



Managing Users

Only for Users with an Administrator Role

Adding New Users

In order to add a user into the system, the user must have successfully registered with NCID and given you their user id (i.e. username).



Reminder!

Provider Responsibilities

The NCIR Agreement requires the following:

- Each practice must have at least 2 administrators.
 - Administrators are responsible for adding new staff and must inactivate users when they leave the practice.
 - A copy of the User Confidentiality agreement must be kept on file for all staff who access the NCIR.
 - Every user must have their own user ID (multiple users sharing a single account is now allowed).

Steps for Adding New Users

1. Select **Manage Users** from the left-side menu.
2. Click **Add User**.
3. Type in the Username.
4. Click **Verify**.

5. The system will retrieve the user's personal information. Confirm that the information is correct
6. Choose the appropriate user **Role**.

7. Click **Save**.

User Roles

Reports Only

- Searches for clients and views/prints client specific records

Inventory Control

- Has all functionality that the reports only and typical user roles have
- Manages inventory and ordering

Typical User

- Has all functionality that the reports only role has
- Manages (add & edit) clients
- Manages immunization information

Administrator (at least 2 required per organization)

- Has all functionality that the other roles have
- Manages users, sites, and clinicians
- Runs practice-level reports, including reminder/recall

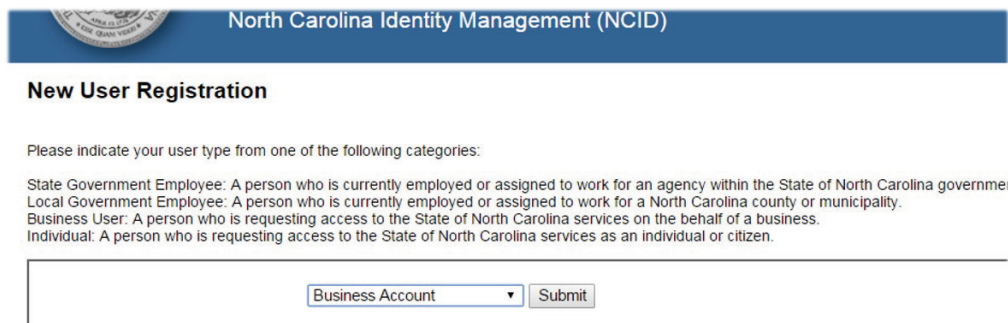
Things to Remember when Adding Users

1. You cannot add a user who registered for an 'individual account' type. You will receive this error message:

Validation Errors

- *Users who registered for an individual account type cannot be added. Only business, local or state government user types can be added. Please have the user reregister through NCID to create a user id with the appropriate user type.*

- The user must re-register for a new account with NCID and select 'Business Account' type (*not applicable to LHDs).



North Carolina Identity Management (NCID)

New User Registration

Please indicate your user type from one of the following categories:

State Government Employee: A person who is currently employed or assigned to work for an agency within the State of North Carolina government.
Local Government Employee: A person who is currently employed or assigned to work for a North Carolina county or municipality.
Business User: A person who is requesting access to the State of North Carolina services on the behalf of a business.
Individual: A person who is requesting access to the State of North Carolina services as an individual or citizen.

Business Account ▼ Submit

2. If the user has not registered correctly, has not activated their account through the email link from NCID, or if the user ID you entered was incorrect, you will get an error message.

Validation Errors

- *Cannot add this user. This user is not defined in NCID.*

3. If you attempt to add a user who has already been added to the organization, you will see the following message:

Validation Errors

- **Cannot add this user. This user has already been defined in this organization.**
4. User names are case sensitive.

Steps for Editing/Inactivating Users

1. Select **Manage Users** from the left-side menu.
2. Click **Find**
3. Select the Last Name hyperlink
4. Update the user.
 - To inactivate, change the **Status** by clicking the 'Inactive' button.
5. Click **Save**.

The screenshot shows a user management form for the NCIR. The form includes fields for Username, User First Name, User Last Name, User Middle Initial, Role, Status, Street Address, Other Address, City, State, Zip, and Email. The 'Status' field is highlighted with a yellow box, showing 'Active' and 'Inactive' radio buttons, with 'Inactive' selected. The 'Role' dropdown is set to 'NCIR Help Desk'. The 'Email' field contains 'alyssarobertsbaes@gmail.com'. Buttons for 'Save', 'Delete', and 'Cancel' are on the right.



Questions?

Contact your Regional Immunization Program Consultant (RIC)

The RIC map with contact information is located on the Immunization Branch website:
dph.ncdhhs.gov/programs/epidemiology/immunization/providers/contacts

NCIR Help Desk: 1-877-873-6247 | ncirhelp@dhhs.nc.gov



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**
Division of Public Health