# Setting up your new Star Online account

**A guide for Account Leads**

## 1 Introduction

This guide is also available through the Star Online’s Help centre.

PLEASE NOTE: If you are not the Account Lead for your organisation's Star Online account, you will not be able to do any of the tasks set out in this guide.

This guide is made up of two parts:

**Stage 1. Before you start**

Stage 1 will give you some background information about the requirements of the system, the role of account lead and what to think about before getting started with setting up your account on the system.

**Stage 2. Setting up your account**

Stage 2 will take you through the simple steps you'll need to do to set up your colleagues with access to the system and to allow them to start recording data and Stars within your account.

Once you have set up your account and invited your colleagues to start using it, we recommend you:

- If you haven’t already, contact the helpdesk to find out the support they can offer and to talk through any questions you have
- Understand what is available in the Help Centre, especially the content that your colleagues will be able to see, as you may need to direct them to instructions or guidance that they will find useful
- Familiarise yourself with the main features of the system – the Resources page, the Records List, a service user’s record, and the Reports

**Remember, if you need support with any aspect of setting up your account, as the Account Lead you can contact the helpdesk on support@staronline.org.uk.**

## 2 Stage 1: Before you start

It is useful to complete these 5 steps before you set anything up within your new account on the Star Online.

You may already have some of this information, so skip to the steps that you are not familiar with.

**Step 1. Recap of the technical requirements**

As the Star Online is a web-based system, the technical requirements are minimal. Your organisation should already be aware of these requirements before deciding to purchase the Star Online, but it is useful to double check that these are in place:

- Devices with internet access and minimum memory of 4GB (standard required for web browsing)
- Browser compatibility of the latest supported versions of Chrome, Internet Explorer, Edge or Safari
- Ability for users to receive emails from support@staronline.org.uk – this email address not to be blocked by internal security
- Users to have unique email addresses and be able to access their own inbox.

If there are any issues with the requirements, contact the helpdesk.

**Step 2. Recap of the Account Lead role**

You are the Account Lead for your organisation's Star Online account. This means that:

- you are responsible for setting up and administering your account
- you will act as the first point of contact for questions from your colleagues using the system
- you have access to the helpdesk team at Triangle for support.

You do not need to have any advanced technical skill, but you do need to be aware and compliant with your organisation's data protection policies (as you have access to all data in your Star Online account and will undertake data management tasks).

Each account includes 1 licence for an Account Lead.

As Account Lead you will be able to:

- control access to Star versions
- create and manage services
- create and manage logins for your colleagues
- see all data entered in your account through the Records List
- pull all data in your account into Reports
- manage requests for deletion of Stars

If you also need to be able to perform the tasks of a Practitioner (Add new service users, Edit service user profiles, Start and end engagements, Add Stars and actions) you will be able to access both Account Lead and Practitioner roles from your one login. (**You do not need to manually set yourself up as a practitioner)**. This will not use up one of your organisation's licences as it is covered by your Account Lead licence.

To begin entering service users and Star readings as a Practitioner go to Records from your Home page, you can then add/search for a service user and add Stars etc. For more information on using records go to the Help Centre in Star Online.

If you are not the right person to be the Account Lead for your organisation, contact the helpdesk or info@triangleconsulting.co.uk.

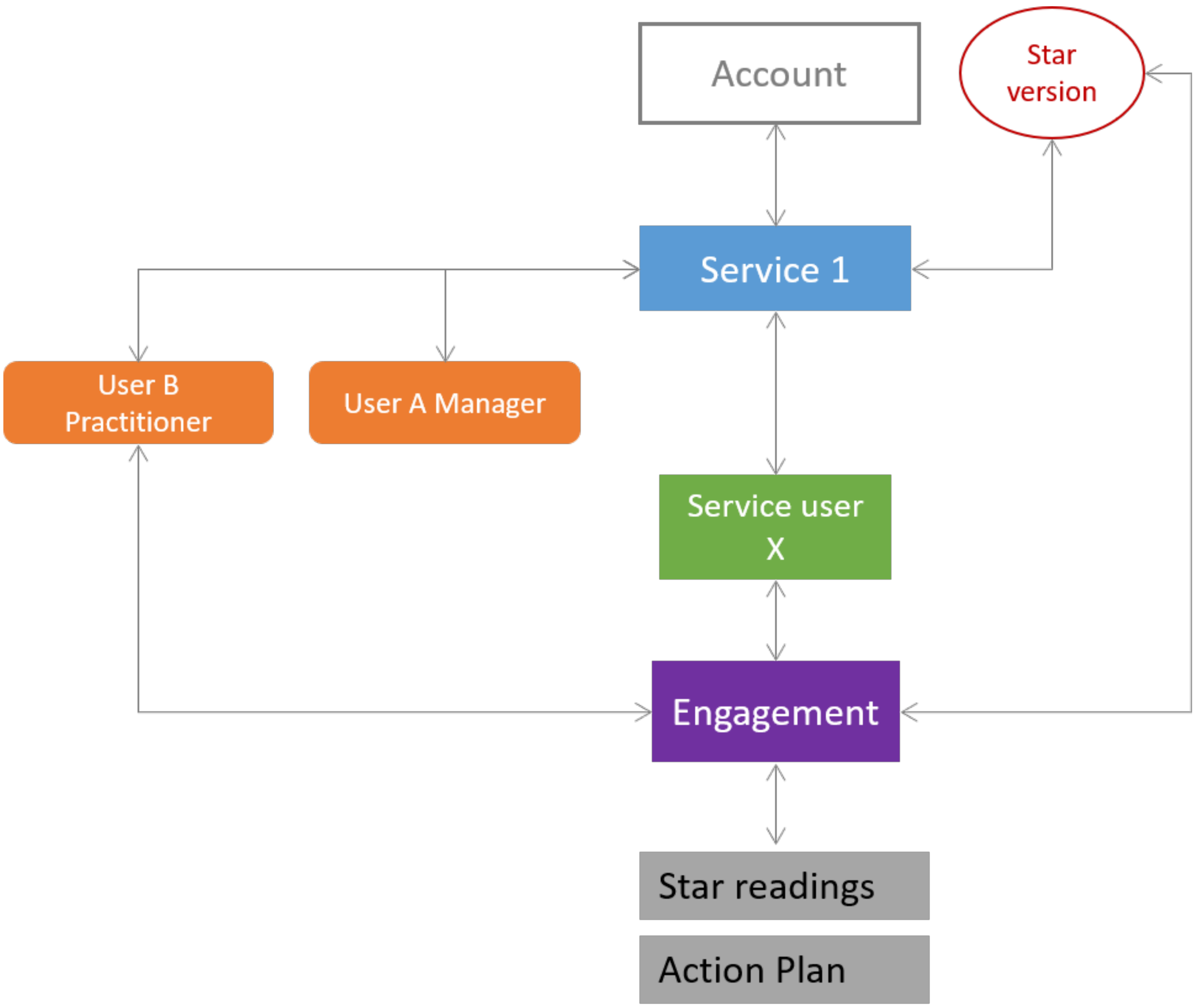
**Step 3. Define how your account will be structured**

Here we explain how accounts work on the Star Online – you can see the detailed information on how to set services up in the Stage 2 step 3.

Star Online accounts are organised into 1 or more "services." There's no limit to how many of these you can have. A service can mean a specific service, a project, a single site team, a centre, or another operational 'unit' within your organisation. A service can use more than one version of the Outcomes Star at a time.

Members of staff are then linked to these services, and then they can link service user records to these services. They can also see and download the resources for the Star versions used by the services they are linked to.

This diagram shows how the different things within your account can relate to each other:



A few rules to be aware of:

- Services can be linked to more than 1 version of a Star
- Members of staff can be linked to more than 1 service
- A service user can be linked to more than 1 service
- An engagement can only be linked to 1 service and 1 version of a Star
- A service user can only have 1 engagement per Star per service in progress at any one time
- A service user can have more than 1 engagement in progress at any one time, if the engagements are linked to different versions of the Star and/or different services

When thinking about your services, think about:

- How your support work and workforce is organised and structured – who supports which service users
- What service user information your members of staff need access to
- How you need to report on the work you are doing, and if you need to compare any 'unit' to another
- If you will be using the Star Online alongside any other software and how information is structured there

It can be useful to draw a map of the services you will set up, which Star versions they will use, which members of staff will be linked to them and which service users will be supported by them.

Contact the helpdesk for support in planning your account structure.

**Step 4. Define user permissions**

Here we explain the different permissions available – you can see the detailed information on how to set people up with logins and control permissions in the Stage 2 step 4.

For each service, members of staff can either be assigned a Manager role or a Practitioner role. A member of staff can be a Practitioner in one service, and a Manager in others.

For the services they are linked to, Managers can:

- Create logins for Practitioners and link them to the service
- See and interact with all service user records and associated data
- Filter reports to show data related to specific Practitioners
- Action requests to delete Stars
- Do the same tasks as a practitioner

Managers have extra features on their homepage:

- Quick action to set up users
- Ability to track requests made by practitioners in the service
- My services button to see service settings

For the services they are linked to, Practitioners can:

- Add new service users
- Search and see service user records
- Edit service user profiles
- Start and end engagements
- Add Stars, add actions and request deletions

Practitioners can be given one of two levels of permission for the tasks above:

- For all service user records in the service they are linked to
- Only for service user records where they are the Lead Practitioner for a service user's engagement

For the services they are linked to, Practitioners can also:

- Filter reports by service user records where they are the Lead Practitioner for a service user's engagement (ie to see data relating only to their own caseload)
- See aggregated information for all service user records in the service

Users can be switched from Practitioner to Manager or Manager to Practitioner at any time. Users can be deactivated at any time.

**Step 5. Review your implementation plan**

Your organisation should have a wider plan for implementing the Star. You may be the person responsible for this, or it might be someone else.

You can use the Planner and Guide provided by Triangle to create an implementation plan - download them from the Resources page.

The key areas of an implementation plan for the Outcomes Star are:

- Managing the change and creating buy-in
- Integrating with existing paperwork, processes and data recording
- Anticipating training and supervision needs
- Using your Star data

It is important that how you set up your Star Online account supports any decisions your organisation makes across those 4 areas. For example, any guidelines your organisation creates for how the Star Online should be used alongside existing IT systems for recording service user data.

## 3 Stage 2. Instructions for set up

In Stage 2, we'll take you through detailed instructions for getting access to Star versions, setting up services and setting up colleagues. For support with any of these steps, contact the helpdesk.

All the steps below are completed via the My Account page. Only you as the Account Lead for your account can make changes on this page. To get to the My Account page, click on the My Account tab in the right hand side of the toolbar, next to Help.

**Step 1. Link Star versions to your account**

Go to My Account.

Look in the Account menu on the left hand side and go to Star Versions.

Look at the Available Star Versions section.

Accept the Star versions that your organisation will be using, and that you will need to link services to.

You will then see these Stars appear in the Stars Versions Used by Account list.

In the future, if your organisation wants to start using another version of the Star, you can add them to your account from here. There are no extra costs for using more versions of the Star but you or the person implementing the Star should talk to Triangle before starting to use a new version of the Star, as there may be additional information to share or further training recommended.

**Step 2. Choose which lists to use**

You can choose which list you want your account to use for:

- Ethnicity – there are different lists available each tailored to regional context
- Gender identity – there are different lists available depending on what is appropriate for your organisation

From the My Account page, look in the Account menu on the left hand side and go to Lists.

For each list, click on the Categories options to see the options available. The box on the right "Example Dropdown" shows you the values that are included in each option.

Select the options most relevant to your organisation.

**Step 3. Create services**

There are a few small steps involved in creating a service. You will need to do steps 3a and 3b.

If you are happy with the default settings, you do not need to do Steps 3c, 3d or 3e.

### Step 3a. Initial service creation (required)

From the My Account page, look in the Account menu on the left hand side and go to Account Details.

Find the Services section of the Account Details page and click on the orange Add Service button.

Enter a name for the Service, the country and timezone, the type of service and the duration of support typically provided by the service.

Please note: the timezone field here does not impact on how the system records times and dates. For more information see Using Records – introduction.

You will then see the Service Details page for this service.

### 3b. Linking service to Star version/s (required)

From the Service Details page, look in the Service menu on the left hand side and go to Star Versions.

Click on the orange Add button on the right hand side of the page.

You will see a list of Star versions available to this service. Select the Star versions that will be used by this service.

Click on the green Add to service button.

You will then see the Star version listed under Star Versions Used by Service.

### 3c. Configuring options for the service (optional)

You can choose to turn on or off:

Service user consent – a section in the service user profile for recording service user consent (off as default). See the section in Using Records – Service Users 'Using the Star Online to record service user consent' for more information.

Action planning – a feature that is available from a service user's record or presented as a step when completing Stars (on as default)

Ignore this step to stick with the defaults.

To change the settings for this service, from the Service Details page, look in the Service menu on the left hand side and go to Options. Tick or untick as required.

### 3d. Configuring implementation info (optional)

Here you can tell the system how this service plans to use the Star, which then informs how the system displays 'overdue' Stars for your colleagues.

You can configure:

- Target time between start of engagement and date of first Star – default is set at within 2 weeks
- Target time between Stars – default is set at within 6 months

Ignore this step to stick with the defaults.

To change the settings for this service, from the Service Details page, look in the Service menu on the left hand side and go to Implementation Info. Use the drop-down lists to choose the relevant settings as required,

### 3e. Configure role permissions (optional)

Here you can configure what permissions practitioners have:

Either

For all service user records in the service they are linked to – this is the default setting

Or

Only for service user records where they are the Lead Practitioner for a service user's engagement

Ignore this step to stick with the default.

To change the settings for this service, from the Service Details page, look in the Service menu on the left hand side and go to Role Permissions. Tick or untick as required.

**Step 4. Create logins for colleagues**

Users must be set up from within a Service (so you must complete Step 3 before Step 4). Once they have been set up they can be linked to other Services.

Once you have set up a user, they will automatically be sent an email containing the information they need to log into your account. Please note, these emails will expire 1 week from the date they are sent.

From the My Account page, look in the Account menu on the left hand side and go to Account Details.

Look at your Services list and click on the Service that your colleague should be linked to.

In the Service Details page, scroll down to the Practitioners section.

Click on the orange Add User button.

Choose New User (as the user has not yet been set up with a login for Star Online - you would choose existing if they already have a login for your account and you wanted to link them to another service)

Enter the details for your colleague – ensuring that their email address is unique to them, and that they can access the inbox for that email address.

Click on the green Create button.

You will then see the user appear in the Practitioner list for that Service.

### Making a Practitioner a Manager

Click on Set as Manager next to the user.

You will then see that the user appears in the Managers list for that Service. Once a user is a Manager, when they log in they will be able to create logins for colleagues linked to this service.

### Linking a Practitioner or Manager to another service/s

From the My Account page, look in the Account menu on the left hand side and go to Account Details.

Look at your Services list and click on the Service that your colleague should be linked to.

Scroll down to the Practitioners list

Click on the orange Add User button.

Choose the Existing User option and find the details of the user. Click on the users name/email in the list to select it.

Click on the green Link User button.

The user will then be listed as a practitioner linked to the service – follow the steps above to turn this user into a Manager if needed.

## 4 Getting started

Your account is now set up, and your colleagues can start logging in by following the instructions in the emails they will have received from the Star Online.

**Remember, if you need support with any aspect of setting up your account, as the Account Lead you can contact the helpdesk on support@staronline.org.uk.** You can find more information about using the Star Online in the Help centre (click on Help in the toolbar once you are logged in.)

For support with any other aspect of the Outcomes Star contact info@triangleconsulting.co.uk or visit our general information website www.outcomesstar.org.uk.