Australian Government
Department of Health and Aged Care

Hearing Services Program

Portal user guide – Portal user roles

All portal users need to be assigned a role within the portal which allows the user to access certain portal functions. There is no one-size-fits-all approach, and the roles you assign to your staff will depend on a range of factors including the size of your organisation, number of sites and users and your business processes.

The portal has four user roles for service providers

- SP Admin
- SP Manager
- SP Site
- SP Claims

And one user role for device suppliers

- DM Admin

The functions available to each of these roles are

	SP Admin	SP Manager	SP Site	SP Claims	DM Admin
Add site	Yes	Yes			
Search and view site details	Yes	Yes			
Export site details	Yes	Yes			
Edit site details	Yes	Yes			
Close site	Yes	Yes			
Apply for client	Yes		Yes	Yes	
Update draft application	Yes		Yes	Yes	
Search and view client details	Yes		Yes	Yes	

	SP Admin	SP Manager	SP Site	SP Claims	DM Admin
Export client details	Yes	Yes	Yes	Yes	
Edit client details	Yes		Yes	Yes	
Transfer client	Yes		Yes	Yes	
Confirm return voucher	Yes		Yes		
Retrieve all clients	Yes	Yes			
Submit manual claims and recoveries	Yes		Yes	Yes	
View manual claims	Yes		Yes	Yes	
Search and export claims	Yes		Yes	Yes	
Batch download of claims	Yes		Yes	Yes	
Reconciliation Report	Yes		Yes		
Add new practitioner	Yes	Yes			
Edit provider- practitioner links	Yes	Yes			
Create user accounts	Yes	Yes			Yes
View user accounts	Yes	Yes			Yes
Export user accounts	Yes	Yes			Yes
Edit user accounts	Yes	Yes			Yes
Edit business details	Yes				Yes
Add new device					Yes
Edit device details					Yes
Cancel device					Yes
Search and view devices					Yes

Depending on the functions you would like your staff to complete, you may assign a user multiple user roles.

Creating users

The first portal user (SP Admin or DM Admin) for a business is created by the department. The SP Admin/DM Admin user can then create new users for their business, including other admin users, as required.

Access

What access do I need?

SP Admin, SP Manager, DM Admin

To add a new user

Step 1

Ensure the new user has a myID account; the myID app on their smart phone; Relationship Authorisation Manager (RAM) authorisation; and Google Chrome installed as their default web browser.

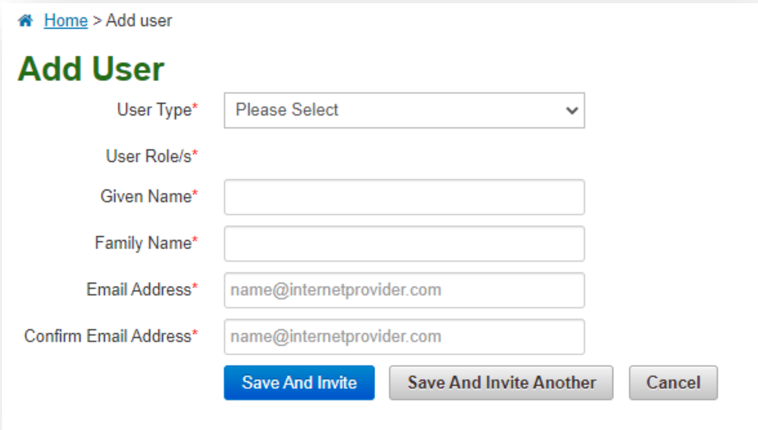
Step 2

Login to the portal and click on the **User Accounts** section to expand the view.

Click on the **Add New User** button.

Step 3

When expanded, complete the relevant fields such as user type, given name, family name and email address (this is the email address that the invitation email will be sent to, and should be the same email address as that they use for their myID account).



Step 4

Once the fields are complete, click the **Save and Invite** button. The user will then be sent an invitation to join the portal via email.

User accepting the invitation

Clicking the unique URL in the invitation email will take the user to the portal, where they will login using their myID to confirm and activate their portal registration.

Note - Invitations to join the portal remain valid for ten days. After this time a new invitation will need to be issued.

Depending on the role assigned, an existing SP Admin/Manager or DM Admin within your organisation can re-invite expired users through the portal.

Revoking user access

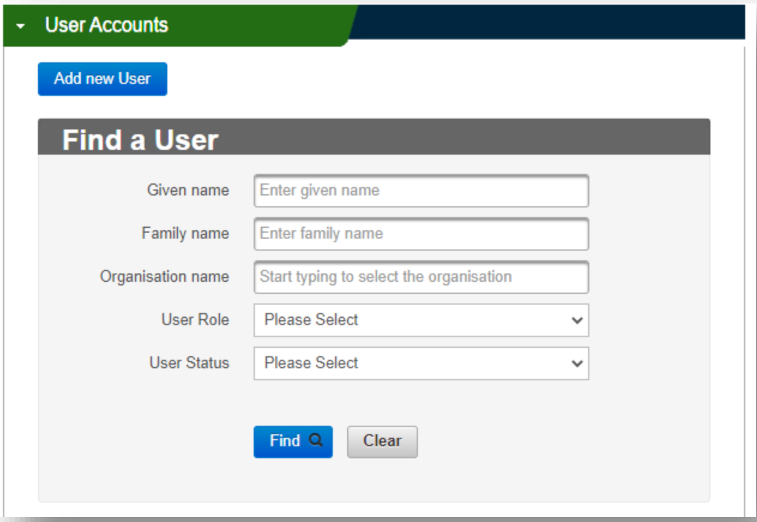
A User needs to have SP Admin, SP Manager or DM Admin access in order to revoke someone's account on the portal.

To revoke a user account

Step 1

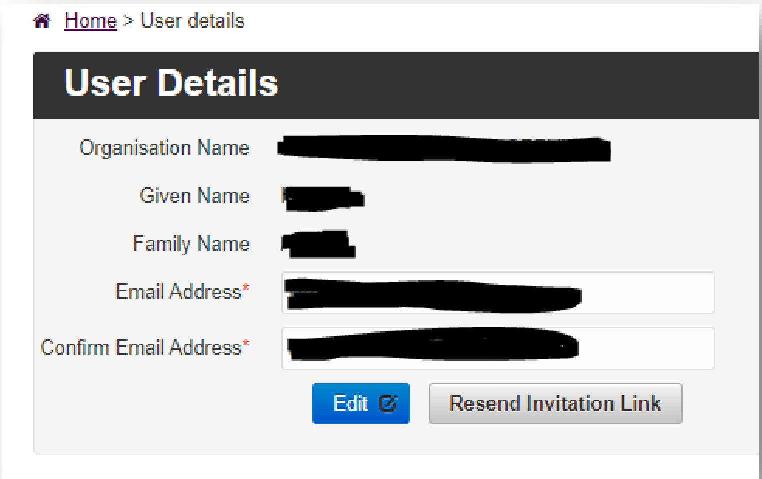
Click on the **User Accounts** section to expand the view.

Enter the details of the user you wish to revoke access to.



Step 2

When the user's details come up, click the blue **Edit** section under the users email address.

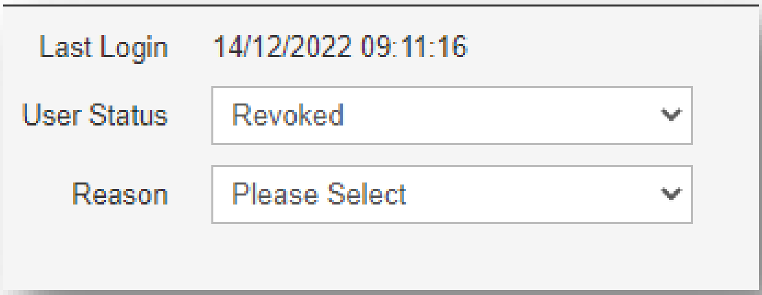


Step 3

On the right hand side next to User Status, click the down arrow and select **Revoke**.

The Reason field will appear underneath.

Select the appropriate reason for revoking access.



Step 4

Click **Save** to finalise.