



## **Quick Start HHCApp Guide**

**Scope: Organisation Administrators, Region Administrators, Organisation Group Administrators, Auditors**

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## 1. Quick Start Guide for Organisation Administrators

### 1.1 Add new Auditor

Step 1. Create login

- > Users tab (horizontal menu, top of page)
- > Add User+
- > Enter details
- > Save

Step 2. Add user to organisation

- > Organisations tab (horizontal menu, top of page)
- > Select organisation under blue line
- > Users tab (vertical menu, right side of page)
- > Add New+ (in line with Auditor list)
- > Enter user details in search fields
- > Search
- > Select user under the blue line
- > Done

### 1.2 Detach Auditor

- > Organisations tab (horizontal menu, top of page)
- > Select organisation under blue line
- > Users tab (vertical menu, right side of page)
- > Edit List
- > Select red circle beside auditor name
- > Save

### 1.3 Add new Organisation Administrator

Step 1. Create login

- > Users tab (horizontal menu, top of page)
- > Add User+
- > Enter details
- > Save

Step 2. Add user to organisation

- > Organisations tab (horizontal menu, top of page)
- > Select organisation under blue line
- > Users tab (vertical menu, right side of page)
- > Add New+ (in line with Organisation Administrator list)
- > Enter user details in search fields
- > Search
- > Select user under the blue line
- > Done
- > To **detach** Organisation Administrator
- > Edit List
- > Select red circle
- > Save

#### **1.4 Assign a Primary Contact**

- >Organisations tab (horizontal menu, top of page)
- >Select organisation under blue line
- >Users tab (vertical menu, right side of page)
- >Edit List (in line with Organisation Administrator list)
- >Select blue star
- >Save

#### **1.5 Add new Department**

- >Organisations tab (horizontal menu, top of page)
- >Select organisation under blue line
- > Departments tab (vertical menu, right side of page)
- > Add Department+
- > Enter department details
- >Save

#### **1.6 Add new Health Care Worker Type**

- > Organisations tab (horizontal menu, top of page)
- > Select organisation under blue line
- >HCW Types
- >Add HCW Type+
- >Enter HCW Type details
- >Select Parent HCW Type
- >Save

#### **1.7 Update User details**

- > Users tab (horizontal menu, top of page)
- >Enter details in search fields
- >Search
- >Select user under the blue line
- >Update user details
- >Save

#### **1.8 Download User list**

- > Users tab (horizontal menu, top of page)
- >Select Organisation and Role
- >Search
- >Download as: XLS, XLSX, CSV

#### **1.9 Auditor and Sessions report**

- >Home tab (horizontal menu, top of page)
- >Auditor and Sessions report
- >Select Organisation
- >Select date range or audit period
- >Run report
- >Download PDF or spreadsheet

- >Print (landscape)
- >Exports tab – PDF available for 7 days

#### **1.10 Enter data**

- >Sessions tab (horizontal menu, top of page)
- >Select organisation under the blue line
- >Audit Periods tab
- >Enter session demographics
- >Save
- >Enter Moment
- >Save

#### **1.11 Delete data**

- >Sessions tab (horizontal menu, top of page)
- >Select organisation under the blue line
- >Audit Periods tab
- >Enter session demographics
- >Save
- >Enter Moment
- >Save

#### **1.12 Add National Audit Period**

- >Audits tab (horizontal menu, top of page)
- >Add Audit+
- >Audit Type - National
- >Select organisation and Audit Period
- >Save

#### **1.13 Add Local Audit Period**

- >Organisations tab (horizontal menu, top of page)
- > Select organisation under blue line
- >Audit Periods tab (vertical menu, right side of page)
- >Add Audit Period+
- >Enter details
- >Save
- >Audits tab (vertical menu, right side of page)
- >Add Audit+
- >Audit Type – Local
- >Audit Period
- >Save

#### **1.14 Submit Audit Period**

- >Audits tab (horizontal menu, top of page)
- >Select Audit (under the blue line)
- >Submit or Approval

### 1.15 Add Department Administrator

- >Organisations tab (horizontal menu, top of page)
- >Select organisation under blue line
- > Departments tab (vertical menu, right side of page)
- >Select department under the blue line
- >Add New+ Department Administrator
- >Enter user details in search fields
- >Search
- >Select user under the blue line
- >Done
- >To **detach** Department Administrator
- >Edit List
- >Select red circle
- >Save

### 1.16 Add Nurse Unit Manager

- >Organisations tab (horizontal menu, top of page)
- >Select organisation under blue line
- > Departments tab (vertical menu, right side of page)
- >Select department under the blue line
- >Add New+ Nurse Unit Manager
- >Enter user details in search fields
- >Search
- >Select user under the blue line
- >Done
- >To **detach** NUM
- >Edit List
- >Select red circle
- >Save

### 1.17 Edit Session Details

- > Organisations tab (horizontal menu, top of page)
- > Select organisation under blue line
- >Sessions
- >Enter Audit details in search fields
- >Search
- >Select session under the blue line
- >Scroll down to session details
- >Edit details (Audit must be 'Active' to edit)
- >Save

## **2. Quick Start Guide for Region Administrators**

### **2.1 Add new Region Administrators**

- > Regions tab (horizontal menu, top of page)
- > Select region under blue line
- >Dependants
- >Add New+
- >Enter user details in search fields
- >Search
- >Select user under the blue line
- >Done

### **2.2 Detach Region Administrators**

- > Regions tab (horizontal menu, top of page)
- > Select region under blue line
- >Dependants
- >Edit List
- >Select red circle beside Region Administrator's name
- >Save

### **2.3 Delete data**

- >Audits tab (horizontal menu, top of page)
- >Filter for Audit Period and Organisation
- >Search
- >Select Audit Period under the blue line
- >Select Session
- >Edit and Del to remove each Moment
- >Delete (bottom right of page)

### **3. Quick Start HHCApp Guide for Auditors**

#### **3.1 Update details**

- >Select own name (top right side of page)
- > Update details
- > Save

#### **3.2 Enter data (desktop)**

- >Home tab (horizontal menu, top of page)
- >Add Session+
- >Enter session demographics
- >Save
- >Enter Moment
- >Save

#### **3.3 Enter data (HHCApp mobile)**

- >Login to mobile site on mobile device
- >Add session
- >Enter session demographics
- >Moments
- >Enter Moment
- >Save All
- >Save All? Yes
- >Done
- >Finished? Yes
- >Sync
- >Sync All? Yes
- >Logout
- >Logout? Yes