

User Manual

05.16.2025

HCAR Client Database

Team:

- Justin Crittenden
- Michael Goodwyn
- Carson Gustafson
- Orlando Trujillo-Ortiz

Overview

This document serves as the official User Manual for the online Humboldt Community Access and Resource Center Client Database (the “Web Application”). The Web Application has varying scope of functionality for different users, but the main distinction is between “regular” and “administrative” users. Please consider keeping a copy of this document on hand for future reference.

Table of Contents

Overview.....	1
Table of Contents.....	1
Glossary.....	2
System Requirements.....	2
Browser Requirements.....	2
Device Requirements.....	2
Installation Instructions.....	3
Accessing the Client Database.....	3
Login Page.....	5
Home Page (Non-admin Account).....	6
Home Page (Admin account).....	7
Search Page.....	8
Results Page.....	9
Client Details.....	10
Client ID Tab.....	10
Medical Information Tab.....	11
Medical Report Download.....	11
Personal Information.....	12
Support Team.....	13
Case Notes.....	14
New Case Note Button.....	14
View/Edit.....	15
Download.....	15
Delete.....	16
Reports.....	17
Example: Mailing List.....	18
Add New Client.....	19

Remove Client.....	19
Assign/Remove a Client.....	20
Add New Employee.....	20
Remove an Employee.....	21
Reset Account Password.....	22

Glossary

- **Browser Cookie:** A small file or part of a file stored on a World Wide Web user's computer, created and subsequently read by a website server, and containing personal information
- **JavaScript:** A programming language that allows programmers to create dynamic and interactive web pages
- **Web Server:** A software application and/or hardware device that stores, processes, and serves web content to users over the internet

System Requirements

Browser Requirements

To access the Web Application, users are required to have a stable internet connection for all operations. Users must use a modern, up-to-date web browser with support for website JavaScript and the storage of browser cookies. Web browsers without enabled JavaScript will not perform many of the system functionalities. The program's authentication logic relies on the storage of a single cookie on the User's computer, so disabling cookies will prevent the User from accessing the entire site.

Users are encouraged to update their web browsers regularly to ensure maximum security.

Device Requirements

The Web Application may be run on both personal computers and smartphones. Personal computers will provide a more comfortable user experience, however smartphones can perform the same functions. Users may find it necessary to zoom in or rotate their smartphones depending on the page layout.

Installation Instructions

General Users: The Web Application can be accessed from the Internet, and therefore does not require any installation from users.

System Administrator: To “install” the program on the Google Cloud Run web server, please follow the instructions provided at <https://cloud.google.com/run/docs/deploying-source-code>. After deployment, please set “environment variables” as instructed by <https://cloud.google.com/run/docs/configuring/services/environment-variables>.

Accessing the Client Database

The HCAR Client Database is a cloud-based web application that is only available over the internet. During the development phase, the site was located at <https://hcar.trujillo-ortiz.com/>



User Interface Overview

Login Page

HCAR Staff Portal

Username:

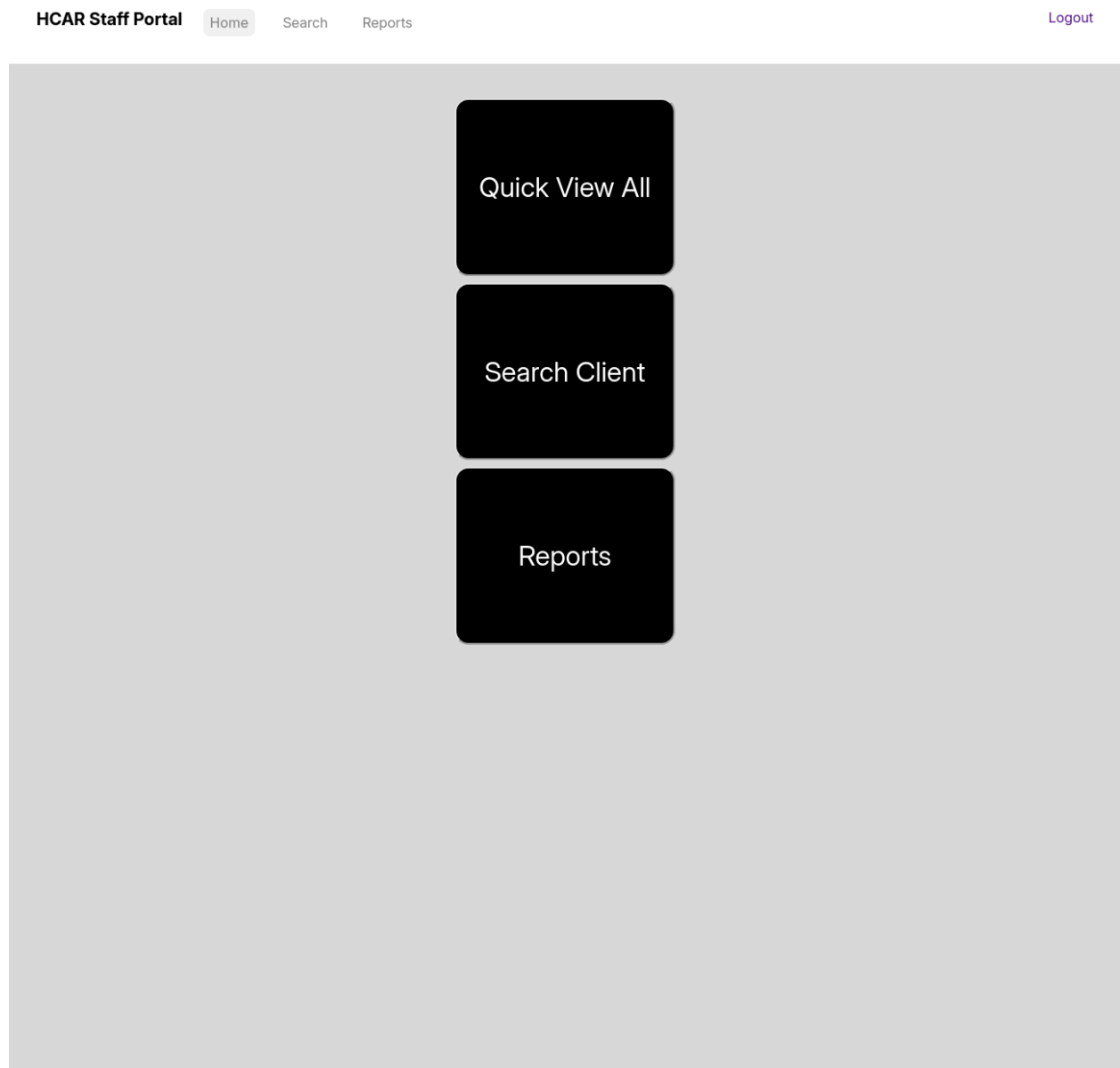
Password:

Sign In

Forgot Password? Click [here](#) to reset it!

- Username box: Text box for the username for the User's account
- Password box: Text box for password for the User's account
- Sign In Button: Submits the username and password
 - If either username or password is omitted, an alert message will pop up notifying the user

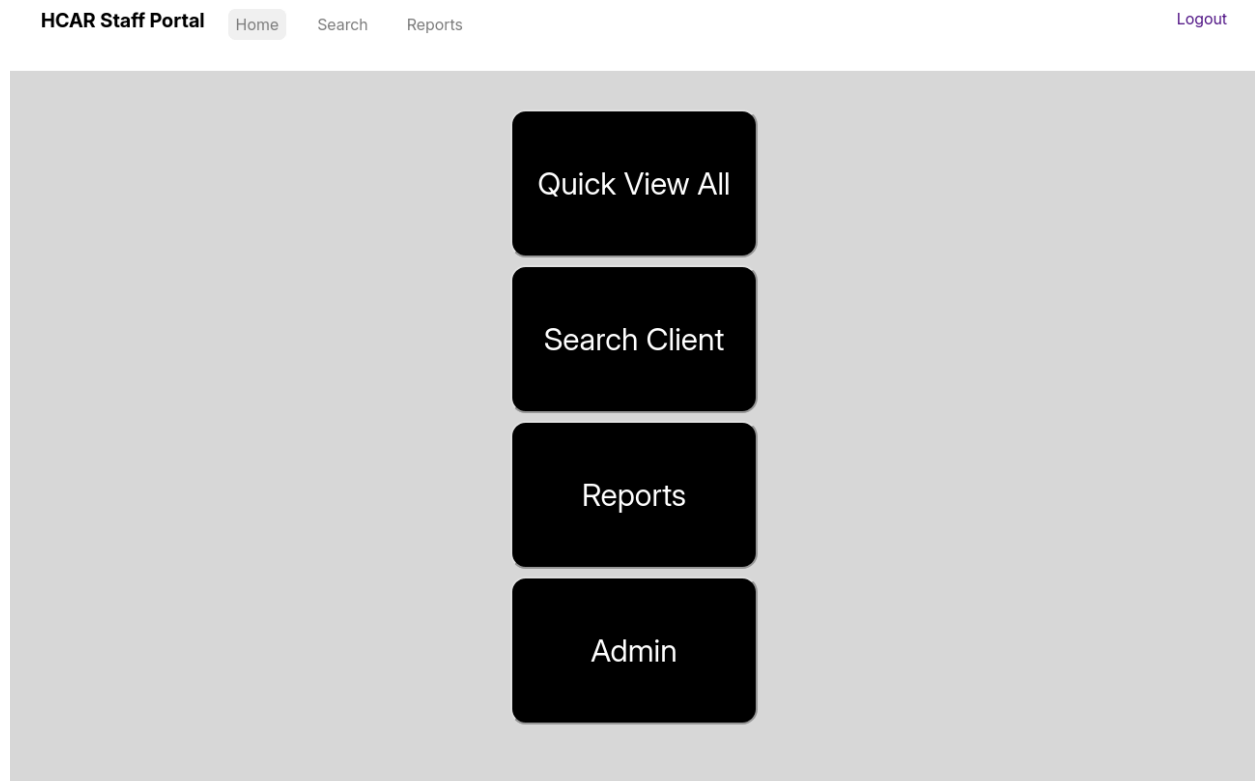
Home Page (Non-admin Account)



- Header Bar: Links to the Home page, Search Client page, Reports page, and a button to Logout of your account
 - Logging out
- Quick View All button: Redirects users to the Results page with no filters applied
 - The user will not be able to see Clients their account is not allowed to see
- Search Client Button: Redirects users to a Search page to establish search criterias

- Reports button: Redirects users to a Reports page where they can select 3 different types of reports to view and download.

Home Page (Admin account)



- Previous buttons behave as described for non-admin
- Admin button: Redirects admin users to a page with several actions that only authorized administrators can perform

Search Page

HCAR Staff Portal Home Search Reports [Logout](#)

First Name

First

Last Name

Last

Phone Number

0123456789

Birthdate

mm / dd / yyyy

More Options

Submit Query

- Search Field Box: Container with various search boxes, such as First Name, Last Name, Phone Number, Birthdate and more. Text and numeric search filters will be matched regardless of case within the entirety of the related parameter
- More/Less Options button: Toggles more and less search criterion boxes
- Submit button: Submits the search request based on the inputs to the fields in the Search Field Box

Results Page

HCAR Staff Portal
[Home](#)
[Search](#)
[Reports](#)
[Logout](#)

Photo	First Name	M.I.	Last Name	Pronouns	Gender	Phone	Email	Date of Birth	Programs	PoS Status
Picture of John	John		Doe	he/him	Male	555-1234	Empty	1/1/1980	Summit Support Services Bay Center Day Services	5/28/2026
Picture of Alice	Alice		Johnson	she/her	Female	555-9012	Empty	3/20/1975	Canvas + Clay Studio	5/23/2025
Picture of Emily	Emily	F.	Davis	she/her	Female	555-1111	Empty	11/22/1992	Respite Services	5/9/2025
Picture of Chris	Chris		Martinez	they/ them	Non- binary	555-4444	Empty	12/12/1995	Summit Support Services	Not on File
Picture of John	John	M.	Doe	he/him	Male	555-123-4567	johnndoe@example.com	5/15/1980	Comprehensive Career Services	Not on File
Picture of Brian	Brian		Young	he/him	Male	555-8888	Empty	3/3/1982	Respite Services	Not on File
Picture of Hannah	Hannah		Lopez	she/her	Female	555-9999	Empty	7/7/1996	Clinical Services	Not on File
Picture of Ethan	Ethan		Clark	he/him	Male	555-1212	Empty	1/1/1983	Self-Determination Program	Not on File
Picture of Olivia	Olivia		Adams	she/her	Female	555-3434	Empty	10/10/1999	Summit Support Services	Not on File
Picture of Noah	Noah		Baker	he/him	Male	555-4545	Empty	5/5/1984	Bay Center Day Services	Not on File
Picture of Sophia	Sophia		Perez	she/her	Female	555-5656	Empty	11/11/1997	Canvas + Clay Studio	Not on File
Picture of Liam	Liam		Harris	he/him	Male	555-6767	Empty	6/6/1981	Comprehensive Career Services	Not on File
Picture of Mason	Mason		Wright	they/ them	Agender	555-8989	Empty	9/9/1986	Clinical Services	Not on File
Picture of Mia	Mia		Hill	she/her	Female	555-9090	Empty	3/3/1993	Self-Determination Program	Not on File
Picture of Logan	Logan		Green	he/him	Male	555-1010	Empty	12/12/1980	Summit Support Services	Not on File

[Go Back](#)
[← Previous](#)
[Next →](#)
[Select](#)


- Tabular results of either a request for all clients, or a search based on search criteria
 - Only 15 results are displayed at a time
 - User can select a Client by clicking or tapping on the table row
 - Users must select a Client before clicking the “Select” button to view client details
- Previous/Next buttons: Requests the previous/next set of 15 clients that meet the search criteria. Buttons are disabled if no more results are available.
- Go Back Button: Returns user to previous screen, as if they clicked the “back” arrow in their browser
- PoS Status cells are colored red if they are within 31 days to expiration
- Select Button: If a client has been selected in the table of results, this will send a request for the client details
 - If no client row has been selected, the request is denied and the user is alerted

Client Details

Client ID Tab

HCAR Staff Portal [Home](#) [Search](#) [Reports](#) [Logout](#)

Showing information for John Doe

Client ID	Medical Information	Personal Information	Support Team	Case Notes
First Name: <input type="text" value="John"/>	Middle Name: <input type="text" value="Middle"/>	Last Name: <input type="text" value="Doe"/>	Date of Birth: <input type="text" value="01 / 01 / 1980"/>	
Phone Number: <input type="text" value="555-1234"/>	Street Address: <input type="text" value="123 Main St"/>	Email: <input type="text" value="Empty"/>	Photo: 	
Sex: <input type="text" value="Male"/>	Marital Status: <input type="text" value="Single"/>	Next PoS Expiration: <input type="text" value="05 / 28 / 2026"/>		

[Go Back](#) [Download Medical Report](#) [Save](#)

- Basic Client demographics
- Fields are editable if the current user is an administrator
- Changes are only saved if the user clicks save
 - All changes across ClientID, Medical Information, and Personal Information are saved at once

Medical Information Tab

HCAR Staff Portal

[Home](#)

[Search](#)

[Reports](#)

[Logout](#)

Showing information for John Doe

Client ID	Medical Information	Personal Information	Support Team	Case Notes																																			
<div> <div>Primary Insurance Provider:</div> <div>State Health Plan A</div> </div> <div> <div>Primary Ins. Number:</div> <div>11111111</div> </div> <div> <div>Primary Care Provider:</div> <div>Empty</div> </div>																																							
<div> <div>Secondary Insurance Provider:</div> <div>Empty</div> </div> <div> <div>Secondary Ins. Number:</div> <div>Empty</div> </div> <div> <div>Primary Physician:</div> <div>Dr. Alice Smith</div> </div>																																							
<div> <div>Preferred Hospital:</div> <div>General Hospital</div> </div>																																							
<div>Vaccinations:</div> <table border="1"> <thead> <tr> <th>Shot Type</th> <th>Date Taken</th> </tr> </thead> <tbody> <tr> <td>Influenza</td> <td>10 / 05 / 2023</td> </tr> <tr> <td>COVID-19 - Dose 2</td> <td>05 / 08 / 2023</td> </tr> <tr> <td>COVID-19 - Dose 1</td> <td>04 / 10 / 2023</td> </tr> <tr> <td>Hepatitis B - Dose 3</td> <td>08 / 01 / 2022</td> </tr> <tr> <td>Hepatitis B - Dose 2</td> <td>03 / 01 / 2022</td> </tr> <tr> <td>Hepatitis B - Dose 1</td> <td>02 / 01 / 2022</td> </tr> <tr> <td>MMR</td> <td>01 / 15 / 2022</td> </tr> <tr> <td>Varicella</td> <td>01 / 15 / 2022</td> </tr> <tr> <td></td> <td>mm / dd / yyyy</td> </tr> </tbody> </table>					Shot Type	Date Taken	Influenza	10 / 05 / 2023	COVID-19 - Dose 2	05 / 08 / 2023	COVID-19 - Dose 1	04 / 10 / 2023	Hepatitis B - Dose 3	08 / 01 / 2022	Hepatitis B - Dose 2	03 / 01 / 2022	Hepatitis B - Dose 1	02 / 01 / 2022	MMR	01 / 15 / 2022	Varicella	01 / 15 / 2022		mm / dd / yyyy															
Shot Type	Date Taken																																						
Influenza	10 / 05 / 2023																																						
COVID-19 - Dose 2	05 / 08 / 2023																																						
COVID-19 - Dose 1	04 / 10 / 2023																																						
Hepatitis B - Dose 3	08 / 01 / 2022																																						
Hepatitis B - Dose 2	03 / 01 / 2022																																						
Hepatitis B - Dose 1	02 / 01 / 2022																																						
MMR	01 / 15 / 2022																																						
Varicella	01 / 15 / 2022																																						
	mm / dd / yyyy																																						
<div>Medication List</div> <table border="1"> <thead> <tr> <th>Medication</th> <th>PRN</th> <th>Dosage</th> <th>Time(s) of Day</th> <th>Purpose</th> <th>Possible Side Effects</th> <th>Prescribing Physician & Speciality</th> </tr> </thead> <tbody> <tr> <td>Advil</td> <td>1</td> <td>50mg</td> <td>One dosage</td> <td>Pain relief</td> <td>Heartburn</td> <td>Dr. Anthony</td> </tr> <tr> <td>Dextrometh</td> <td>1</td> <td>10mg</td> <td>One dosage</td> <td>Cough Supp</td> <td>nausea, vom</td> <td>Dr. Luis Paci</td> </tr> <tr> <td>Vitamin D</td> <td>0</td> <td>10mg</td> <td>One a day</td> <td>Vitamin D de</td> <td>Empty</td> <td>Dr. Anthony</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>					Medication	PRN	Dosage	Time(s) of Day	Purpose	Possible Side Effects	Prescribing Physician & Speciality	Advil	1	50mg	One dosage	Pain relief	Heartburn	Dr. Anthony	Dextrometh	1	10mg	One dosage	Cough Supp	nausea, vom	Dr. Luis Paci	Vitamin D	0	10mg	One a day	Vitamin D de	Empty	Dr. Anthony							
Medication	PRN	Dosage	Time(s) of Day	Purpose	Possible Side Effects	Prescribing Physician & Speciality																																	
Advil	1	50mg	One dosage	Pain relief	Heartburn	Dr. Anthony																																	
Dextrometh	1	10mg	One dosage	Cough Supp	nausea, vom	Dr. Luis Paci																																	
Vitamin D	0	10mg	One a day	Vitamin D de	Empty	Dr. Anthony																																	

[Go Back](#)

[Download Medical Report](#)

[Save](#)

- Basic Medical Information
- Vaccinations and Medications are updated independently of other data changes
 - User must click "Save" to save any other changes to the Medical Information tab
- Only Administrators are allowed to to modify the contents of this tab

Medical Report Download

- Across all tabs of a Client Details request, there is a button in the footer of the page that will download a medical report
- This report opens in a new browser tab and contains all information in the Medical Information tab and some basic demographics for the client

Personal Information

HCAR Staff Portal[Home](#)[Search](#)[Reports](#)[Logout](#)

Showing information for John Doe

Client ID	Medical Information	Personal Information	Support Team	Case Notes
<div><div><div>Client Likes:</div><div>Pizza</div></div><div><div>Client Dislikes:</div><div>Traffic</div></div><div><div>Client Goals:</div><div>Succeed</div></div><div><div>Client Hobbies / Favorite Activities:</div><div>Reading</div></div><div><div>Client Achievements:</div><div>None</div></div><div><div>Additional Notes:</div><div>Pizza</div></div></div>				
Go Back	Download Medical Report			Save

- General information about a client's personal life
- All staff are allowed to edit the data on this tab
 - Users must click "Save" to save their edits
- Character limit of 2048 characters for all text areas

Logout

Showing information for John Doe

Save

Case Notes

HCAR Staff Portal Home Search Reports Logout

Showing Information for John Doe

Client ID	Medical Information	Personal Information	Support Team	Case Notes																																								
	<table border="1"> <thead> <tr> <th>Subject</th> <th>Date</th> <th>Posted By</th> <th>Program</th> </tr> </thead> <tbody> <tr> <td>Test Creation</td> <td>5/15/2025</td> <td>Fay Schaefer</td> <td>Summit Support Services</td> </tr> <tr> <td>To Be Deleted</td> <td>5/15/2025</td> <td>Fay Schaefer</td> <td>Summit Support Services</td> </tr> <tr> <td>Sample Case Note</td> <td>5/13/2025</td> <td>Lonzo Volkman</td> <td>Summit Support Services</td> </tr> <tr> <td>The Next Steps</td> <td>5/13/2025</td> <td>Lonzo Volkman</td> <td>Summit Support Services</td> </tr> <tr> <td>Job Interview Skills Practice</td> <td>2/29/2024</td> <td>Jake Mayer</td> <td>Canvas + Clay Studio</td> </tr> <tr> <td>Quarterly IPP Progress Report Submission</td> <td>2/22/2024</td> <td>Alba Heller</td> <td>Summit Support Services</td> </tr> <tr> <td>Community Involvement Options Discussion</td> <td>2/15/2024</td> <td>Lonzo Volkman</td> <td>Bay Center Day Services</td> </tr> <tr> <td>ISP Goal Progress Check-in Call</td> <td>2/8/2024</td> <td>Alba Heller</td> <td>Summit Support Services</td> </tr> <tr> <td>ISP Goal Review: Budgeting</td> <td>2/1/2024</td> <td>Alba Heller</td> <td>Summit Support Services</td> </tr> </tbody> </table>	Subject	Date	Posted By	Program	Test Creation	5/15/2025	Fay Schaefer	Summit Support Services	To Be Deleted	5/15/2025	Fay Schaefer	Summit Support Services	Sample Case Note	5/13/2025	Lonzo Volkman	Summit Support Services	The Next Steps	5/13/2025	Lonzo Volkman	Summit Support Services	Job Interview Skills Practice	2/29/2024	Jake Mayer	Canvas + Clay Studio	Quarterly IPP Progress Report Submission	2/22/2024	Alba Heller	Summit Support Services	Community Involvement Options Discussion	2/15/2024	Lonzo Volkman	Bay Center Day Services	ISP Goal Progress Check-in Call	2/8/2024	Alba Heller	Summit Support Services	ISP Goal Review: Budgeting	2/1/2024	Alba Heller	Summit Support Services			<div>new</div> <div>view/edit</div> <div>download</div> <div>delete</div>
Subject	Date	Posted By	Program																																									
Test Creation	5/15/2025	Fay Schaefer	Summit Support Services																																									
To Be Deleted	5/15/2025	Fay Schaefer	Summit Support Services																																									
Sample Case Note	5/13/2025	Lonzo Volkman	Summit Support Services																																									
The Next Steps	5/13/2025	Lonzo Volkman	Summit Support Services																																									
Job Interview Skills Practice	2/29/2024	Jake Mayer	Canvas + Clay Studio																																									
Quarterly IPP Progress Report Submission	2/22/2024	Alba Heller	Summit Support Services																																									
Community Involvement Options Discussion	2/15/2024	Lonzo Volkman	Bay Center Day Services																																									
ISP Goal Progress Check-in Call	2/8/2024	Alba Heller	Summit Support Services																																									
ISP Goal Review: Budgeting	2/1/2024	Alba Heller	Summit Support Services																																									

Go Back Download Medical Report Save

- Case Note tab of Client Details lists existing case notes for a client sorted by date
- If no Case Notes are selected, the user is only allowed to click the “New” button to create a new Case Note
- If a Case Note has been selected from the table by a click/tap on the row, the View/Edit, Download, and Delete buttons are enabled

New Case Note Button

HCAR Staff Portal Home Search Reports Logout

Case Note for Client: John Doe

Program:

Date of Meeting/Activity:

Subject:

Contact Type: ☒ In-Person ☐ Written ☐ Over the Phone

Goal Worked on: ☒ ISP Goal ☐ IPP Goal ☐ Personal Goal

Narrative:

Progress on Goal:

Next Steps:

Employee Sign-Off:

Date of Sign-Off:

Cancel Create

- Clicking the “New” button brings the user to a new page where they can create a new Case Note
- If any required fields are not filled out, they are alerted and prevented from submitting the new case note
- Create button: Creates the case note if fields are filled out

- Cancel Button: Cancels the creation of a new case note

View/Edit

HCAR Staff Portal Home Search Reports Logout

Case Note for Client: John Doe

Program: Bay Center Day Services Date of Meeting/Activity: 01/21/2020 Subject: Community Involvement Options

Contact Type: ☒ In-Person ☐ Written ☐ Over the Phone Goal Worked on: ☐ ISP Goal ☐ IPP Goal ☒ Personal Goal

Narrative: Discussed volunteer opportunities based on client interests. Progress on Goal: Explored options for community involvement. Next Steps: Client to research two options before next meeting.

Employee Sign-Off: Date of Sign-Off: 05/16/2025

Cancel Save

- Clicking on View/Edit takes a user to the View/Edit screen
- If the user has the permission to edit, upon clicking the "Save" button all changes to the case note are recorded in the database
- Otherwise, users may just view the case note as-is

Download

Case Note

Humboldt Community Access and Resource Center

Generated by User: TestUser5
Generated on: 05/16/2025, 03:37 PM

If you are not the intended recipient of this document or their agent, or if this document has been delivered to you in error, please immediately alert HCAR and delete this document.

Client: John Doe

Subject: Community Involvement Options Discussion
Program: Bay Center Day Services
Posted By: Lonzo Volkman

Date of Meeting/Activity	Date of Note Creation	Last Modified
Unknown	02/15/2024	Not Modified

Contact Type	Goal Worked On
In-Person	Personal Goal

Narrative	Progress on Goal	Next Steps
Discussed volunteer opportunities based on client interests.	Explored options for community involvement.	Client to research two options before next meeting.

- Clicking “Download” will generate and open a PDF report of the case note in a new browser tab
- The user can then download the PDF or edit it if supported by their browser
 - Most modern desktop browsers allow simple additional edits to PDFs, such as adding text, adding a signature, or directly printing from the browser preview
 - Mobile browsers are more limited and may only support downloading of the generated PDF

Delete

The screenshot shows the HCAR Staff Portal interface. At the top, there's a navigation bar with 'Home', 'Search', and 'Reports' links, and a 'Logout' button on the right. Below the navigation bar, it says 'Showing Information for John Doe'. The main content area is divided into several sections: 'Client ID', 'Medical Information', 'Personal Information', 'Support Team', and 'Case Notes'. The 'Case Notes' section contains a table with columns for 'Subject', 'Date', 'Posted By', and 'Program'. The table lists several case notes, including 'Test Creation', 'To Be Deleted', 'Sample Case Note', 'The Next Steps', 'Job Interview Skills Practice', 'Quarterly IPP Progress Report Submission', 'Community Involvement Options Discussion', 'ISP Goal Progress Check-in Call', and 'ISP Goal Review: Budgeting'. To the right of the table, there are four buttons: 'new', 'view/edit', 'download', and 'delete'. A confirmation dialog box is displayed over the table, asking 'Are you sure you would like to delete this case note?' with 'Yes' and 'No' buttons.

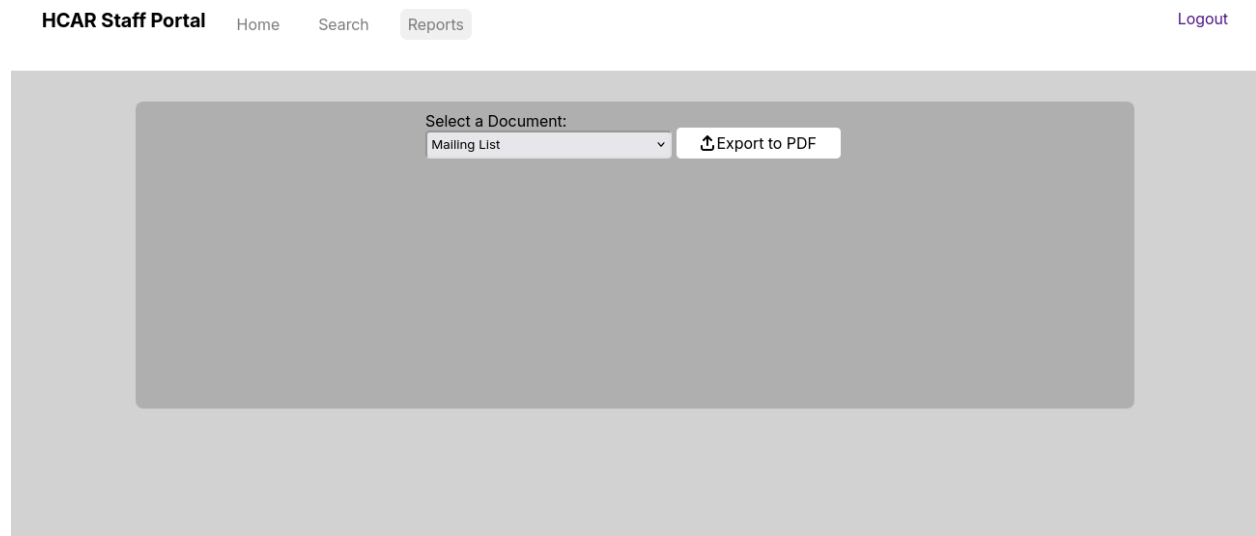
Client ID	Medical Information	Personal Information	Support Team	Case Notes
				new
				view/edit
				download
				delete

Are you sure you would like to delete this case note?

Yes No

- The “Delete” button will simply delete the selected case note
- A confirmation dialog will be displayed to prevent accidental case note deletion

Reports




- Current reports consist of:
 - Mailing List
 - Name, Contact Information, Address
 - Expiring/Expired Purchase of Services
 - Name, Date of Birth, Phone, PoS Expiration Date, Days Left/Expired
 - List of All Viewable Clients
 - Name, Date of Birth, Gender

Example: Mailing List

HCAR Staff Portal Home Search Reports [Logout](#)

Report: Mailing List

Your report is generated and is displayed below.



Mailing List

Humboldt Community Access and Resource Center

Generated by User: TestUser5
Generated on: 05/12/2025, 11:56 PM

Mailing list of clients who are viewable to the current requester.

If you are not the intended recipient of this document or their agent, or if this document has been delivered to you in error, please immediately alert HCAR and delete this document.

Client Name	Phone Number	Address	City	State	Zip
Sophia Adams	555-2930	3636 Willow Creek Dr	Meadowbrook	VA	22003
Olivia Adams	555-3434	1010 Sycamore Blvd	Foresthill	MT	30303
Grace Allen	5559012345	9999 Cedar Ct	Atlanta	GA	30303
Mason Allen	555-2627	3333 Oakwood Ct	Springfield	IL	62701
Mason Allen	555-2627	3333 Oakwood Ct	Springfield	IL	62701
Ella Allen	555-1314	2020 Hickory St	Bluetown	WY	44445

Go Back

- Reports are generated and displayed in the browser tab, and can be edited using your browsers default PDF tools
 - Phone browsers may be limited to only downloading or printing the PDF with no edit functionality

Admin Functionality

- Admin functionality is restricted only to accounts created as admins
- Admins may see all clients in the database
- User interface for admin functionality is subject to visual improvements in further iterations

Add New Client

HCAR Staff Portal Home Search Reports Logout

Employee Actions:

Assign/Remove a Client

Add a New Employee

Remove an Employee

Reset Employee Password

Client Actions:

Add a New Client

Remove a Client

Add a New Client

First Name:

Middle Name:

Last Name:

Build

Go Back

Remove Client

HCAR Staff Portal Home Search Reports Logout

Employee Actions:

Assign/Remove a Client

Add a New Employee

Remove an Employee

Reset Employee Password

Client Actions:

Add a New Client

Remove a Client

Remove a Client

Enter Client Name:

bob

Search

Clients:

Select a Client: ▾

Go Back

- Admin must search for a client and select one from the results before being able to delete

Assign/Remove a Client

HCAR Staff Portal Home Search Reports Logout

Employee Actions:

Assign/Remove a Client

Add a New Employee

Remove an Employee

Reset Employee Password

Client Actions:

Add a New Client

Remove a Client

Assign a Client to an Employee

Client First Name:

Client Last Name:

Employee First Name:

Employee Last Name:

Search

Employees:

Select an Employee

Clients:

Select a Client:

Assign

Go Back

- Admin must search for a client and employee in order to modify their staff-client relationship

Add New Employee

HCAR Staff Portal Home Search Reports Logout

Employee Actions:

Assign/Remove a Client

Add a New Employee

Remove an Employee

Reset Employee Password

Client Actions:

Add a New Client

Remove a Client

Add an Employee

First Name:

Middle Name:

Last Name:

Username:

Password:

Confirm Password:

Address:

City:

State:

Zip Code:

Phone:

Submit

Go Back

- In a future release, creation of employee accounts will automatically generate a temporary password for their account
- Admins must securely communicate password with the user
- Upon logging in for the first time with the new password, they will be prompted to set their own password

- **WARNING:** Users should create strong passwords and our team highly recommends adequate training on password creation and management. Please refer to the National Institute of Standards and Technology's recommendations on passwords:
<https://www.nist.gov/cybersecurity/how-do-i-create-good-password>
- Long passwords are mathematically proven to be more secure than shorter, more abstract passwords. The current HCAR client database accepts passwords up to 32 characters long.
- **NOTE:** The HCAR client database requires passwords at least 8 characters long, but NIST standards recommend 15 characters in a password.

Remove an Employee

HCAR Staff Portal Home Search Reports [Logout](#)

Employee Actions:

Assign/Remove a Client

Add a New Employee

Remove an Employee

Reset Employee Password

Client Actions:

Add a New Client

Remove a Client

Remove an Employee

First Name:

Last Name:

Search

Select an Employee ▼

Submit

[Go Back](#)

- Admin must search for an employee by name and make a selection from the results presented
- Removal of employees will remove their login credentials and traces of them as staff, but case notes created by them will remain in the system
 - For removed admin accounts, any results of their changes will also persist, such as new clients or new accounts

Reset Account Password

The screenshot displays the HCAR Staff Portal interface. At the top, there is a navigation bar with the text 'HCAR Staff Portal' and links for 'Home', 'Search', and 'Reports'. On the far right of this bar is a 'Logout' link. Below the navigation bar, the main content area is divided into two columns. The left column, titled 'Employee Actions:', contains five buttons: 'Assign/Remove a Client', 'Add a New Employee', 'Remove an Employee', and 'Reset Employee Password'. The right column, titled 'Client Actions:', contains two buttons: 'Add a New Client' and 'Remove a Client'. To the right of these columns is a form titled 'Reset Employee Password'. This form includes a 'Username:' label followed by a text input field and a 'Submit' button. At the bottom left of the main content area, there is a 'Go Back' button.

- Admin must enter the exact account username for the account password they wish to reset
- Once the reset request has been submitted, a new temporary account password will be displayed
- This password should be securely communicated to the user
- Upon logging into the account with the temporary password, the user will be forced to set a new password before proceeding further to the online portal