

How to choose your Account Lead for the Outcomes Star™

Top tips for choosing who takes on the role of Account Lead for your organisation

1 What is an “Account Lead”?

Account Lead is the role of main administrator for your organisation’s Star Online account. When you first purchase Outcomes Star licences, someone in your organisation needs to be named as the Account Lead for your account.

In addition to general administrative responsibilities, the Account Lead also undertakes responsibility for the data recorded within your account, so it’s important the right person is given the role.

2 Account Lead role for organisations using the Star Online system

- When you first start using the Star Online, the Account Lead will need to set the system up into the right configuration for your organisation. They will need to understand or be informed about how you want your teams, projects and work to be organised into ‘services’ on the Star Online as this will affect the reports you are able to create with Star data.
- Only the Account Lead can:
 - Add services, view and edit services in your organisation’s account
 - Add workers and managers to these services and close worker and manager accounts, preventing users from logging in
 - Review and edit service user details, and access Star readings (including Star Notes) and action plans for all service users, which often contain sensitive information
 - Run all reports including reports at ‘Organisation’ (whole account) level
 - Delete any and all data without additional authorisation.
- **They are responsible for ensuring the account is managed in a way that meets the terms and conditions of the Star Online and crucially in line with your organisation’s own information governance and GDPR policies and legislation.**
- The Account Lead and their access to the Star Online must be covered by your organisation's data protection policy and be trained in data protection best practice, as they can view, edit and delete any and all data entered by an organisation.

- In addition, they form an important link between the helpdesk and the organisation's users, e.g. your practitioners, managers and administrators. They are contacted when there is planned downtime, invited to contribute feedback on new features and passed critical troubleshooting information. They are responsible for passing this information on internally.
- They can also provide an internal expert on the Star Online, providing support to users.
- They will be the only person, in most instances, within the organisation who can carry out some critical features, such as deleting erroneous Stars, adding users and upgrading the account, setting up the account and running certain organisation-wide reports and closing or renewing the account.

3 Who should be Account Lead?

A relatively senior or trusted administrator, co-ordinator, IT support, or data analyst who can:

- Understand your organisation's data protection policies and who is trusted to have access to all data on the Star Online
- Have enough time and capacity to undertake initial set-up work, provide ongoing support to people using the Star Online system in your organisation and respond to requests from workers and managers to make changes to your account as needed
- Bring some IT knowledge (although the system is designed to be intuitive and no specialist skills are needed)
- Understand or be informed about how your organisation needs to use the Outcomes Star and to report on your Star data and therefore how the system needs to be set up initially

4 Next steps

If you have any queries about the Star Lead role or further advice on how it might work best in your organisation, please contact Triangle on **info@triangleconsulting.co.uk** or **+44(0)207 272 8765**.

If you are not based in the UK, please contact the licensed Star service provider in your country – contact details can be found on our website **www.outcomesstar.org.uk**.

APPENDIX – BREAKDOWN OF ACCOUNT LEAD PERMISSIONS

Task	Account Lead?	Service Manager?	Practitioner?
Set up services	Y	N	N
Add new practitioners	Y	Y	N
Reset passwords	Y	Only their own	Only their own
Edit practitioners	Y	N	N
Link practitioner to service	Y	Y	N
Grant Service Manager permissions	Y	Y	N
Add/remove Licensed Trainer permissions	N	N	N
Deactivate practitioners	Y	N	N
Access Star resources	Y	Y	Y
Accept Star versions to account	Y	N	N
Configure Action Planning	Y (for account or service)	N	N
Configure Contact Details	Y (for account or service)	N	N
Configure Implementation Info	Y (for account or service)	Y (for service)	N
Select Gender and Ethnicity Lists	Y (for account)	N	N
Be Lead Practitioner for engagement (ie have a caseload)	Y	Y	Y
Edit submitted Star	Y	Y	Y
Delete submitted Star	Y	Y	Y – request permission
Delete action	Y	Y	Y – request permission
Edit / delete engagement	Y	Y	Y – request permission or direct delete if no Stars added
Delete service user	Y	Y	Y – request permission
Move engagements to another service	Y	N	N
Merge service user	Y	Y – request permission	Y – request permission
Run dashboard reports	Y	Y	Y
Export raw data extracts	Y	Y	N