Site Administrator and Provider Administrator

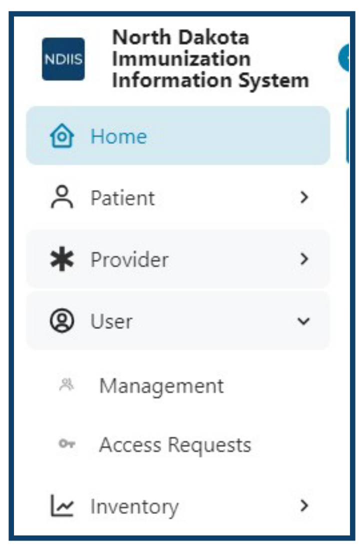
Getting Started

Site Administrators and users with Provider Administrator-level access can view, approve, deny, or modify user access for their Provider Site in the NDIIS. Provider Administrator access is assigned to Site Administrators as listed on the NDIIS Provider Site Agreement, and each Site Administrator must have a unique NDIIS login. Site Administrators may grant Provider Administrator-level access to other users at their discretion. It is advised to limit the number of users each site has with this level of access. Provider Administrators may only manage users for the provider sites where they hold this level of access.

- Site Administrator – The person named on the Provider Site Agreement and serves as the main point of contact between the provider site and NDIIS staff.
- Provider Administrator – A type of access level in the NDIIS. This NDIIS user role can be given to any active user by someone who already has Provider Administrator access to the provider site.

Managing Provider Site Users

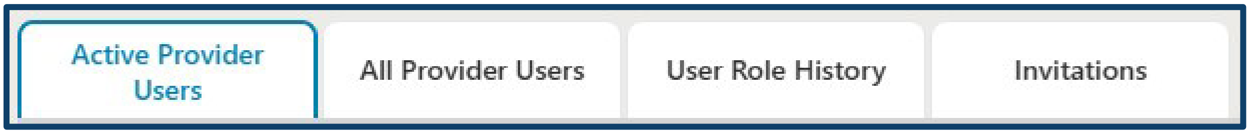
Provider Sites can have multiple users with Provider Administrator-level access. Provider Administrator users manage user access in the User function found on the Main Menu. Click the User function to view the available options.



- Management function allows Provider Administrator-level users the ability to review active users for the selected provider site, view all users (both active and inactive) for the selected provider site, view the user role history for all users for the selected provider site, and export lists of active or all users for the selected provider site.

- Access Requests function allows Provider Administrator-level users the ability to approve, deny, or modify NDIIS user access requests for their provider site. They are also able to view historical requests for their site.

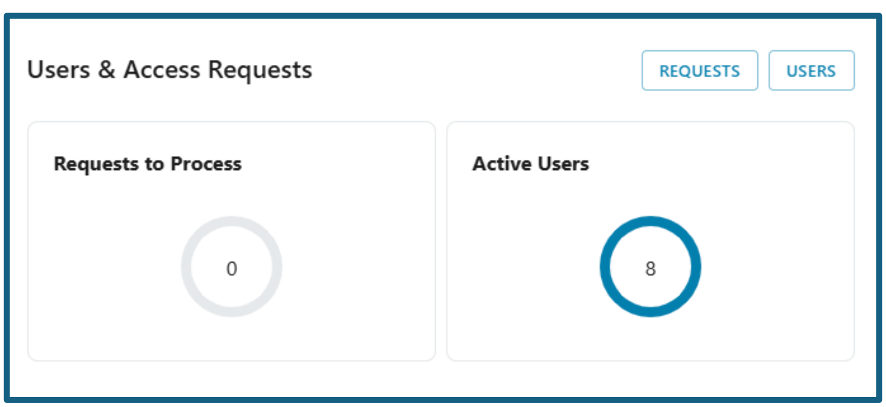
Management



- Active Provider Users shows the current list of approved users for the selected provider site that have an active NDIIS user account.
- All Provider Users shows all active and inactive users that currently have or previously had access to the selected provider site.
- User Role History shows changes to the access of active and inactive users that have or had access to the selected provider site.
- Invitations allow Provider Administrator-level users to send new NDIIS users a link to create their individual user account. This function increases security of NDIIS by limiting account creation to only those intended users.

User Dashboard

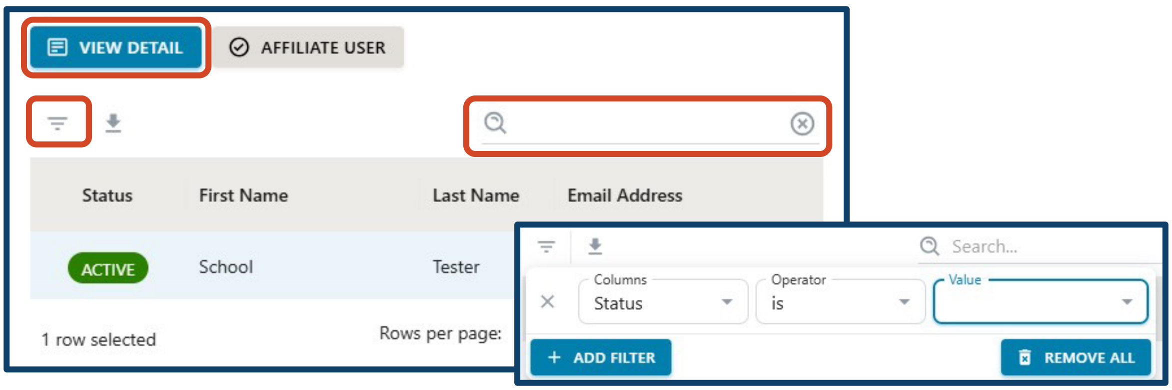
To increase awareness of User Management, a User dashboard is viewable on Provider Admin's homepage of the NDIIS. Provider Admins can quickly view their Provider Site's current number of Active Users and if there are outstanding access requests. The User dashboard also has links to different user management functions. Provider Admins can now quickly review Access Requests by clicking the Requests button or be taken directly to the User Management module through the Users button.



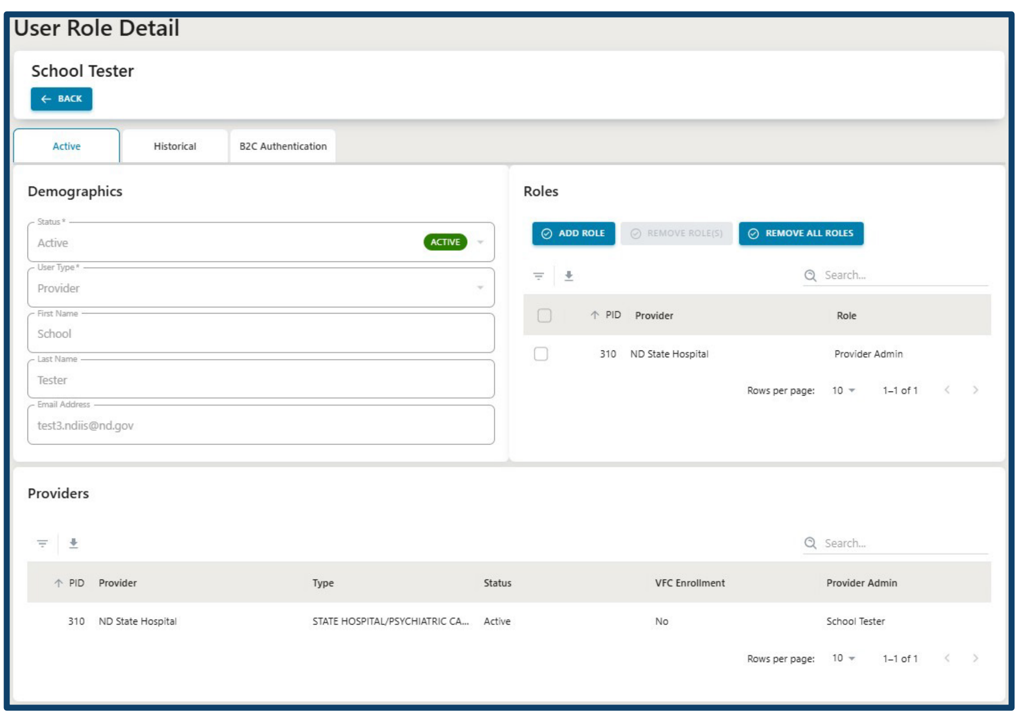
User Management: Existing Users

Provider Sites are expected to manage their approved User list and are encouraged to review the list at least once per month.

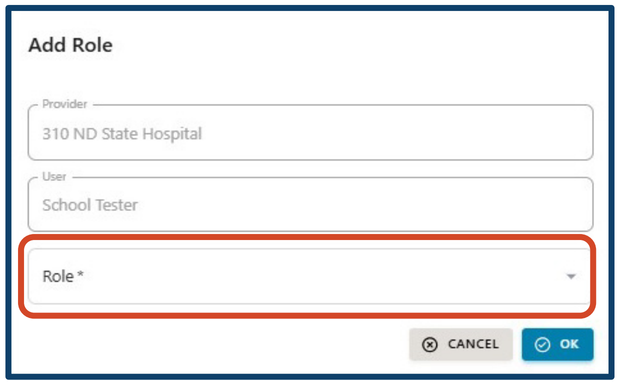
1. To begin, select the Active Provider Users tab to view the list of active users. Select the user to be reviewed and click View Detail.
    - Provider Administrator with large user lists can use the Search function on the right side of the module or use the Filters function under the View Detail button to find a specific user.



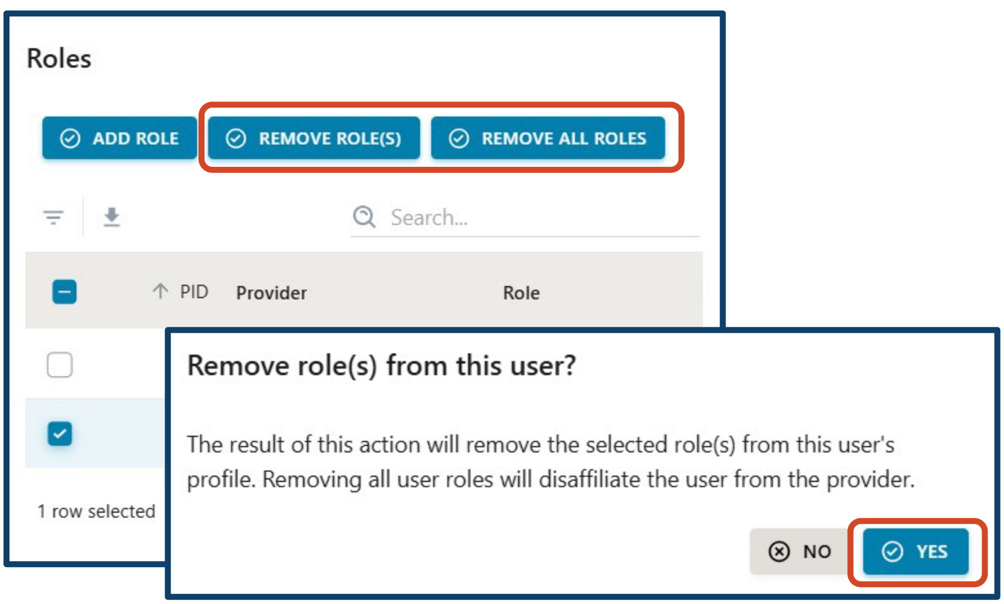
2. The selected user account will open to User Role Detail that has three tabs. The Active tab outlines the user's Demographics, current user Roles, and Provider sites the user currently has access under.



3. In the Roles module, Provider Administrator users can add, modify, or remove the user's access to the NDIIS. When modifying a user's role, remove the old role before adding the new user role.
    - Provider Admin users can only see the user access for the site they have selected in their Active Provider drop-down.
    - Add/Modify a user's access level in the NDIIS by clicking "Add Role" to open the pop-up. In the new window, the Role dropdown will provide available access level options. Select the new Role and click "OK".



    - Remove Role/User Access by selecting the role(s) and clicking Remove Role(s). If the user only has access to NDIIS under your provider site, clicking Remove All Roles will work. A pop-up warning will appear to confirm the removal role(s)/access. Click Yes to confirm the removal.



User Management: New Users

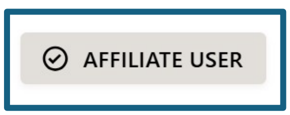
When access for a new user of the provider site is needed, there are two options available.

- Existing Users can request access to the provider site through the User Self Service or the Provider Administrator can assign them access under their provider site using the Affiliate User function.
- New Users, those who do not have an active NDIIS user account, will need to be sent an Invitation by the Provider Administrator and then complete the New User Set-Up, including sending an access request through the User Self Service.

Affiliate User

The Affiliate User function is a way to assign access to your provider site for an existing NDIIS user without requiring them to submit a formal access request. This is typically someone who works in another location and has transferred, goes between locations, or over sees multiple locations.

1. In the User Management function click the Affiliate User button.



2. This will trigger a pop-up to appear. Search in the User drop down for the person to be granted access by name or email and select the account.

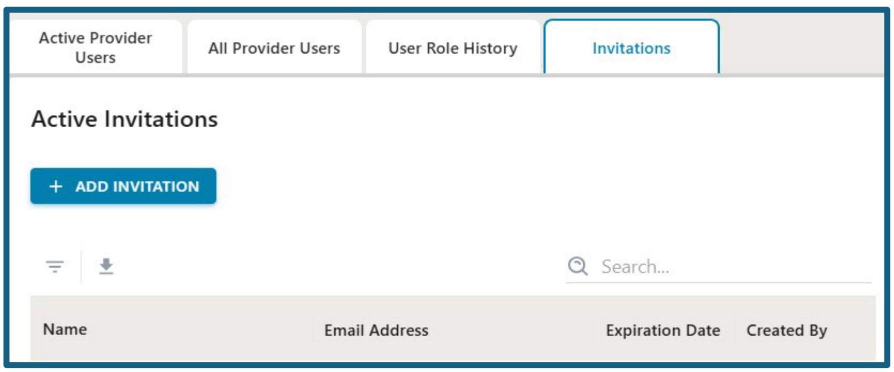
3. In the Role dropdown, select the level of access to be granted.

4. Click OK to complete the process.

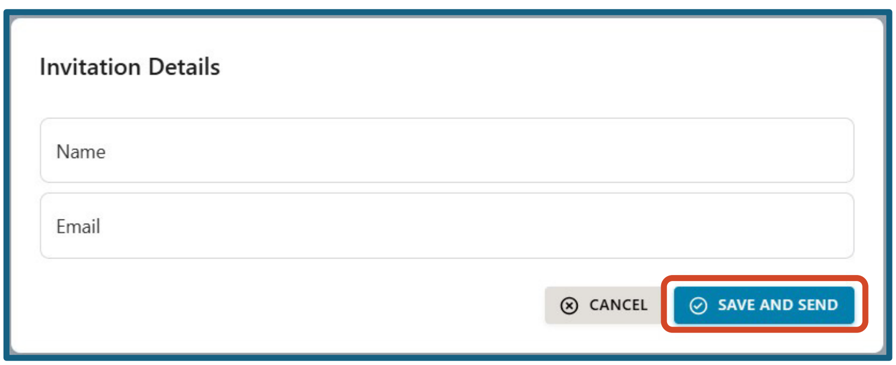
Invitations

This function limits unintended user account creation in the NDIIS. Provider Administrators must send a new user invitation in order for anyone to be allowed to create a new NDIIS user account. Invitations can only be sent to an email address once every seven (7) days. A new link cannot be sent until the previous link has expired. The Invitation tab lists all active invitations for the provider site. This includes the name of the person invited, the email address used for the link, the expiration date of the invitation, and user that sent the invitation.

1. To create a new invitation, click on the Add Invitation button to trigger the pop-up.



2. In the pop-up, enter the new user's full name and email address. This is the email address the invitation will be sent to and that must be used for the NDIIS account.



3. Click Save and Send to complete the invitation and close the pop-up.
4. The new invitation will appear in the Active Invitations list until the user creates their account or the invitation expires.