

# 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 MHL D Wards)

Click **Delegated Users** to continue.

Select a **Service** from the drop down

## Delegated Users

From this menu you can control who can login on behalf of your services.  
All people that can login to your service are listed in the Delegated User menu. This will allow you to add new users, edit existing user details (e.g. name), or edit permissions (i.e. what the user can perform on behalf of the service).

**Service:**

[Create User](#) [Edit User Contact Details](#) [Edit User Permissions](#) [Unlock User](#)

[Remove User](#)

Name	Id	Email	Locked Out
<input type="radio"/> Henry Rollins	CT011641	sfarr123@sysco-software.com	<input type="checkbox"/>
<input type="radio"/> Frank Zappa	CT011620	uat.test@rqia.org.uk	<input type="checkbox"/>
<input type="radio"/> Barry McGuigan	CT011632	sfarr@sysco-software.com	<input type="checkbox"/>
<input type="radio"/> Gordon Strachan	CT011633	gordon.test@test.test.com	<input type="checkbox"/>

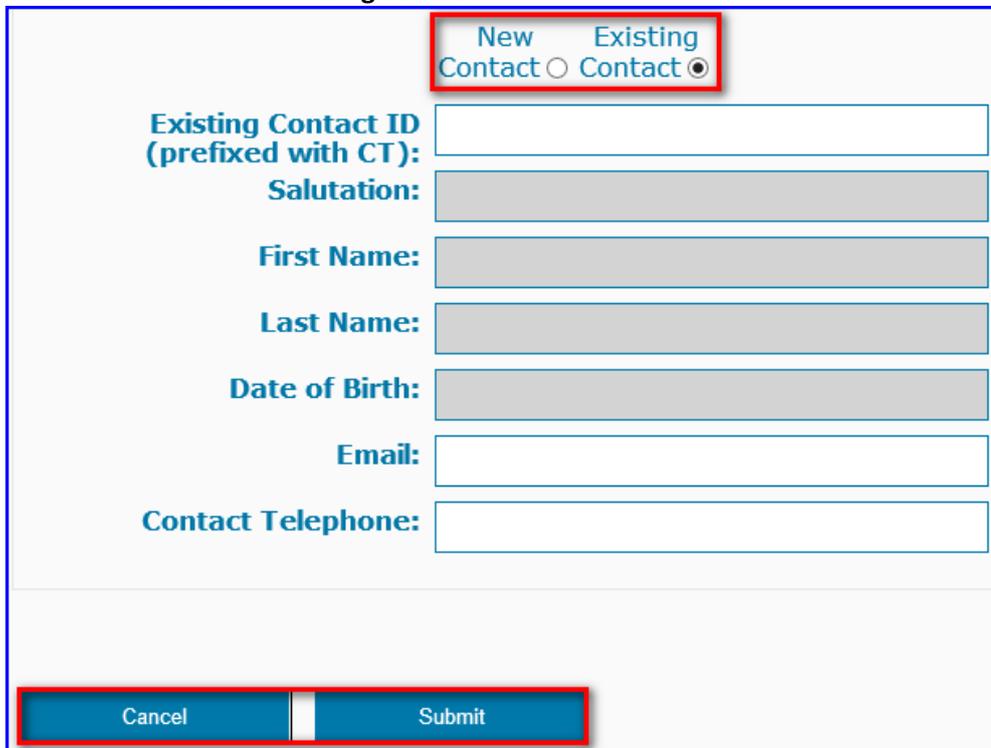
***The screen will refresh and display existing Delegated Users for the selected Service.***

## 1.1.1 Creating a new User

1. Click **Create User**



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

A screenshot of a web form for creating a user. At the top right, there are two radio buttons: "New Contact" (unselected) and "Existing Contact" (selected). Below this are several input fields: "Existing Contact ID (prefixed with CT):", "Salutation:", "First Name:", "Last Name:", "Date of Birth:", "Email:", and "Contact Telephone:". At the bottom, there are two buttons: "Cancel" and "Submit".

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 prompts the provider to select their permissions. (see 1.1.3 Editing User Permissions)

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	<input type="checkbox"/>

2. Click **Edit User Contact Details**

Edit User Contact Details

3. Amend details as required

<b>Service: *</b>	00Demonstraion Service (020138) <input type="button" value="v"/>
<b>Locked Out:</b>	<input type="checkbox"/>
<b>Salutation: *</b>	Mr <input type="button" value="v"/>
<b>First Name: *</b>	Henry
<b>Last Name: *</b>	Rollins
<b>Date of Birth: *</b>	21/06/1960
<b>Email: *</b>	sfarr123@sysco-software.com
<b>Contact Telephone (no spaces): *</b>	234234234

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
<input checked="" type="radio"/> Henry Rollins	CT011641	sfarr123@sysco-software.com	<input type="checkbox"/>

2. Click **Edit User 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	<input type="radio"/>	<input checked="" type="radio"/>
Access Button Upload QIP	<input type="radio"/>	<input checked="" type="radio"/>
Access Menu Post Inspection Evaluations	<input type="radio"/>	<input checked="" type="radio"/>
Access Submenu Application Cancellation	<input type="radio"/>	<input checked="" type="radio"/>
Access Submenu Delegated Users	<input type="radio"/>	<input checked="" type="radio"/>
Access Submenu Form 1a - Initial Notification - Adult Services	<input type="radio"/>	<input checked="" type="radio"/>
Access Submenu Form 1b - Initial Notification - Children's	<input checked="" type="radio"/>	<input type="radio"/>
Access Submenu Notification of Absence	<input type="radio"/>	<input checked="" type="radio"/>
Access Submenu Registration of new manager	<input type="radio"/>	<input checked="" type="radio"/>
Access Submenu Variation	<input type="radio"/>	<input checked="" type="radio"/>

Permission Name	Read Only	No Access	Full Access
Access Menu Manage Paperlite	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

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