

Add or Remove a CQRS User and Assign a Role Job Aid

CQRS users are created or removed from the system by a CQRS User Administrator or an Advanced User Administrator.

Creating a new user is a two-stage process and requires you to 1) create the user account and 2) specify an associated organisation(s) and role(s) within the organisation(s).

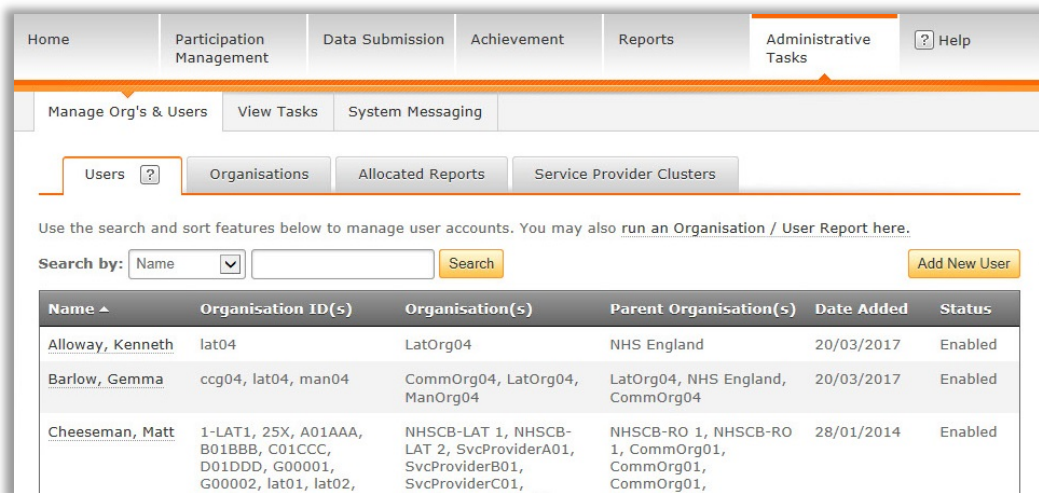
A CQRS user cannot be deleted from the system. Removal involves revoking links to one or more organisations with which the user is associated. This is useful when a user is transferring between or leaving an organisation. If the user will no longer need to use CQRS, you can disable their CQRS user access.

This job aid describes the steps required to add or remove CQRS users. It also describes linking or unlinking organisations and disabling a user account.

Note: The data that appears in this job aid is for training purposes only and does not represent actual data.

Adding a New User

1. From the CQRS Home screen, select the **Administrative Tasks** tab.

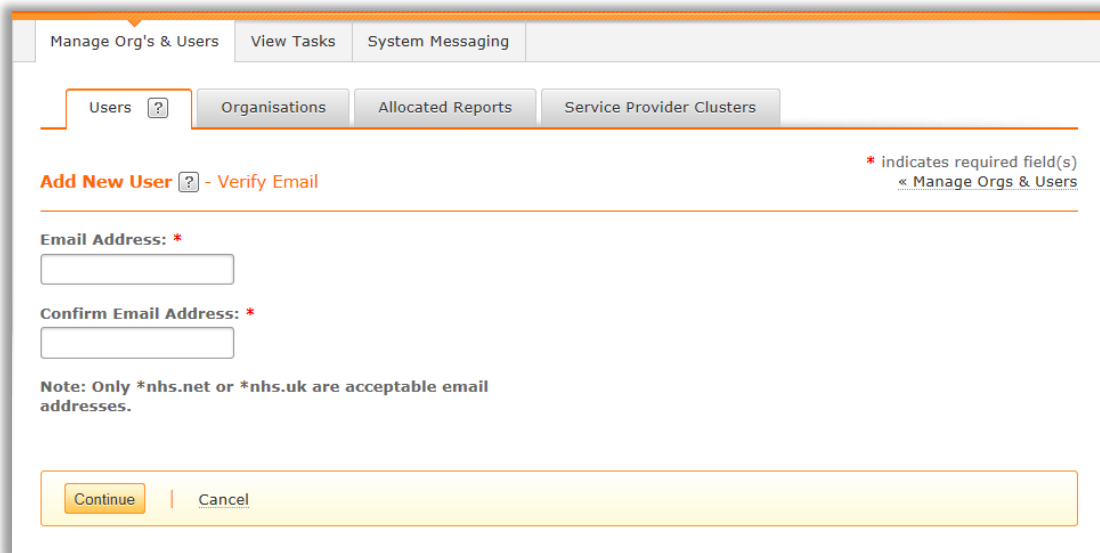


The screenshot shows the CQRS Administrative Tasks interface. The top navigation bar includes tabs for Home, Participation Management, Data Submission, Achievement, Reports, Administrative Tasks (selected), and Help. Below this, there are sub-tabs for Manage Org's & Users, View Tasks, and System Messaging. Under Manage Org's & Users, there are further sub-tabs for Users (selected), Organisations, Allocated Reports, and Service Provider Clusters. A search bar is present with a dropdown menu set to 'Name' and a 'Search' button. An 'Add New User' button is also visible. Below the search bar is a table listing users with columns for Name, Organisation ID(s), Organisation(s), Parent Organisation(s), Date Added, and Status.

Name ^	Organisation ID(s)	Organisation(s)	Parent Organisation(s)	Date Added	Status
Alloway, Kenneth	lat04	LatOrg04	NHS England	20/03/2017	Enabled
Barlow, Gemma	ccg04, lat04, man04	CommOrg04, LatOrg04, ManOrg04	LatOrg04, NHS England, CommOrg04	20/03/2017	Enabled
Cheeseman, Matt	1-LAT1, 25X, A01AAA, B01BBB, C01CCC, D01DDD, G00001, G00002, lat01, lat02,	NHSCB-LAT 1, NHSCB-LAT 2, SvcProviderA01, SvcProviderB01, SvcProviderC01,	NHSCB-RO 1, NHSCB-RO 1, CommOrg01, CommOrg01, CommOrg01,	28/01/2014	Enabled

NOTE: CQRS displays current users, their organisation and the date they were added.

2. Select the **Add New User** button.
3. Select the **Email Address** field. Enter the email address associated with the new user.



Manage Org's & Users | View Tasks | System Messaging

Users ? | Organisations | Allocated Reports | Service Provider Clusters

Add New User ? - Verify Email * indicates required field(s)
← Manage Orgs & Users

Email Address: *

Confirm Email Address: *

Note: Only *nhs.net or *nhs.uk are acceptable email addresses.

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4. Select or tab to the **Confirm Email Address** field and re-enter the email address associated with the new user.
5. Select the **Continue** button.

The Add New User–User Information screen displays. Note that the user email address information entered in the previous screen automatically appears. All fields, with the exception of **Mobile Phone**, are mandatory.



6. Complete all required fields.

User Details [?](#) * indicates required field(s)
[« Manage Orgs & Users](#)

Email Address: **Work Phone: ***

Title: **Mobile Phone:**

First Name: * **CQRS Access**
 Enabled Disabled

Last Name: *

User ID:

Organisation Access

commissioning-board-b - Commissioning Board B

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Adding Organisation and Role

Next, you must link the new user with one or more organisations and specify their role permissions within those organisations.

7. Select the **Add Organisation** button.
8. If it is not visible, you can use the **Search By** filter to quickly find the organisation that is to be associated with the new user.
9. Select the checkbox next to the organisations that you wish to link to the new user.
10. Select the **Submit** button. An expanded view of the chosen organisation is displayed. Available CQRS roles can be viewed on this screen.

ccg04 - CommOrg04 Remove Organisation

Parent Organisation: LatOrg04 Role(s): * Select None

Organisation Type: Clinical Commissioning Group Note: When no payment type is selected, all types are included

Access Requested: 28/03/2017

Achievement Entry

Payment Type:

QOF GPES DES CC VAC LES

Advanced User Admin

Approval Management

Commissioning Management

11. Select the relevant checkboxes next to the roles to be allocated to the new user.
NOTE: Each role expands to reveal payment-type capabilities. When you leave all Payment Type boxes unchecked, the user has access to all Payment Types for that particular role.
12. If relevant, select the checkbox next to the organisation's Service Provider Cluster(s) to limit the user's access within that organization.

Reference Job Aid "Restricting User Access Using a Service Provider Cluster" for additional information on assigning a user to a Service Provider Cluster.

Service Provider Cluster(s):

Note: When no Provider Cluster is selected the user's access is not restricted by Provider Cluster.

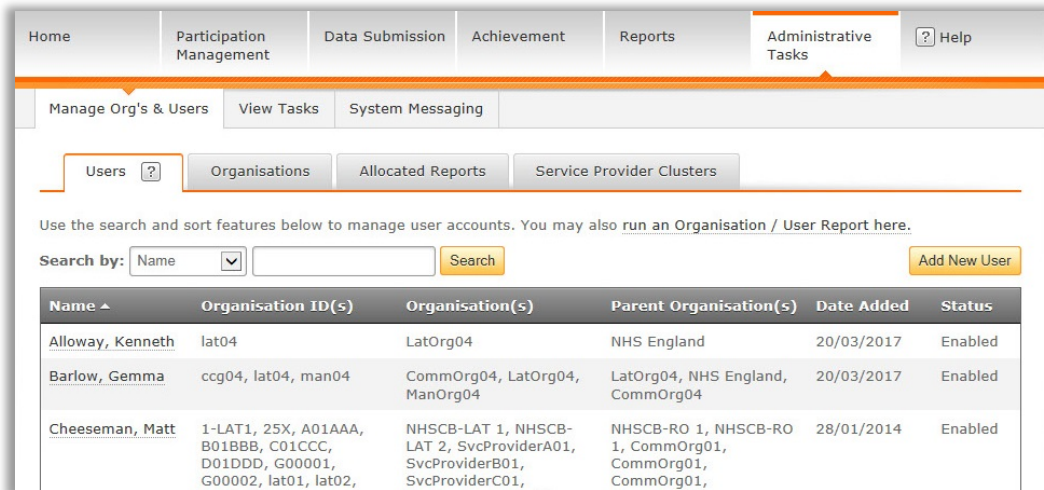
Short Name	Name
<input type="checkbox"/> C61A6DB801	Eastern City Practices
<input type="checkbox"/> 873CF39E1C	Northern Region GP Practices
<input type="checkbox"/> B089991938	Western Area GP Cluster

13. Select the **Submit** button. CQRS displays a message confirming that you have successfully added the new user.

Removing Organisation Access for a User

Remember, you cannot delete a CQRS user. Removal simply means that you revoke any or all links to organisations. If the user no longer has responsibilities within CQRS, you can disable their access to the system.

1. From the CQRS Home screen, select the **Administrative Tasks** tab.

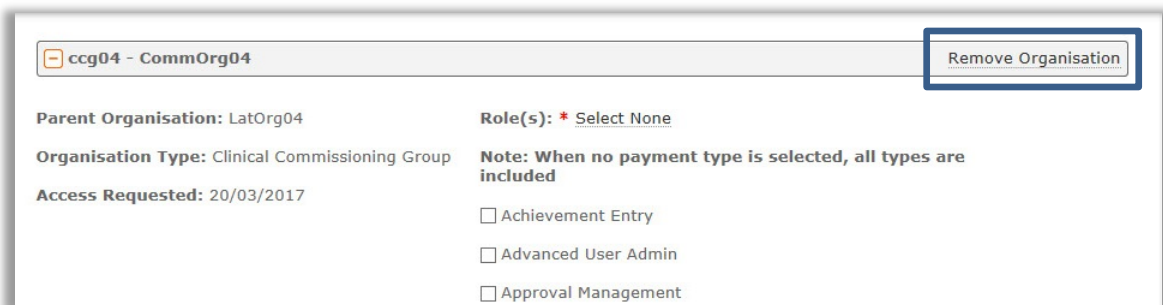


The screenshot shows the 'Administrative Tasks' section of the CQRS interface. The 'Users' tab is selected, displaying a table of user accounts. The table has columns for Name, Organisation ID(s), Organisation(s), Parent Organisation(s), Date Added, and Status.

Name ^	Organisation ID(s)	Organisation(s)	Parent Organisation(s)	Date Added	Status
Alloway, Kenneth	lat04	LatOrg04	NHS England	20/03/2017	Enabled
Barlow, Gemma	ccg04, lat04, man04	CommOrg04, LatOrg04, ManOrg04	LatOrg04, NHS England, CommOrg04	20/03/2017	Enabled
Cheeseman, Matt	1-LAT1, 25X, A01AAA, B01BBB, C01CCC, D01DDD, G00001, G00002, lat01, lat02,	NHSCB-LAT 1, NHSCB-LAT 2, SvcProviderA01, SvcProviderB01, SvcProviderC01,	NHSCB-RO 1, NHSCB-RO 1, CommOrg01, CommOrg01, CommOrg01,	28/01/2014	Enabled

NOTE: CQRS displays current users, their organisation and the date they were added. If the user name is not displayed, use the **Search By** filter to locate them.

2. Select the user name from the display list.
3. To remove access to an organisation, select the **Remove Organisation** link.



The screenshot shows the 'Remove Organisation' dialog box for user Gemma Barlow. The dialog displays the following information:

- Parent Organisation:** LatOrg04
- Organisation Type:** Clinical Commissioning Group
- Access Requested:** 20/03/2017
- Role(s):** * Select None
- Note:** When no payment type is selected, all types are included
- Achievement Entry
- Advanced User Admin
- Approval Management

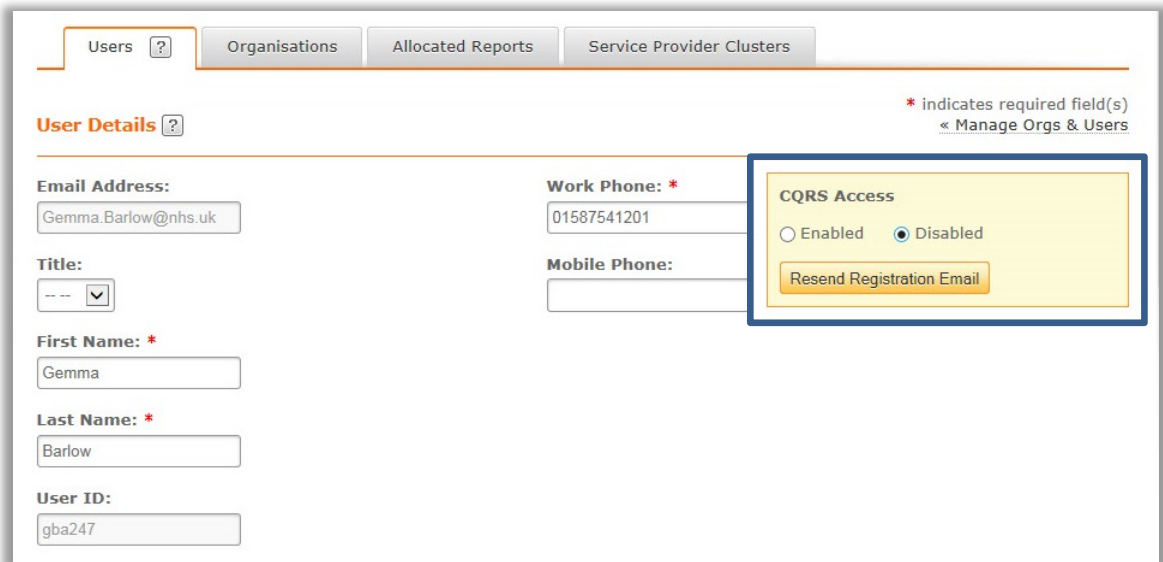
4. Select the **Submit** button.

CQRS displays a message confirming that you have successfully removed user access to the chosen organisation.

If the user no longer has any CQRS responsibilities, you will also need to disable their access to the system. If this is the case, continue with the steps described below.

Disabling a User Account

1. In the upper right corner of the User Details screen, select the **Disabled** radio button.



The screenshot shows the 'User Details' screen for a user named Gemma Barlow. The 'CQRS Access' section is highlighted with a blue box, showing the 'Disabled' radio button selected. The 'Resend Registration Email' button is also visible in this section. The form includes fields for Email Address, Title, First Name, Last Name, and User ID, as well as Work Phone and Mobile Phone fields. A legend indicates that an asterisk (*) denotes a required field.

User Details ? * indicates required field(s) [Manage Orgs & Users](#)

Email Address:

Work Phone: *

Title:

Mobile Phone:

First Name: *

Last Name: *

User ID:

CQRS Access

Enabled Disabled

2. Select the **Submit** button.

CQRS displays a message confirming that you have successfully disabled the user's CQRS access.