Managing Users

Intended Audience

- Managers and Supervisors

- Technical Leads

Policy Background

After establishing new users, agency managers and technical leads must manage all of their users' access to ARIES. Since ARIES contains sensitive client information, access to the system is tightly controlled. It is important that only users who need access to ARIES can log into the system.

The procedures below will address:

- Modifying the permissions within a User Group Role,

- Changing the User Group Role,

- Setting up staff as Non-Users,

- Requesting additional Digital Certificates,

- Disabling former users' access to ARIES, and

- Renewing Digital Certificates.

Procedures

- **Modifying the Permissions within a User Group Role**

  The permissions for each user group role are not always intuitive. The best approach for assigning a user group is to find a category that most closely matches the staff person's duties, such as a case manager or receptionist, and simply choose that role.

  If the default permissions do not meet the business needs of that staff person, permissions can be adjusted accordingly on a case-by-case basis. For example, a front office clerk was assigned to the Receptionist user group. However, the business flow requires him to confirm and update clients' financial information when they arrive for their appointments. Since the Receptionist user group does not allow for the editing of financial information, the manager or technical lead would have to activate that specific permission for that particular user.

  When modifying permissions, do not give users more permissions than their job duties require.

■ **Changing The User Group Role**

Sometimes a user is assigned a user group role that is either too powerful or not powerful enough. For example, a case manager was assigned to the Case Manager role. Over time, that case manager took on more responsibility for ARIES and came to be seen as a Technical Lead for her agency. To carry out the functions of a Technical Lead, her role needs to be upgrade to the "Agency ARIES Administrator" role.

To change user group roles, the user can submit a new **ARIES User Registration Form** which indicates the new role. To do so, please follow the instructions in ARIES Policy Notice No. A1 regarding **Establishing New Users**. The user's manager or technical lead can also contact the ARIES Help Desk to request the change. In some cases, the user will not need to submit a new **ARIES User Registration Form**.

■ **Setting Up Staff as Non-Users**

ARIES is designed to compliment many different business flows. Some agencies decide to have only certain staff access ARIES, but want to track the work of all employees who provide direct client services. For instance, a dental clinic has three dentists who serve clients. None of the dentists access ARIES. All their service data is entered by the receptionist. However, the clinic would like to track the services provided by each dentist.

To do this, the manager or technical lead would create Staff accounts for each dentist and select "Non-User" as their Homepage. Now their names will appear in the Staff drop-down lists in ARIES but they will not be able to access ARIES. When the receptionist enters these services into ARIES, she should select the appropriate staff name from the Staff drop-down list. This would allow services to be tracked by each dentist even though the dentists do not use ARIES.

Adding Non-Users to ARIES does not require submittal of an **ARIES User Registration Form**. Should such Non-Users need to become active ARIES users in the future, the manager or technical lead needs to contact the ARIES Help Desk.

■ **Requesting Additional Digital Certificates**

Sometimes an existing user needs additional digital certificates. For example, a user originally thought that she would only need to access ARIES from her office but now also wants to access ARIES from two clinic exam rooms. Or a user's outdated computer was finally upgraded and now needs a digital certificate installed on it. To request additional digital certificates, the user or their manager or technical lead needs to contact the ARIES Help Desk. In most cases, the user will not need to submit a new **ARIES User Registration Form**.

■ **Disabling Former Users' Access to ARIES**

It is important that only users who need access to ARIES can log into the system. When a user leaves an agency, or when a user's job duties no longer require access to ARIES, the manager or technical lead should Immediately edit that user's permissions in ARIES and change the user group role to "Inactive." This role has no checkmarks on the user permissions screen, and therefore no access to ARIES. Managers or technical leads **should not use the Deactivate button** to remove inactive staff from ARIES. Many records in ARIES are linked to staff records, and deactivating the inactive staff person can cause those records to be "orphaned" – such records still exist but no longer correctly report the staff person's name.

■ **Renewing Digital Certificates**

Digital certificates automatically expire every two years. The ARIES System Administrator will contact users prior to the expiration date to install a new digital certificate. So long as users reply to the ARIES System Administrator's inquiries in a timely manner, there should be no break in their access to ARIES.

Additional Information

■ For assistance with modifying user permissions, setting up Non-Users, or changing a user's role to "Inactive," please contact the ARIES Help Desk at 866-411-ARIES (2743).

■ **Directions for Assigning an ARIES User Group Role for Staff** lists all the user group roles and their permissions. This document can be found at www.projectaries.org > **Resources/Supporting Documentation** > "More information on ARIES user group roles and permissions."

Related Policies

■ ARIES Policy Notice No. A1 regarding **Establishing New Users**

■ ARIES Policy Notice No. F1 regarding **Technical Leads**

■ ARIES Policy Notice No. F2 regarding **The ARIES Help Desk**