



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 manufacturers

- 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		
Update draft application			Yes		
Search and view client details			Yes	Yes	
Export client details		Yes	Yes	Yes	
Edit client details			Yes		
Transfer client			Yes	Yes	
Confirm return voucher			Yes		
Retrieve all clients		Yes			

	SP Admin	SP Manager	SP Site	SP Claims	DM Admin
Submit manual claims and recoveries				Yes	
View manual claims			Yes	Yes	
Search and export manual claims				Yes	
View user accounts	Yes	Yes			Yes
Export user accounts	Yes	Yes			Yes
Edit user accounts	Yes	Yes			Yes
Add new device					Yes
Edit device details					Yes
Cancel device					Yes
Search and view devices					Yes
Add new practitioner	Yes	Yes			
Edit provider-practitioner links	Yes	Yes			
Edit business details	Yes				Yes

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

Creating Users

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

The User Account section found on the portal landing page allows you to add new users and manage existing user accounts within your organisation. To add a new user

1. Click on the 'User Accounts' section to expand the view.
2. Click on the 'Add New User' button.
3. Select the user role or roles you wish to allocate.
4. When expanded, complete the relevant fields such as role type, given name, family name and email address (this is the email address that the invitation email will be sent to).
5. 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.

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

Further information about user roles is available in the [user guides](#).

Revoking User Access

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

1. Click on the 'User Accounts' section to expand the view.
2. Enter the details of the user you wish to revoke access to.
3. When the users details come up, click the blue edit section under the users email address.
4. On the right hand side next to User Status, click the down arrow and select 'Revoke'.
5. The Reason field will appear underneath. Select the appropriate reason for revoking access.
6. Click save to finalise.