Public Health England

Protecting and improving the nation's health

HCAI Data Capture System
Training Guide

Manage Account Requests

About Public Health England

Public Health England exists to protect and improve the nation's health and wellbeing, and reduce health inequalities. It does this through world-class science, knowledge and intelligence, advocacy, partnerships and the delivery of specialist public health services. PHE is an operationally autonomous executive agency of the Department of Health.

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Document History

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Manage Account Requests

If you are registered as a Local Administrator user you will be responsible for Authorising or Rejecting user account requests from users within your organisation(s). Authorising and Rejecting Accounts can be done through the Manage Account Request screens

When approving an account you must check the following:

- The email address has a valid suffix for the selected Organisation Type e.g. nhs.uk; nhs.net; phe.gov.uk
- The user has requested the appropriate Role (e.g. Data Entry, Shared User, Sign-Off etc.)
- Local Administrators are responsible for setting up and managing accounts for users within their organisation(s). They are therefore accountable for ensuring only appropriate access is granted. Please refer to the Appendix at the end of this document for further information on the roles and associated permissions
- When a Local Administrator opts to Reject and account request they must provide a reason to the requesting user

Account Request Notification

When a user in your organisation(s) requests an account, as a Local Administrator you will receive a notification email from the HCAI DCS System titled "HCAI Data Capture System: Request for a New Account"

Selecting the link "click here" in the email message will direct you to the HCAI DCS System "Homepage" screen where you will need to enter your login credentials. If you are already logged into the HCAI DCS System, clicking on the link will take you directly to the "Authorise User Account" screen
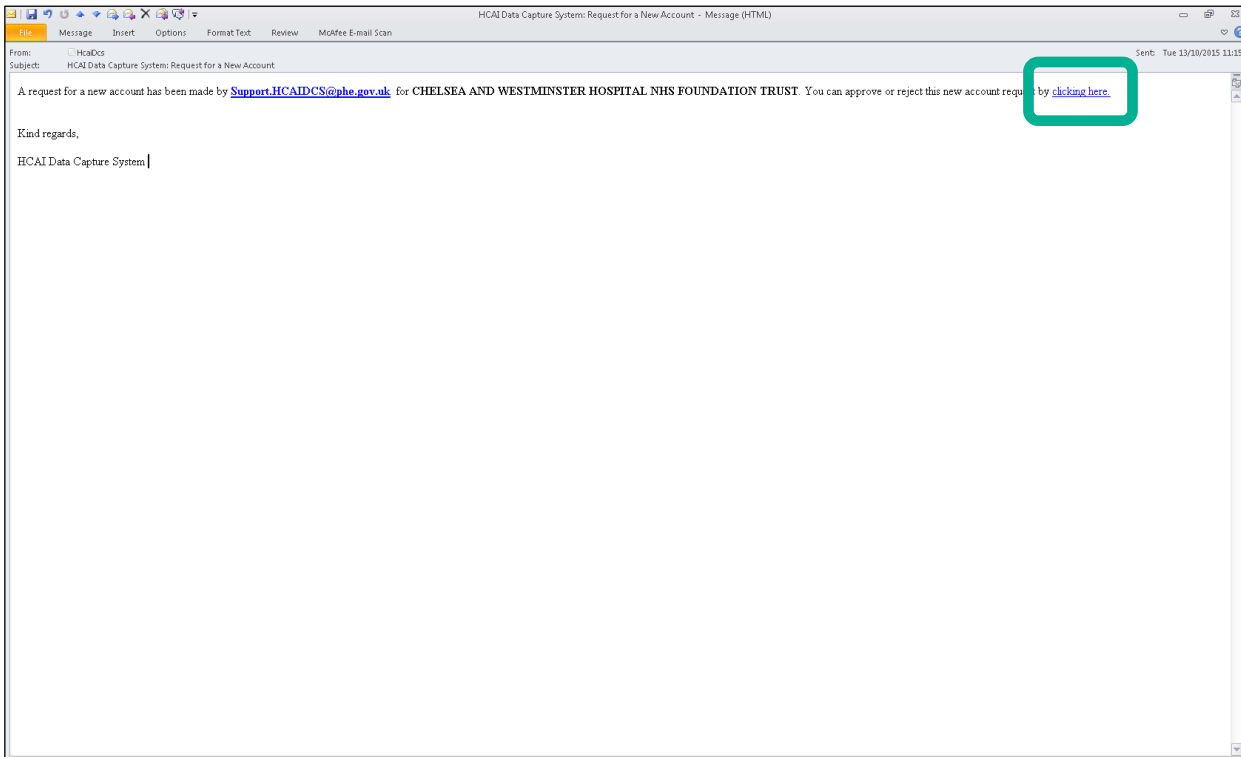
Login to the HCAI DCS System

- Go to https://hcaidcs.phe.org.uk
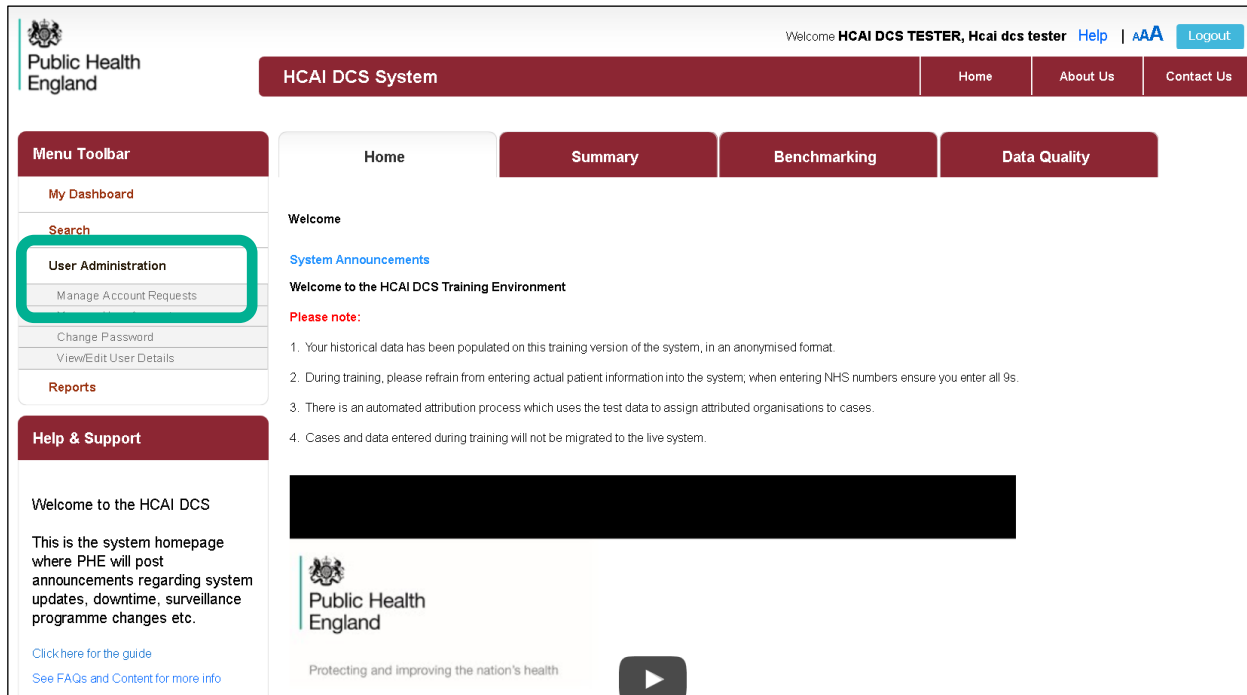- The HCAI DCS System will display the "Homepage" screen
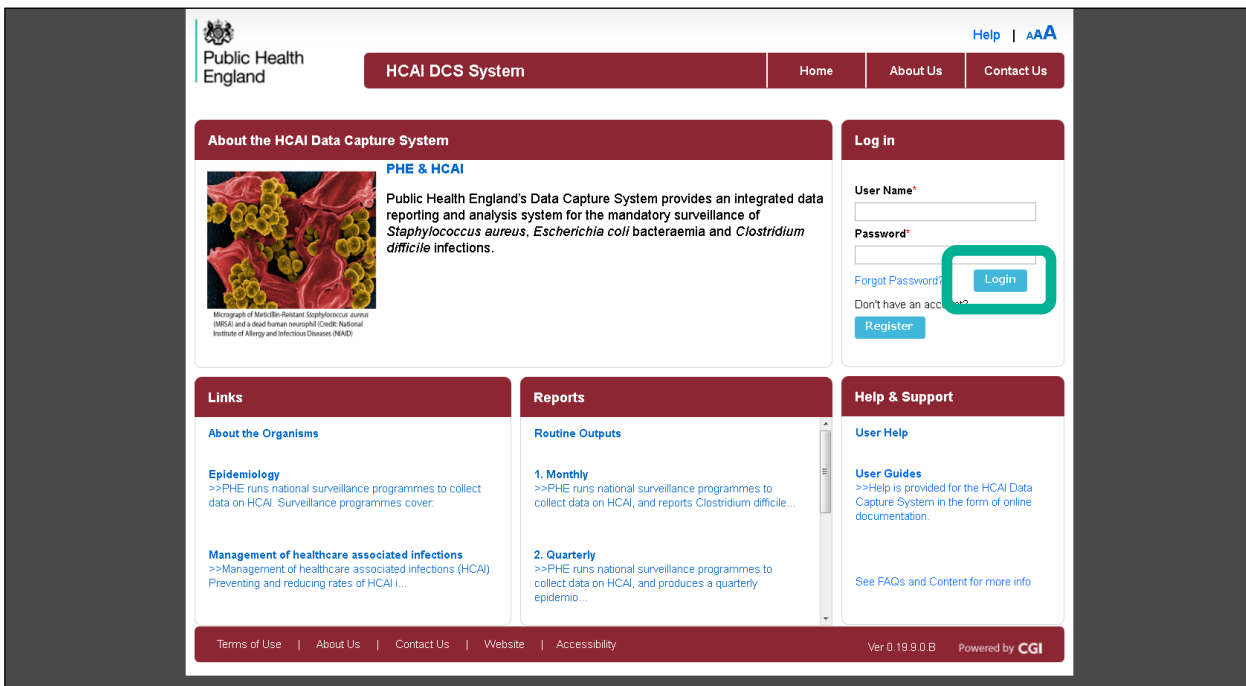
- Enter your "User Name" (the email address that was used to request your account) and "Password" in the "Log in" panel
- Select the "Login" Button

- The HCAI DCS System will display the "Home Dashboard" screen

Access the Manage Account Request Screens

- Navigate to the Menu Toolbar on the left-hand side of the screen
- Select "User Administration"
- Select "Manage Account Requests"

- The HCAI DCS System will display the "Search User Account Requests" screen
- The "Search User Account Requests" screen displays all pending account requests for your respective organisation(s)

- If required, update the search criteria to narrow results and select "Find"
- Locate the account you wish to Authorise in the search results grid
- Select "View"
- The HCAI DCS System will display the "Authorise User Account" screen

Authorise an Account Request

- On the "Authorise User Account" screen check the users email address has a valid suffix for the selected Organisation Type e.g. nhs.uk; nhs.net; phe.gov.uk
- Select the "Roles" dropdown menu and check the user has requested the appropriate user roles, for further information about Roles and Permissions please view the Appendix at the end of this Training Manual

- Select or Deselect roles associated to the user as required
- If you are a Local Administrator across multiple organisations check that the user has requested an account for the appropriate organisation
- Select "Authorise" button

- The HCAI DCS System will request you confirm the authorisation request
- Select "OK" button
- The HCAI DCS System will confirm the authorisation request was successful
- Select "OK" button

- The HCAI DCS System will display the "Search User Account Requests" screen
- The HCAI DCS System will send the requesting user an email requesting they Create account

Reject an Account Request

- When in the "Search User Account Requests" screen locate the account you wish to Reject in the search results grid
- Select "View"

- Select "Reject" button
- The HCAI DCS System will request you provide a reason for the rejecting the account request
- Select "Reject Reason" from the Reject Reason dropdown
- Select the "OK" button
- The HCAI DCS System will confirm the account rejection was successful
- Select the "OK" button
- The HCAI DCS System will send the requesting user an email informing them of the Rejected account request with the Reject Reason

Appendix

Organisation Types and User Roles

The HCAI DCS System supports a range of organisations and user types or roles (Tables 1 and 2), each of which have associated permissions and levels of access to the system. Within each organisation it is possible for the same user to have a range of different roles and for different users to have different roles. A user's organisation type, its place in the hierarchy and the user's role affect whether the user is able to enter or sign off data or participate in the PIR process. It also impacts on what data they are able to view.

All roles allow users to view data entered on the system at a summary level via a range of reports. For example, all users are able to view a count or rate of reported MRSA bacteraemia by NHS Trust.

Access to patient level data, with or without PII, is restricted based on the organisational hierarchy (Table 1). National users have access to patient level data for all cases entered on the system. Sub-national users have patient level access for cases mapped to their organisation in one of several ways. Organisation units only have patient level access to records entered by themselves. This is summarised in Table 1. Specific permissions associated with each of the roles are shown in Table 2.

Table 1

Summary of organisation types and role and data presentation in reports.

Organisation Type	Hierarchy	Roles Supported	Access to patient level data (with or without PII)	Default Pathway **	Data visible on line listings
Public Health England (National)	National	• System Administrator	All	Reporting Route	All cases, no mapping applied
Public Health England Region	Sub National Group	• Local Administrator • Read Only*	Cases reported by Trusts mapped to the region, and cases attributed to CCGs mapped to the region	Reporting Route	Reporting and commissioning routes. Resident pathway mapping
Public Health England Centres	Sub National Group	• Local Administrator • Read Only*	Cases reported by Trusts mapped to the centre, and cases attributed to CCGs mapped to the centre	Reporting Route	Reporting and commissioning routes. Resident pathway mapping
Local Authority	Sub National Group	• Local Administrator • Read Only*	Cases mapped to the Local authority based on the resident pathway algorithm	Resident Pathway	Resident pathway
Directors of Public Health (DPH)	Sub National Group	• Local Administrator • Read Only*	Cases mapped to the DPH via the CCG algorithm	Commissioning Route	Commissioning route
NHS England Area Teams	Sub National Group	• Local Administrator • Read Only*	Cases reported by Trusts mapped to the Area Team, and cases attributed to CCGs mapped to the Area Team	Commissioning Route	Reporting and commissioning routes
NHS England	National	• Local Administrator • Read Only*	All	Commissioning Route	All cases, no mapping applied
NHS England Region	Sub National Group	• Local Administrator • Read Only* • PIR Arbitrator • PIR Read Only	Cases reported by Trusts mapped to the region, and cases attributed to CCGs mapped to the region	Commissioning Route	Reporting and commissioning routes
Clinical Commissioning Group	Organisation Unit	• Local Administrator • Read Only* • PIR Assignment • PIR Data Entry • PIR Read Only	Cases attributed to the CCG	Commissioning Route	Commissioning route
Department of Health	National	• Local Administrator • Read Only*	All (no PII access for any user)	Reporting Route	All cases, no mapping applied

Organisation Type	Hierarchy	Roles Supported	Access to patient level data (with or without PII)	Default Pathway **	Data visible on line listings
Independent Sector Healthcare Provider Sites	Organisation Unit	• Local Administrator • Read Only* • Data Entry • Sign Off Authority	Cases entered by the IS site/s (a user may have permissions for multiple sites)	Reporting Route	Cases entered by the IS site/s
Independent Sector Healthcare Providers	Sub National Group	• Local Administrator • Read Only* • Data Entry • Sign Off Authority	Cases entered by sites within the provider that the user has permissions to view (this may be all or some of the sites within a provider)	Reporting Route	Cases entered by sites within the provider that the user has permissions to view
NHS Trusts	Organisation Unit	• Local Administrator • Read Only* • Data Entry • Sign Off Authority • PIR Assignment • PIR Data Entry • PIR Read Only	Cases entered by the NHS Trust	Reporting Route	Cases entered by the Trust
Renal Unit	Organisation Unit	• Local Administrator • Renal Data Entry	All cases shared with the renal unit	N/A	Cases shared with the renal unit
Care Quality Commission	National	• Local Administrator • Read Only*	All (no PII access for any user)	Reporting Route	All cases, no mapping applied
PHE Field Epidemiology	National	• Local Administrator • Read Only*	All	Reporting Route	All cases, no mapping applied
Trust Development Authority	National	• Local Administrator • Read Only*	All (no PII access for any user)	Reporting Route	All cases, no mapping applied

*Allows read only permission to view data at patient level, either with or without PII access, depending on requirements
** TBC this is the usual pathway by which cases are mapped to this organisation type. This is how the data is presented on all reports, except the line listing where other mappings are applied

Table 2

Overview of User Roles and Permissions

Menu or Report Name	Sub Menu or Report Name	Role									
		Local Administrator	Data Entry	Shared User	Read Only (No PII)	Sign-Off	Read Only (PII)	PIR Data Entry	PIR Assignment	PIR Arbitrator	PIR View Only
Summary Dashboard	Summary Graph	View	View		View	View	View	View	View	View	View
	Trends Graph	View	View		View	View	View	View	View	View	View
	Data Collection Completeness	View	View		View	View	View	View	View	View	View
	Data Collection Completeness (Shared Cases)	View	View	View				View	View	View	View
	Sign-Off History					View					
	PIR Case Summary								View	View	View
Benchmarking Dashboard	Benchmarking	View	View	View	View	View	View	View	View	View	View
Data Quality Dashboard	Data Collection Field Completeness by Organisation	View	View	View	View	View	View	View	View	View	View
Case Capture	Enter a Case		Add								
	Manage Shared Cases			Edit							
Sign-Off Cases	Sign-Off Episodes					Edit					
Search	Search Infection Episodes	View	Edit/Delete	View	View	View	View	View	View	View	View
User Administration	Manage Account Requests	Edit									
	Manage User Accounts	Edit									
	View/Edit User Details	Edit									
	User Login Audit	View									
Reports	Counts or Rates of Infection Episodes	View	View	View	View	View	View	View	View	View	View
	Timeliness of CEO Sign Off	View	View	View	View	View	View	View	View	View	View
	Nil Returns	View	View	View	View	View	View	View	View	View	View
	Line Listings		View	View	View	View	View	View	View	View	View
	Number Of Logins	View									
	Find Duplicates		View								
	QMLR Report	View	View	View	View	View	View	View	View	View	View
	PIR Reports	View	View	View	View	View	View	View	View	View	View
	Standard Reports	View	View	View	View	View	View	View	View	View	View

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