# Warm Welcome!

- Thank you!
- Chat for questions

# Learning Outcomes

- Maintain staff records
- Create user accounts
- Manage access rights

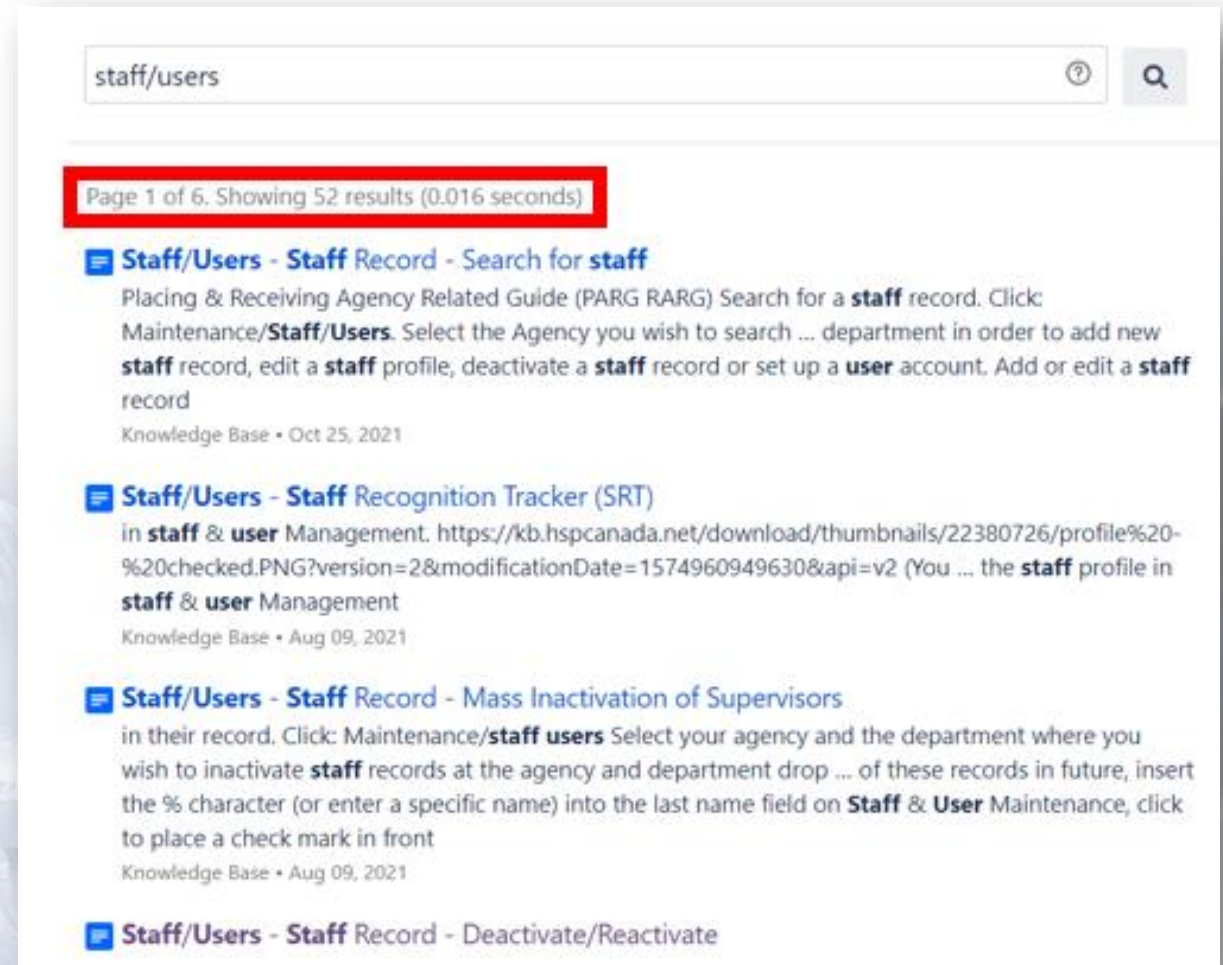- Not covered:
  - Staff profiles
  - Training
  - First login
  - Change password
  - KB: Staff/Users – Staff Record – Profiles

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# Resources

- Knowledge base
  - Search for staff
  - Mass inactivation of supervisors
  - Deactivate & reactivate
  - Password reset
  - Create (or edit) a new staff record
  - RA new user set up and editing
  - Help/Support
    - Knowledge Base
- https://kb.hspcanada.net/

# Questions? Feedback? Request?

- Email to: support@hspcanada.net

# Quiz

- Role of receiving coordinator
- Missing editing tools

*What could be the issue?*

# Local Administrator Role

- Manage site contents: services & destinations for RA

- Manage staff records & user accounts (incl. user access rights)

- Provides assistance users in their department(s)
  - Logging into the system;
  - & updating passwords.



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# Departments

- ## Contain staff records:
  - By profession
  - Facility
  - Geography/Region

| Nursing Department Site A | Nursing Department Site B | Nursing Department Site C |
|---|---|---|
| Staff records for Nursing Supervisors: Site A | Staff records for Nursing Supervisors: Site B | Staff records for Nursing Supervisors: Site C |

# Winning Lottery!

- Department contacts:
  - Individual may authorize new user accounts on behalf department; typically senior manager; may or may not be HSPnet user.

# Maintenance | Add Record

*Verify record exists*

- Department

- Plus sign (add)

- Contact & role

# Maintenance | Inactivate Staff/Users

- Department
- Head icon
- Inactivate record
  - Select reason
  - Save



**Staff & User Maintenance**

**Current View** ☐ Show Content Roles

Agency: HeartHealt ▼   Department: HSLnursing ▼ ✉   Last **coors**   First: [    ]   Clear All

Receiving Agency Roles:
☐ Receiving Coordinator   ☐ Destination Coordinator   ☐ IT Provisioning
☐ Staff Administrator   ☐ Other Staff (non-user only)   ☐ Supervisor
☐ Staff Applicant   ☐ RA Policy Access Level

Search Filter:
☐ HSPnet users only   ☐ Show Inactive Staff   ☐ DeptC only
↳ ☐ Active accounts only

Search

Search on all or part of the individual's last and/or first name. Enter "%" to search for all individuals in a role.

Upload Staff File to database

| ✓ | | Last | First | Middle | Phone | Dept | Home Dest. | Role(s) | | | | + |
|---|---|------|-------|--------|-------|------|-----------|---------|---|---|---|---|
| ☐ | ✉ | Coors | Brent | | | HSLnursing ⇄ | | Superv | ✏ | ☑ | 🔑 | 👤 |

**Deactivate Staff**

Deactivate:   Candle, Light

Reason:   No longer in position/agency ▼

Comments:   [                    ]

✓ ✗

# Maintenance | Sometimes …

- *Staff assigned to request*

**Warning:**
You are deactivating a user that is currently listed as the Supervisor for one or more placements: Reference numbers
**23082**
You must assign another Supervisor (or assign no Supervisor) before deactivating this staff member.

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# Maintenance | Show Inactive

- Show inactive staff

# Maintenance | Reactivate

- Red head icon
- Uncheck: Show inactivate staff

# Sometimes …

50 per screen X 14 screens = 700 records

# Maintenance | Supervisors

- **Mass inactivation supervisors**
  - **Filter options**
    - Department
    - Wild card %
    - Select duration
    - View list

# Maintenance | Inactive Login

- Users not login for 180+ days

# Maintenance | Reactivate Users

- ## User ID Enabled

# Activate User Access

- Avoid duplicate
- Existing record
- Key icon

# User Maintenance

- User ID
- Email Address
- Next

# Access Authorization

- Who
- Why
- Next

## User Maintenance

**Candle, Light**

User Account Information
**User Access Authorization**
Copy Access Rights
Departments
Disciplines
Sites
Services
Destinations
Review and Save

**User Access Authorization**   Help

| | |
|---|---|
| Authorized by: | <Other> * |
| | Paul Morin * |
| Reason: | New User * |
| Date: | Feb 18/22 📅 * |
| Comments: | |

< Previous    Next >

Cancel  |  Close Window

# Copy Access Rights

- Account: same site, service, destination & discipline access is issued
- Select User
- Checkmark
- Email
- Close window

## User Maintenance

**Candle, Light**

User Account Information
User Access Authorization
**Copy Access Rights**
Departments
Disciplines
Sites
Services
Destinations
Review and Save

**Copy Access Rights**

Copy from Existing User: Deriet, Carole (HSLnursing) ✓

Or click "Next" to skip this step.

< Previous    Next >

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# Select Access Rights

- Select "not allowed"
- To "allowed"

# Select Access Disciplines

- *All* or from *list*
- Select from "not allowed"
- To "allowed"
- Next

# Select Access Sites
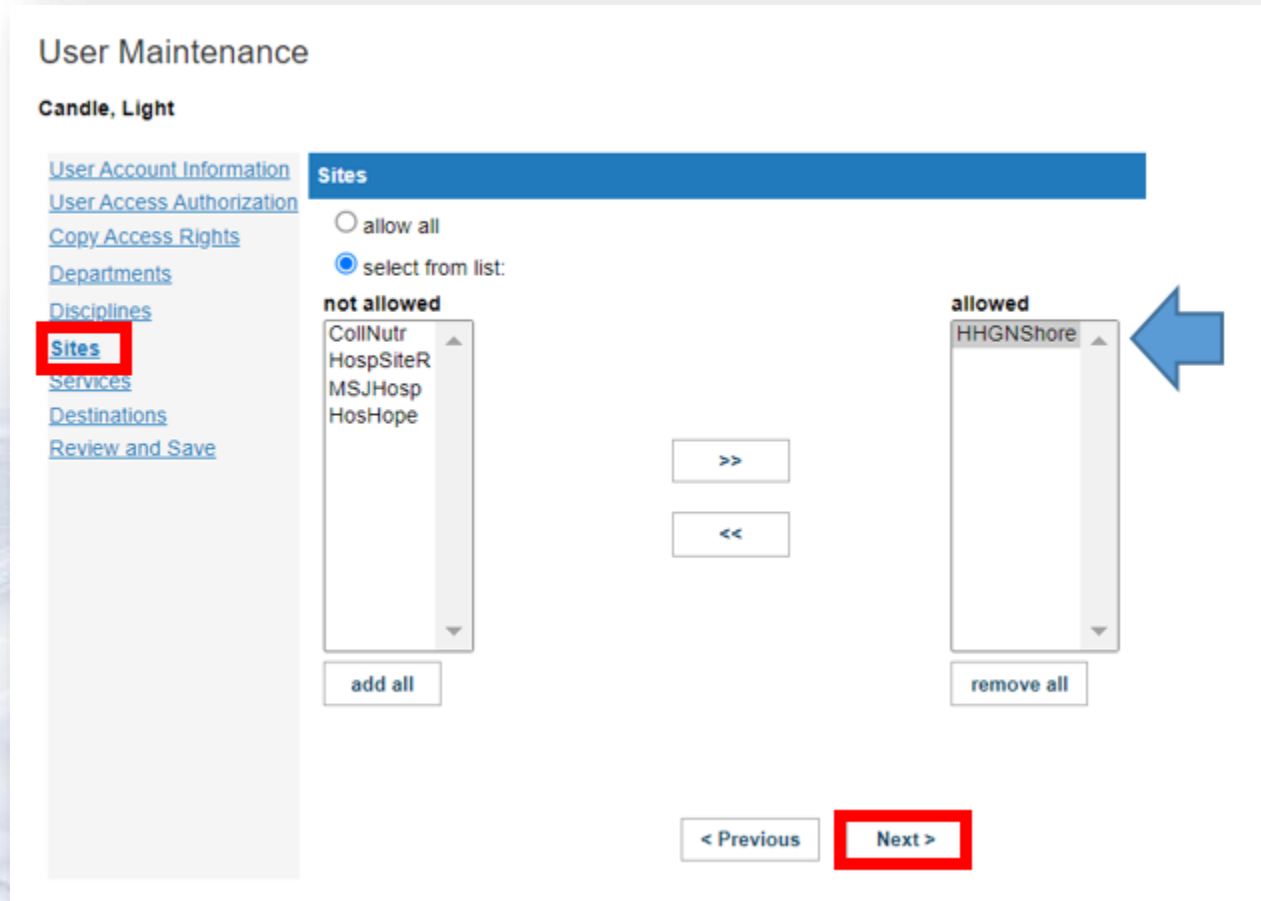
- *All* or from *list*
- Select from "not allowed"
- To "allowed"
- Next

# Select Access Services

- *All* or from *list*
- Select from "not allowed"
- To "allowed"
- Next

# Select Access Destinations

- Select from "not allowed"
- To "allowed"
- Next

# Review & Save

- Click Save

- Email

- First login

Resource:

- User guide:
  *Staff/Users –User
  Account –
  Receiving Agency
  new user set up
  and editing*

# Summary

- Maintain staff records

- Create user accounts

- Manage access rights

- Video: Training for RCs – Module 7
  - Staff & User Management

# Thank you!

- Email to: support@hspcanada.net