CHAPTER 5. STAFF AND USER ID FUNCTIONS

Adding New Staff and Users

Users with Local Administrator rights will be responsible for setup and ongoing maintenance of HSPnet user ID's and passwords.

1. Select **Maintenance** from the left navigation, then **Staff/Users.**

> ***Always search before adding*** *staff to avoid duplicate records in dropdowns.*

2. Perform a Search on the staff member by entering 2-3 letters of their last for first name and click Search.
   - If a match is found, proceed to Step 5.
   - If no match is found, click + to add a new staff member.
3. Complete the required fields (indicated by *) including **First** and **Last** names and **Role**:

Placing Agency Roles:

Placement Coordinator	Coordinates PR's in a Program
Course Leader	Coordinates or leads a Course
Instructor	Teaches a Course or leads a Group
Group Instructor	Access to Group Shift Schedules only
Student Administrator	Maintains student records and profiles

Receiving Agency Roles:

Receiving Coordinator	Coordinates PR's for a Service e.g. Medicine, Physio
Destination Coordinator	Coordinates PR's for a Destination
Spervisor/Preceptor	Supervises a student while on site

> The User ID should be set to the individual's first initial + last name (e.g. "jsmith" or "mjones").
>
> If an orange error message advises that this User ID is already taken, try adding the user's middle initial (e.g. "jwsmith") or append a number.

4. Once the individual is added to or located in the Staff database, review their User status:

   Not an active user

   Active user – Regular level

   Active user – Local Administrator

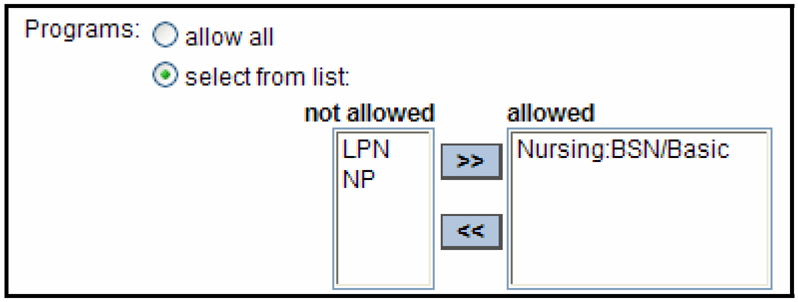
5. Click an individual's key icon to create or modify their user ID – this opens the **User Maintenance** window.
   - Check the "Enable User ID' checkbox to activate or re-activate their User ID.
   - Receiving Agency roles - check the "Receives Email Alerts" checkbox to activate weekly email reminders of Pending requests (and to activate the Inbox for this user if they are responsible for responding to incoming requests.

6. Establish the *Access Rights* for the user:

   - **Departments**: this section is read-only; if you need to grant access to multiple Departments for a user, please contact Help Desk.

Placing Agencies

   - **Programs** – choose "allow all" to grant access to all programs in the Department, or choose "select from List" and move one or more Programs to the "allowed" box by selecting the Program and clicking >> :



Receiving Agencies

Choose "allow all" to grant access to all of the following areas of access, or choose "select from list" and move one or more items to the "allowed" box by selecting the item and clicking >>.

- **Disciplines** – the discipline (e.g. Nursing, Pharmacy) and subdiscipline (e.g. BSN, practical nursing, care aide) to be monitored by this user.
- **Sites**
- **Services**
- **Destinations**

> It is ***critical*** that Access Rights be setup properly, with each user granted access only to placement (and student) information on a "***need to know basis***" (i.e. as appropriate for their organizational role involving student placements)

7. Click Save Changes to grant the selected access rights and activate the User ID.

   - If the green status message indicates that your changes were successful, click Close Window to return to the **Staff/Users** screen.

   - If an orange status message indicates that required information is missing, complete the necessary changes and Save again.,

8. If the User ID is being activated for the first time, a Welcome email will be sent automatically to the user with their new User ID and temporary password. On their first login, the user will be required to select a new secret password.

5.1. HSPnet USER ID MAINTENANCE

Deactivating a User ID

1. Select **Maintenance** from the left navigation, then **Staff/Users.**
2. Find the staff member by entering 2-3 letters of their last for first name and click Search.

> To view de-activated staff members, click the "Include Inactive Staff" checkbox in the **Current View** filter.

3. Click to deactivate a staff member. Select a reason from the drop-down list for deactivation, or select "Other" and enter a comment.
4. Click to Save. If the staff member had an active User ID, their account will automatically be inactivated as well.

Reactivating Staff User ID's

1. Select **Maintenance** from the left navigation, then **Staff/Users.**
2. Enable the checkbox in the current view filter to "Include Inactive Staff".
3. Find the staff member by entering 2-3 letters of their last for first name and click Search. Inactive users are indicated as .
4. Click to reactivate the user. Answer "yes" to the prompt if you want to proceed with re-activating the userl.
5. On refresh, the deactivated user will now appear as an active Staff member. If their User ID should also be re-activated, follow steps 5 to 7 above.