

Printable Checklist for Creating New Accounts

CASELOAD TRACKER: NEW ACCOUNT CREATION CHECKLIST				
First and Last Name	Email & Phone	Will person log in?	Role(s) (check all that apply)	Provides care to patients?
		Y/N	<input type="checkbox"/> Account Admin <input type="checkbox"/> Care Manager <input type="checkbox"/> Consultant <input type="checkbox"/> Data Manager <input type="checkbox"/> Psych Consultant <input type="checkbox"/> Site Manager	Y/N
		Y/N	<input type="checkbox"/> Account Admin <input type="checkbox"/> Care Manager <input type="checkbox"/> Consultant <input type="checkbox"/> Data Manager <input type="checkbox"/> Psych Consultant <input type="checkbox"/> Site Manager	Y/N
		Y/N	<input type="checkbox"/> Account Admin <input type="checkbox"/> Care Manager <input type="checkbox"/> Consultant <input type="checkbox"/> Data Manager <input type="checkbox"/> Psych Consultant <input type="checkbox"/> Site Manager	Y/N
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