User account management

[Training videos - User account management]

Required permissions

User accounts can be added and edited only by users in the "System Admin" or "PHN Admin" roles.

View list of user accounts

To see the list of user accounts in the PHN you're currently in, go to Admin > User accounts.

Create a user account

1. Go to the list of user accounts (see above).
2. Click **New**.
3. Enter first name, last name, and email.
4. When you click **Save account** it will create the user account and take you to the edit screen. By default, the user account will be assigned to the organisation you're currently in and will have have no roles assigned. As well, the password will be expired.
5. Select the relevant organisation (eg. North Western Melbourne PHN) under the **Organisations** section. Then under Roles section you will be able to assign roles. Once done, press save.
6. Click **Change password** and enter a default password. A user can log in when the password expires, but they can't do anything else until they have changed their password.
7. Check the record. The password must be expired and it shouldn't be displaying the "password not set" alert.

This is correct:

Correct setting for new user account

This is not:

Incorrect setting for new user account

Add/remove roles

To remove, click the trash icon.

To add a role, select the organisation and add a value from the dropdown underneath the user's Roles list, then click the Add role button.

If you are adding users to more than one Site/Centre, you will have to add the roles individually to every Site/Centre.

Once the above steps are complete, notify the user that their account has been set up. Tell them the main URL of the system and the default password.

Add/remove organisations

- To add an organisation, select a value from the dropdown underneath the user's **Organisations** list, then click the **Add organisation** button.
- To remove an organisation from the user's account, click the trash icon.

Note: simply adding an organisation won't enable full record access. To give access, you need to select the organisation and add a relevant role (see below).

Note: for setting up people who need access to organisations across multiple PHNs you will need to email the NWMPHN Medicare Mental Health support team.

Add/remove roles

- To add a role, first select an organisation in the user account's list of organisations. Then select a value from the dropdown underneath the user account's **Roles** list, and click the **Add**

role button.

- To remove, click the trash icon.

If you need someone to be set up in the PHN for a special reason, you must first get approval from the manager in the PHN responsible for Medicare Mental Health.

Automatic deactivation

As a security risk control, user accounts that have not viewed a consumer record in the previous 3 months are automatically deactivated. The intake system will email you to notify that you will be deactivated on a specific date if you do not log in beforehand. A consumer record is a Contact, a Client, or a Referral.

PHN staff working on data analysis or in a management role usually aren't viewing consumer records. To prevent their accounts from deactivating, we recommend setting a reminder every three months to view a consumer record. User accounts that are not assigned to a clinical role don't see any identifying or sensitive information when they view a record.

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