Guidance on how to manage delegates

Registered providers and managers will by default be provided with permissions to add and edit delegate users for their service(s).

Clicking **Permissions** will display the following navigation options:

(**Manager Administration** only appears for non-registered Services such as MHLD Wards)

Click **Delegated Users** to continue.
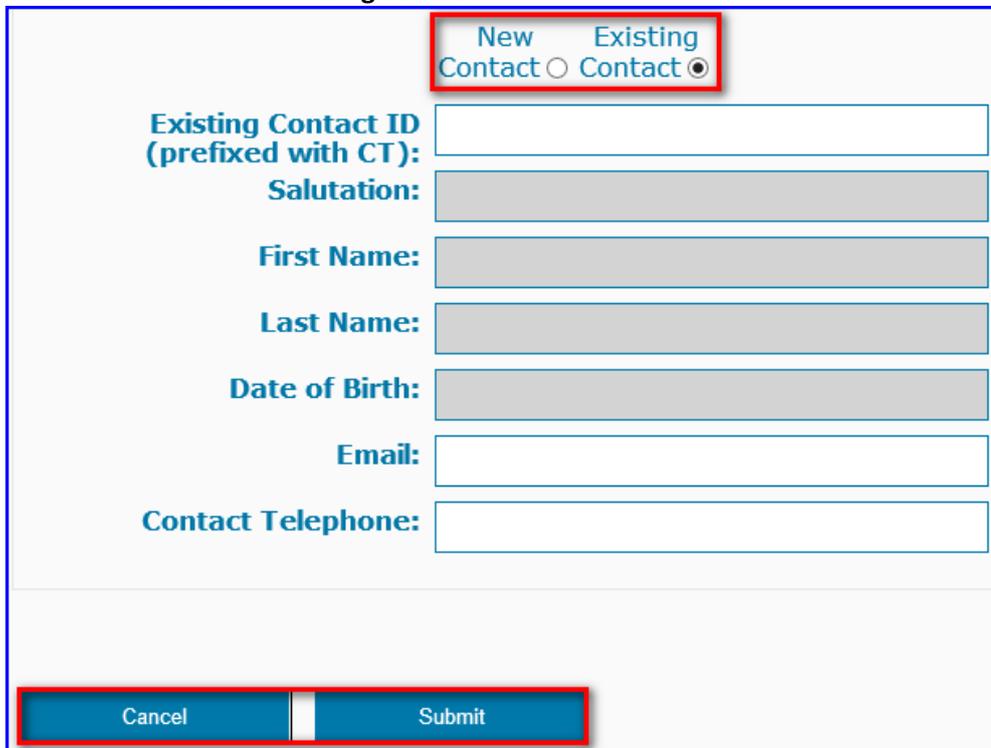
Select a **Service** from the drop down

The screen will refresh and display existing Delegated Users for the selected Service.

1.1.1 Creating a new User

1. Click **Create User**

   Create User

2. Select **New Contact** or **Existing Contact**

   If existing Contact is selected it will prompt for their **Existing Contact ID.**

   This is the IConnect contact number prefixed with **CT,** which the user should know if they have already registered with RQIA and have previously used the Portal.

   For New Contacts, please complete the Form.

   The system will also check that the email address entered is unique and not already in use.

   Please note - The Portal User creation process will perform duplicate detection against the Surname & Date of Birth of existing contacts and alert the Provider\Manager if a match is found. If there is a match but the new user is not aware of their details please contact the RQIA web portal team.

   Click **Submit** to create and/or register the new or existing user with the Service

   The next screen promompts the provider to select their permissions. (see 1.1.3 Editing User Permissoins)

Once the user has been created, their details will be displayed on the Delegated Users screen for that Service. If it is a new user **automated email** will be sent to the user's email address containing their password. For security reasons, the person creating a new user will have to verbally inform the new user of their log in name (CT number) which can be found next to their name on the **Delegate Users** Screen.

1.1.2 Editing existing user details

1. **Select** the User to be Edited using the selector button.

Name	Id	Email	Locked Out
⦿ Henry Rollins	CT011641	sfarr123@sysco-software.com	☐

2. Click **Edit User Contact Details**

Edit User Contact Details

3. Amend details as required

Service: *	00Demonstraion Service (020138) ⌄
Locked Out:	☐
Salutation: *	Mr ⌄
First Name: *	Henry
Last Name: *	Rollins
Date of Birth: *	21/06/1960
Email: *	sfarr123@sysco-software.com
Contact Telephone (no spaces): *	234234234

Cancel   Submit

4. Click **Submit** to save the changes and return to the Delegated User screen.

1.1.3 Editing User Permissions

1. Select the User to be Edited using the selector button.

Name	Id	Email	Locked Out
⦿ Henry Rollins	CT011641	sfarr123@sysco-software.com	☐

2. Click **Edit User Permissions**

Edit Permissions

3. Amend User Permissions for the Service as required

Choose the permissions for this user below. For a description of each option please hold the mouse pointer over the relevant Permission Name.

Permission Name	No Access	Full Access
Access Button Download QIP	○	⦿
Access Button Upload QIP	○	⦿
Access Menu Post Inspection Evaluations	○	⦿
Access Submenu Application Cancellation	○	⦿
Access Submenu Delegated Users	○	⦿
Access Submenu Form 1a - Initial Notification - Adult Services	○	⦿
Access Submenu Form 1b - Initial Notification - Children's	⦿	○
Access Submenu Notification of Absence	○	⦿
Access Submenu Registration of new manager	○	⦿
Access Submenu Variation	○	⦿

Permission Name	Read Only	No Access	Full Access
Access Menu Manage Paperlite	○	○	⦿

4. Click **Submit** to save the changes and return to the Delegated User screen.