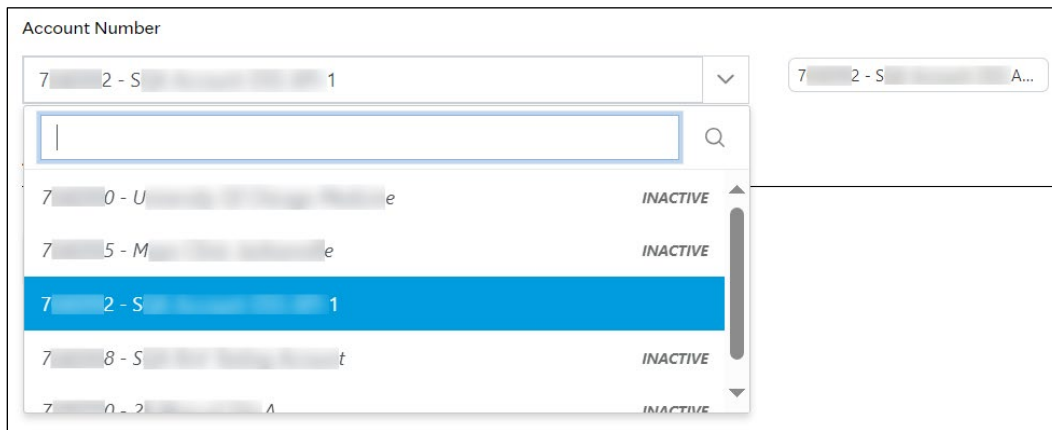


 **Tip:** Hover over the account tile, which will turn **blue**, to bring up a tooltip displaying the complete account name and number (right).





To change your account selection, select a different account in the **Account Number** drop-down menu.



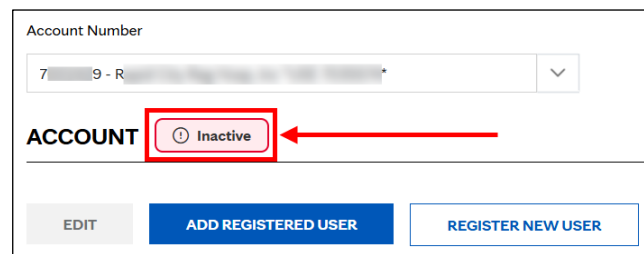
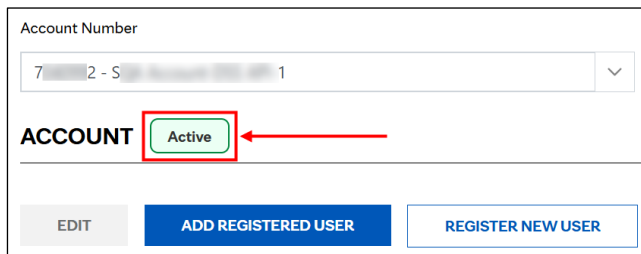
### Subsequent login

If this is not your first time logging in to Permissions Manager, the **Account Number** field displays the account that was selected when you logged out of your last session.

## Account and user Login Status

Permissions Manager now displays each user’s **Login Status**. This can help you find and remove users who are no longer working in the selected account, find those who may be locked out of [MayoClinicLabs.com](http://MayoClinicLabs.com) due to inactivity, and identify those who have not finished registering on the website.




At top left of the landing page, to the right of the word **ACCOUNT**, Permissions Manager indicates whether the account is **Active** (below, left) or **Inactive** (below, right).







<input type="checkbox"/>		updatesonly, ordersplatformfbionly
<input type="checkbox"/>		updateEmailone, Ordersplatform
<input type="checkbox"/>		uionly, ordersplatformfbionly
<input type="checkbox"/>		Transactional1, Orders
<input type="checkbox"/>		Testing (QA) Commercial


In the User List, the second column displays icons indicating each user’s **Login Status** in Permissions Manager (left).

At top right of the User List, the **STATUS KEY** provides brief definitions of the three user statuses (right). The table below expands on these definitions and provides resolutions where needed.


STATUS KEY	
	Signed on within 90 days
	No sign on within 90 days
	Incomplete registration

Icon	Login Status	Details
	<b>Signed on within 90 days</b>	The user is currently active in Permissions Manager.
	<b>No sign on within 90 days</b>	The user has not recently logged on and may be having trouble logging in. If they no longer need access to this account, you can remove the user's association with it. See <a href="#">Removing a user from an account</a> . If the user still needs to login, the login screen on <a href="#">MayoClinicLabs.com</a> will direct them in resetting their password.
	<b>Incomplete Registration</b>	<p>This user has begun the registration process but has not logged in to <a href="#">MayoClinicLabs.com</a>. They should check their email account for their welcome email with the subject header "Mayo Clinic Laboratories Access is Approved," and then click the link in the body of the email to login and complete their registration.</p> <div data-bbox="618 1012 1338 1738" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>[EXTERNAL] Fwd: Mayo Clinic Laboratories Access is Approved MML Testing &lt;mmlwebtest@gmail.com&gt;</p> <div style="text-align: center;">  </div> <p><b>**DO NOT REPLY DIRECTLY TO THIS EMAIL**</b></p> <p>You have taken the first steps in registering for the Mayo Clinic Laboratories website and establishing a business relationship with us.</p> <p>To complete the process, click the following link or copy and paste it into your browser:</p> <p><a href="https://signup.mayoclinic.org/invite/?applicationID=...">https://signup.mayoclinic.org/invite/?applicationID=...</a></p> <p>If you need further assistance, please contact <a href="#">Customer Service</a>.</p> <p>Thank you,</p> <p>Mayo Clinic Laboratories</p> <p><small>This message was sent as an automatic response to your recent activity with Mayo Clinic. Please do not respond to this message as it was sent from an unmonitored email address that cannot accept replies.</small></p> <p><small>© 2023 Mayo Foundation for Medical Education and Research. All rights reserved.</small></p> </div>

Hover over an icon to bring up a tooltip with more information on the user's status (right).


update

Days since last login: 78









Clicking the down-arrow  to the right of the **Permissions** column expands the table row to display the user's phone number in the **Contact** column, as well as any information that does not fit on the row when it is collapsed.

<input type="checkbox"/>			Email:  Work: +1- 	Email Notifications Results - View: Last Accessed Date 7/12/2024 Message Center Access: Last Accessed Date 6/29/2024 Message Center Account Preferences Notification Rules Access: Last Accessed Date 6/12/2024 Permissions - Client Administrator Access: Last Accessed Date 9/12/2024	 <a href="#">REMOVE</a>
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**Note: Last Accessed Date** information does not appear in the **Permissions** column for users who have not logged in since before 9/12/2024.

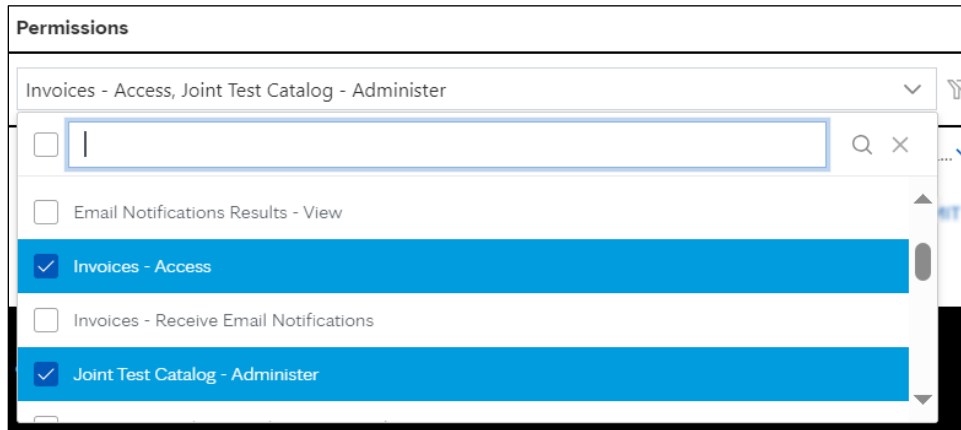
Enter search terms into the free-text search fields over the **Name** and **Contact** columns to narrow down the User List by those parameters.

Name
<input type="text" value="Orders"/>
AccountPreferences, Orders
Basic, Orders
IncompleteRegistration, Orders
MayoLinkMessageCenterpermissionsloginuser, O...
MultipleAccountsMultiplePermissions, Orders
NAtermsnotaccepted, orders
nonadmin, ordersplatformfbionly
NonAdminpermissionswrite, Orders
NonAdminpermissionswriteFive, Orders
NonAdminpermissionswriteFour, Orders
NonAdminpermissionswriteOne, Orders


Contact
<input type="text" value="gmail"/>
 @gmail.com
 @gmail.com
 @gmail.com
 @gmail.com
 @gmail.com
 @gmail.com
 @gma...
 @gmail.com
 @gmail.com
 @gmail.com
 @gmail.com

## Adding a user

You can also use the **Permissions** column drop-down menu to filter that column by the permission(s) whose check boxes you select.



**Note:** The **Permissions** filter displays only those permissions that have already been granted to users included in the User List.

To clear all check boxes, click the **Clear Filter** icon  at upper right of the drop-down menu.

If you need help resolving login issues, contact [Customer Service](#).

## Adding a user

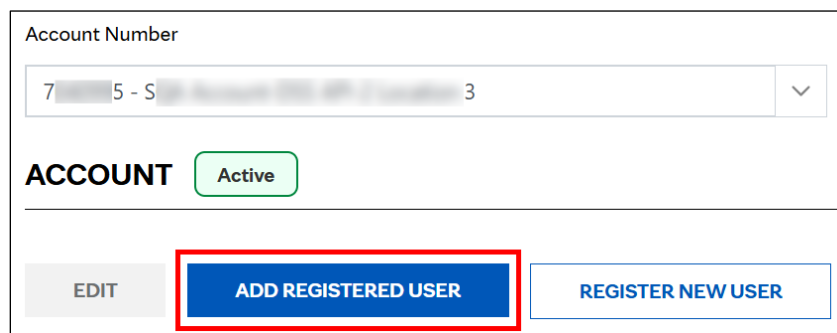
In Permissions Manager, you can add a user to an account on either of the tabs: **BY ACCOUNT**, which is the default, or **BY USER**. On the **BY ACCOUNT** tab, you can add either a registered or an unregistered user.

**Important:** It is not recommended that you add permissions to inactive accounts. You can edit permissions in inactive accounts to provide access to invoices or older data. You can also remove unused permissions. However, adding access to other features in inactive accounts is not recommended.

### Adding a registered user to an account from the BY ACCOUNT tab

To add a registered user to the selected account(s) from the **BY ACCOUNT** tab:

1. Click the **ADD REGISTERED USER** button. 

A screenshot of the account selection form. At the top is a text input field labeled 'Account Number' containing '7 5 - S' and a dropdown arrow. Below this is a green pill-shaped button labeled 'Active'. At the bottom, there are three buttons: 'EDIT' (grey), 'ADD REGISTERED USER' (blue, highlighted with a red border), and 'REGISTER NEW USER' (white with blue border).

The **ADD REGISTERED USER TO ACCOUNT** dialog box appears.

- In the search field, begin to enter the name or email address of the desired user.

**Note:** The user must be registered on [MayoClinicLabs.com](https://www.mayocliniclabs.com) and associated with an account you administer.

As soon as two characters are entered, Permissions Manager begins a predictive search and returns a list of results.

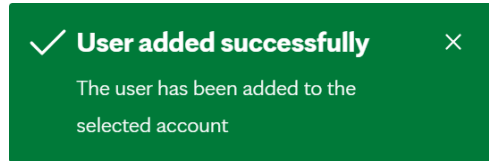
**Note:** If you enter a string of characters that can be found in only one user's name or email address, Permissions Manager brings that user up without requiring any selections.

- Select the desired user's name.
- At bottom right, click the **SUBMIT** button. (To cancel the addition of the new user, click the **Cancel** button.)

The new user is added to the User List on the **PERMISSIONS** landing page. To grant the user permissions, see [Editing existing users' permissions](#) below.

**Note:** Permissions are not automatically added when new users are added to an account. The CA must grant each new user the appropriate permissions.

You are returned to the **PERMISSIONS** landing page. The **User(s) added successfully** pop-up (right) appears at top right.



## Adding an unregistered user to an account from the **BY ACCOUNT** tab

To add an unregistered user to the selected account(s) from the **BY ACCOUNT** tab:

1. Click the **REGISTER NEW USER** button. 


The **REGISTER NEW USER TO ACCOUNT** dialog box appears.

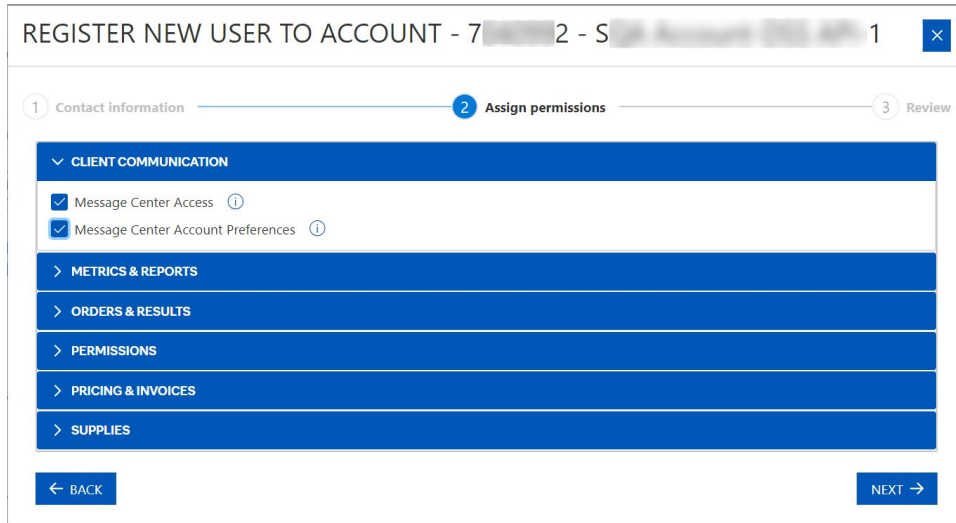
2. On the **1: Contact Information** screen, enter the user's **First Name**, **Last Name**, and **Email Address**.

**Note:** Permissions Manager checks to ensure that the email address is formatted correctly, but it does not check to ensure that the address is valid.


When all three fields are complete, the **NEXT** button  appears at bottom right.

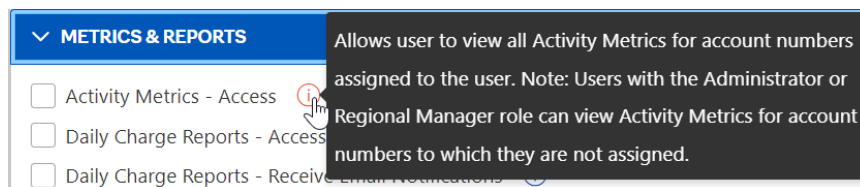
3. Click the **NEXT** button.


4. On the **2: Assign permissions** screen, click the right-arrow icon  at the left of each section to expand it. Check the boxes  as needed to choose permissions for the user.



### Notes:

- Click the **Information** icon  to the right of each permission name to bring up a tooltip with a description of that permission.



- You do not need to assign the user any permissions at this step. Assignments can be made later, once you have registered and added the user and they have logged in to [MayoClinicLabs.com](https://www.mayocliniclabs.com).
5. When done, click the **NEXT** button. 

To return to the previous screen, click the **BACK** button. 

6. On the **3: Review** screen, review your selections.

To return to previous screens to make changes, click the **BACK** button.

**Note:** You can also remove permissions from the **3: Review** screen by clicking the circled **X** at the end of the permission tile. As you hover over the tile, it turns light blue (right).



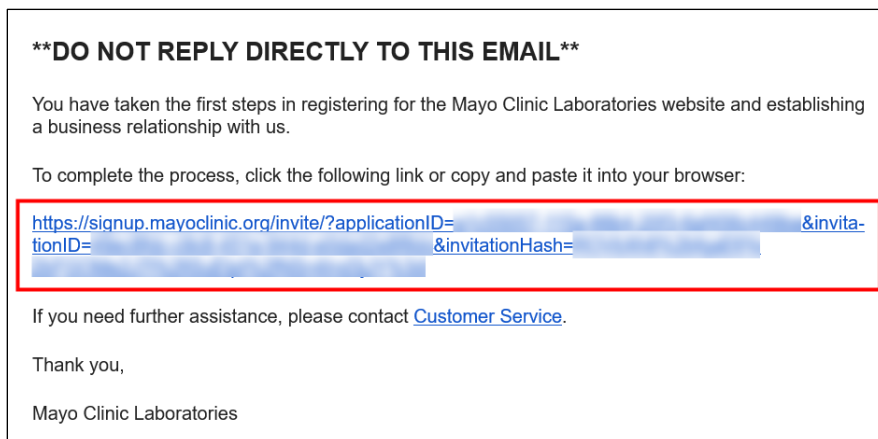
7. When done, click the **SUBMIT** button.

You are returned to the **PERMISSIONS** landing page. The **ADD NEW USER TO ACCOUNT** pop-up (right) appears at top right, informing you that the user has been successfully created in the Mayo Clinic Laboratories system.

**✓ ADD NEW USER TO ACCOUNT** ✕

The user has been successfully created. The user should check their inbox for an email from Mayo Clinic Laboratories, click the link to create their User Name and Password, and then login to MCL.com to complete their registration.

The user should check their inbox for an invitation email, click the link (highlighted below) to create a login on [MayoClinicLabs.com](https://www.mayocliniclabs.com), and then login to the website to complete their registration.






**Notes:**

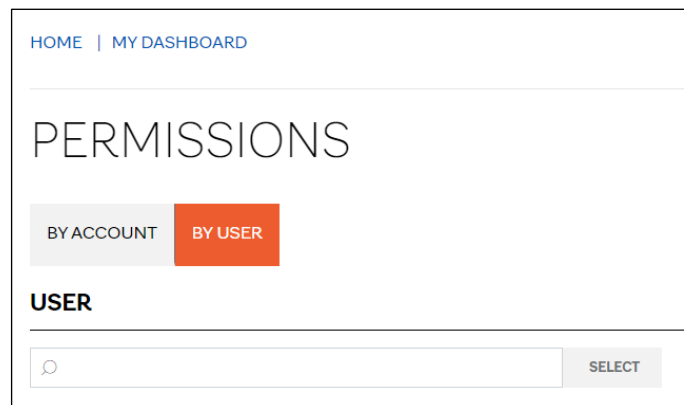
- The **ADD NEW USER TO ACCOUNT** pop-up remains on the landing page until you click the **X** in its top-right corner to close it.
- The invitation email is valid for ten (10) days from delivery.
- After logging in, the user may wish to go to **My Dashboard > SETTINGS > Subscriptions** to review and edit their **Test updates/Email frequency** options.

**Adding a user to an account from the BY USER tab**

To add the user to a new account from the **BY USER** tab:

1. Click the **BY USER** tab (right). 
2. In the **USER** search field, begin to enter the name or email address of the desired user.

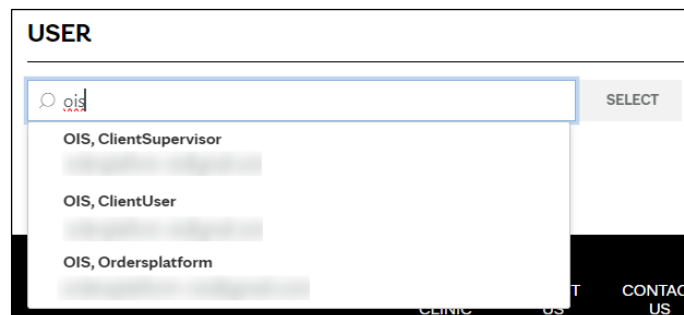
**Note:** The user must be registered on [MayoClinicLabs.com](https://www.mayocliniclabs.com) and already have access to an account that you are able to administer. If you cannot add a user to the desired account, contact [Customer Service](#).



As soon as two characters are entered, Permissions Manager begins a predictive search and returns a list of results (right).

3. Select the desired user from the list.

**Note:** If you enter a string of characters that can be found in only one user's name or email address into the **USER** text field, Permissions Manager brings you directly to that individual's **USER** page without requiring any selections.



The **USER** page for that user appears.

HOME | MY DASHBOARD ?

## PERMISSIONS

BY ACCOUNT
BY USER

### USER

**Name** OIS, Ordersplatform  
**Email** [redacted]@[redacted]  
**Work Phone** +1-507-000-0000  
**Cell Phone**  
**Login Status** ● Active  
[Change User](#)

Show Inactive Accounts

SAVE CHANGES

ADD ACCOUNT      C7 [redacted] 2 S [redacted] S... : S C7 [redacted] 3 S [redacted] S... :

---

#### Client Communication

Message Center Access ⓘ <small>Last accessed 1/12/25</small>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Message Center Account Preferences ⓘ	<input type="checkbox"/>	<input type="checkbox"/>

---

#### Metrics & Reports

Activity Metrics - Access ⓘ	<input type="checkbox"/>	<input type="checkbox"/>
Daily Charge Reports - Access ⓘ	<input type="checkbox"/>	<input type="checkbox"/>
Daily Charge Reports - Receive Email Notifications ⓘ	<input type="checkbox"/>	<input type="checkbox"/>
Reportable Disease Reports - View and Receive Notifications ⓘ	<input type="checkbox"/>	<input type="checkbox"/>
Tests Not Performed - Access ⓘ	<input type="checkbox"/>	<input type="checkbox"/>
Tests Not Performed - Receive Email Notifications ⓘ	<input type="checkbox"/>	<input type="checkbox"/>

---

#### Orders & Results

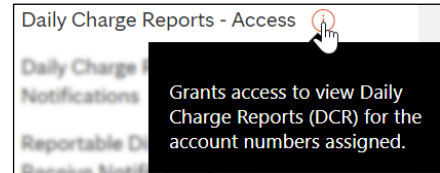
Email Notifications Results - View ⓘ	<input type="checkbox"/>	<input type="checkbox"/>
MayoLINK - Access ⓘ	<input type="checkbox"/>	<input type="checkbox"/>
Notification Rules Access ⓘ	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Permissions**

**Notes:**

- **Last accessed** information may not appear in the **Permissions** column for permissions that the user has not accessed since before 9/12/2024.

- Click the **Information** icon ⓘ to the right of a permission to view a tooltip explaining that permission (right).



4. At top left, click the **ADD ACCOUNT** button. ADD ACCOUNT

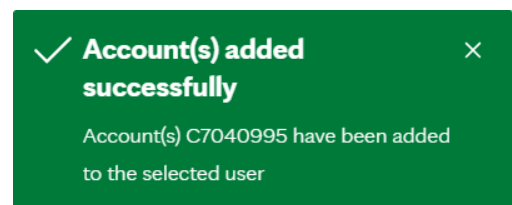
The **ADD ACCOUNT** dialog box appears (left).

5. Check the check box of each account to which you want to add the user (right).
6. At bottom right of the dialog box, click the **SUBMIT** button. SUBMIT

Once you have made one or more changes, the **SAVE CHANGES** button SAVE CHANGES at the top of the **USER** page becomes active (left).

7. Click the button to save your changes.

You are returned to the **PERMISSIONS** landing page. The **Account(s) added successfully** pop-up (right) appears at top right.



## Editing existing users' permissions

### Editing permissions by account

To change the permissions of one user or of multiple users already associated with an account:

1. On the landing page, on the **BY ACCOUNT** tab (default), select the user(s) whose permissions you want to change.
  - To select an individual user, check the box  to the left of their name in the User List.

BY ACCOUNT BY USER

Account Number  
7 2 - S 1 7040992 - SQA Account-DSS A...

**ACCOUNT** Active

EDIT ADD REGISTERED USER REGISTER NEW USER

STATUS KEY  
 Signed on within 90 days  
 No sign on within 90 days  
 Incomplete registration

Only Display Active Users

Export to Excel Export to PDF

	Name	Contact	Permissions	
<input type="checkbox"/>	nonadmin		Any	
<input type="checkbox"/>	nonadmin, ordersplatform...		Message Center Access	REMOVE
<input checked="" type="checkbox"/>	NonAdminpermissionswri...		Message Center Access, Message Center Account Prefer...	REMOVE
<input type="checkbox"/>	NonAdminpermissionswri...		Message Center Access, Permissions - Client Administra...	REMOVE

- To select multiple users, check their boxes.
- You can also select all users at once. At top left of the User List, at far left of the [free-text search field](#) row, check the box.

	Name	Contact	Permissions
<input checked="" type="checkbox"/>			Any
<input checked="" type="checkbox"/>	NonAdminpermissionswrite, Orders		Permiss
<input checked="" type="checkbox"/>	NonAdminpermissionswriteFive, Or...		Message
<input checked="" type="checkbox"/>	NonAdminpermissionswriteFour, Or...		Message

To deselect all users again, uncheck the box.

Once you have selected one or more checkboxes, the **EDIT** button **EDIT** below the word **ACCOUNT** becomes active (right).

2. Click the **EDIT** button.

**ACCOUNT** Active

**EDIT** ADD REGISTER

The **EDIT PERMISSIONS** page appears.

HOME | MY DASHBOARD ?

## PERMISSIONS

Account Number  
7-2-S-1

SAVE CHANGES

S... O... n... e... O... e...

---

**Client Communication**

Message Center Access <span style="font-size: 0.8em;">(i)</span>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Message Center Account Preferences <span style="font-size: 0.8em;">(i)</span>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Metrics & Reports**

Activity Metrics - Access <span style="font-size: 0.8em;">(i)</span>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Daily Charge Reports - Access <span style="font-size: 0.8em;">(i)</span>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Daily Charge Reports - Receive Email Notifications <span style="font-size: 0.8em;">(i)</span>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reportable Disease Reports - View and Receive Notifications <span style="font-size: 0.8em;">(i)</span>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tests Not Performed - Access <span style="font-size: 0.8em;">(i)</span>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Tests Not Performed - Receive Email Notifications <span style="font-size: 0.8em;">(i)</span>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Orders & Results**

Email Notifications Results - View <span style="font-size: 0.8em;">(i)</span>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MayoLINK - Access <span style="font-size: 0.8em;">(i)</span>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notification Rules Access <span style="font-size: 0.8em;">(i)</span>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Permissions**

Permissions - Client Administrator Access <span style="font-size: 0.8em;">(i)</span>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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**Pricing & Invoices**

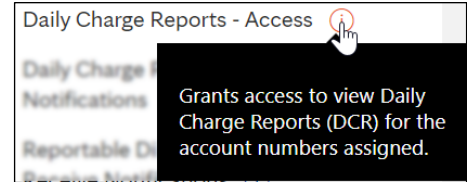
Invoices - Access <span style="font-size: 0.8em;">(i)</span>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Invoices - Receive Email Notifications <span style="font-size: 0.8em;">(i)</span>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test Prices - View <span style="font-size: 0.8em;">(i)</span>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Supplies**

Supply Catalog - Access <span style="font-size: 0.8em;">(i)</span>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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On this page, each user's permissions are displayed in a column, with the user's name and email address as the column header. A checked check box  indicates that the corresponding permission has been enabled for the user.

- Click the **Information** icon ⓘ to the right of a permission name to view a tooltip explaining that permission (right).




If you checked the boxes for multiple users in the User List on the **PERMISSIONS** landing page, the **EDIT PERMISSIONS** page displays a column for each of those users.

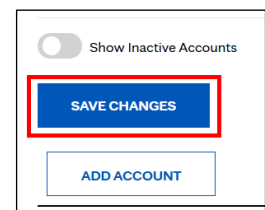
	S...	n...	e...
<b>Client Communication</b>			
Message Center Access ⓘ	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Message Center Account Preferences ⓘ	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Metrics &amp; Reports</b>			
Activity Metrics - Access ⓘ	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Daily Charge Reports - Access ⓘ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Daily Charge Reports - Receive Email Notifications ⓘ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reportable Disease Reports - View and...			

3. Check or uncheck permissions check boxes as needed for each user.

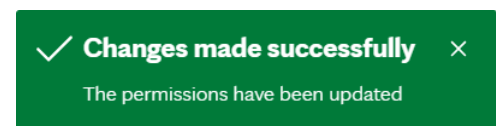
**Note:** Permissions for MayoLINK and Message Center require account configuration prior to usage. They will not appear in Permissions Manager until account configuration is complete and a Mayo representative has assigned you these permissions, after which the permissions will be available for you to assign to team members. If you have any questions about these permissions, contact [Customer Service](#).

Once you have made one or more changes, the **SAVE CHANGES** button  below the user information becomes active (right).

4. Click the button to save your changes.



You are returned to the **PERMISSIONS** landing page. The **Changes made successfully** pop-up (right) appears at top right.

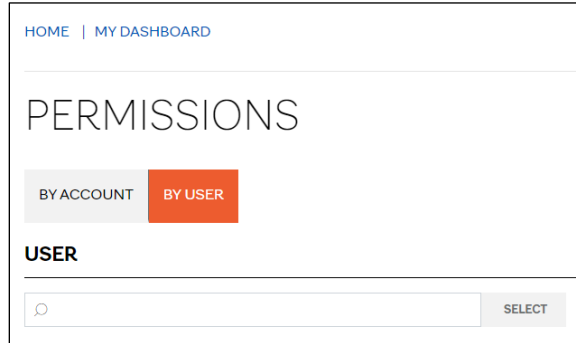


If you wish to cancel your changes on the **EDIT PERMISSIONS** page and return to the **PERMISSIONS** landing page, click the **BACK** button in your web browser.

## Editing permissions by user

To change the permissions of a single user across all accounts to which that user has access:

1. On the landing page, click the **BY USER** tab. 



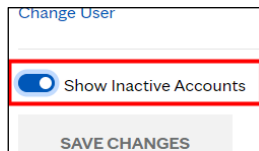
2. Find the user by following [steps 2 and 3](#) under [Adding a user to an account from the BY USER tab](#).


At the top of the [USER page for that user](#), the user's **Name**, contact information, and **Login Status** (right) are listed. If




**Login Status** is either **Active** or **Inactive**, Permissions Manager indicates the number of days since their last login.

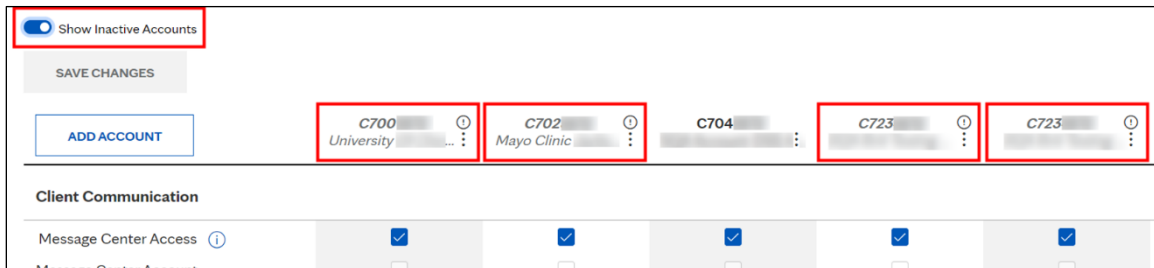
Below, you can click the **Change User** link  to return to the [BY USER search field](#).



The **Show Inactive Accounts** slider (left) is toggled off by default. Slide it to the right  to toggle it on.

Each account to which the user has access is represented by a column of permissions check boxes. Each column header displays the account number and name.

If the **Show Inactive Accounts** slider is toggled on, columns for inactive accounts to which the user has access appear. Their numbers and names are *italicized*, and a warning icon  appears to the right of the account number.



3. Check or uncheck the permissions check boxes as needed for the user.

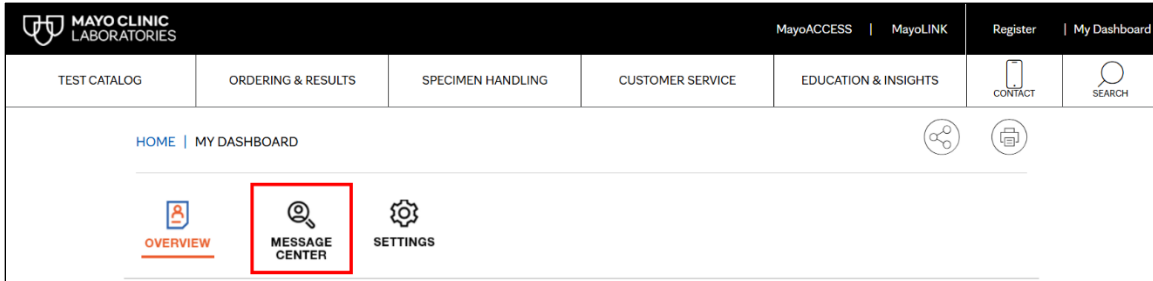
**Note:** Permissions for MayoLINK and Message Center require account configuration prior to usage. They will not appear in Permissions Manager until account configuration is complete

and your organization's CA has been granted access to Permissions Manager. If you have any questions about these permissions, contact [Customer Service](#).

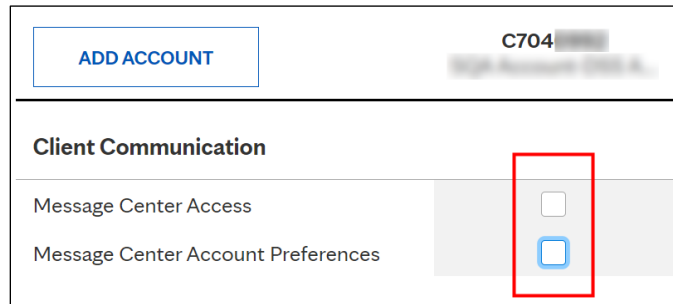
4. Click the **SAVE CHANGES** button  to save your changes.

If you wish to cancel your changes on the **EDIT PERMISSIONS** page and return to the **PERMISSIONS** landing page, click the **BACK** button in your web browser.

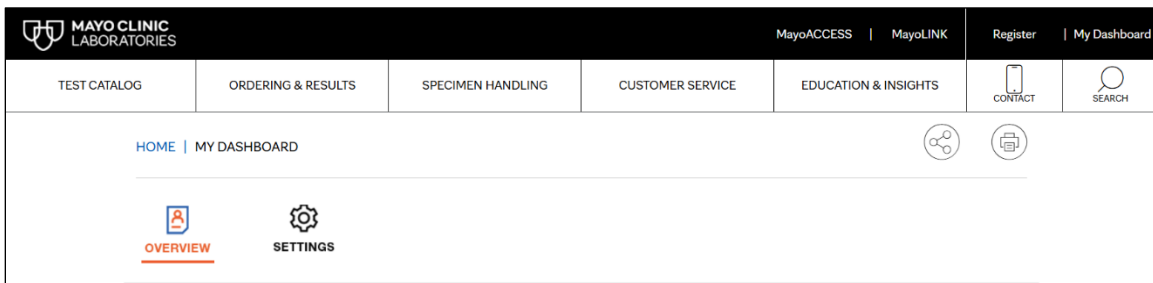
**Note:** When you remove a user's access to a **Dashboard** feature or application in Permissions Manager, the corresponding icon is automatically removed from the **Dashboard** when the user logs in to [MayoClinicLabs.com](#). See the example screenshots below.



**Dashboard** before removal of Message Center access



Message Center permissions check boxes for the user are unchecked



**Dashboard** after removal of Message Center access



## Removing a user from an account

### Removing a user from the BY ACCOUNT tab

To remove a user from the selected account from the **BY ACCOUNT** tab:

1. In the User List on the **BY ACCOUNT** tab of the **PERMISSIONS** landing page, find the user you wish to remove.

<input type="checkbox"/>		TëStiñg29, ßrimáRy10	Email Notifications Results - View, Message Center Access, ...	REMOVE
<input checked="" type="checkbox"/>		Test User, FBI Webhook		REMOVE
<input type="checkbox"/>		Testing, Transactional	Email Notifications Results - View, Message Center Access, ...	REMOVE
<input type="checkbox"/>		Testing (QA), Commercial	Notification Rules Access	REMOVE
<input type="checkbox"/>		Transactional1, Orders		REMOVE

**Note:** You do not need to check the user's check box. In the screenshot above, the box is checked to provide clarity on which user is being removed.

2. At the right end of the list row for that user, click the **REMOVE** link.

The **REMOVE USER FROM ACCOUNT** dialog box appears (right), asking you whether you would like to continue removing the user.

**REMOVE USER FROM ACCOUNT** ×

C704

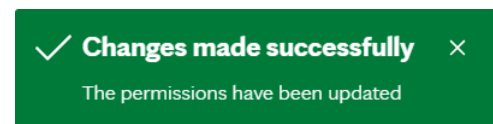
---

You are about to remove **FBI Webhook Test User** ( ) from this account. Once removed, this user will no longer have permissions for this account.

3. To remove the user, click the **REMOVE** button at bottom right.

To cancel the removal, click the **CANCEL** button.


If you click the **YES** button, the user is removed from the User List. You are returned to the **PERMISSIONS** landing page. The **Changes made successfully** pop-up (right) appears at top right.

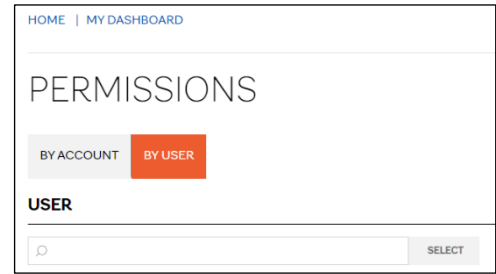


**Note:** This procedure removes any association between the user and the selected account, as well as any permissions the user had that were specific to that account. However, the user remains registered on [MayoClinicLabs.com](https://www.mayocliniclabs.com), and their access to other accounts is not affected.

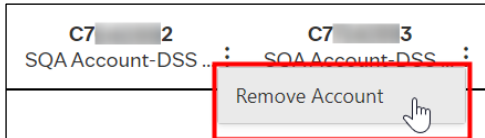
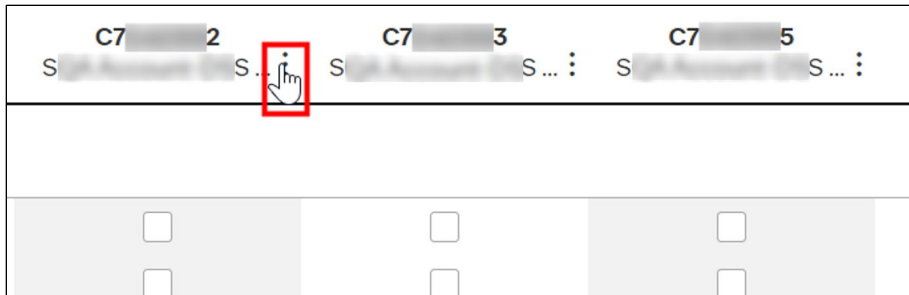
## Removing a user from the BY USER tab

To remove a user from the selected account from the **BY USER** tab:

1. On the landing page, click the **BY USER** tab  (right).
2. Find the user by following [steps 2 and 3](#) under [Adding a user to an account from the BY USER tab](#).

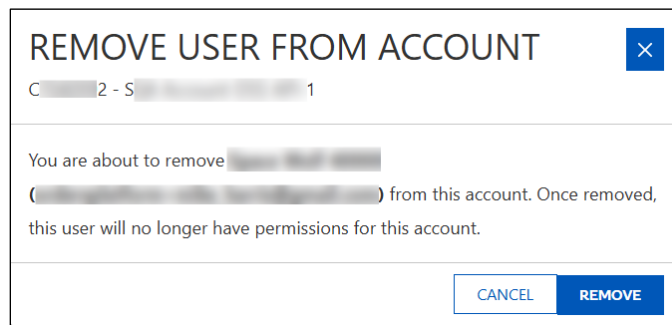


3. In the appropriate account column, hover over the vertical ellipsis. 



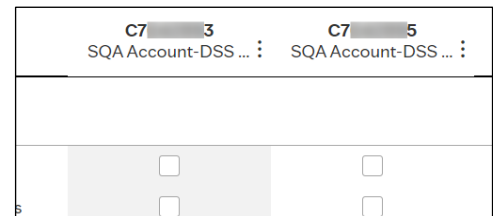
4. Select **Remove Account** (left).

The **REMOVE USER FROM ACCOUNT** dialog box appears.



5. At bottom right, click the **REMOVE** button. 

The column disappears from the **USER** page (right).



## Exporting data from the User List

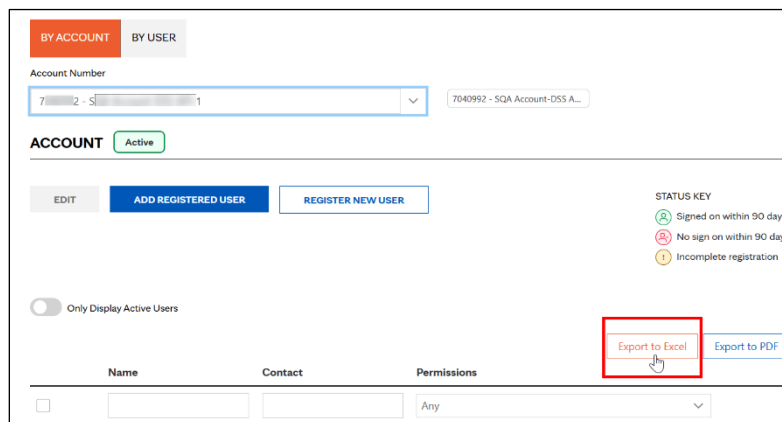
You can export data from the User List, sorted in any way you like, as:

- A Microsoft Excel (.xlsx) file.
- A PDF file, with data grouped by either permission or user.

**Note:** Export is limited to data in the selected account.

### Exporting data to Excel

On the **PERMISSIONS** landing page, on the right just below the **STATUS KEY**, click the **Export to Excel** button.




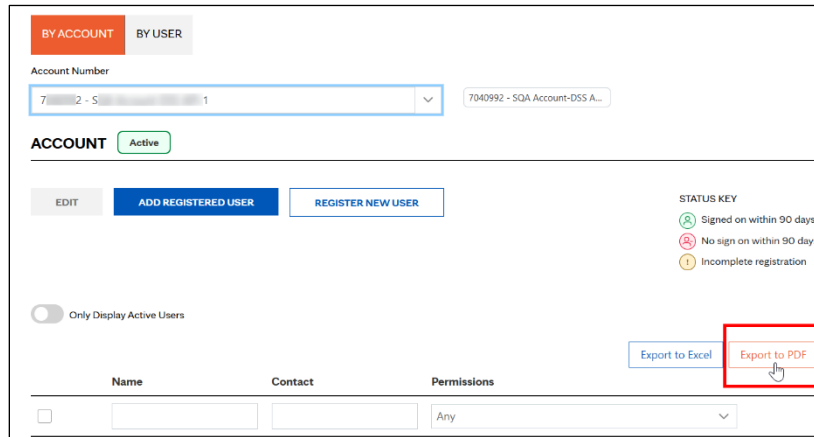
An Excel file titled “Permissions [account number].xlsx”, containing all data currently shown in the User List, will be downloaded to your device. Below is a screenshot showing the first several columns of an example Excel file.

The screenshot shows an Excel spreadsheet titled 'Permissions C704'. The spreadsheet has a table with the following columns: CLIENT PERMISSIONS, LAST NAME, FIRST NAME, and E-MAIL. The data is as follows:

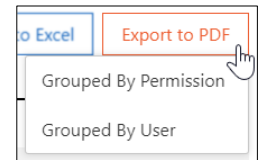
CLIENT PERMISSIONS	LAST NAME	FIRST NAME	E-MAIL
Activity Metrics - Access			
Activity Metrics - Access			
Activity Metrics - Access			
Activity Metrics - Access			
Activity Metrics - Access			
Activity Metrics - Access			
Activity Metrics - Access			
Activity Metrics - Access			
Activity Metrics - Access			
Activity Metrics - Access			
Daily Charge Reports - Access			
Daily Charge Reports - Access			
Daily Charge Reports - Receive Email Notifications			
Email Notifications Results - View			
Email Notifications Results - View			
Email Notifications Results - View			
Email Notifications Results - View			
Email Notifications Results - View			
Email Notifications Results - View			

## Exporting data to PDF

1. On the **PERMISSIONS** landing page, on the right just below the **STATUS KEY**, click the **Export to PDF** button. 



2. From the drop-down menu, select either **Grouped By Permission** or **Grouped By User** (right).



Depending on your selection, a PDF file titled “Permissions [account number] - By Permission.pdf” or “Permissions [account number] - By User.pdf”, containing all data currently shown in the User List, will be downloaded to your device.

Below is a screenshot of an example PDF file with data grouped by permission.

**MAYO CLINIC LABORATORIES**

Client Permissions for Account 7... 2  
S... 1

### Activity Metrics - Access

LAST NAME	FIRST NAME	CONTACT	DATE LAST ACCESSED	STATUS
		Email: [REDACTED] Work: +1-[REDACTED]	NA	Days Since Last Login: 684
		Email: [REDACTED] Cell: +1-[REDACTED]	NA	Days Since Last Login: 124
		Email: [REDACTED] Work: +1-[REDACTED]	NA	Incomplete Registration
		Email: [REDACTED] Work: +1-[REDACTED]	NA	Days Since Last Login: 684
		Email: [REDACTED] Work: +1-[REDACTED]	NA	Days Since Last Login: 465
		Email: [REDACTED] Work: +1-[REDACTED]	NA	Days Since Last Login: 245

### Daily Charge Reports - Access

LAST NAME	FIRST NAME	CONTACT	DATE LAST ACCESSED	STATUS
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Below is a screenshot of an example PDF file with data grouped by user.

**MAYO CLINIC LABORATORIES**

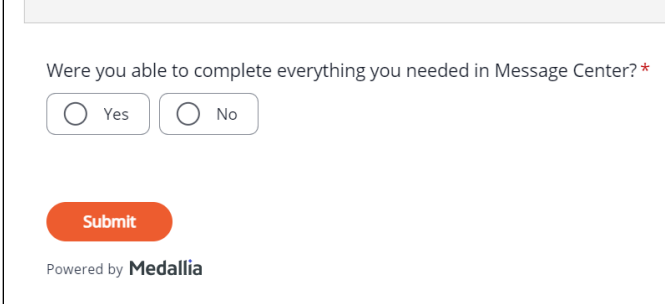
Client Permissions for Account 7... 2 - S... 1

LAST NAME	FIRST NAME	CONTACT	PERMISSIONS	STATUS
		Email: [REDACTED] Work: +1-[REDACTED]		Days Since Last Login: 545
		Email: [REDACTED] Cell: +1-[REDACTED]		Days Since Last Login: 116
		Email: [REDACTED] Cell: +1-[REDACTED]		Signed on within 90 days
		Email: [REDACTED] Work: +1-[REDACTED]		Days Since Last Login: 703
		Email: [REDACTED] Work: +1-[REDACTED]		Days Since Last Login: 706
		Email: [REDACTED] Work: +1-[REDACTED]		Days Since Last Login: 684
		Email: [REDACTED] Work: +1-[REDACTED]		Days Since Last Login: 684
		Email: [REDACTED] Cell: +1-[REDACTED]		Days Since Last Login: 124
		Email: [REDACTED] Work: +1-[REDACTED]		Incomplete Registration
		Email: boshela.kristy@mayo.edu Work: +1-[REDACTED]		Days Since Last Login: 232

## Submit your feedback

Hearing from you helps us serve you better. If you would like, please tell us what you think of Message Center.

1. At bottom left of the **PERMISSIONS MANAGER** landing page, answer the question, “*Were you able to complete everything you needed in Permissions Manager?*” by clicking either the **Yes** or **No** radio button.



Were you able to complete everything you needed in Message Center? \*

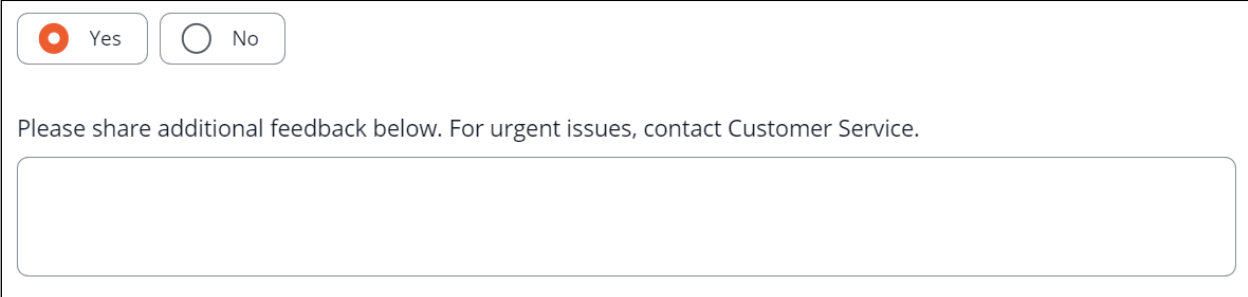
Yes  No

**Submit**

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The request “*Please share additional feedback below. For urgent issues, contact Customer Service*” (or, if you selected **No**, the request “*Please let us know how we can improve Message Center*”) appears, along with a text field.

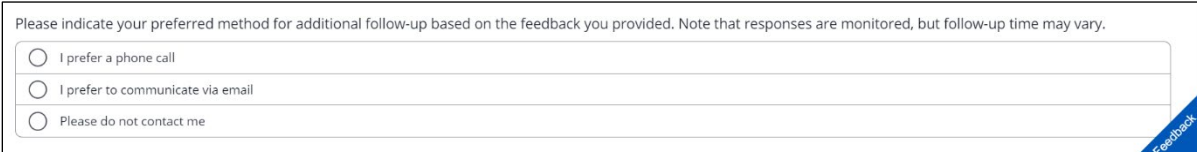
2. Enter your feedback, if any, into the text field.



Yes  No

Please share additional feedback below. For urgent issues, contact Customer Service.

3. Further down, select one of the three radio buttons to indicate how/whether you would prefer additional follow-up from Mayo Clinic Laboratories.



Please indicate your preferred method for additional follow-up based on the feedback you provided. Note that responses are monitored, but follow-up time may vary.

I prefer a phone call

I prefer to communicate via email

Please do not contact me

Feedback

- a. If you select **I prefer a phone call**, the **Name** and **Phone Number** fields appear below.

Please indicate your preferred method for additional follow-up based on the feedback you provided. Note that responses are monitored, but follow-up time may vary.

I prefer a phone call

I prefer to communicate via email

Please do not contact me

Name:

0/50

Phone Number:

0/50

[Submit](#)

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Complete these two fields and, at the bottom of the page, click the **Submit** button.

[Submit](#)

- b. If you select **I prefer to communicate via email**, the **Name** and **Email** fields appear below.

Please indicate your preferred method for additional follow-up based on the feedback you provided. Note that responses are monitored, but follow-up time may vary.

I prefer a phone call

I prefer to communicate via email

Please do not contact me

Name:

0/50

Email:

[Submit](#)

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Complete these two fields and, at the bottom of the page, click the **Submit** button.

[Submit](#)

- c. If you select **Please do not contact me**, no additional text fields appear below.

Please indicate your preferred method for additional follow-up based on the feedback you provided. Note that responses are monitored, but follow-up time may vary.

I prefer a phone call

I prefer to communicate via email

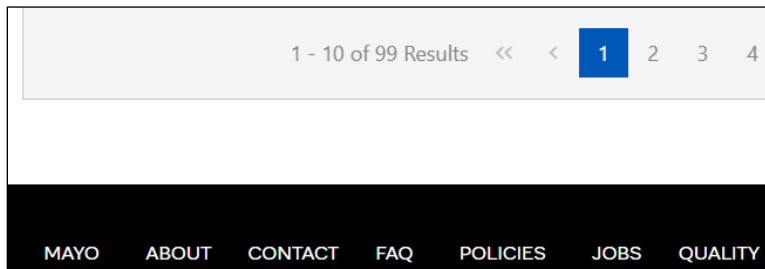
Please do not contact me

[Submit](#)

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At the bottom of the page, click the **Submit** button. [Submit](#)

The feedback section disappears.



## Frequently asked questions

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**Q:** A user is missing from the User List on the **Permissions** landing page. How do I re-add the user?

**A:** In some cases, if all a user's permissions have been removed, that user may be automatically removed from the account(s) in question. If this occurs, re-add them by following the instructions in [Adding a user to an account](#). If the user's permissions are subsequently removed again, they will continue to appear in the User List with no permissions.

**Q:** Are there any limitations on how many Client Administrators (CAs) we can have?

**A:** No. You can have more than one CA. To add a CA, work with [Customer Service](#).

**Q:** What happens if a user changes their name or email address?

**A:** Permissions Manager captures all user and account information found on [MayoClinicLabs.com](#) and reflects any updates made to that information.

**Q:** I need to change a permission listed in the **For Mayo Use Only** category for one of my users. How do I update those permissions?

**A:** To change **For Mayo Use Only** permissions, contact [Customer Service](#).





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