How to use QCS Care Management System

Staff

How do I Add a Member of Staff to the System

It is crucial that all staff members have individual logins to QCS, and we have made it nice and easy for you to create the profile for them:

- Choose 'My Staff' on the left-hand side of the system, and select the option to 'Create Staff Member':
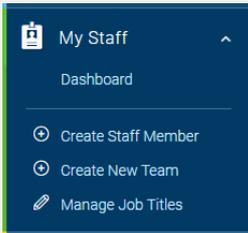
- You will be presented with 2 options – the first, to create one staff member profile, and the second, to create multiple:
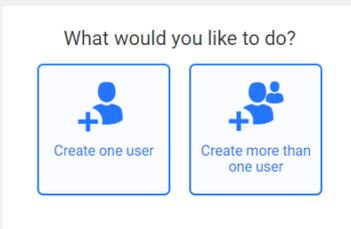
The following steps apply if you'd like to create one user, please skip to step 5 for guidance around creating more than one user.

<u>To create one user:</u>

1. Once you have clicked the option to 'Create one user', you will see the below screen:

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2. You will need to add in the necessary information (the fields marked as mandatory must be completed), and you'll need to decide whether you would like to list this user as a Standard, or Power User:

Standard User = This user can only access policies and procedures and service user records
Power User = This user has full access and can manager other users, and update the organisation profile

3. If you have already created Teams, you can add this staff member to a team by clicking the relevant option in the 'Select team' box at the bottom of the screen. If you haven't created any Teams yet, you can do this later:

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4. Once you have clicked the green 'Save' button, you will see this pop-up, confirming you have successfully created the profile:

User Created Successfully

OK
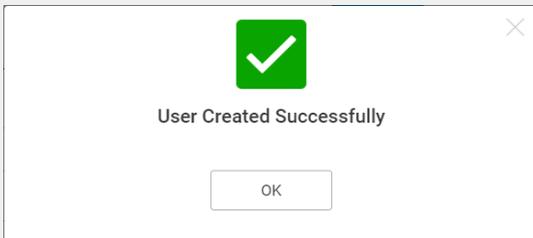
If you receive any of the below error messages, simply follow the suggested instructions:

*   'Username already exists' = at QCS, we use Usernames as unique identifiers, so it may be that someone else within the QCS Community is already using this Username. This will need to be amended until this error message disappears (you could try adding a number or two, to the end)
*   'Email address already in use' = the email address you have entered is already linked with an existing profile within QCS (perhaps this user had a profile under another Company) – see help sheet titled "I am trying to create a User and am getting the following message 'Email address already exists', what should I do?"
*   'Email address is invalid' = Simply email customer.experience@qcs.co.uk outlining the error message you have received, and our Product Team will fix this one for you. Please include your Company name, your customer number (if you know it) and the email address you're trying to add.

To create multiple users:

5. Select the option to create more than one user, and you will see the below screen:

Need to create more than one user? Use our bulk creation tool to create users from a spreadsheet. Simply follow these steps:

1   Download the spreadsheet by clicking below. Open the downloaded file and fill in the user details in the respective columns. **Remember to save file.**

Download excel file

2   Upload your excel sheet

Drag & drop to Upload Excel Sheet
or browse

Cancel   Save

6. Firstly, you will need to click the 'Download excel file' button, to download the spreadsheet onto your computer
7. Once downloaded, open the file and you will see the following titles:

A	B	C	D	E	F	G	H	I	J
*First Name	*Last Name	*Email	*Job Title	User Name (if available)	Mobile Number (optional)	Team (optional)	*Access to Service Users Required? ('Yes' or 'No')	Password (optional)	

8. All fields marked with a '*' symbol are mandatory, so this is the minimum amount of information you need to add. Simply add in all of the require information for each member of staff you'd like to add to the system, and save this

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document

9. Click the option to 'browse' to locate the saved excel fie, or simply drag and drop it in the blue box:

2   Upload your excel sheet

Drag & drop to Upload Excel Sheet

or browse

All staff members you have created profiles for, will now receive an email from QCS welcoming them, and confirming their login details.