Managing Users
Table of Contents

Contents

Managing Your Users

Add a User

Levels of Access and Roles

Search for a User

Download User Search Results

Deactivate a User

Deactivate a User who is also a Provider

Change a User’s Role and/or Level of Access

Update Contact Information for a User

3

3

6

7

9

10

12

13

16
This manual is intended to outline how to manage your health care facility users, including explaining how to add users, update user roles and deactivating users on the HCAI User Management tab.

To make changes to the User Management tab in HCAI, you must be the Authorizing Officer or have the Facility User Administration role assigned.

Add a User

To add a new User:

- Sign-in to [www.hcai.ca](http://www.hcai.ca)
- Go to the Manage → User Management sub-tab.
- Press the [ADD NEW USER](#) button. The Add / Edit / View User Details screen appears.
Answer the question “Is the User a Provider?”
- If the answer is Yes, a drop-down list appears. Select the Provider to whom a User Profile is being assigned.
- If no, enter the first and last name of the new User.

Enter a User Name.
- A User Name must contain at least six characters and must be unique within the HCAI system.

Enter Employee ID.
If your facility does not use Employee ID’s, enter characters in this field to help identify the user, such as their initials.

- Enter the user’s email address.
  - You can also enter a phone number for the user if available.

- Select the level of access to assign to the User.

If you select the Provider-level access, consider which patient information the User should be permitted to view.

- Complete the “Grant Access Rights to the User” section to allow the new user to view, update and submit forms for specific Providers.
If the new User is also the new Authorizing Officer for the facility, you must assign the Facility Administrator and the Facility User Administrator roles.

HCAI will display the User Name and temporary password for the new User.

- If an email address was entered, the User receives an email with their User Name and temporary password.
- If an email address was not entered, you must communicate the User Name and temporary password to the new User.

Please note: if the new user is also the new Authorizing Officer for the facility, you must also update the Authorizing Officer section of the Facility Management tab.

- For instructions on how to do this, review Chapter 4 of the Web User Manual “Managing Your Facility.”

Levels of Access and Roles
In HCAI, there are two levels of access that can be assigned to a User:

- The **Facility** level of access
- The **Provider** level of access

There are various roles that can be chosen within each access level. Depending on the role, the User can see different tabs within HCAI and update different sections.

<table>
<thead>
<tr>
<th>Level of Access</th>
<th>Roles Available</th>
<th>Viewable Tab(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility*</td>
<td>Facility User Administrator</td>
<td>Access to the Manage global tab and the User Management sub-tab</td>
</tr>
<tr>
<td></td>
<td>Facility Administrator</td>
<td>Access to the Manage global tab and Facility Management sub-tab</td>
</tr>
<tr>
<td></td>
<td>Provider Report Viewer</td>
<td>Access to the Manage global tab and the Reports sub-tab</td>
</tr>
<tr>
<td></td>
<td>Form Submitter</td>
<td>Access to all global tabs and their sub-tabs, except for the Manage global tab and the sub-tabs within it.</td>
</tr>
<tr>
<td></td>
<td>Form Support</td>
<td>Access to forms and Search global tabs and their sub-tabs. Can create forms but not submit them.</td>
</tr>
<tr>
<td>Provider</td>
<td>Form Submitter</td>
<td>Access to all global tabs and their sub-tabs, except for the Manage global tab and the sub-tabs within it. User will only be able to see the submitted forms that they created or those in which they are referenced</td>
</tr>
<tr>
<td></td>
<td>Form Support</td>
<td>Access forms and Search global tabs and their sub-tabs. Can see only forms for the provider(s) for which they have access. Can create forms but not submit them.</td>
</tr>
</tbody>
</table>

* The *Facility level of access also includes the roles listed under the Provider level of access.*

**Search for a User**

To search for a User in HCAI:
• Sign-in to www.hcai.ca
• Go to the Manage → User Management sub-tab

Under Search for Users, enter the name of the User you are searching
  ○ To see a list of all active HCAI Users in your Facility, select “Active” under User Status and leave all other fields blank
• Click SEARCH

Search results can be refined by entering additional criteria in the search fields.

• Click on the User Name to view detailed information
Download User Search Results

After searching for a User, a report can be downloaded from the User Search → Search Results screen onto a spreadsheet. This spreadsheet will provide a more detailed report, including information such as the User Name, email address, phone number and Date of Deactivation for each User appearing in the search results.

To download the User search results:

- Repeat the steps for *Search for a User*
- From the search results screen, click **Download Report** button.
- The spreadsheet can be immediately opened or saved into your computer

Deactivate a User

Providers who no longer work at your facility must be deactivated in a timely manner to avoid placing your facility data at risk of unauthorized access.

- Sign-in to [www.hcai.ca](http://www.hcai.ca)
- Go to the Manage → User Management sub-tab.
- In the Search for Users section, select Active for User Status, enter the last name of the user to be deactivated and press the **SEARCH** button.

Click on the name of the user to be deactivated in the *Search Results* screen to open their User Profile.

The search results can be further refined by entering the User Name, Employee ID, or E-mail of the user or selecting their Facility Roles.
• From the Add/Edit User screen, click the **DEACTIVATE** button located near the top right corner of the screen.

By deactivating rather than deleting users, their data remains in HCAI but their account can no longer be used.

• Click **OK**.
• **Please note:** if the deactivated user was also the Authorizing Officer for the facility, you must update the Authorizing Officer section of the Facility Management tab.
  o For instructions on how to do this, review Chapter 4 of the Web User Manual “Managing Your Facility."

**Deactivate a User who is also a Provider**

To deactivate a User who is also a Provider:

• Sign-in to [www.hcai.ca](http://www.hcai.ca) and follow the steps to **Deactivate a User**
• Once the User has been deactivated, go to the Manage → Facility Management sub-tab
• Scroll down to the Associated Providers list and click on the name of the Provider whose account will be deactivated
• Scroll to the bottom of the screen to the Associated Providers screen
• Click on the name of the Provider who is going to be deactivated
  o Any User Name associated with the Provider will also be deactivated unless it is also associated with another active Provider

![Associated Providers](image)

Click on the name of the Provider to be deactivated.

• Enter the “End Date” for the Provider and click **SAVE**
Change a User’s Role and/or Level of Access

- Sign-in to www.hcai.ca
- Go to the Manage → User Management sub-tab

- In the Search for User section, select Active for User Status, and enter the last name of the user and press the SEARCH button
• Click on the name of the user who requires changes to their role or level of access in the *Search Results* screen to open their User Profile.

• From the *Add/Edit User* screen, update the User’s role or level of access.
• Use the drop-down menu to select the desired level of access

There are two different levels of access in HCAI – Facility and Provider.

• To change the User’s roles, check or uncheck the boxes next to the role title

**Please note:** if you are updating the roles and/or level of access for your facility’s Authorizing Officer, designate the Facility level of access with the Facility User Administrator and Facility Administrator roles assigned

• Click **Submit** to save the changes

• The email address field is now mandatory for all user accounts. If the user account did not have an email address associated to it, you will be required to enter an email address before you are able to save any changes you have made. If no email address is entered, an error message will appear at the top of the screen and the changes will not be saved until an email address is entered and “Submit” is pressed again.
Update Contact Information for a User

To update a User’s contact information:

- Sign-in to www.hcai.ca
- Go to the Manage ➔ User Management sub-tab
- Using the search fields, enter the User whose contact information will be updated and press the **SEARCH** button
- Click on the name of the user who requires changes to their role or level of access in the *Search Results* screen to open their User Profile

The search results can be further refined by entering the User Name, Employee ID, or E-mail of the user or selecting their Facility Roles.
• Under Add/Edit/View User Details, update the contact information

• Scroll down and click **Submit**

**Please note:** The email address field is now mandatory for all user accounts. If the user account did not have an email address associated to it, you will be required to enter an email address before you are able to save any changes you have made. If no email address is entered, an error message will appear at the top of the screen and the changes will not be saved until an email address is entered and “Submit” is pressed again.
Update contact information in the required fields.