USER GUIDE

Creating your ionMy system

ion**My** | Governance, Risk & Compliance

About ionMy

For almost 2 decades, ionMy has been steadfastly aiding the care sector by providing specialised solutions tailored to Governance, Risk, Compliance, and Quality.

We have firsthand experience in witnessing the profound impact that arises when care providers can effortlessly showcase their compliance, minimise risks, enhance quality, and possess a well-defined roadmap to guarantee the delivery of the finest service possible.

Today, there are more than 260,000 people under the care of ionMy. Through the years, we just reinforced our belief that technology is a fundamental tool to bring people together, to improve work and relationships and to deliver better care.

The use of ionMy can both speed up and improve decision-making processes. It allows providers to work more efficiently, reduce the administrative load and increase the time available for care. As a result, consumers have improved outcomes, and care-providing organisations can operate more efficiently.

At the core of our values lies a deep commitment to community, which is why we have chosen to actively participate in the fields of aged care, community care, and disability services. The ionMy team comprises passionate individuals who are dedicated to both their work and the way they carry it out. You play a pivotal role within our community, and we are honoured to be a supportive presence within yours.

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Introduction

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This user guide will walk you through setting up your ionMy system with information specific to your organization. With the help of our onboarding wizard, you'll be ready to leverage ionMy's features to improve Quality, Governance, Risk, and Compliance (QGRC) management in no time.

What to expect:

- A guided setup process in four easy steps.

- You'll define your organisational structure by setting up Business Units, Positions, and Employees.

- At the completion of the setup, we'll provide you with resources and support to get you started quickly.

Before you begin:

Gather some key information about your organisation:

- **Business Units:** These are your main organisational areas, like departments, facilities, or regions. Each employee will be assigned to a Business Unit, which controls what information they see and alerts they receive. You will also have the opportunity to set up parent-child relationships to reflect your organisational structure.

- **Positions:** This is a list of all job titles within your organisation. Avoid creating duplicate titles across locations. (e.g., only add one "Registered Nurse" position for all locations).

- **Employees:** You can add your staff manually during the wizard process or by uploading a CSV file at a later date. You will need to provide their First and Last Names, Work Email addresses, Business Unit, Position, and Security Group.

Available Security Groups are Administrator, Executive Manager, Manager, Quality, WHS and Staff.

 Discussion – Security User Groups High Level Overview

The system comes with some default user groups for your use. Each group has slightly different permissions to the other.

System Administrator – full system and record access

Auditor – view only access

Board Member- access to main modules and committees they are a member of

Executive Manager – access to all records within their part of the organisation structure (the business unit they are in and any child units of that unit)

Manager – access to all records within their business unit

Quality – access to all records within their business unit in addition to all feedback and continuous improvement records

Staff – access to records they created or a the person involved. We can limit access to feedback should you wish to avoid staff from viewing complaints.

WHS - access to all records within their business unit in addition to all incident and hazard records

Third Party Person – access to their own record within the Community module.

Volunteer – limited access to their own record within the community module and the ability to add records via the Compliance Hub

Getting Started

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We recommend you follow these steps in order.

Welcome

The welcome page is information on what you will experience during the setup wizard steps. It is mostly the same information as provided in the Introduction section above.

1) **Click** the *Let's Get Started* blue button once you are ready to commence setting up your organisation.

LET'S GET STARTED

Step 1: Organisation Setup

This first page is very important for capturing initial contact information retained in your new ionMy database

* Organisation Name:

Quality Care Group

How did you hear about us?:

ACCPA conference and LinkedIn posts

*Contact Phone Number:

0411123654

*Contact Email Address:

youremailaddress@yourdomain.com

Address:

12 Mary Street
Brisbane Qld 4000

2) **Enter** in your *Organisation Name*.
   Please note that this is a mandatory field, as indicated by the red asterisk*

3) We'd love to know how you first heard about ionMy. This helps us understand what marketing channels are most effective and allows us to reward referrals from existing customers. Please **provide** a *brief description* of how you learned about ionMy. If you were referred by an existing ionMy customer, please be sure to provide their name so we can thank them.

4) Please **type** in the *Contact Phone Number* and *Contact Email Address* of the person best be recorded as our main point of contact for ongoing ionMy Customer Success

communications.

Please note that these are both mandatory fields

5) **Enter** your main *address* – this is usually the address of your Head Office.

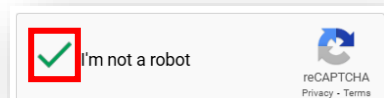6) Once the above details have been completed, please **tick** the *I'm not a robot* checkbox
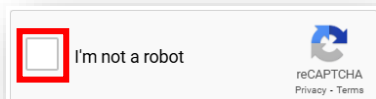
7) You will be prompted to complete a verification puzzle. Please **select** all applicable *boxes* and then **click** the blue *Verify* button.
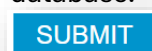
Sample image only:

8) If the verification puzzle was completed successfully, a green tick will appear in place of the checkbox presented earlier.

9) You can now **click** the blue *Submit* button to commence the creation of your ionMy database.

10) You will notice a *Loading icon* on the page. This is to indicate that a process is underway in the background. Please do not refresh the page while your database is being built. This may take up to 5 minutes to complete.
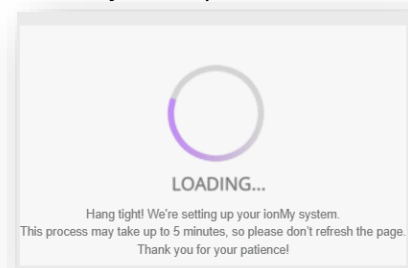
11) Once the database has been created you will be presented with a successful message and a link to your new unique ionMy database. Congratulations!

Thank you for waiting. We are now ready to start capturing data structures that are specific to you and your organisation.

Click the Begin Wizard button below to start setting up your ionMy system now. Or you can access https://help.ionmy.com.au/ionMyWizard/SetupWizard_Final.aspx?organization_code=____ to start the wizard later.

Start Setup >>

But... we haven't finished yet.

12) **Select** the blue *Start Setup* button if you are ready to start building your organisation structure and setting up of your employees.

Step 2: Business Unit Setup

This step allows you to define your organisation's structure by setting up each of your Business Units

13) **Add** in your first *unit* in the free text field

14) Continue to **click** the blue *plus icon* to add additional lines until all units have been added

Organisation Data Entry Wizard

To get started, enter some organisational units below, or proceed to the next step.

Business Unit: (e.g. Marketing,Admin)

Operations
Finance
People and Culture
Home Care
Region A
Region B
Residential Services
Facility 1
Facility 2

⊕ Please click the + button to add additional lines for data entry

NEXT: CREATE POSITIONS >>   OR   Cancel

Note: We will link 'child to parent' unit relationships at a later step.

15) **Click** the blue *Next: Create Positions* button to proceed to the next step or the grey *Cancel* button if you are not ready to complete the setup wizard.

Step 3: Creating Positions

This step allows you to continue to refine your organisation's structure by setting up each of your Positions. This is a list of all job titles within your organisation.

Tip – One-to-many Position relationships

Avoid creating duplicate position titles for different locations (e.g., add only one "Registered Nurse" position for all locations).

16) **Add** in your first *position* in the free text field

17) Continue to **click** the blue *plus icon* to add additional lines until all positions have been added

18) **Click** the blue *Next: Create Unit – Parent Unit Allocation* button to proceed to the next step.

You also have the choice to click the blue *Go Back* button if you realised you have missed a business unit. Or you can select the grey *Cancel* button if you are not ready to complete the setup wizard.

Step 4: Setting Child to Parent Unit Allocations

You now have the opportunity to set your business unit structure to better reflect your organisations reporting lines. We call this the 'child unit to parent unit allocation' step where one child unit can only be allocated to <u>one parent unit</u>, however, a parent unit can have many child units.

19) The first column on this page represents your 'child' units, and the second column is your parent units. From the first *unit drop down list* (ddl) **select** a child unit. (eg. Facility 1)
   Note: As you select a child unit, it will be dropped from the list, avoiding the possibility of being accidentally allocated to additional parent units.

20) At the next ddl, choose the parent unit of the child unit selected at step 19. (eg. Residential Services)

21) Continue to **click** the blue *plus icon* to add additional lines for data entry.

Step 3 - Create Unit - Parent Unit Allocation

Create Unit - Parent Unit Allocation:

Unit	Parent Unit
Facility 1	Residential Services
Facility 2	Residential Services
Region A	Home Care
Region B	Please Select

Please Select
Facility 1
Facility 2
Finance
Home Care
Operations
People and Culture
Region A
Residential Services

➕ Please click the + button to add additional lines for data entry

Go Back   NEXT: CREATE EMPLOYEES >>   OR   Cancel

22) Once you have completed allocating units, you may move onto the employee creation step. **Click** the blue *Next: Create Employees* button to proceed.

Step 5: Adding Employees

You can now add staff to the system so they can access ionMy and start using its features.

As noted on the wizard and mentioned earlier in this guide, you have two options for adding employees:

Option 1: Manual Entry

Option 2: Upload from CSV File

If you have a list of your employees in a CSV file and would prefer a bulk upload as opposed to manual entry, you can upload it directly into ionMy. To do this will require assistance from our

support team. Please move onto the next step and then contact **support@ionmy.com.au** to import your staff.

For this guide, we will walk through the manual entry option.

23) Refer to your employee list to complete this step, ensuring you have on hand their First Name, Last Name, Email address (for alert purposes), the Business Unit they work in, their Position and the Security user group they will be assigned to for ionMy permissions.
Please note that any of this information can be updated at a later date should you need.

24) **Enter** in the employees *first name*.

25) **Enter** in their *Last name*

26) **Type** their *email address* that will be used for all system related alerts and reminders

27) **Select** their *business unit* from the ddl. These are the units you created at Step 2

28) From the ddl, **choose** the employees *position*

29) **Assign** this employee to the relevant *security user group*. Noting again that this can be updated should you find the wrong group has been assigned.
Note: Refer to page 4 of this document for an overview of the user groups available

30) Continue to **click** the blue *plus icon* to add additional employees, repeating steps 24-29 for each.

Step 4 - Create Employees

Let's get your team on board!

Now you can add your employees to the system. This will allow them to access ionMy and start using its features.

You have two options for adding employees:

Option 1: Manual Entry

The Email Address field is vital for people to receive system alerts and reminders.

Option 2: Upload from CSV File

If you have a list of your employees in a CSV file, you can upload it directly into ionMy.

You can continue with the setup process and contact our support team later. They can arrange a webinar to guide you through managing employee details in ionMy. Contact **support@ionmy.com.au** for more information.

Employees:

First Name	Last Name	Email Address	Business Unit	Position	Security User Group
Michelle	Kay	michellek@ionmy.com.au	Residential Services	Executive Manager Residential Servic	ionMy_Executive_Manager
Samara	Prasad	samarap@ionmy.com.au	Operations	COO	ionMy_Administrator
			Please Select	Please Select	Please Select

Please click the + button to add additional lines for data entry

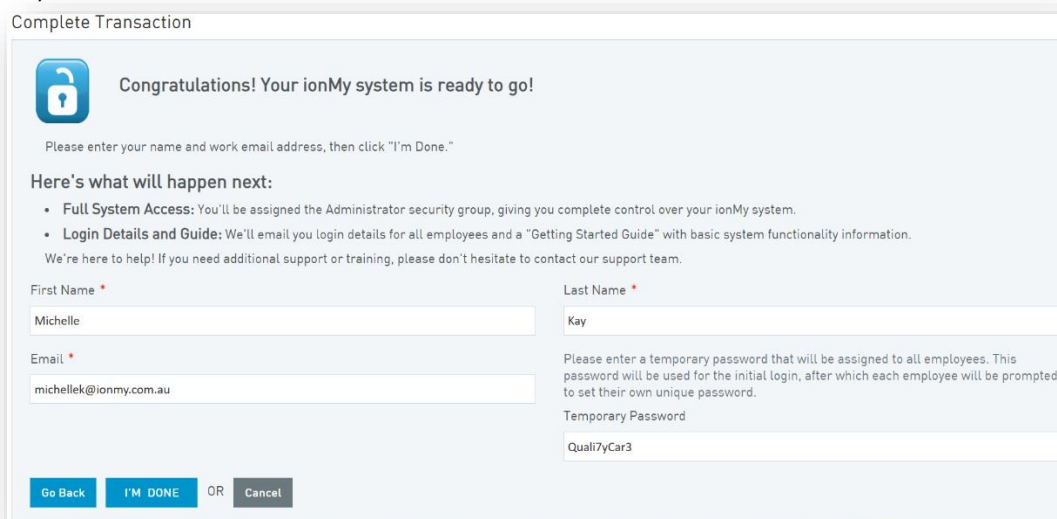Go Back   **NEXT: FINAL STEP >>**   OR   Cancel

31) **Click** the blue *Next: Final Step* button to move to the Complete Transaction phase

Step 6: Complete Transaction

Once you've completed setting up your organisation and adding your staff, you're ready to go! Simply:

32) **Enter** your *first name, last name* and work *email address*. We will send you a welcome pack and confirmation of data you have entered throughout this onboarding wizard setup.

33) We also need you to **type** in a *temporary password*. This password will be assigned to all staff. Once a staff member logs in for the first time, they will be prompted to reset the password to their own unique password.

34) Click the blue I'm Done button

35) Your ionMy system is being set up. This process should take approximately 2 minutes. Once complete, you'll see a green confirmation message on your screen. You'll also receive an email with important information, including your unique system links. Please keep an eye on your inbox.

The wizard has been completed.

Congratulations!

You're now part of the ionMy community!

We're excited to help you improve Quality, Governance, Risk, and Compliance management.

What's next?

- **Access your system:** https://prod.ionmy.com.au/login.aspx?organization_code=291955
- **Employee details and guide:** We've emailed you employee access details and a "Getting Started Guide" to help you get started.

We're here to support you every step of the way. Let us know if you have any questions or need assistance.

We're here to help! If you have any questions or need assistance getting started, please don't hesitate to contact our support team at support@ionmy.com.au or via live chat on our support website.

Welcome onboard!

APPENDIX A – Glossary

Term or Acronym	Meaning
QGRC	Quality, Governance, Risk, Compliance
ddl	Drop Down List