HCAI Data Capture System
Training Guide

Create User Account

About Public Health England

Public Health England exists to protect and improve the nation's health and wellbeing, and reduce health inequalities. It does this through world-class science, knowledge and intelligence, advocacy, partnerships and the delivery of specialist public health services. PHE is an operationally autonomous executive agency of the Department of Health.

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Create a User Account

All users on the HCAI DCS System must create a user account. There is a two-step process to create an account, you must first request an account, which is authorised by your Local Administrator, or by PHE if you have requested a Local Administrator Account. Once your request has been authorised you can activate your account and log into the HCAI DCS System

Request an Account

- Go to https://hcaidcs.phe.org.uk
- The HCAI DCS System will display the "Homepage" screen
- Select "Register" button in the in the Log in Panel
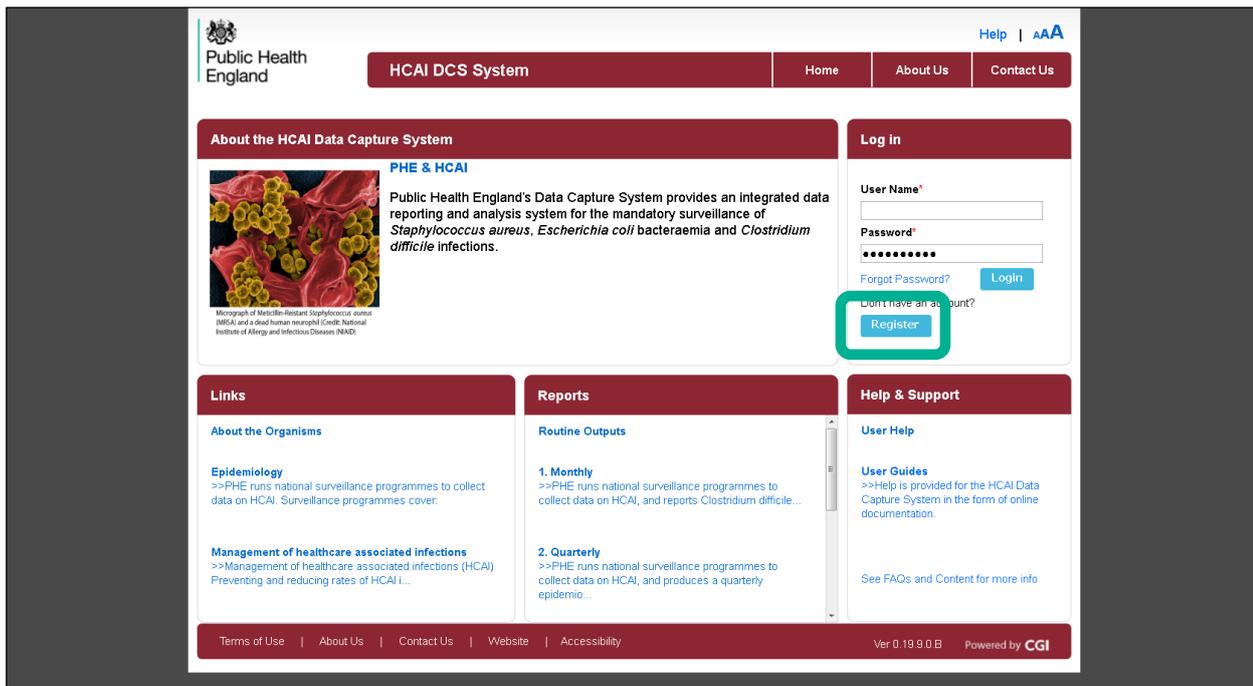
- The HCAI DCS System will display the "Request User Account" screen

- Enter your "Email Address", "First Name", "Surname" and Contact Telephone Number(s)
  - Your 'Email Address' and 'Confirm Email Address' must be the same
- Select the "Region" associated to your organisation from the dropdown menu
  - If access is being requested for a national level organisation then 'National' should be selected. For further information regarding organisational structure please refer to Table 1 in the Appendix at the end of this Training Manual
- Select your "Organisation Type" from the dropdown menu
  - The "Organisation Type" field provides a choice of different organisational classes, these include NHS Trusts, NHS Clinical Commissioning Groups (CCGs), NHS Area Teams etc. Please select the 'Organisation Type' relevant to the organisation for which you are requesting access. For further information regarding organisation types please refer to Table 1 in the Appendix at the end of this Training Manual
- Select your "Organisation(s)" from the dropdown menu
  - The "Organisation" field enables the selection of specific organisation(s) associated to the "Organisation Type" selected above. You can request accounts for more than one organisation by selecting multiple options from the dropdown menu
- If you are an Independent Sector user select your organisation Site(s)
  - The 'Site' field is only available to Independent Sector users
- Select at least one "Role", for further information about Roles and Permissions please view Table 2 of the Appendix at the end of this Training Manual
  - You can select more than one role to access the HCAI DCS System by selecting multiple options from the dropdown menu. The role(s) you have selected will impact the level of access and data you are able to view
- Enter the security code at the bottom of the page

- Select the "Submit" button
- The HCAI DCS System will display the "User Account Submission Confirmation" screen
- Select the "Continue" button
- The HCAI DCS System will display the "Homepage" screen
- The HCAI DCS System will send you an email confirming your request for an account
- Your Local Administrator will then "Authorise" or "Reject" your account request

Request Accounts for Multiple Organisations

Users associated to more than one organisation, or site can register for multiple organisation access to the HCAI DCS System, by setting their associated organisations from the "Organisations" dropdown menu, or if you are an Independent Sector Provider the "Organisations" and "Site" dropdown menus

Independent Sector Providers please note that an "All" option is available at the top of the "Site" dropdown list. This will select all the sites mapped to the organisation(s) selected in "Organisations" dropdown menu. Providing your account requests have been authorised, each request for access to an organisation, will trigger an email which will need to be individually verified.

Activate an Account

- If your account request is Authorised, the HCAI DCS System will send an email titled "HCAI Data Capture System: Your Request for a New Account", asking you to activate your account by selecting the "Verify Account" link in the message
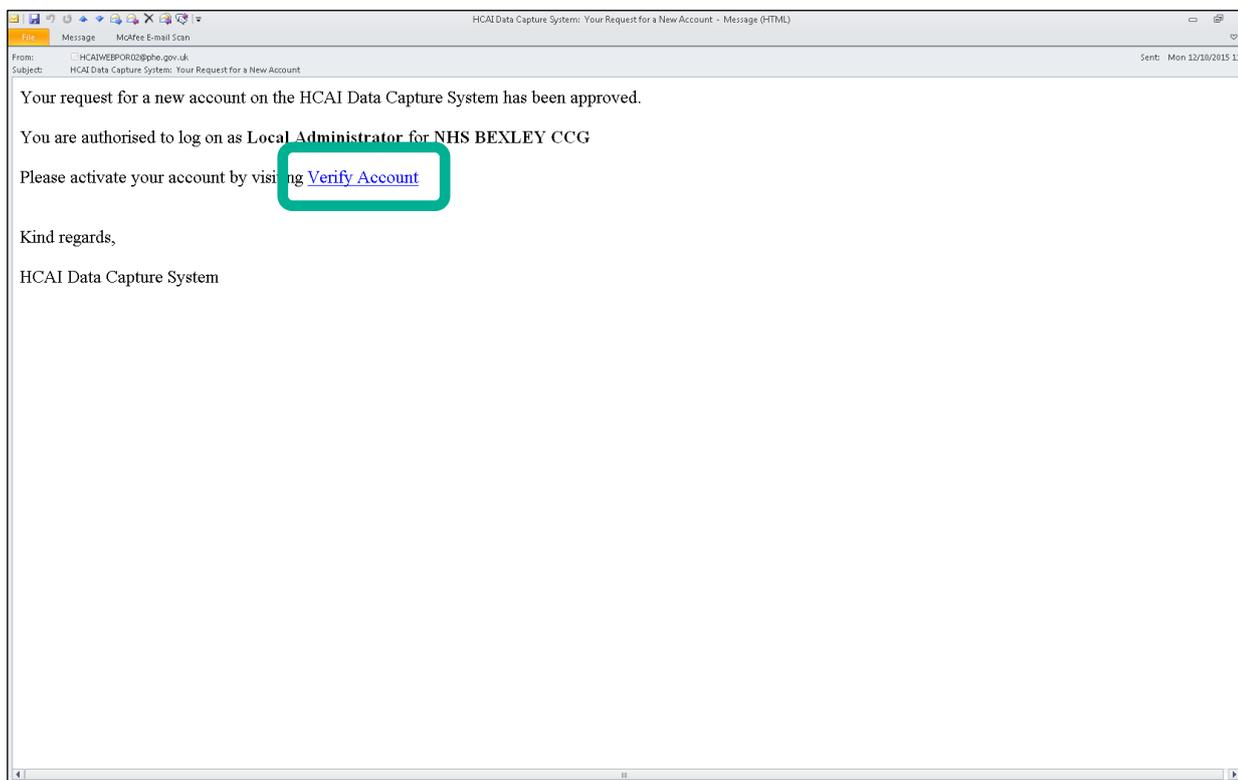
- The HCAI DCS System will display the "User Account Verified" screen
- Read and "Accept" the End-User Licence Agreement, if you select "Reject" you will need to register again
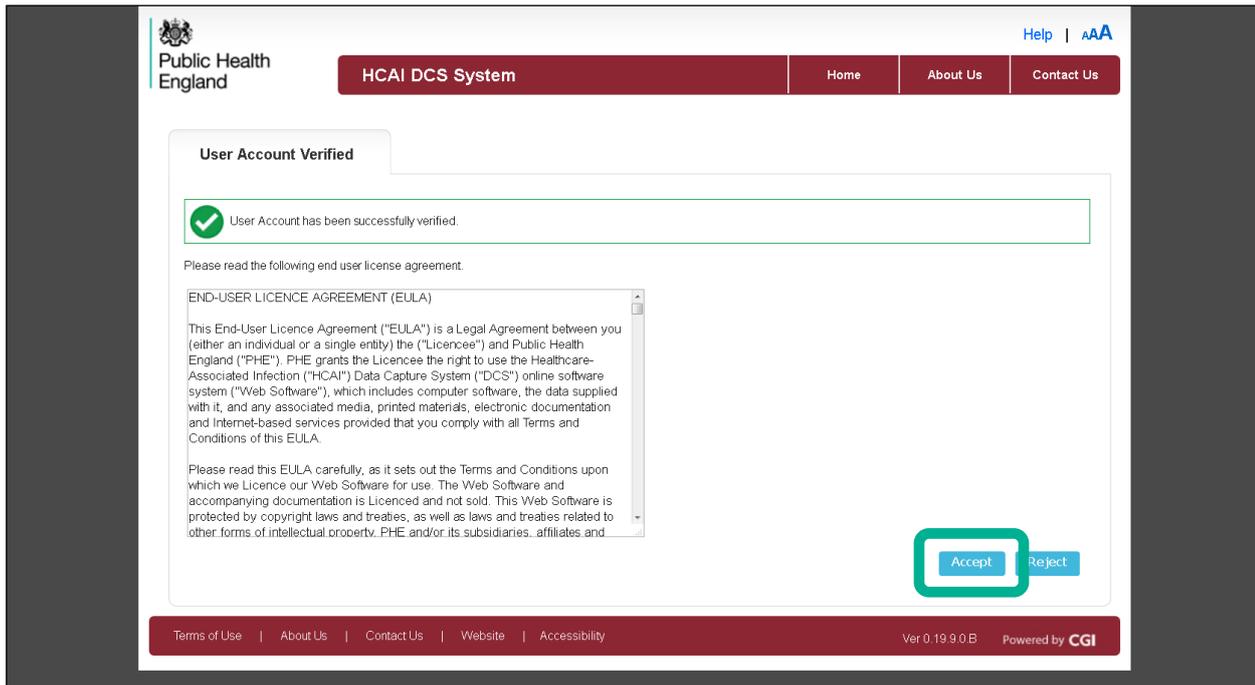
- The HCAI DCS System will display the "Create User Account" screen
- Choose and enter your "Password", Security Questions and Answers
  - Passwords must be eight or more characters to include at least one capital letter, one numeric character and non-alpha numeric character i.e. #*£)
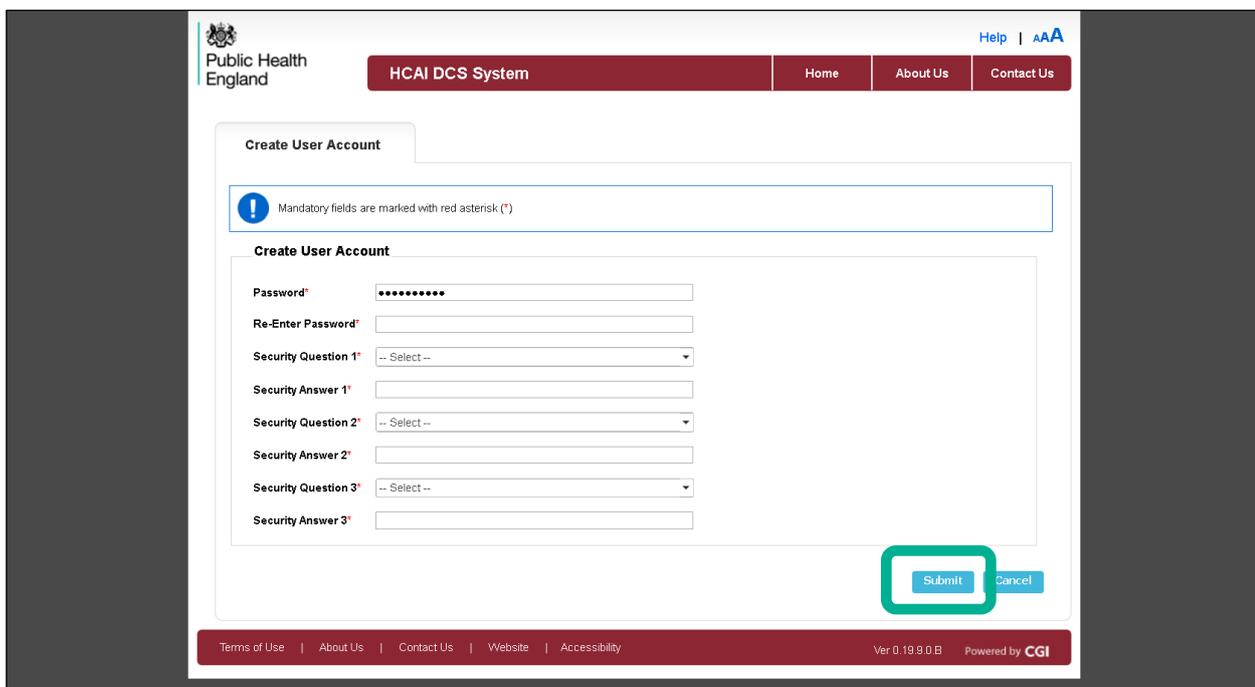
- Select the "Submit" button
- The HCAI DCS System will display the "Create User Account Confirmation" screen

- Select the "Login" button
- The HCAI DCS System will display the "Homepage" screen
- The HCAI DCS System will send an email confirming your account has successfully been created

If your account request is Rejected, The HCAI DCS System will send an email explaining why they account request was rejected, for further details please contact your Local Administrator or PHE if you have requested a Local Administrator Account

Activate Accounts for Multiple Organisations

Multi-organisation users will only have to complete the "Create User Account" screen for the first account they verify. Each email which will need to be individually verified. All subsequent account verifications will follow straight through to the log on screen

Login to the HCAI DCS System

- Go to https://hcaidcs.phe.org.uk
- The HCAI DCS System will display the "Homepage" screen
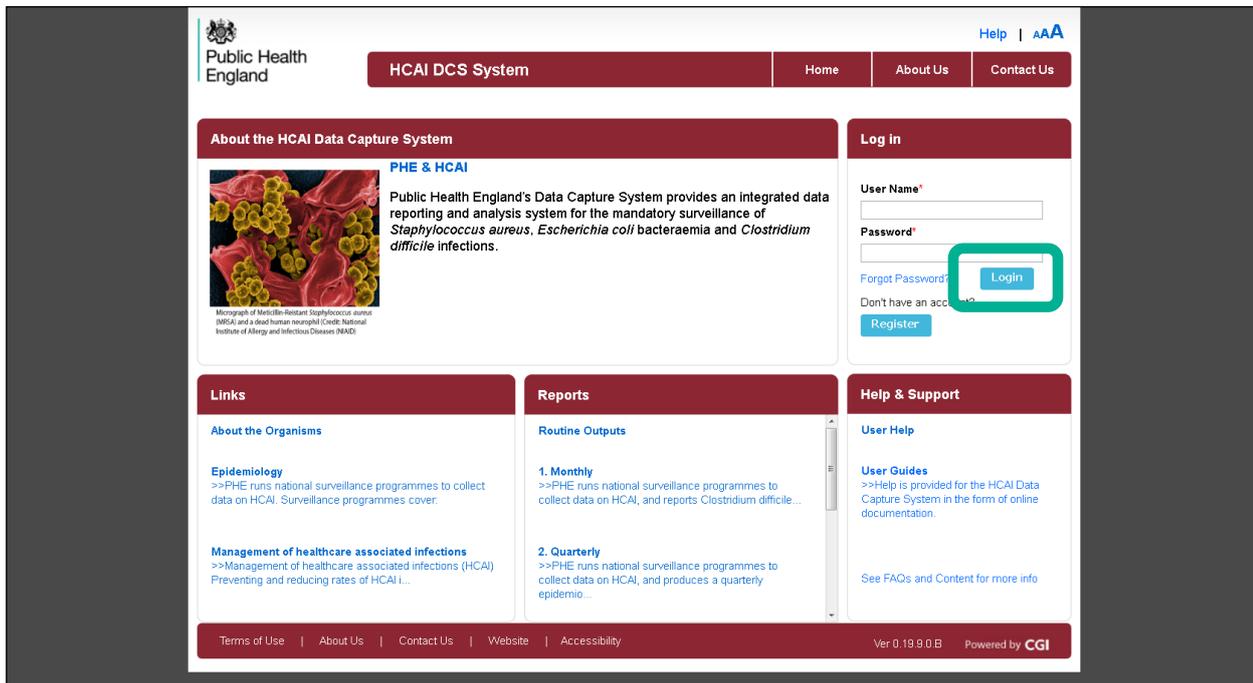
- Enter your "User Name" (the email address that was used to request your account) and "Password" in the "Log in" panel
- Select the "Login" Button
- The HCAI DCS System will display the "Home Dashboard" screen

Appendix

Organisation Types and User Roles

The HCAI DCS System supports a range of organisations and user types or roles (Tables 1 and 2), each of which have associated permissions and levels of access to the system. Within each organisation it is possible for the same user to have a range of different roles and for different users to have different roles. A user's organisation type, its place in the hierarchy and the user's role affect whether the user is able to enter or sign off data or participate in the PIR process. It also impacts on what data they are able to view.

All roles allow users to view data entered on the system at a summary level via a range of reports. For example, all users are able to view a count or rate of reported MRSA bacteraemia by NHS Trust.

Access to patient level data, with or without PII, is restricted based on the organisational hierarchy (Table 1). National users have access to patient level data for all cases entered on the system. Sub-national users have patient level access for cases mapped to their organisation in one of several ways. Organisation units only have patient level access to records entered by themselves. This is summarised in Table 1. Specific permissions associated with each of the roles are shown in Table 2.

Table 1

Summary of organisation types and role and data presentation in reports.

Organisation Type	Hierarchy	Roles Supported	Access to patient level data (with or without PII)	Default Pathway **	Data visible on line listings
Public Health England (National)	National	• System Administrator	All	Reporting Route	All cases, no mapping applied
Public Health England Region	Sub National Group	• Local Administrator • Read Only*	Cases reported by Trusts mapped to the region, and cases attributed to CCGs mapped to the region	Reporting Route	Reporting and commissioning routes. Resident pathway mapping
Public Health England Centres	Sub National Group	• Local Administrator • Read Only*	Cases reported by Trusts mapped to the centre, and cases attributed to CCGs mapped to the centre	Reporting Route	Reporting and commissioning routes. Resident pathway mapping
Local Authority	Sub National Group	• Local Administrator • Read Only*	Cases mapped to the Local authority based on the resident pathway algorithm	Resident Pathway	Resident pathway
Directors of Public Health (DPH)	Sub National Group	• Local Administrator • Read Only*	Cases mapped to the DPH via the CCG algorithm	Commissioning Route	Commissioning route
NHS England Area Teams	Sub National Group	• Local Administrator • Read Only*	Cases reported by Trusts mapped to the Area Team, and cases attributed to CCGs mapped to the Area Team	Commissioning Route	Reporting and commissioning routes
NHS England	National	• Local Administrator • Read Only*	All	Commissioning Route	All cases, no mapping applied
NHS England Region	Sub National Group	• Local Administrator • Read Only* • PIR Arbitrator • PIR Read Only	Cases reported by Trusts mapped to the region, and cases attributed to CCGs mapped to the region	Commissioning Route	Reporting and commissioning routes
Clinical Commissioning Group	Organisation Unit	• Local Administrator • Read Only* • PIR Assignment • PIR Data Entry • PIR Read Only	Cases attributed to the CCG	Commissioning Route	Commissioning route
Department of Health	National	• Local Administrator • Read Only*	All (no PII access for any user)	Reporting Route	All cases, no mapping applied

Organisation Type	Hierarchy	Roles Supported	Access to patient level data (with or without PII)	Default Pathway **	Data visible on line listings
Independent Sector Healthcare Provider Sites	Organisation Unit	• Local Administrator • Read Only* • Data Entry • Sign Off Authority	Cases entered by the IS site/s (a user may have permissions for multiple sites)	Reporting Route	Cases entered by the IS site/s
Independent Sector Healthcare Providers	Sub National Group	• Local Administrator • Read Only* • Data Entry • Sign Off Authority	Cases entered by sites within the provider that the user has permissions to view (this may be all or some of the sites within a provider)	Reporting Route	Cases entered by sites within the provider that the user has permissions to view
NHS Trusts	Organisation Unit	• Local Administrator • Read Only* • Data Entry • Sign Off Authority • PIR Assignment • PIR Data Entry • PIR Read Only	Cases entered by the NHS Trust	Reporting Route	Cases entered by the Trust
Renal Unit	Organisation Unit	• Local Administrator • Renal Data Entry	All cases shared with the renal unit	N/A	Cases shared with the renal unit
Care Quality Commission	National	• Local Administrator • Read Only*	All (no PII access for any user)	Reporting Route	All cases, no mapping applied
PHE Field Epidemiology	National	• Local Administrator • Read Only*	All	Reporting Route	All cases, no mapping applied
Trust Development Authority	National	• Local Administrator • Read Only*	All (no PII access for any user)	Reporting Route	All cases, no mapping applied

*Allows read only permission to view data at patient level, either with or without PII access, depending on requirements
** TBC this is the usual pathway by which cases are mapped to this organisation type. This is how the data is presented on all reports, except the line listing where other mappings are applied

Table 2

Overview of User Roles and Permissions

Menu or Report Name	Sub Menu or Report Name	Role									
		Local Administrator	Data Entry	Shared User	Read Only (No PII)	Sign-Off	Read Only (PII)	PIR Data Entry	PIR Assignment	PIR Arbitrator	PIR View Only
Summary Dashboard	Summary Graph	View	View		View	View	View	View	View	View	View
	Trends Graph	View	View		View	View	View	View	View	View	View
	Data Collection Completeness	View	View		View	View	View	View	View	View	View
	Data Collection Completeness (Shared Cases)	View	View	View				View	View	View	View
	Sign-Off History					View					
	PIR Case Summary								View	View	View
Benchmarking Dashboard	Benchmarking	View	View	View	View	View	View	View	View	View	View
Data Quality Dashboard	Data Collection Field Completeness by Organisation	View	View	View	View	View	View	View	View	View	View
Case Capture	Enter a Case		Add								
	Manage Shared Cases			Edit							
Sign-Off Cases	Sign-Off Episodes					Edit					
Search	Search Infection Episodes	View	Edit/Delete	View	View	View	View	View	View	View	View
User Administration	Manage Account Requests	Edit									
	Manage User Accounts	Edit									
	View/Edit User Details	Edit									
	User Login Audit	View									
Reports	Counts or Rates of Infection Episodes	View	View	View	View	View	View	View	View	View	View
	Timeliness of CEO Sign Off	View	View	View	View	View	View	View	View	View	View
	Nil Returns	View	View	View	View	View	View	View	View	View	View
	Line Listings		View	View	View	View	View	View	View	View	View
	Number Of Logins	View									
	Find Duplicates		View								
	QMLR Report	View	View	View	View	View	View	View	View	View	View
	PIR Reports	View	View	View	View	View	View	View	View	View	View
	Standard Reports	View	View	View	View	View	View	View	View	View	View