Quick Steps for PHN Users

For experienced users and as a quick reference this chapter lists some common tasks in dot point form. Full details can be found in the remainder of this guide and you can click on the hyperlinks to access the relevant chapter.

Creating a new user for your PHN

- Log on as admin user
- Select your organisation from the 'This User's Organisation'link on the top left
- Click on 'Add new User' and fill in the details on the next screen, then click save

Creating a new client organisation

This will need to be done for all practices not already listed as client organisations for your PHN

- Log on as admin user
- Select your organisation from the 'This User's Organisation'link on the top left
- Click on the 'Client Organisations'tab
- Click on 'Add new client organisation' and fill in the details on the next screen, then click 'Save'

Creating a new user for a client organisation

After creating a new client organisation you need to create the users at that organisation. For existing client organisations you might have to add new users.

- Log on as admin user
- Select your organisation from the 'This User's Organisation'link on the top left
- Click on the 'Client Organisations'tab
- Select the practice you want to add users by clicking on the practice name
- Click on 'Add new User' and fill in the details on the next screen, then click save

Changing user preferences or password

- Log on as admin user
- Select your organisation from the 'This User's Organisation'link on the top left
- For PHN users: Click on the user you want to change to display the user details, then on the 'Organisations'tab
- For practice level users: Click on the 'client organisations' tab to select a client organisation, then on the practice to display the practice level users and then on the user you want to change, then on the 'Organisations' tab
- Change notification options and/or administrator access
- Click on the 'Password' tab to change the password by entering a new password

Removing a user

- Log on as admin user
- Select your organisation from the 'This User's Organisation' link on the top left
- For PHN users: Click on the user you want to change to display the user details, then on the 'Organisations' tab
- For practice level users: Click on the client organisations tab to select a client organisation, then on the practice to display the practice level users and then on the user you want to change, then on the 'Organisations' tab
- Click on 'Remove' on the bottom right for the organisation you want to remove the user

Creating a list of all current users

- Log on to the portal – no admin access required
- Select your organisation from the 'This User's Organisation' link on the top left
- Click on the 'Export List to file (including Users at all client organisations' button

- The report will download as a comma delimited file (.csv) and can be opened and edited with MS Excel or other programs