

HENS USER GUIDE ADMINISTRATORS

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HENS Administrator User Guide

The Ohio Department of Aging (ODA) is responsible for the administration of the HENS system. Working with its partners, the department identified a HENS administrator at each PASSPORT Administrative Agency (PAA). The HENS administrator at the PAA works with participating hospitals and nursing facilities to identify and set up a HENS administrator at each location.

ODA also works with the participating state agencies- the Ohio Department of Mental Health and Addiction Service(OHMHAS) and the Ohio Department of Developmental Disabilities (DODD)- to identify and set up an administrator for HENS at each state agency.

ODA has set up the administrator at each County Board of Developmental Disabilities.

Role of the HENS administrator

- The HENS administrator is responsible for creating user accounts for the identified users at their organization. The HENS administrator can add, change or delete any user they've created.
- Each staff member who will use HENS at a location will need a user name and password for the system.

User Names and Passwords

The HENS system automatically creates a user name and password when an administrator adds a new user to the system. HENS sends two e-mails to the new user, using the e-mail address recorded in the system when the new user is added. The first e-mail contains the user's user name for the system. Generally, the user name will be the first initial of the first name, then the last name (e.g. Sam Smith would be ssmith in HENS). If more than one user would have the same user name, the system adds a number after the user name (e.g. Sara Smith would be ssmith2 in HENS). User names are not case sensitive.

The second e-mail from HENS contains the user's password for the system. This is randomly generated by HENS and sent only to the user to which it is assigned. When you first log in to HENS, use the password automatically generated by the system, then change the password to something you'll remember. For directions on how to change your password, see "Change Password" below. **Passwords are case sensitive**, so if you are having problems logging in to the system, be sure you are using the appropriate case.

Both the e-mail containing the user name and the e-mail containing the password are sent from an e-mail address that your e-mail system may think is spam (noreply.hens@age.state.oh.us). If you do not receive these e-mails in your inbox, check your spam folder or work with your IT department to retrieve these e-mails from spam.

Re-Sending the Initial E-mails

If a user you've registered in the system does not receive their initial e-mails from HENS with their user name and password, you can re-send the e-mail. Click on the Manage Users tab. Identify the user to whom you want to re-send the e-mail. Then, scroll all the way to the right in the row containing their information to the final column and click "Resend Mail". The system will re-send both the e-mail containing the user name and the e-mail containing the password to the e-mail address you have recorded in the system for that user.

Forgotten Password

If you forget your password, you can re-set it. From the login screen, click on "forgot password?" and enter your user name on the next screen. A new password will be sent to the e-mail address that is on record with the system for the user. You can then use this new password with your user name to log in to the system. The re-set password is randomly generated, so your first act when you've logged into the system successfully should be to change your password to something that will be easier to remember. Any user with a valid user name can re-set their own password using these instructions.

How to Login

- Type the URL: <https://hens2.age.ohio.gov> into the browser. The system will take you to the login screen.
- Enter your assigned user name and password and click "login."
- Please note that user names are NOT case sensitive, but passwords are. If you have trouble logging in with your password, make sure you are using the appropriate case letters.

Set Up Users- PAA Administrators

Once you've logged in with an administrator account created for you by ODA, you can add, change or delete any user. All management of the user accounts starts by clicking on *Manage Users* in the black bar.

The screen will open with a list of current users at the top of the page, arranged by User Type. The "Manage Users" function, where you will add new users, is below the list of users.

First "Select User Type" from the drop down box. The choices are Hospital User, MCP User, NF User or PAA User. Once a user type has been selected, the list shown on the screen will show users of that user type.

To add a user in a user type, enter the first name, last name, e-mail address and phone number in the boxes provided. These fields are required for ALL new users.

- Be sure to complete an e-mail address for the user. The system generates a user ID (usually the first initial of the first name and the last name) and a password and will send an e-mail to the user with each. This is the user name and password the user will need to access the system.

Creating a user at your PAA

- In addition to the required fields, please select the user's name from the PIMS User drop down box. Then complete the required fields.
- The "roles" box automatically selects "general" as the user type; most users at the PAA will have "general" access. Select "admin" if the individual will also act as a HENS administrator at your site.
- The ODA Agency column will be auto-populated with your PAA.
- Click the "save user" box to set the user to an active status.

Creating an administrator at a Hospital or Nursing Facility

- In addition to the required fields (first name, last name, e-mail and phone number) , select the appropriate facility from the drop down box in the *Institution* column.
- Select "admin" to set the individual as a HENS administrator at the site. PAAs should only set up administrator accounts. Those administrators should set up users at their site. Click the "save user" box to set the user to an active status.

Set Up Users- Hospital Administrators

Once you've logged in with an administrator account created for you by the PAA, you can add, change or delete any user. All management of the user accounts starts by clicking on *Manage Users* in the black bar. The "Select User Type" box defaults to Hospital User, and that is the only type of user the hospital HENS administrator can create.

To add a user, enter the first name, last name, e-mail address and phone number in the boxes provided. These fields are required for ALL new users.

- Be sure to complete an e-mail address for the user. The system generates a user ID (usually the first initial of the first name and the last name) and a password and will send an e-mail to the user with each. This is the user name and password the user will need to access the system.
- The "institution" selection will be limited to your institution.
- Most hospital users should have "general" access, which allows them to create documents.
- The Hospital Administrator does not need to do anything with the "PIMS User", "ODA Agency", or "Local Boards" fields.
- Click the "save user" box to set the user to an active status.
- If a user works at more than one hospital, the user will need a user ID for each hospital setting. The same e-mail address may be registered for a user at multiple settings. It is important that the user use the correct user ID for each hospital setting.

Set Up Users- Nursing Facility Administrators

Once you've logged in with an administrator account created for you by the PAA, you can add, change or delete any user. All management of the user accounts starts by clicking on *Manage Users* in the black bar. The "Select User Type" box defaults to NF User, and that is the only type of user the nursing facility HENS administrator can create.

To add a user, enter the first name, last name, e-mail address and phone number in the boxes provided. These fields are required for ALL new users. If there is information about a user visible in the boxes, click the “New” button to create a new user.

- Be sure to complete an e-mail address for the user. The system generates a user ID (usually the first initial of the first name and the last name) and a password and will send an e-mail to the user with each. This is the user name and password the user will need to access the system. If the user needs to re-set their password, the new password will be sent to the e-mail address in the user record.
- The “institution” selection will be limited to your institution.
- Most nursing facility users should have “general” access, which allows them to create documents.
- The Nursing Facility Administrator does not need to do anything with the “PIMS User”, “ODA Agency” or “Local Boards” fields.
- Click the “save user” box to set the user to an active status.

Set Up Users- State Agency Administrators

Once you’ve logged in with an administrator account created for you by ODA, you can add, change or delete any user at your agency. All management of the user accounts starts by clicking on *Manage Users* in the black bar. The “Select User Type” box defaults to Agency User, and that is the only type of user the state agency HENS administrator can create.

To add a user in a user type, enter the first name, last name, e-mail address and phone number in the boxes provided. These fields are required for ALL new users.

- Be sure to complete an e-mail address for the user. The system generates a user ID (usually the first initial of the first name and the last name) and a password and will send an e-mail to the user with each. This is the user name and password the user will need to access the system. If the user needs to re-set their password, the new password will be sent to the e-mail address in the user record.
- State Agency Administrators don’t have to do anything with the “PIMS User” or “Institution” fields.
- Most state agency users should have “general” access, which allows them to view documents received at your state agency.
- Click the “save user” box to set the user to an active status.

Search for Users

You can use the search feature above the list of names to find a particular user in the system. Enter the individual’s first and last name in the boxes and click search. Individuals matching that combination of names will appear in the User List. Select the appropriate individual to populate their information in the *Manage Users* section of the window.

The PAA Administrator can also identify a list of users for a particular institution. To search for an institution, in the box underneath “Institution” either begin typing the first few letters of the institution’s name to move to that part of the list, or click on the down arrow to show the list and scroll to the appropriate institution. Only the PAA has this capability; all other administrators can only see individuals at their institution.

Edit Users

Once you’ve logged in with an administrator account, you can add, change or delete any user. All management of the user accounts starts by clicking on *Manage Users* in the black bar. First locate the user you wish to edit by clicking on the user’s name in the chart (if it is visible) or by entering their first and/or last name into the search boxes and clicking “search”. The required fields will populate with that user’s information. You can edit the user’s first name, last name, e-mail address or phone number. You CANNOT edit the user’s user name.

Administrators only have access to the user type appropriate to their setting. Once the information has been changed, click on the “save user” box.

Note: Users can edit their own name, e-mail address and phone number using the *My Profile* function—these activities do not require the intervention of a HENS Administrator.

Delete Users

Once you’ve logged in with an administrator account, you can add, change or delete any user. All management of the user accounts starts by clicking on *Manage Users* in the black bar. First locate the user you wish to edit by clicking on the user’s name in the chart (if it is visible) or by entering their first and/or last name into the search boxes and clicking “search”. To delete a user, click on “delete” in the *Delete* column when their name appears. You will be prompted to confirm your delete. Click “yes” to delete or “cancel” to not delete.

Make a User Account Inactive

Another option rather than deleting a user is to make their account inactive. If you have a user who will not be using the system for a period of time (e.g. leave of absence), set their account as inactive and then re-activate when they return. To make a user account inactive, click on *Manage Users* in the black bar. First locate the user you wish to make inactive by clicking on the user’s name in the chart (if it is visible) or by entering their first and/or last name into the search boxes and clicking “search”. To deactivate a user, click on the user’s name when it appears. The user’s information will appear in the required fields in the *Manage Users* section. Uncheck the *Active* box to make the account inactive. When you are ready to re-activate the account, identify the user by searching for them. When their name appears, simply click on the user’s name to populate the required field boxes then click the *Active* box to reactivate the account. Then click “save user”.

My Profile

Each user in the system has a profile. A user can change their e-mail address, phone number and actual name from the “My Profile” tab. All other fields on this tab are controlled by the system or the HENS administrator at the site and cannot be changed by the user.

Change Password

Users change their password from the *My Profile* page. To do this, first log in to the system using your user name and password. Next, click on *My Profile* from the home page. At the bottom of the profile information, next to “To change password,” click on “click here”. At the next screen, enter your old password, then enter a new password and verify the new password by entering it a second time.

Passwords must meet the following requirements:

- cannot contain your username
- must be at least 8 characters in length
- must contain at least 1 digit
- must contain at least 1 lowercase character
- must contain at least 1 uppercase character
- must contain at least 1 special character – special characters are: ^ . * [] ! @ # \$ % ^ & ()
- cannot be a password that you’ve used in the past

Finally, click “change password.” Once you have changed your password, an e-mail confirming that your password has been changed will be sent to the e-mail address recorded in your profile. That e-mail will NOT include your new password, so be sure to remember the new password you’ve created.

Update Your Password

The HENS system will require that users change their password every 90 days. When it is time for you to change your password, you will be prompted to change it when you first log in. Passwords must meet the following requirements:

- cannot contain your username
- must be at least 8 characters in length
- must contain at least 1 digit
- must contain at least 1 lowercase character
- must contain at least 1 uppercase character
- must contain at least 1 special character – special characters are: ^ . * [] ! @ # \$ % ^ & ()
- cannot be a password that you’ve used in the past

Log Out

When you are done working in the system, click *Log Out* to leave the system, or *Documents* to work on a document.