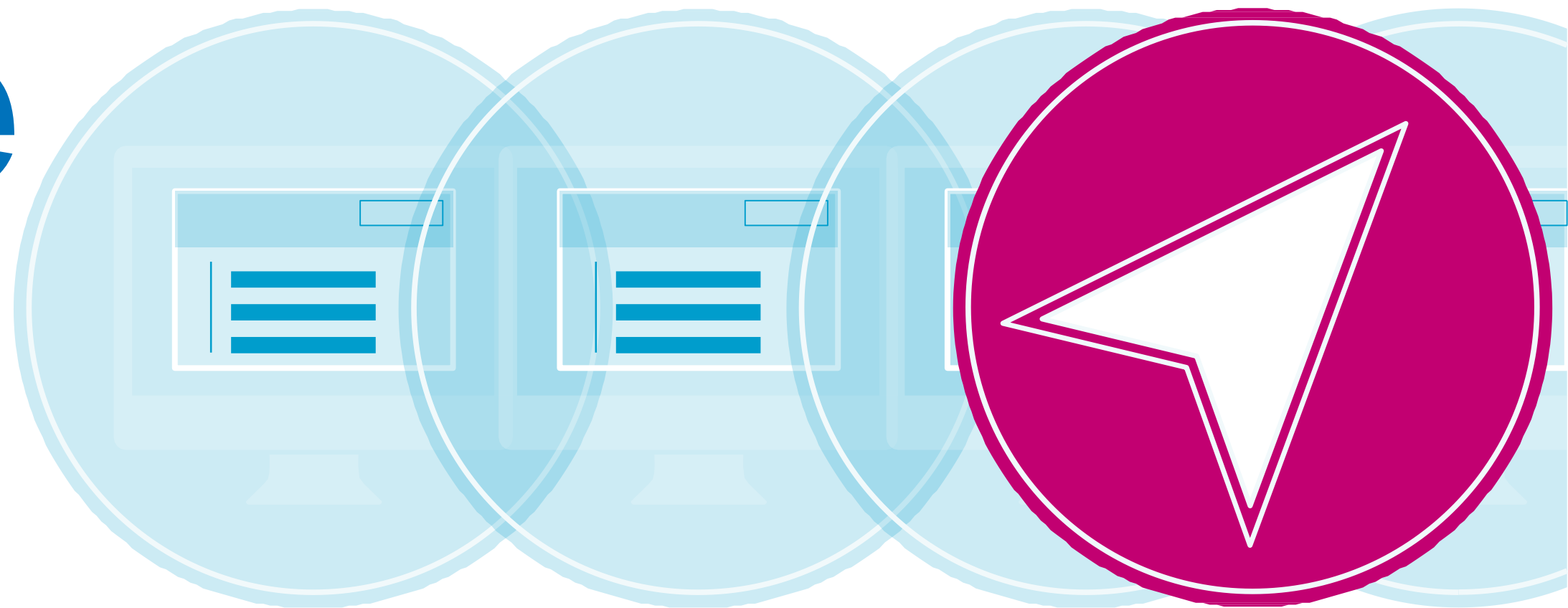


Market Entry - Applicant

User Management Guide



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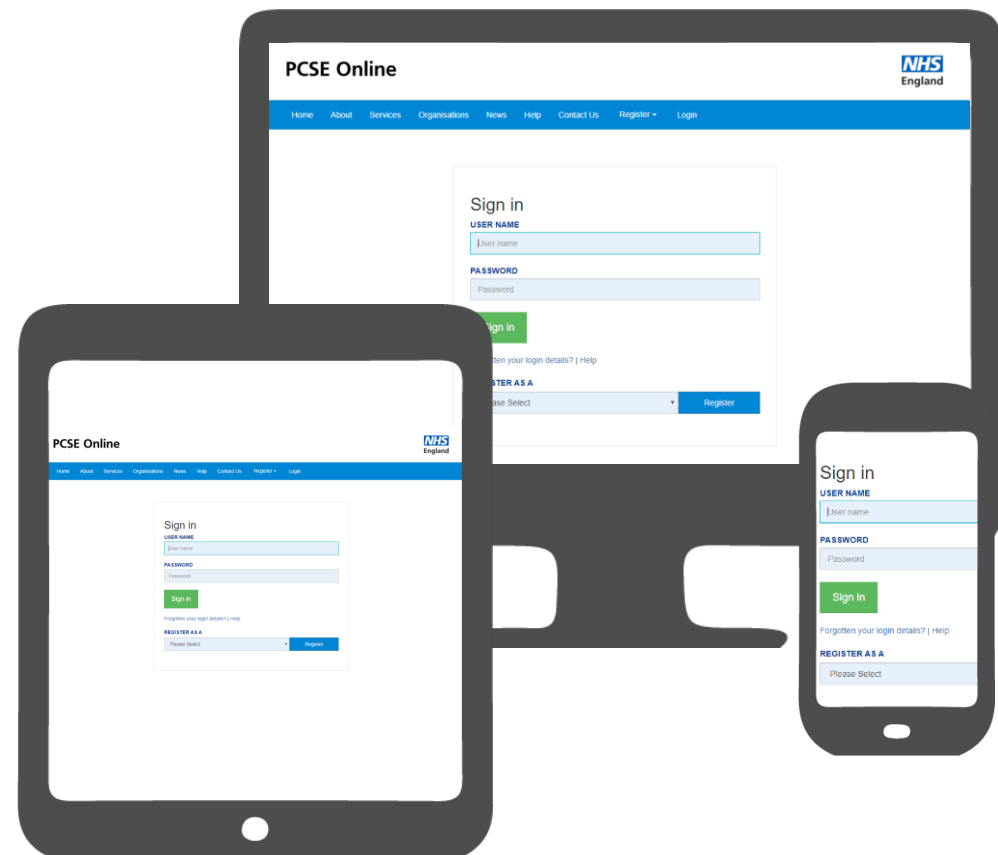


Introduction

This guide has been created to offer you as a user administrator, guidance for when you are managing your assigned users.

This new feature in PCSE Online has been designed with you in mind, offering you ease of access and enabling you to be able to work through each section of the system in your own time.

Replacing the existing paper process with a sleek, intuitive digital platform, this system will offer you complete control of your users throughout the whole application process.



Guide Insights

Please note that for an optimum experience using PCSE online, we would recommend using either:



Google Chrome



Firefox

Assigning roles to PCSE Online

There are two roles available for users within PCSE Online for Market Entry. These are:



Applicant



Administrator

The responsibilities of a User Administrator

A User Administrator will have three core responsibilities. These are:



Setting up colleagues with the appropriate role(s) for their position



Editing user's access within their organisation to ensure users have the appropriate role(s) for their position



Deactivating users who leave



Accessing PCSE Online

Firstly, to use PCSE online, you must be registered with an account.

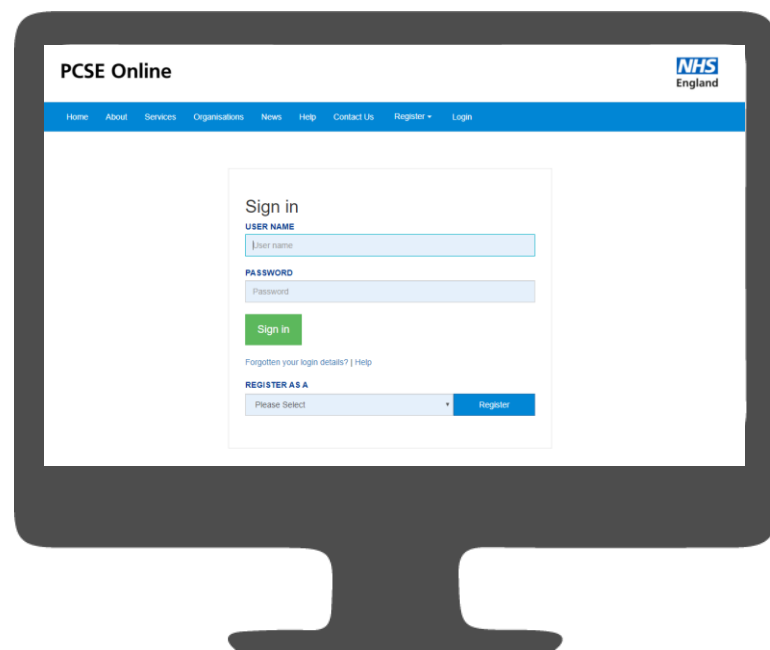
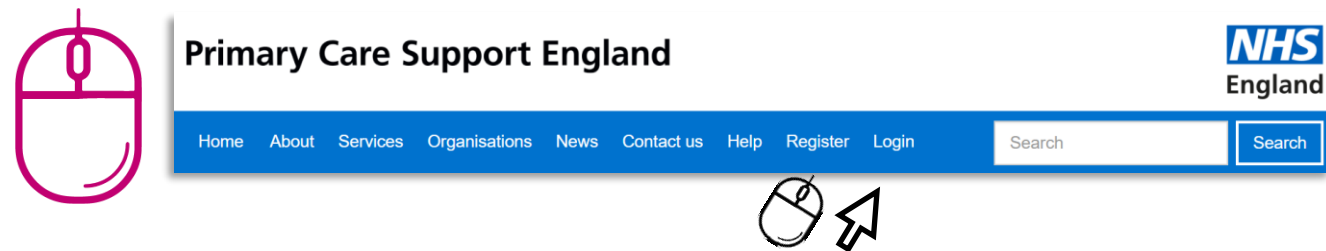
To register, please send an email to PCSE.Marketentry@nhs.net and we will contact you to request further details if required. You will receive an automated email once an account has been created.

Once you have a username and password, you will be able to log in to your homepage where you can:

- **Create a new Application/Notification**
- **View the progress of previously submitted Application/Notifications.**

To manage your users, open up your web browser and go to <https://pcse.england.nhs.uk/>

When the website opens, look at the blue ribbon along the top of the page and click on the **“Login”** tab.

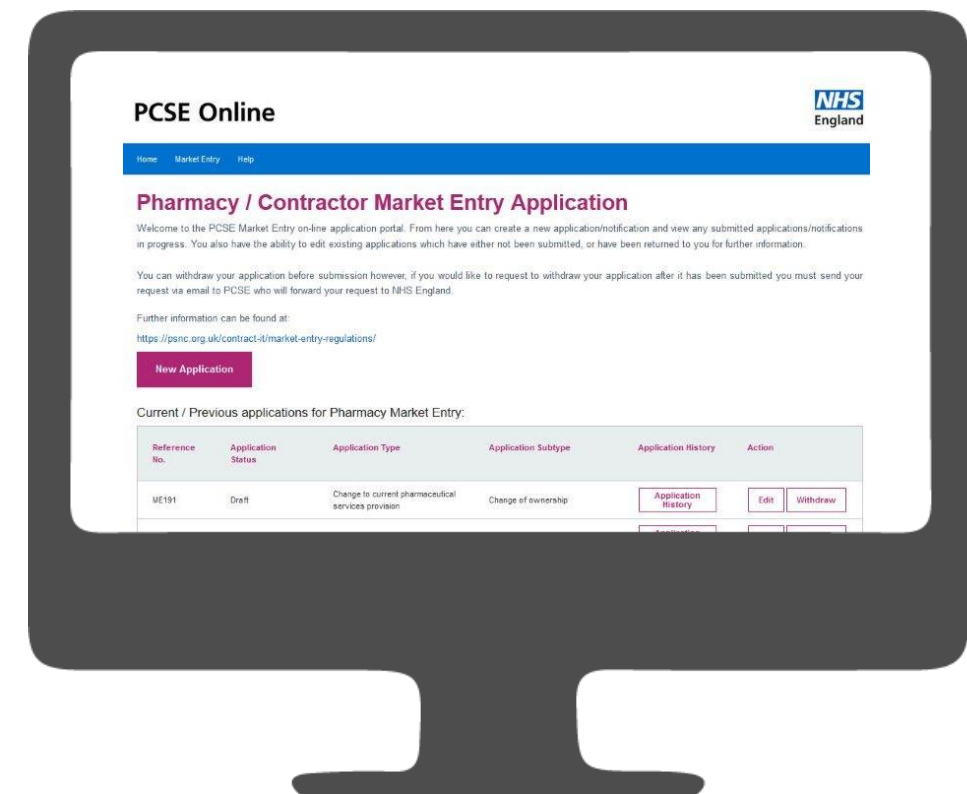


Accessing PCSE Online

Once you have logged in, you will be presented with the PCSE online home page. Click on the on **“Market Entry”** tab and you will be redirected to the Applicant homepage.

From the applicant home page you can:

- **Set up your colleagues with the appropriate role(s) for their position**
- **Edit a user’s access within their organisation to ensure they have the appropriate role(s) for their position**
- **Deactivate users who leave**



User Roles

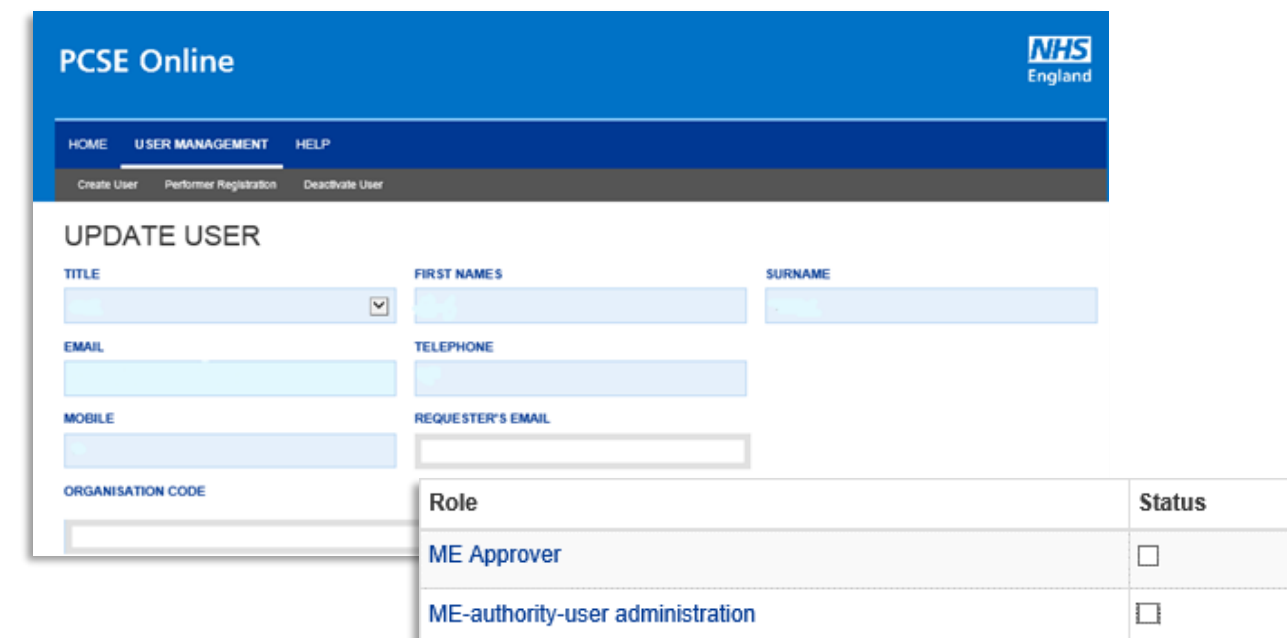
The table below provides details of the User Roles that can be assigned to users within your organisation:

| PCSE Online Role | Role description |
|------------------|---|
| Applicant | This role can create and amend the “Organisation User Administrator” and all other roles listed below |
| Administrator | <ul style="list-style-type: none"> ○ Can create & submit new applications ○ Can view and edit applications in ‘Draft’ ○ Can view and edit returned applications from PCSE ○ Can submit commencement & consolidation forms |

Assign User Administrators and Market Entry Roles

The **“Authority User Administrators”** can set up the roles listed on page ** by following the below steps:

- 01** Go to **‘https://pcse.england.nhs.uk/’** and log in using your Local Office credentials.
- 02** Once logged in, you will see three tabs on your homepage:
 - **Home**
 - **User Management**
 - **Help**
 Click on the **“User Management”** tab
- 03** In the search bar, enter the specific users email address, then click on the **“Edit User Button”** (If the user does not already exist, use the Create User option in the toolbar to continue)
- 04** Once you have your user, simply scroll to the bottom of the page and you will see the role table. Click the relevant option then **“Update/Create”**.



Adding an organisation



Good to know!

In some cases, you as the applicant may wish to use an applicant representative to submit and process an application on your behalf. You can do this however, when adding an applicant representative please be aware of the following:

- When adding an applicant representative to your organisation this person will have full access to any other application that has already been submitted by your organisation on a separate occasion.
- They will also have full access to any subsequent applications that you as the applicant submit separately from your organisation.
- The applicant representative will be able to view and amend any other application within your organisation.

To add an organisation to the application, click on the box that says **“Add Organisation”**, you will need to click on the drop down available and locate the relevant organisation code. It will look like **“MEAD00000”**.

ORGANISATION CODE

Once selected from the drop down please choose the appropriate user role and click **“Update”**.

Updating Users

There are many instances where you may need to update the personal details of an applicant, maybe they have got married and you need to amend their surname.

To update the details of an existing PCSE Online User, select the User Management menu and search for the user in the search field. The easiest way to search is by entering the users email address.

Once the user is located click on a record returned by the search and then click on the **“Edit User”** button.

| Email | Surname | First name | Last Logon Time | Bad Password Count | Account Deactivated. | Account Expired | Action |
|---------------------------|---------|------------|-----------------|--------------------|----------------------|-----------------|-----------|
| robert.jones@pcsdev.co.uk | Jones | Robert | | 0 | No | No | Edit User |

You will be taken to the screen for editing the details which is very similar to the one for creating a new user.

When editing the details of an Internal User, you cannot change the email address. Select the **“Add Organisation button”**.



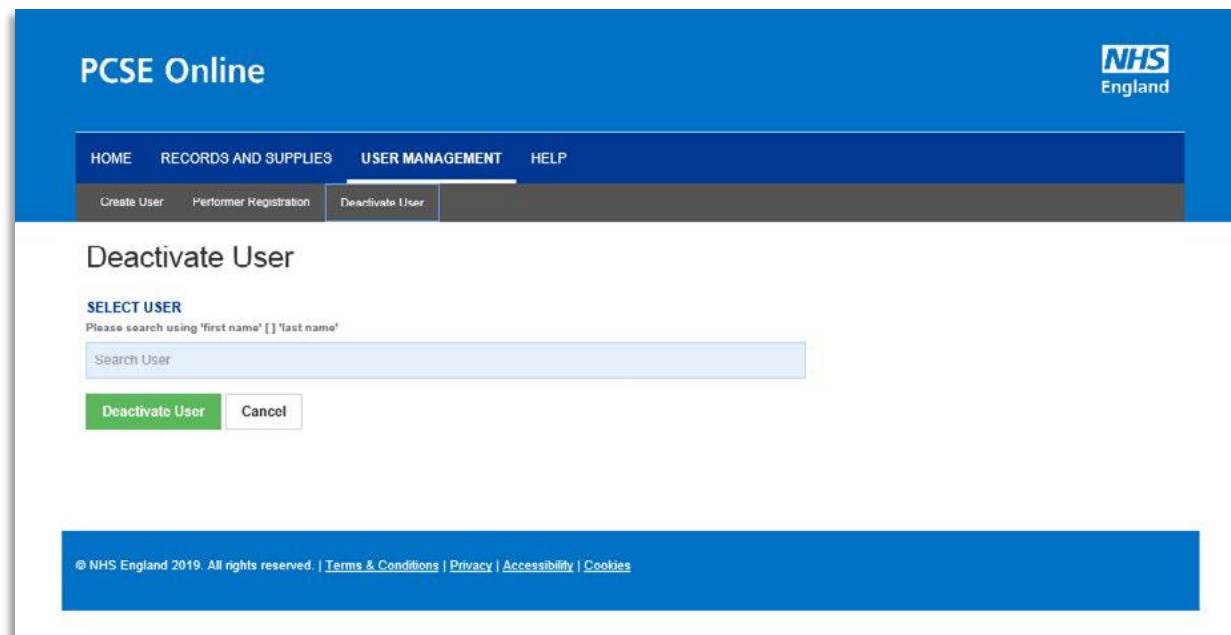
Deactivating Users

From the User Management menu, choose the **“Deactivate User”** option.

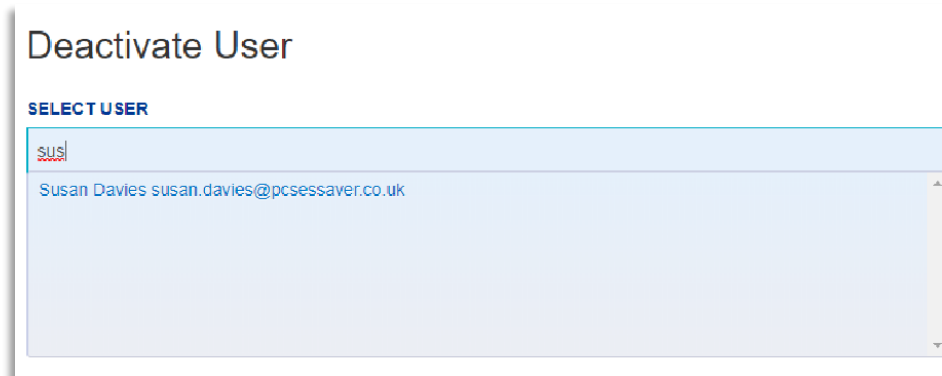
Once the user is located click on a record returned by the search and then click on the **“Edit User button”**.



You will see the screen below.

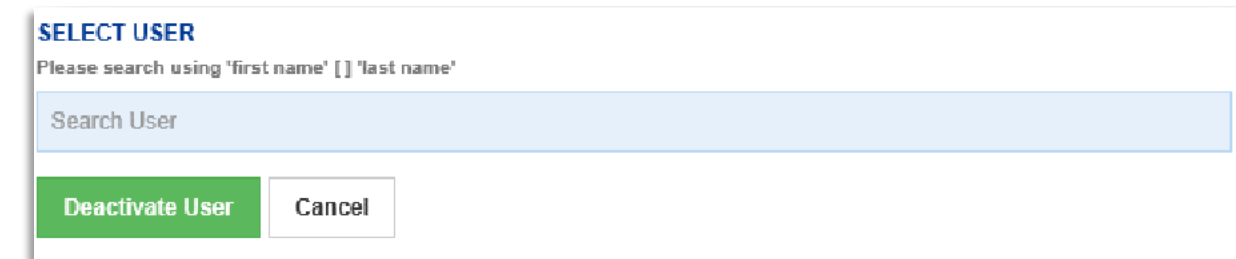


To select the user to deactivate, enter the user’s name in the **“Select User”** field. You must type in at least the first 3 letters of the user’s full name. You will see all of the users who meet the criteria with their User name.

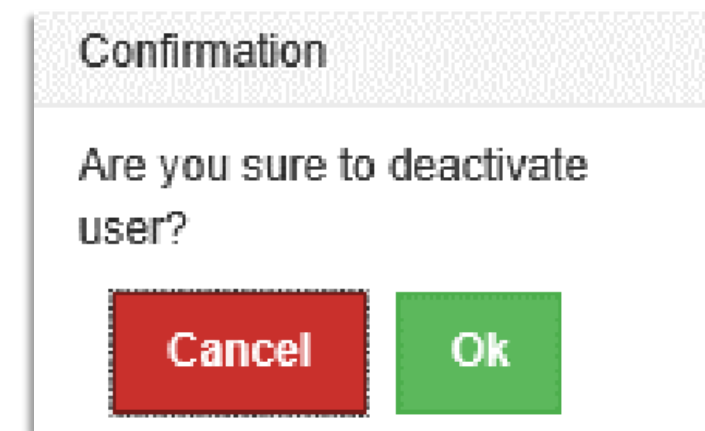


Deactivating Users

Click on the **“Deactivate User”** button.



You will be requested to confirm the deactivation request. Click on the **“Ok”** button. You will see the **“User disabled successfully”** message.



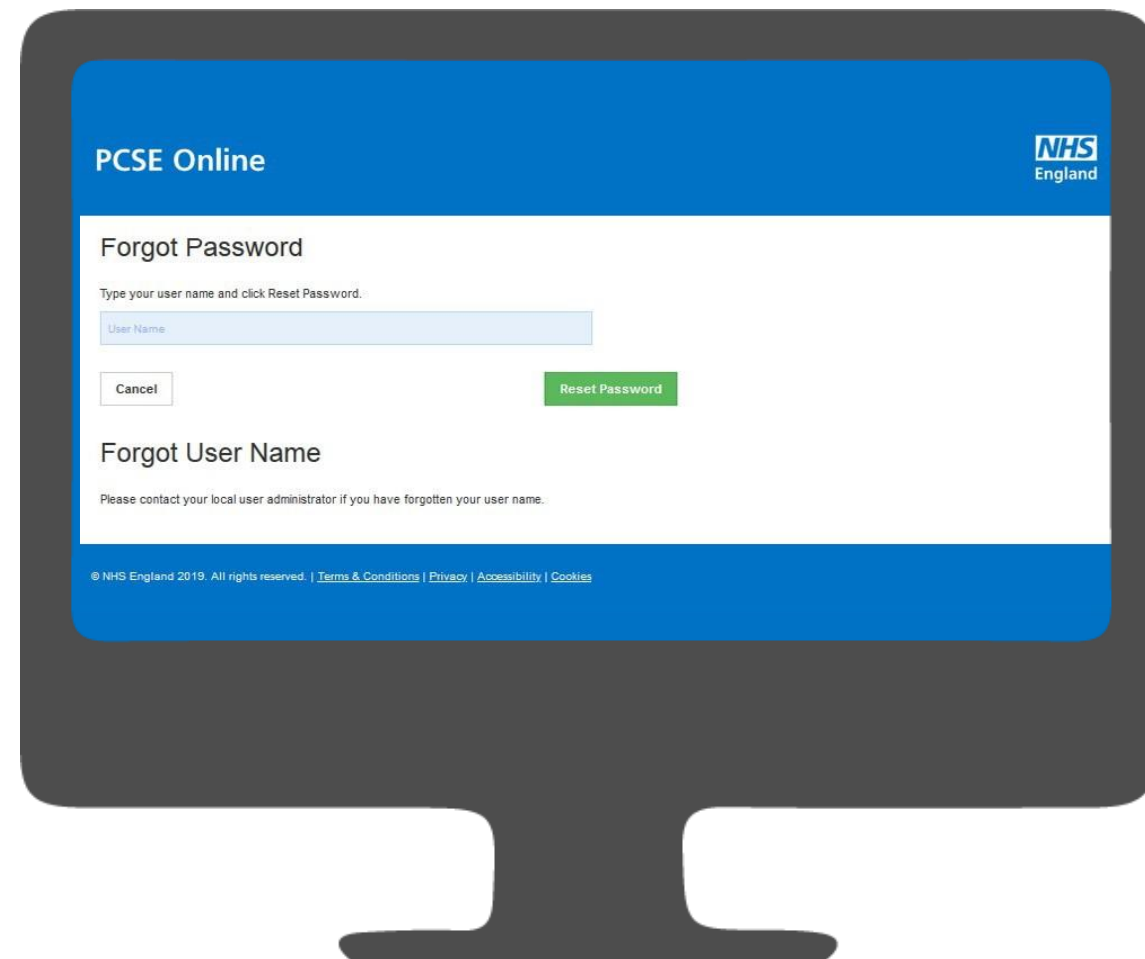
Good to know!

- ✓ Disabling a user from a role does not revoke all their credentials.
- ✓ A user who has been disabled will continue to have access to PCSE Online but only for any other roles assigned.

User has forgotten their password

If a user has forgotten their Username or password, they should click **“Forgotten your login details”** on the PCSE Online homepage.

The user should then enter their user name and click **“Reset Password”**.



The screenshot shows a computer monitor displaying the PCSE Online website. The page has a blue header with 'PCSE Online' on the left and the NHS England logo on the right. Below the header, there are two sections: 'Forgot Password' and 'Forgot User Name'. The 'Forgot Password' section includes the instruction 'Type your user name and click Reset Password.' and a text input field labeled 'User Name'. Below the input field are two buttons: 'Cancel' and 'Reset Password'. The 'Forgot User Name' section includes the instruction 'Please contact your local user administrator if you have forgotten your user name.' At the bottom of the page, there is a footer with copyright information: '© NHS England 2019. All rights reserved. | Terms & Conditions | Privacy | Accessibility | Cookies'.

User has forgotten their password

Once the request has been sent, you will need to wait for an email to land in your registered email inbox. This email will contain a link. Simply click on this and follow the instructions.



Good to know!

The User Name will be the individuals registered email address. If a user has forgotten their User name, then they must contact their User Administrator!



Primary Care Support England

Contact us

For further support and information, please visit our website:



PCSE Online

www.pcse.england.nhs.uk

For queries relating to a particular service, please use our:



Online enquiries form

<https://pcse.england.nhs.uk/contact-us/>

Or alternatively, you can call our:



Customer Support Centre

0333 014 2884