



HomeTrak

Your expert companions in home care software

HOMETRAK COMPANION

USER SECURITY GUIDE

VERSION 6.3

Pre-Requisite:

- You must have access to *Office Staff* module to add new office staff members and assign user security.
- You must have access to *User Defined* to create custom security levels.
- You must have access to the *Agency Office* module to manage usernames and passwords setup for Office Staff users.

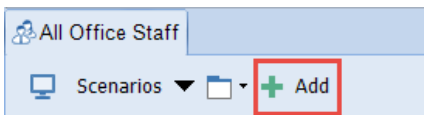
Why create individual users for Companion?

For security purposes it's recommended you create a username and password for each employee who will be accessing the software.

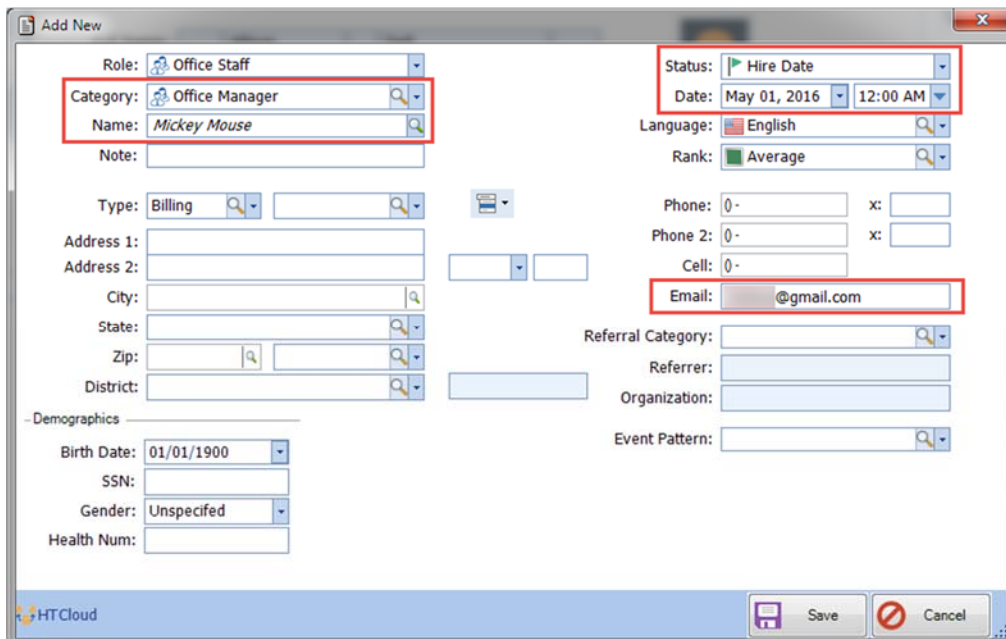
- This provides you the ability to allow only certain employee's access to the software not everyone.
- This provides you with the ability to limit what modules and features they have access to.
- This give you the ability to track changes in modification history by each user.
- When an employee quits or is terminated you can expiry their account so they no longer have access to the software; especially if they have installed it on their home computer.
- Each user must be setup as an office staff person to be given a mobile security username and password for access to the mobile app.
- This also provides them with their own office calendar for booking appointments, tasks and schedules which is visible to all other users.

How to create new Companion users

From the *Main Module* screen click the **Relationship Management** icon. Next, click the Office Staff tab. Click the **Add** button on the left-hand panel.



The *Add New Person* screen will appear. Populate the pertinent information and set the *Status* to **Hire Date** and set the *Date* to the date they were hired (back date if you have to). Next, add their **Email** to be used as their *Username* and as the address to send the activation email to. Then, click the **Save** button.

A screenshot of the 'Add New' form in a software application. The form is divided into several sections. The 'Role' dropdown is set to 'Office Staff'. The 'Category' dropdown is set to 'Office Manager'. The 'Name' field contains 'Mickey Mouse'. The 'Status' dropdown is set to 'Hire Date'. The 'Date' field is set to 'May 01, 2016' and '12:00 AM'. The 'Language' dropdown is set to 'English'. The 'Rank' dropdown is set to 'Average'. The 'Email' field contains '@gmail.com'. The 'Birth Date' field is set to '01/01/1900'. The 'Gender' dropdown is set to 'Unspecified'. The 'Save' and 'Cancel' buttons are at the bottom right. Several fields are highlighted with red boxes: 'Role', 'Category', 'Name', 'Status', 'Date', 'Email', and 'Birth Date'.

The *User Security* screen will appear. At this time you can configure the user's security.

Security Levels



NOTE: If you ***do not*** assign a security level to an office staff member, they will have full access to the program by default. If you wish to allow a user full access to all parts of the program, it is best not to give that user any security at all.

Manage Identity Account

User: Mickey Mouse Is Identity:

User name: tnbikes@gmail.com Delete Identity Account

Email: tnbikes@gmail.com

Cell #: 0 -

Status: Active

Note:

Create and Email Identity Account


Security Levels | Security Options | Remove User Interface Features (Desktop Only) | People that this Account can View

Choose

Security Level

HTCloud Identity Save Cancel

Your Office Staff person will receive the following email to activate their Identity Login account.

 **HomeTrak Identity**
Welcome

Mickey Mouse, you have been granted access to HomeTrak Demo Office. Please use your existing HomeTrak Identity account to login.

[Please click here to login.](#)

Company Code: XXXXX
UserName: test@gmail.com

If you have any questions, please contact the agency below.

Sincerely,

HomeTrak Demo Office
10636 Scripps Summit Cr
San Diego, CA 92130

[\(519\) 332-0868](tel:5193320868)

This is a message from HomeTrak Inc. on behalf of HomeTrak Demo Office
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How to add security levels to Office Staff usernames

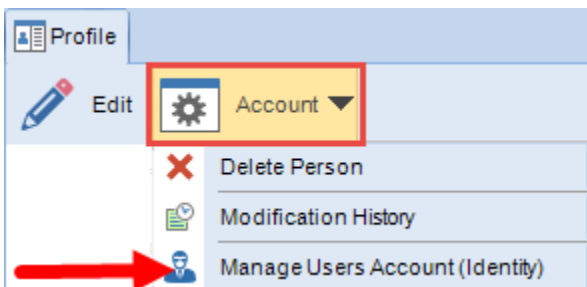
You have two options:

OPTION 1:

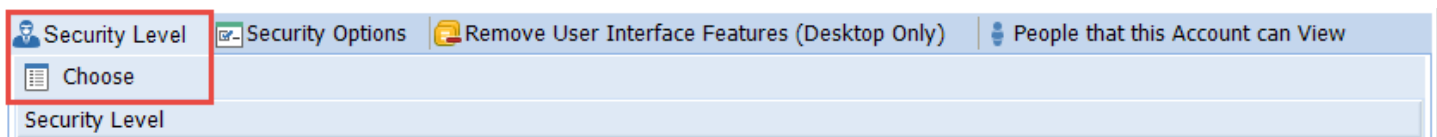
When you are adding an employee to the *Office Staff Module*, the **Manage Users Account (Identity)** screen will appear for you to configure their security at that time. If you miss configuring their security at this time you will need to go to Option 2 to add their security.

OPTION 2:

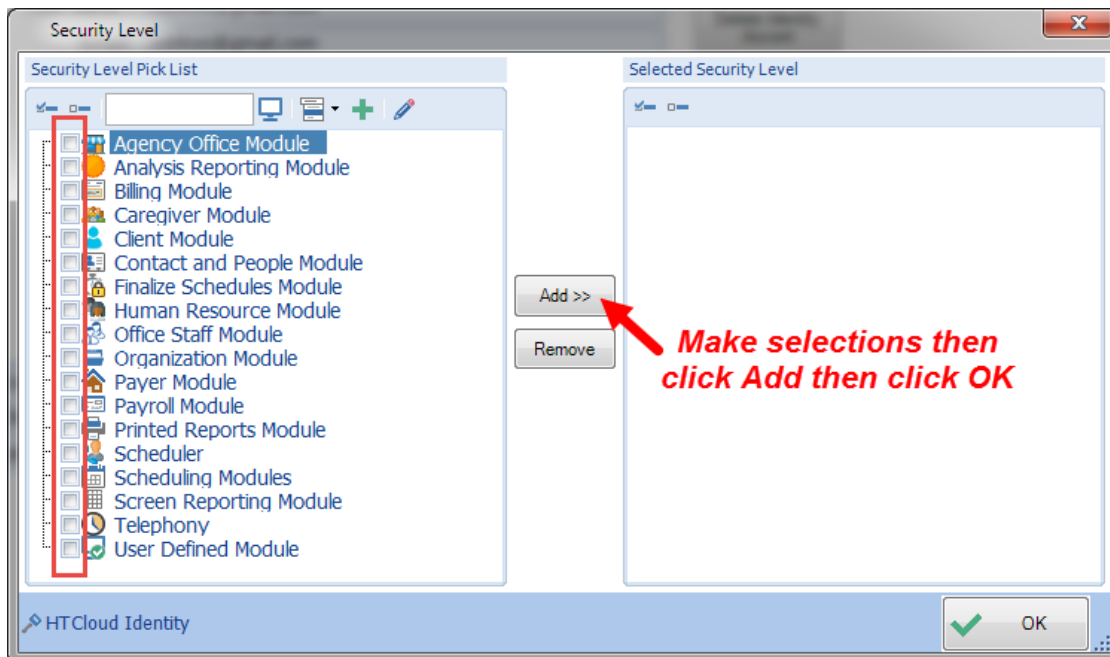
If you miss filling out the Manage Identity Account screen at the time you're adding the Office Staff person you can go to the **Profile** screen click the Account menu on the toolbar then click **Manage User Account (Identity)**.



Click Choose on the **Security Level** panel on the left-hand side of the screen to add which modules a user can access.

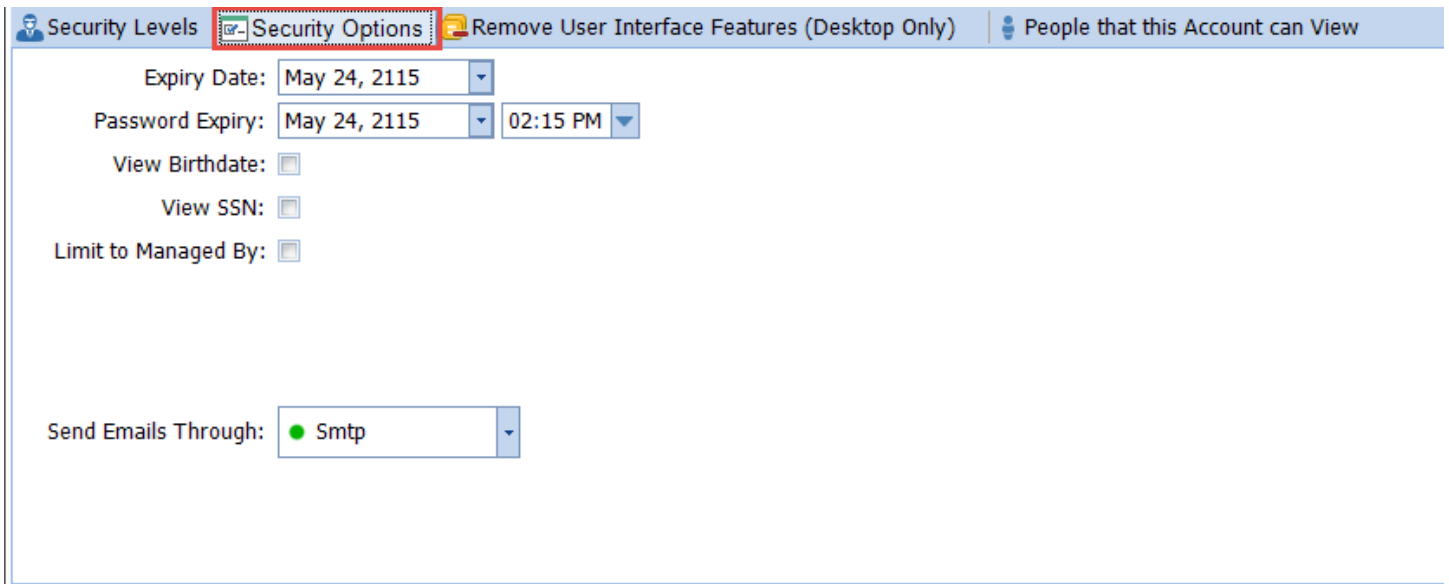


The *Security Level* screen appears. Check the box beside the modules you want to give access. Next, click **Add** button, then click **OK** button to save.



Security Options

Additional security options can be assign to an Office Staff person.



The screenshot shows the 'Security Options' tab in a user management interface. The tab is highlighted with a red dashed box. The interface includes several settings:

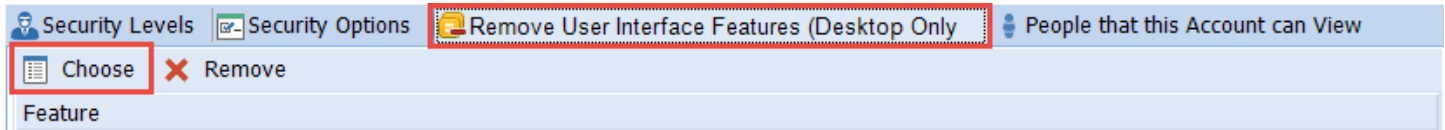
- Expiry Date:** A dropdown menu set to 'May 24, 2115'.
- Password Expiry:** Two dropdown menus, the first set to 'May 24, 2115' and the second to '02:15 PM'.
- View Birthdate:** An unchecked checkbox.
- View SSN:** An unchecked checkbox.
- Limit to Managed By:** An unchecked checkbox.
- Send Emails Through:** A dropdown menu with a green dot next to 'Smtp'.

Expiry Date	Account expiration date.
Password Expiry	Password expiration date/time.
View Birthdate	This user account can view birth date information in the desktop application.
View SSN	This user account can view SSN information in the desktop application.
Limit to Managed By	Limit this user account from being able to access or edit information for people that they do not manage.
Send Emails Through	When sending emails from the desktop application, you have two options: SMTP and Outlook.

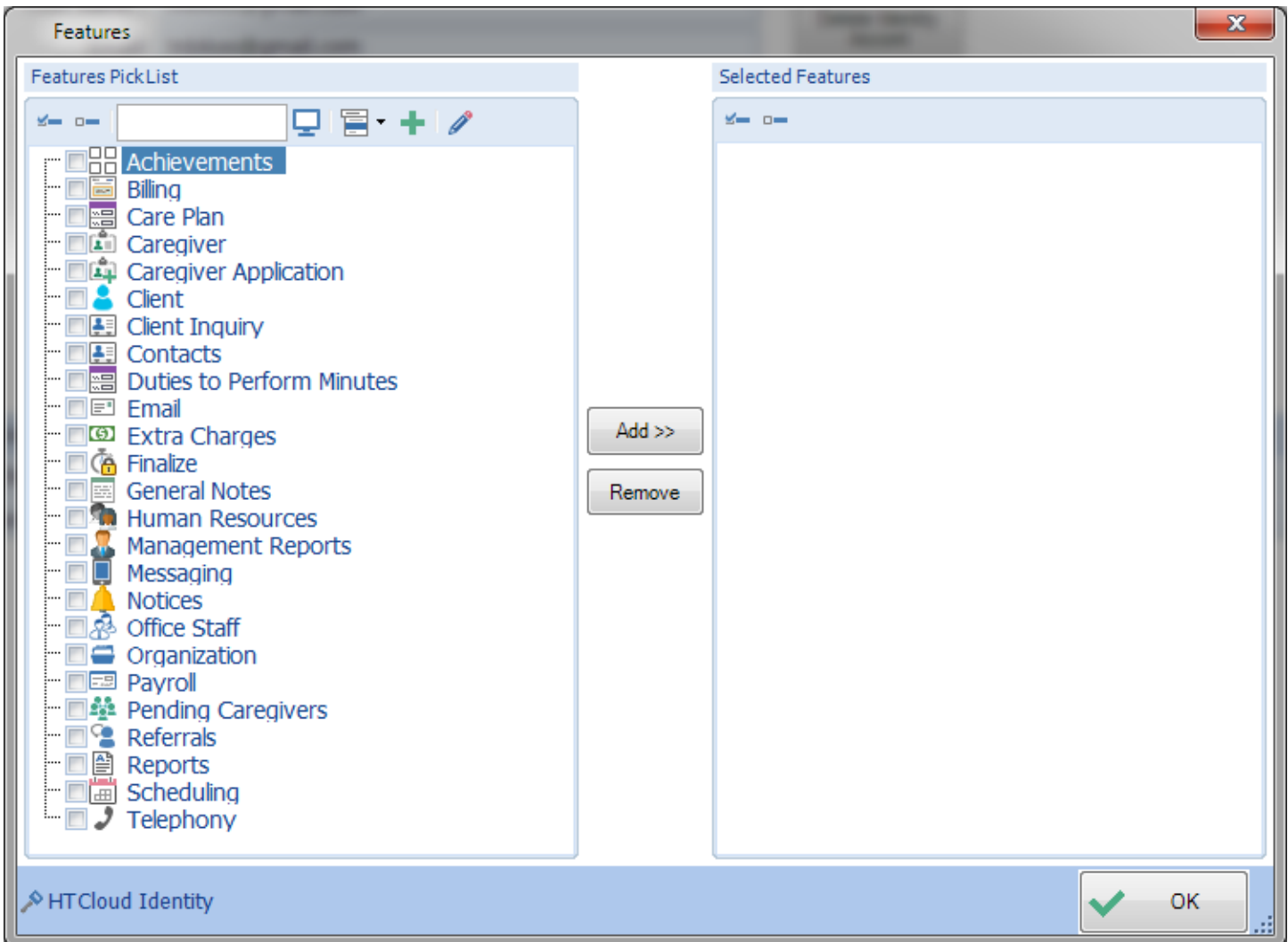
Remove User Interface Features (Desktop Only)

There may be times when you need to give access to a specific module but not want them to see all features within that module. A good example of this is the Caregiver Module and Payroll rates. Some offices don't want their staff to be able to see payroll rates. To achieve this we can hide Payroll and still give access to the Caregiver module.

Click the **Remove User Interface Features (Desktop Only)** panel then click the *Choose* button to open the *Features Pick List* screen.



Next, select which features you want to remove then click the *Add* button. Next, click the *OK* button. In our example we clicked *Payroll*.



People that this Account can View

This feature will be available in a future release of Companion.

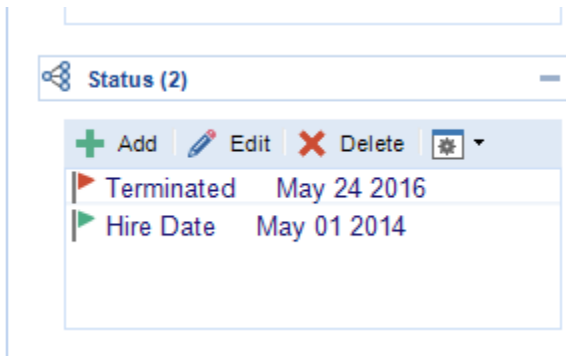
How to close a terminated Office Staff person

When an office staff person leaves or is terminated from your office, you will want to close their profile to block their access and protect your system from any malicious actions.

First you will want to set the office staff person's status to Inactive.

To change the office staff person's status:

- Open the *Office Staff module*.
- Select the office staff person in the Results panel on the left.
- Go to the *Profile* screen under the Demographic menu.
- Click on the *Status* tool on the right-hand side of the screen.
- Add a new status with an *Inactive type (Closed, Quit or Terminated)*. Do not edit any existing statuses to preserve history!
- Then click *Save*.



Once the Office Staff person is made Inactive, they will no longer be able to log in to the system.

[How to create a custom Security Level or edit an existing Security Level](#)