

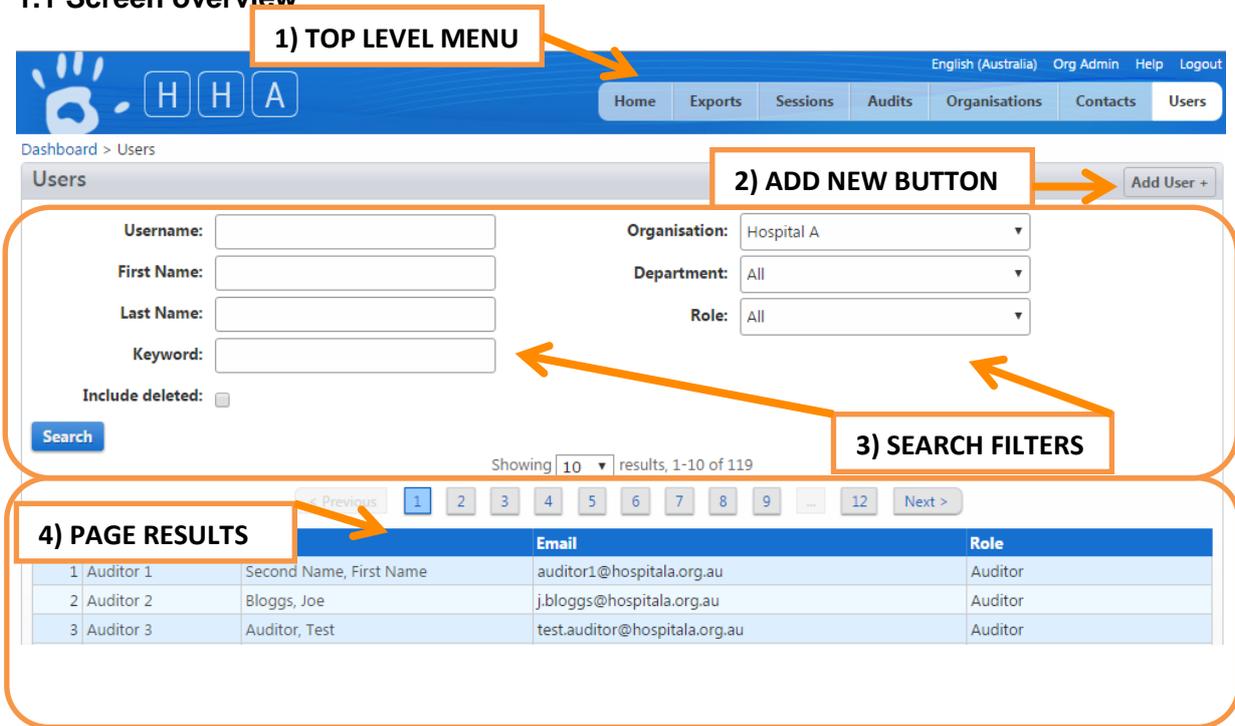
## Adding a User as an Auditor for an Organisation

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

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### 1.1 Screen overview



**1) TOP LEVEL MENU**

**2) ADD NEW BUTTON**

**3) SEARCH FILTERS**

**4) PAGE RESULTS**

		Email	Role	
1	Auditor 1	Second Name, First Name	auditor1@hospitala.org.au	Auditor
2	Auditor 2	Bloggs, Joe	j.bloggs@hospitala.org.au	Auditor
3	Auditor 3	Auditor, Test	test.auditor@hospitala.org.au	Auditor

### 1.2 Viewing an Organisations' users

>Login to HHCApp

>Click the Organisations button in the top level menu



>Click the name of the organisation under the blue line to select it.

Organisations

Code:

Name:

State: All

Total results: 1

Code	Name	Type	Depts	Beds	Parent
1   HOSP-A	Hospital A	Hospital		34	565   Metropolitan

N.B. If you are responsible for multiple organisations you can use the search filters to narrow down the list of organisations displayed and then select the required organisation.

Dashboard > Organisation List > Organisation Audits

TEST HOSPITAL - Audits

Name:

Audit Type: Any

Audit Period: Any

Audit Status: Any

Spans Date:

**ORGANISATION MENU** →

- Audits
- Audit Periods
- Sessions
- Departments
- HCW Types
- Users**
- Details

**USERS** →

>Select Users from the Organisation Menu on the right hand side

This will take you to the Organisation Users page where you will see a list of all roles for the selected organisation.

>View list of auditors by selecting dropdown box

From here you can manage the organisation's auditors by adding a new auditor or editing and removing an existing one.

Reporters and Data Entry users cannot be added or removed from this page unless they have been attached at the organisation level. If they are attached at the department level, go to the Departments tab and click on the required department.

Hospital A - Users

- Organisation Administrators (1)  (\* = Primary contact)
- Auditors (139)
- Reporter Users (0)
- Data Entry Users (0)

**All 4 roles visible on the one page**

- Audits
- Audit Periods
- Sessions
- Departments
- HCW Types
- Users**
- Details

### 1.3 Adding an existing User to the role of Auditor at an Organisation

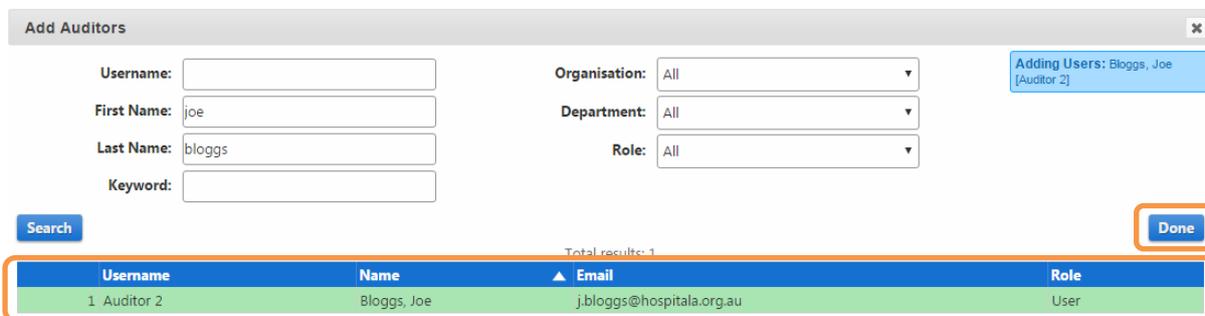
>Click 'Add New+' next to Auditor



The list of users displayed contains all users that have previously been allocated roles to your organisation(s) along with any users that have not been allocated to a role at any organisation.

N.B. Use the search criteria above the Search button to filter the list to make it easier to find a user.

>Click on the user(s) you wish to add as an auditor to select them. The selected user(s) will be highlighted green



Username	Name	Email	Role
1 Auditor 2	Bloggs, Joe	j.bloggs@hospitala.org.au	User

>Click Done

If the auditor is not already a user in the HHCApp you will need to create them as new user (see section 1.5 for instructions for Creating a new User).

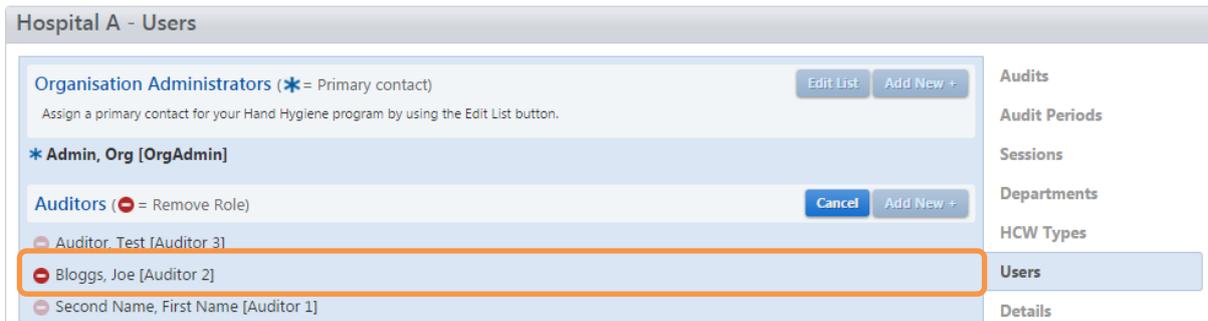
If an auditor has already been added to the HHCApp as a User by an organisation that you are not an administrator for, you will need to contact a higher administrator who can access your organisation and the other organisation. For example, a region administrator can allocate a user from another organisation from the same region or region group or a state administrator would need to allocate a user from another region.

## 1.4 Detaching an Auditor

To remove an auditor from your organisation

>Click Edit List

>Click on the red dot beside the auditor's name.



>Click Save

Roles can also be detached directly from the Users profile page (see 1.6 Adding or detaching an auditor directly from the users profile page)

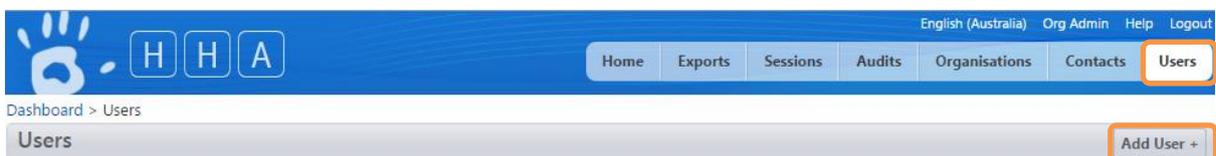
N.B. The auditor is only detached from the organisation, not deleted from HHCApp.

HHCApp will automatically detach auditors who have not collected data in more than 2 years. These auditors will become 'Users' (not deleted) and can be reattached by an Organisation Administrator on successful completion of the 'Lapsed Auditor Pathway'.  
<https://www.hha.org.au/audits/auditor-training/auditor-validation-requirements>

## 1.5 Creating a new HHCApp User

>Login to HHCApp

>Click the Users button in the top level menu



>Click Add User +

>Enter a **unique** Username for the Auditor to use when logging in to the HHCApp.  
The username can be in any format you choose, eg. FirstNameLastName.

>Enter the user's First Name.

>Enter the user's Last name

>Enter an email address that can be used to recover a lost password

- >Enter the user's contact details (optional)
- >Enter a Password of your choice.
- >Confirm the Password by re-entering it.

Nb. Checking the Force password change box is an additional security measure that will allow you to tell the user a password that they will be made to change the first time they login.

- >Click Save to add the user to HHCApp.

Dashboard > Users > User Details

### Add User

**Main Details**

Username: \*

First Names: \*

Last Name: \*

Email: \*

Phone:

Street:

Suburb:

**Password**

New Password: \*

Confirm Password: \*

Force password change:

The new user can now be allocated to a role

- >Click Assign Role

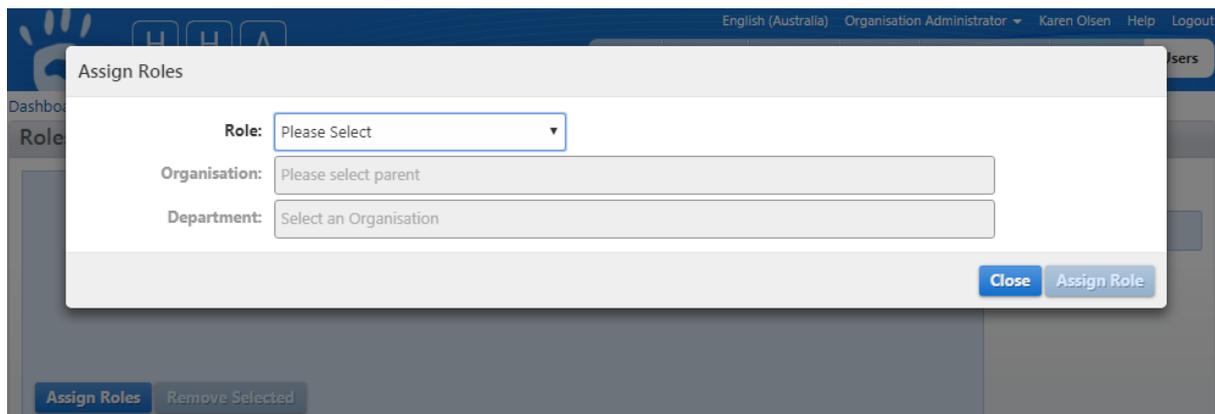
Dashboard > Roles

### Roles for: Anne Auditor

Details

Roles

- >Select Role and level (organisation +/- department depending on level of access required)



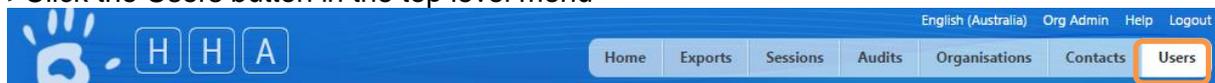
### >Assign Role

Auditors only require one login which must be personalised with current contact details. All data collected by an auditor must be attributed to the auditor it was collected by. If an Auditor has multiple logins, please notify the national office to have the profiles and data merged into one.

### 1.6 Adding or detaching an auditor directly from the users profile page

Roles can be added (if they are already attached to your organisation) or removed directly from a user's profile page.

#### >Click the Users button in the top level menu

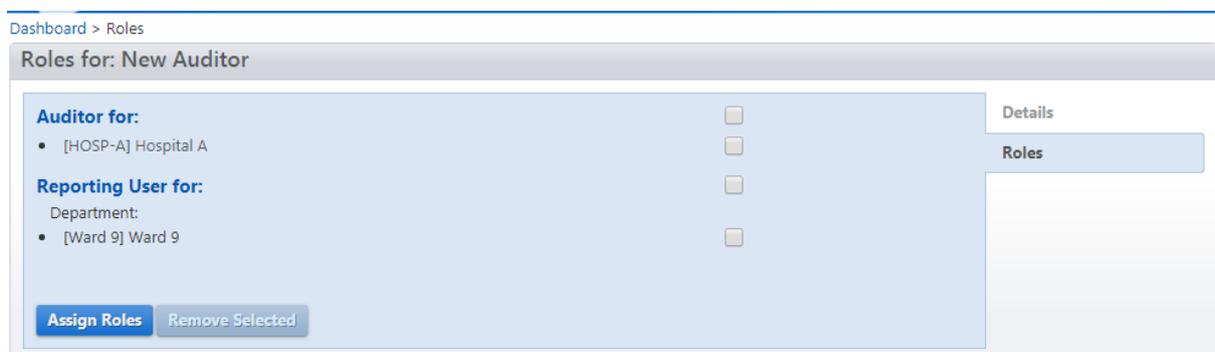


#### >Use the search criteria above the Search button to filter the list

#### >Search

#### >Click on the name of the required user in the search results to open their profile page

#### >Click on the Roles tab



#### >To assign a new role, click on the Assign Roles button



>Select Role and level (e.g. organisation or department)

>Assign Role

>To detach a role, check the box beside the role to be removed

>Click Remove Selected