



Complete Client Registration User Guide

For FI and SP

Complete Client Registration Overview

This guide is for a new client profile with the client login enabled. It provides step-by-step instruction for the client user, who has just received their profile activation email.

How to Complete Client Registration

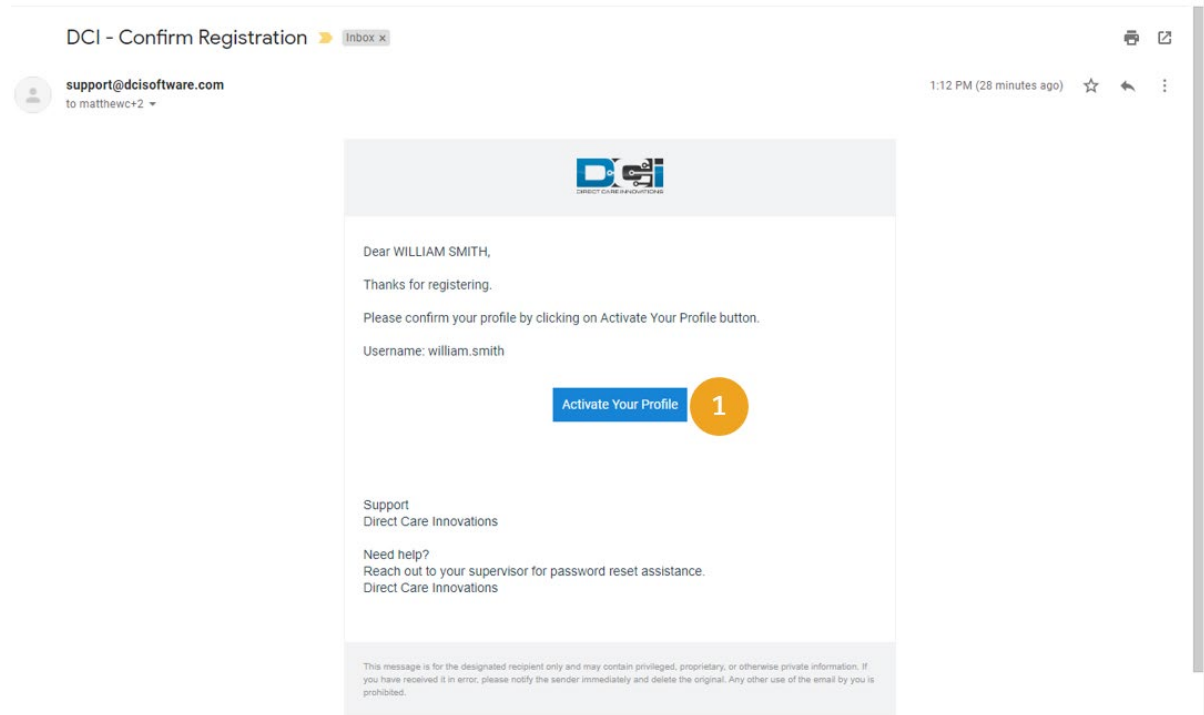
Upon completion of the Add New Client form, an email will be generated and sent to the email address on the form. To successfully activate an account, the email address must be validated.

1. Select Activate Your Profile from the email

Note:

The sender email will be support@dcisoftware.com

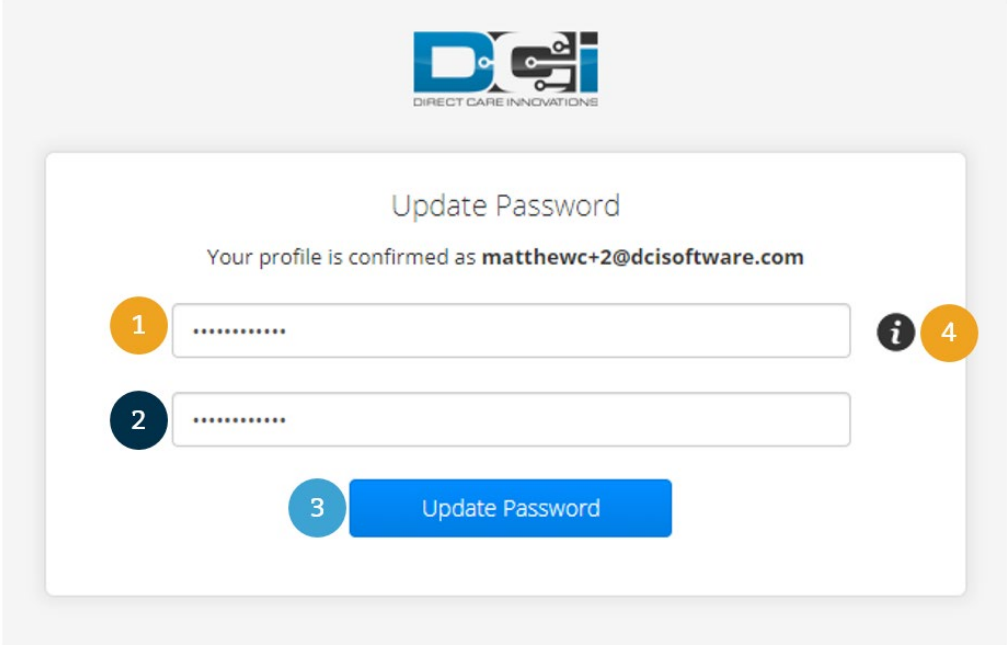
If the client says they did not receive the email, please have them check their spam/junk filters



Update Password

Once the client selects Activate Your Profile from the system email, they will be redirected to DCI to complete the registration.

1. Create a password compliant with the guidelines
2. Confirm the password
3. Save the password
4. Contains password criteria



The screenshot shows the DCI (Direct Care Innovations) 'Update Password' interface. At the top, the DCI logo and 'DIRECT CARE INNOVATIONS' are displayed. Below the logo, the text 'Update Password' is centered, followed by 'Your profile is confirmed as matthewc+2@dcisoftware.com'. The form contains two password input fields, each with a circular number indicator (1 and 2) to its left. To the right of the first input field is an information icon (i) and a circular number indicator (4). Below the input fields is a blue button labeled 'Update Password' with a circular number indicator (3) to its left.

Password Criteria

Passwords must contain:

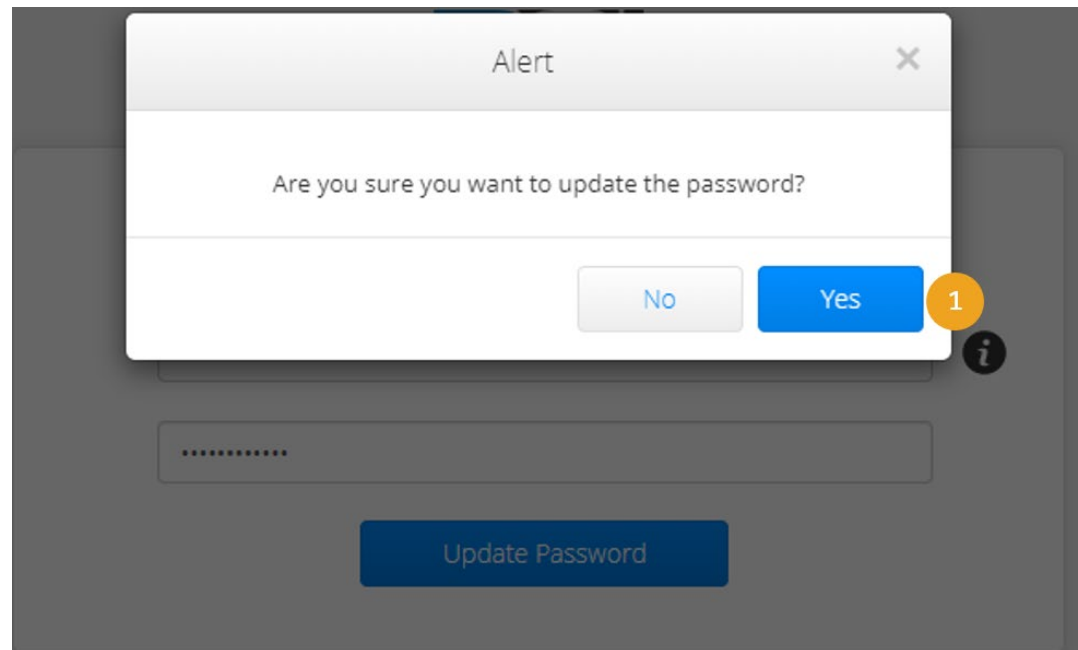
1. Must be at least 10 characters
2. Must contain 1 uppercase letter, lowercase letter, number and special character
3. Must not contain more the three repeated characters in a row
4. Depending on your company's policy, the system may require your password to be different from previous password

Confirm Password Change

1. Select Yes to confirm password

Note:

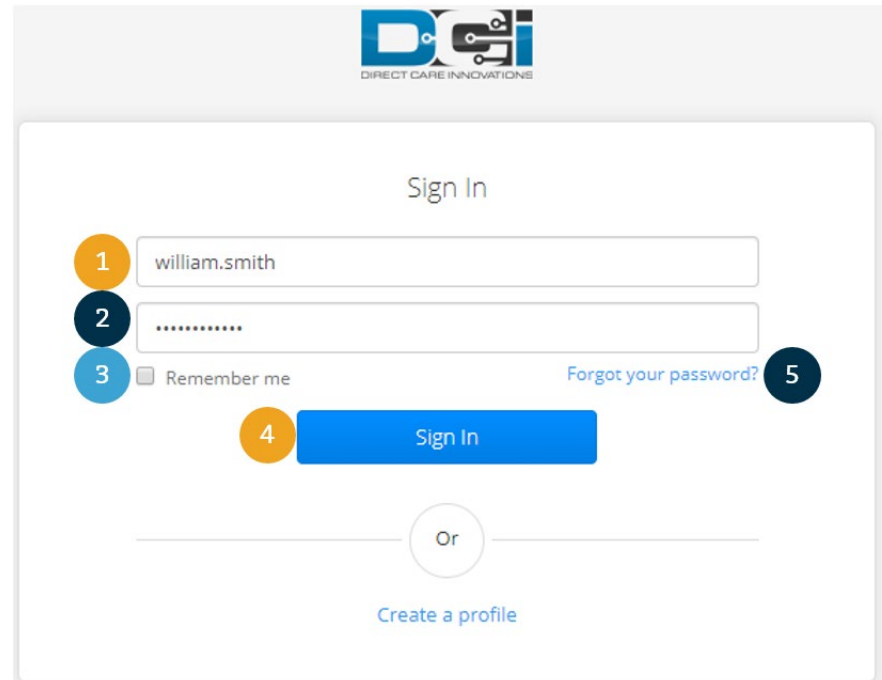
Password management can be a challenge. Recommend that the client create a password that is easy to remember, familiar and that they keep a record of the password to minimize risk of forgetting or losing their password.



Client Sign In

Once the password has been created, the client needs to log in for the first time to complete profile set up.

1. Username, which is provided in the validation email
2. Password, which the client just created
3. Remember me, click for the browser to remember username and password
4. Select to sign in
5. Select to reset password



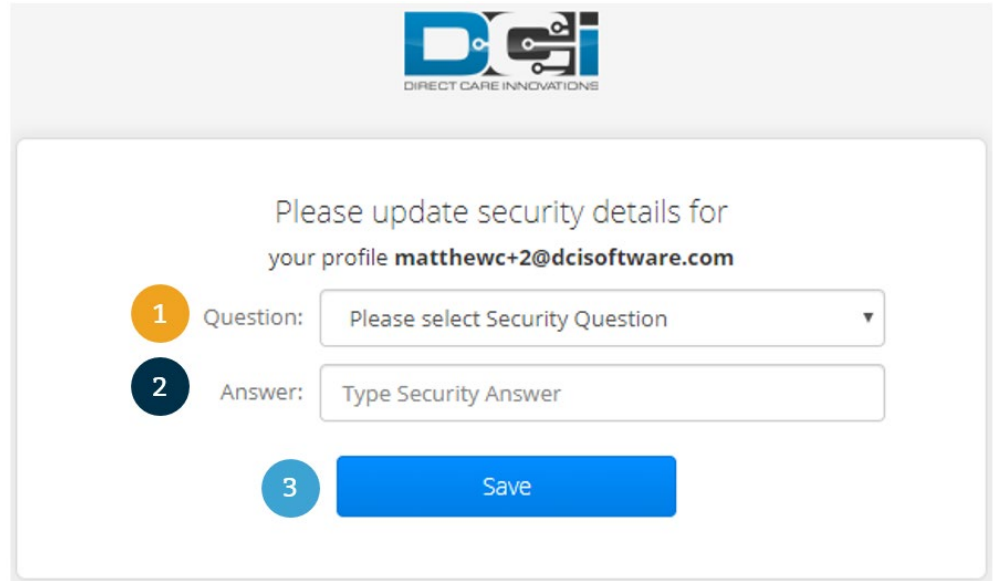
The screenshot shows the 'Sign In' page for Direct Care Innovations. The page features a logo at the top right and a central form. The form includes a username field (1) containing 'william.smith', a password field (2) with masked characters, a 'Remember me' checkbox (3), a 'Forgot your password?' link (5), and a blue 'Sign In' button (4). Below the form is an 'Or' separator and a 'Create a profile' link.

Update Security Details

1. Select a security question from the drop-down list
 - a. Select from a list or use Other to create a unique question
2. Enter the answer to the question
3. Select Save

Note:

This question will be used if the user selects the Forgot Password Link to reset their password.



DCI
DIRECT CARE INNOVATIONS

Please update security details for your profile **matthewc+2@dcisoftware.com**

1 Question:

2 Answer:

3

Client Dashboard

Once the login is complete the client will open the DCI dashboard.

1. Dashboard is the client homepage
2. Entries the client needs to sign off on
3. Historical list of entries
4. Access the schedule
5. Administrative area to change system settings

The screenshot displays the DCI Client Dashboard. On the left, a navigation sidebar contains five items: 1. DASHBOARD (highlighted with a blue circle), 2. ENTRIES REQUIRING SIGN OFF (highlighted with a blue circle), 3. ENTRIES (highlighted with a blue circle), and 4. SCHEDULES (highlighted with a blue circle). The main content area shows the 'Home > Dashboard' breadcrumb, a 'News Posts' section with 'No records to display', an 'Online Training' section with a search input for 'Type Certification Requirement Name' and a dropdown for 'Certification Requirement Name', and an 'Authorizations' section with a search input for 'William Smith' and 'Search' and 'Reset' buttons. In the top right corner, a user profile dropdown for 'william.smith' is open, showing options for 'Settings' and 'Logout', with a blue circle containing the number 5 next to it.

Thank you!

Visit the DCI Help Center to learn more at:

<https://directcareinnovations.zendesk.com/hc/en-us>