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MYSOZO ADMIN
Quick Start Guide

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Sign In

1. Using Chrome or Firefox or Edge Chromium sign into mysozo.com

The administrator password is created during the initial set up of MySOZO.

Please note: MySOZO will not be accessible after 5 incorrect login attempts for 30 minutes.
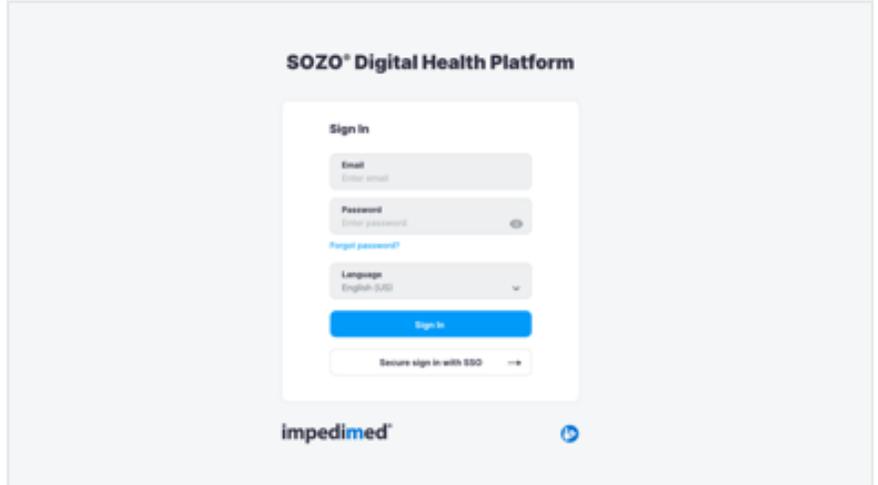
2

User List

After the administrator logs in for the first time, the MySOZO should show an empty database (no users listed).

Please note: The administrator will not be able to access patient data through MySOZO. Only clinicians can access patient data.
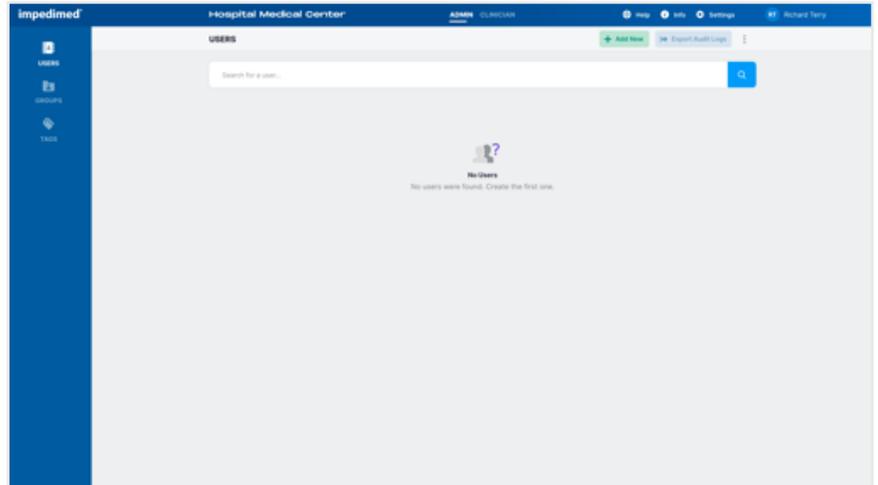
3

Create User

1. Select "Add New"
2. Enter user details and select user role
3. Select "Create" to save entry

Please note: The user list will fill out as each new user is created.

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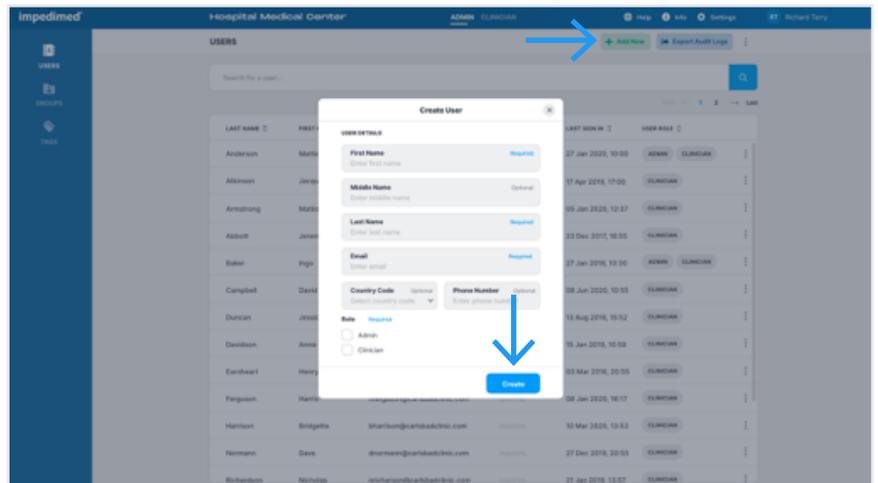
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User Profile

1. From the 3 dots menu select "User Profile"
2. User profile entries can be modified and re-saved
3. To reset user email select "Change"
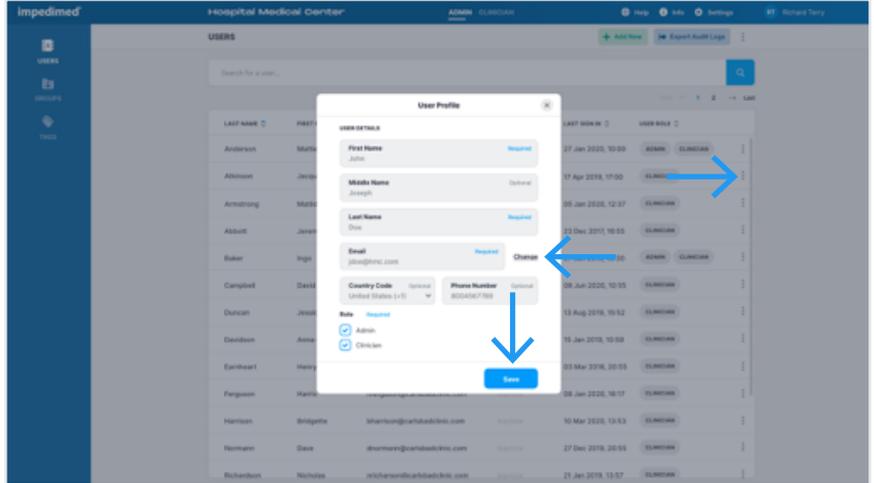
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Delete User

1. From the 3 dots menu select "Delete User"
2. Confirmation pop-up will appear. Confirm deletion by selecting "Delete"
3. Success notification appears confirming deletion
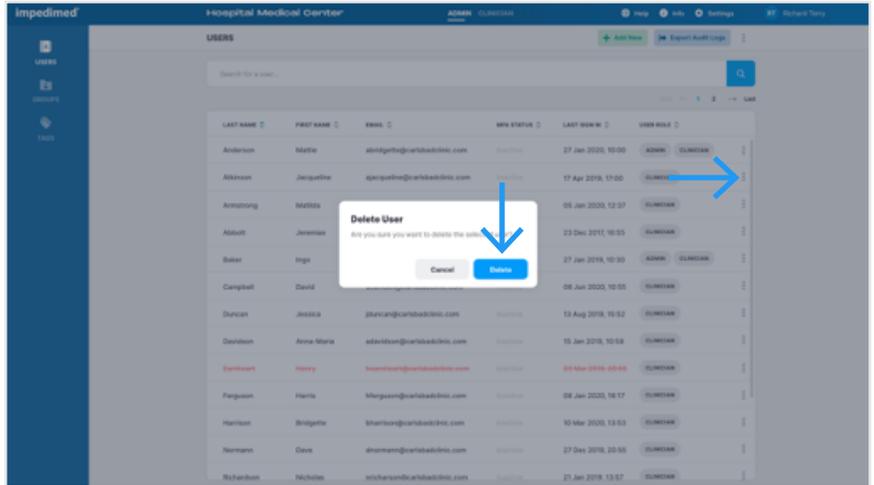
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Export Audit Logs

1. Select "Export Audit Logs"
2. Select date range or select "All"
3. Select "Export"

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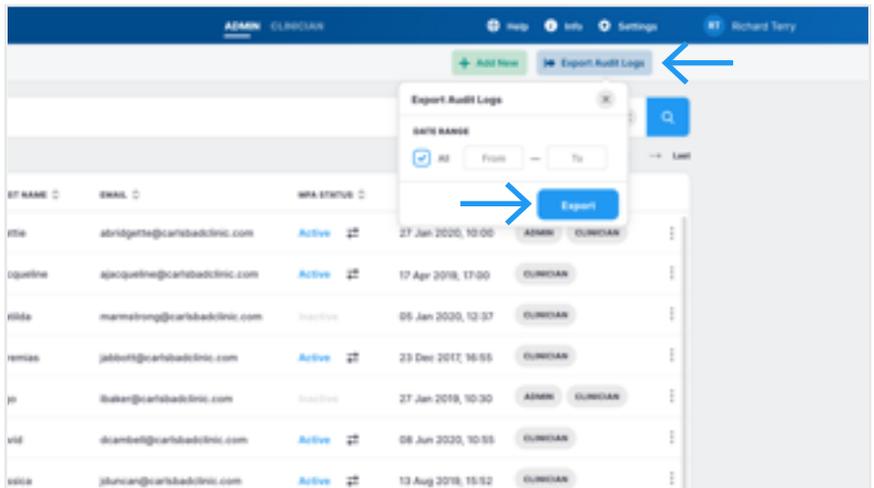
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Groups

1. Select "Groups" on the sidebar
2. Select "Add New"
3. New group pop-over appears. Type in group name and select "Add"
4. New group will be added to the group list
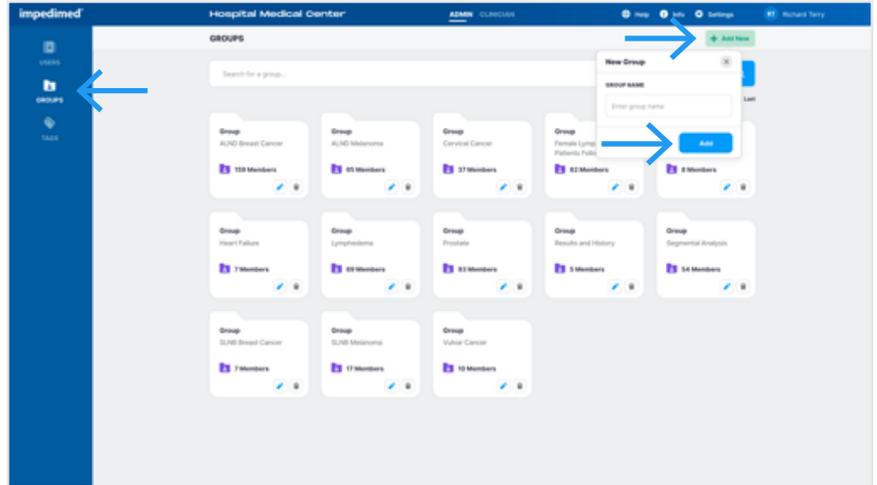
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Tags

1. Select "Tags" on the sidebar
2. Select "Add New"
3. New tag pop-over appears. Type in group name and select "Add"
4. New tag will be added to the tag list
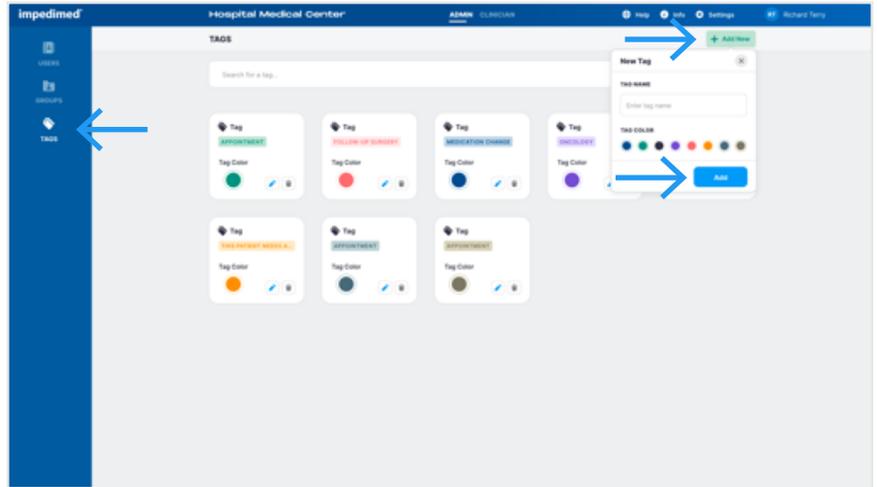
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General Menu Items

1. Help
2. Info
3. Settings
4. My Account