



POLAR User Management Guide

Version 1.0

Version History

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1 Audience

This guide is intended for Practice Administrators and anyone with administrator access who is responsible for managing user accounts within the POLAR platform.

The guide provides step-by-step instructions for creating users, managing user information, assigning roles, resetting passwords, and removing user access when required.

2 Assumptions

Welcome to this guide on managing user access within POLAR.

Before proceeding, it is assumed that you meet the following requirements:

- You have a POLAR Administrator account.
- You have permission to manage users within your organisation or PHN.
- You are familiar with the POLAR interface.
- You understand your organisation's user access and security requirements.
- Appropriate approval has been obtained before creating, modifying, or deleting user accounts.

If you are unsure about any of the above requirements, please contact Outcome Health Support (see [Support](#) section) or your PHN administrator before proceeding.

3 User Management Overview

The User Management module allows authorised administrators to manage user access within POLAR.

Using this module, administrators can:

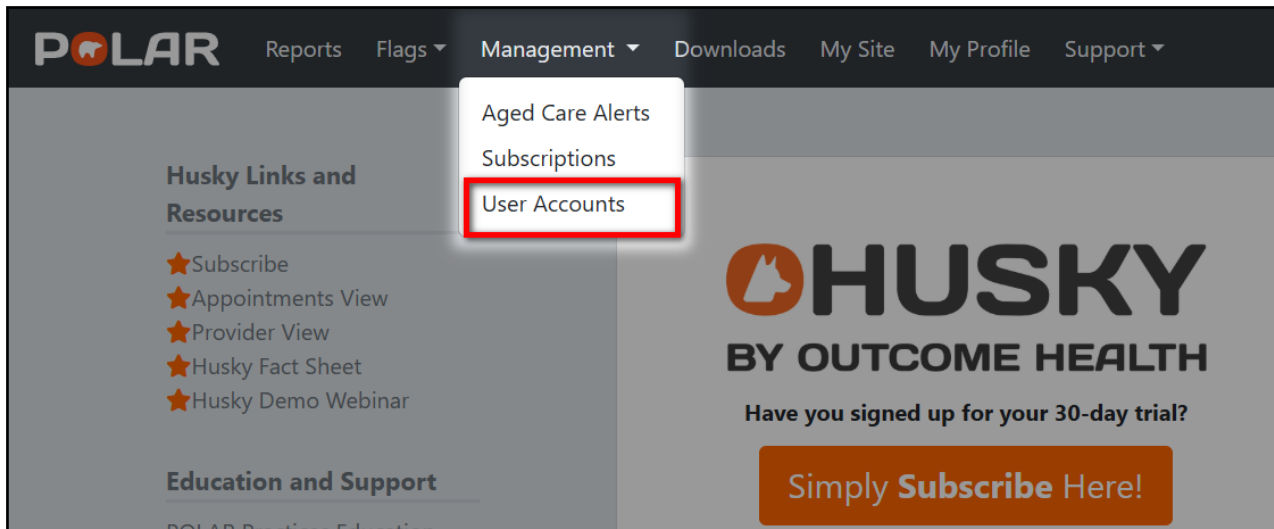
- Create new user accounts.
- Update existing user information.
- Assign and modify user roles.
- Reset user passwords.
- Delete user accounts when access is no longer required.

Proper user management helps ensure that access to POLAR is appropriately controlled and aligned with organisational security requirements.

4 Accessing Practice User Accounts

Admin users assigned the **POLAR Admin** role can access user accounts directly from their practice site.

To access User Accounts, navigate to **Management** and select **User Accounts**.



After selecting **User Accounts**, you will be taken to the User Accounts management screen.

This screen displays all user accounts configured and provides administrators with the ability to create new accounts and manage existing users.

The User Accounts list displays all configured accounts, including the account type, last login date, and assigned role(s).

Note: To open and manage an existing user account, double-click on the user's name within the User Accounts list.

POLAR supports two account types:

Account Type	Description
User	Provides access to POLAR. Access to reports, dashboards, and administrative functions is determined by the role or roles assigned to the account.
Contact	Does not provide access to POLAR. Contact accounts are used only to receive mailed reports and notifications.

VM-BP2 user accounts

Roles New User Account

User Accounts

Name	Account Type	Last Login	Roles
Polar Developer	User		POLAR Admin, Default, Practice Manager
Abdullah Test	User	17/06/2026 15:49	POLAR Admin, Default, Reception
Mandy Harb	User	10/06/2026 11:02	Doctor
T.A.	Contact		Reception

Reports Mailed Reports Walrus Sections Walrus Notifications

Access Name ↑ Reset

Yes No

Select user account to manage permissions

5 Creating a User

To create a new account, select **New User Account** on the user accounts page.

VM-BP2 user accounts

Roles **New User Account**

User Accounts

Name	Account Type	Last Login	Roles
Polar Developer	User		POLAR Admin, Default, Practice Manager
Abdullah Test	User	17/06/2026 13:48	POLAR Admin, Default, Reception
Mandy Harb	User	10/06/2026 11:02	Doctor
T.A.	Contact		Reception

Reports Mailed Reports Walrus Sections Walrus Notifications

Access Name ↑ Reset

Yes No

Select user account to manage permissions

5.1 Account Information

The New User Account screen allows administrators to enter the user's details and assign the appropriate access.

Complete the following account information:

- Account Type (Account type can't be changed once user is created)
- First Name
- Last Name
- Username – Automatically generated using the format **firstname.lastname** and can be edited if required.
- Provider (if applicable)

Account

Account Type User ▼

First Name

Last Name

Username

Provider ▼

5.2 Assigning User Roles

Assign the appropriate role or roles for the user. The selected role determines the level of access available within POLAR.

Available roles include:

- POLAR Admin
- Doctor
- Nurse
- Practice Manager
- Reception
- Default

Note: POLAR Admin users can create, edit, delete, and manage user accounts. New user accounts are automatically assigned the Default role. Access to reports and features is based on the assigned role, and new features will be made available to the appropriate roles as they are introduced.

Roles

☐	POLAR Admin	☒	Default	☐	Doctor
☐	Nurse	☐	Practice Manager	☐	Reception

5.3 User Details and Password

Enter the user's contact information:

- **Email**
- **Confirm Email**
- **Mobile**

Each user must have a unique email address. Shared email addresses are not supported.

Next, create a password for the user or select **Generate Password** to create one automatically.

If the password fields are left blank, POLAR will generate a random password and email the user instructions to sign in and change their password.

Note: A mobile number is required for future multi-factor authentication (MFA). For more information, refer to the [POLAR Privacy Policy](#).

User Details

Email

Confirm Email

Mobile

Password

Password

Confirm Password

Generate Password

Minimum password length: 8

Creating the user with blank password will assign them a random password and an email will be sent to the user to log in and change their password within the next 7 days

Note: New users may take up to 24 hours before all assigned reports become available while report licences and permissions are populated.

6 Managing a User Account

To manage an existing user account, locate the user in the User Accounts list and double-click on the account.

Name	Account Type	Last Login	Roles
	User		POLAR Admin, Default, Practice Manager
	User	23/06/2026 13:59	POLAR Admin, Default, Reception
	User	10/06/2026 11:02	Doctor
	Contact		Reception
John Doe	User		POLAR Admin, Default

6.1 Updating User Information

The following information can be updated:

- First Name
- Last Name
- Email Address
- Mobile Number

Note: Usernames cannot be modified after a user account has been created.

Account

Account Type

User ▼

First Name

Adam

Last Name

Smith

Username

John.Doe

Provider

▼

User Details

Email

test@outcomehealth.org.au

Confirm Email

test@outcomehealth.org.au

Mobile

0400000000

6.2 Managing User Roles

The assigned role determines what a user can see and do within POLAR.

Roles can be added or removed as required.

For example, a user may initially be created with the Default role and later assigned the Practice Manager role to provide access to additional reports and functionality.

Roles

☒ POLAR Admin

☒ Default

☐ Doctor

☐ Nurse

☒ Practice Manager

☐ Reception

6.3 Managing User Permissions

POLAR Admin users can manage the reports and features available to each user.

Note: The reports and permissions shown below are examples only. The reports available to users may vary depending on your organisation's configuration and assigned role.

The available permissions include:

- **Reports** – Controls which reports the user can access.

User Accounts

Name	Account Type	Last Login	Roles
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	User		POLAR Admin, Default, Practice Manager
[Redacted]	User	23/06/2026 14:28	POLAR Admin, Default, Reception
[Redacted]	User	10/06/2026 11:02	Doctor
[Redacted]	Contact		Reception
John Doe	User		POLAR Admin, Default, Practice Manager

Reports | Mailed Reports | Walrus Sections | Walrus Notifications

Access	Name ↑	Reset
Yes ☒ No ☐	[Redacted]	
☒	Clinic Summary Patient level data discovery report	
☒	Hospitalisation Avoidance Tool POLAR Diversion 2 Calculation	
☐	PIPQI Clinic PIPQI Clinic Report	Reset
☐	Puffin GPACI Management Report	Reset
☒	QIPC Clinic Report QIPC Report	

- **Mailed Reports** – Controls which emailed reports the user can receive.

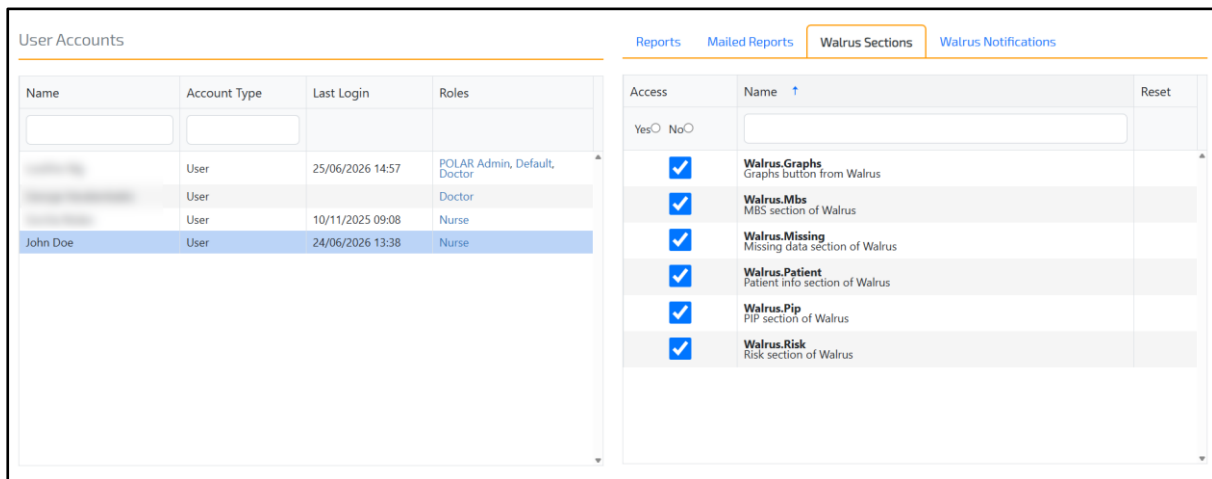
User Accounts

Name	Account Type	Last Login	Roles
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	User	25/06/2026 14:57	POLAR Admin, Default, Doctor
[Redacted]	User		Doctor
[Redacted]	User	10/11/2025 09:08	Nurse
John Doe	User	24/06/2026 13:38	Nurse

Reports | **Mailed Reports** | Walrus Sections | Walrus Notifications

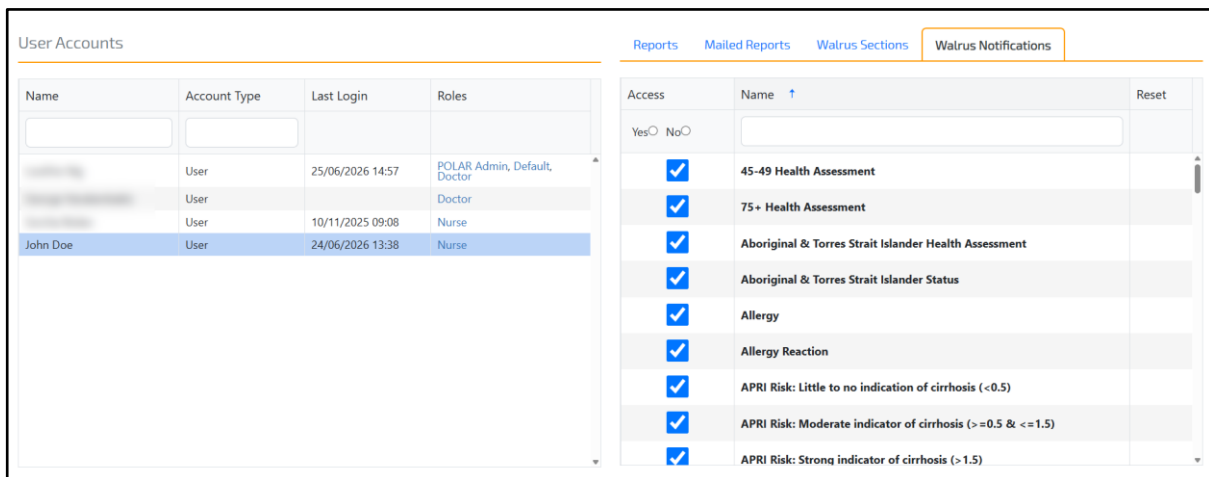
Access	Name ↑	Reset
Yes ☐ No ☐	[Redacted]	
☐	[Redacted]	
☐	Monthly Report-TEST PHN MBS Opportunity Monthly Report MBS Opportunity	
☐	Monthly Report-TEST PHN v1 Monthly practice report sent via email by PHN	
☐	Monthly Report-TEST PHN v2 Monthly practice report sent via email by PHN	

- **Walrus Sections** – Controls which sections of Walrus are available to the user.



User Accounts				Reports Mailed Reports Walrus Sections Walrus Notifications		
Name	Account Type	Last Login	Roles	Access	Name ↑	Reset
				Yes ☐ No ☐		
[User]	User	25/06/2026 14:57	POLAR Admin, Default, Doctor	☒	Walrus.Graphs Graphs button from Walrus	
[User]	User		Doctor	☒	Walrus.Mbs MBS section of Walrus	
[User]	User	10/11/2025 09:08	Nurse	☒	Walrus.Missing Missing data section of Walrus	
John Doe	User	24/06/2026 13:38	Nurse	☒	Walrus.Patient Patient info section of Walrus	
				☒	Walrus.Pip PIP section of Walrus	
				☒	Walrus.Risk Risk section of Walrus	

- **Walrus Notifications** – Controls which Walrus notifications are available to the user.



User Accounts				Reports Mailed Reports Walrus Sections Walrus Notifications		
Name	Account Type	Last Login	Roles	Access	Name ↑	Reset
				Yes ☐ No ☐		
[User]	User	25/06/2026 14:57	POLAR Admin, Default, Doctor	☒	45-49 Health Assessment	
[User]	User		Doctor	☒	75+ Health Assessment	
[User]	User	10/11/2025 09:08	Nurse	☒	Aboriginal & Torres Strait Islander Health Assessment	
John Doe	User	24/06/2026 13:38	Nurse	☒	Aboriginal & Torres Strait Islander Status	
				☒	Allergy	
				☒	Allergy Reaction	
				☒	APRI Risk: Little to no indication of cirrhosis (<0.5)	
				☒	APRI Risk: Moderate indicator of cirrhosis (>=0.5 & <=1.5)	
				☒	APRI Risk: Strong indicator of cirrhosis (>1.5)	

Note: Default permissions can also be configured for each role. For more information, see [Section 8 – Managing Role Permissions](#).

Note: If Walrus is not installed, refer to [Section 9 – Accessing the Knowledge Base](#) for instructions on accessing the Knowledge Base and installing Walrus.

6.4 Managing Multi-Location Access

For practices configured with multiple POLAR locations, administrators can assign users to one or more locations.

Within the **Edit User Account** screen, use the **Which POLAR locations is this user associated with?** section to select the locations the user should have access to.

Users will only be able to access reports for the locations assigned to their account.

Which POLAR locations is this user associated with?

☒ Location 1
☒ Location 2
☐ Location 3

6.5 Resetting a Password

User passwords can be reset from the Password Reset section within the Edit User Account screen.

Administrators can reset a password using one of the following methods:

Method	Description
Via Email	Sends a password reset email to the user's registered email address, allowing them to create a new password.
Online	Allows the administrator to manually set a new password for the user.

Password Reset

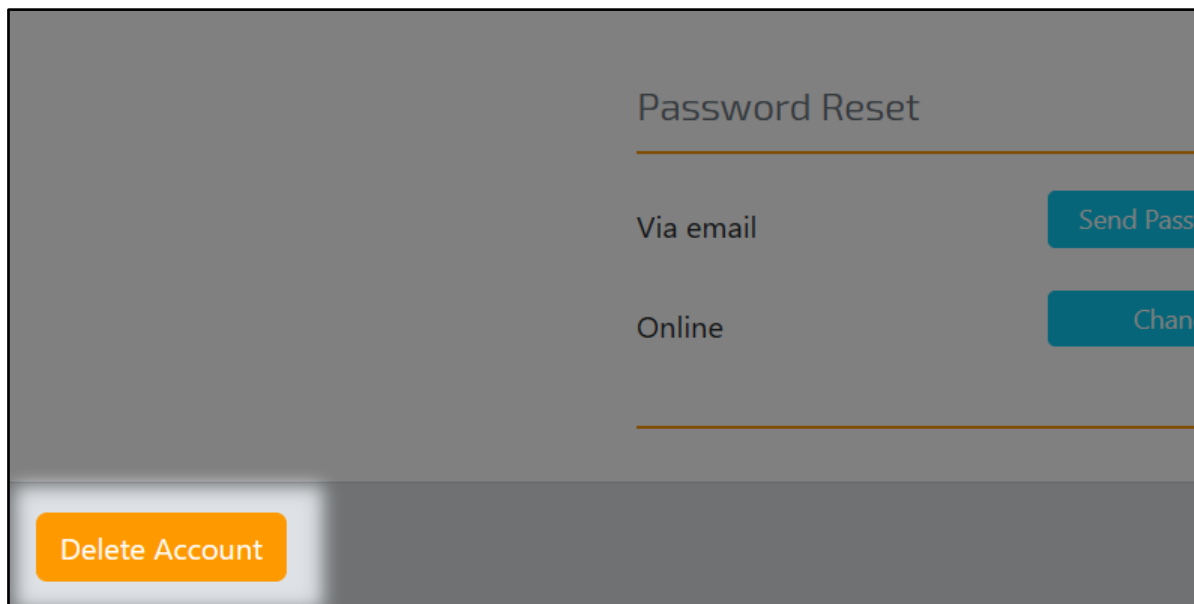
Via email

Online

7 Deleting a User Account

User accounts can be deleted from the Edit User Account screen.

To delete a user account, locate the user in the User Accounts list, double-click the account, and select Delete Account at the bottom of the page, beneath the Password Reset section.

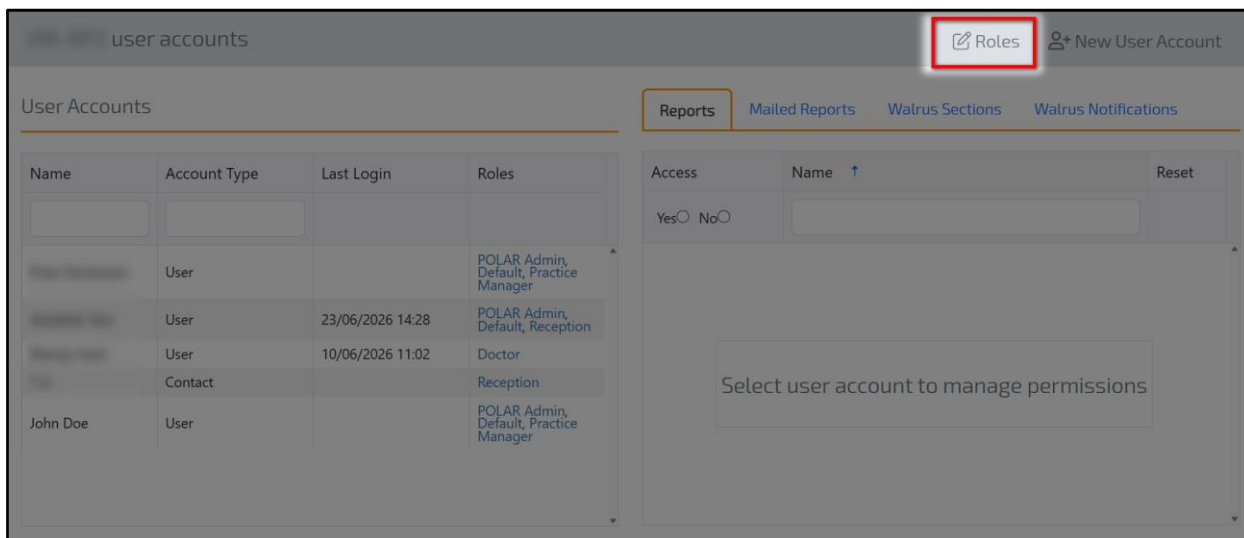


Note: Deleting a user account is permanent and should only be performed when the account is no longer required.

8 Managing Role Permissions

Role permissions allow administrators to control which reports are available to users assigned to each role.

To manage role permissions, select **Roles** from the User Accounts management screen.



Name	Account Type	Last Login	Roles
[Redacted]	User		POLAR Admin, Default, Practice Manager
[Redacted]	User	23/06/2026 14:28	POLAR Admin, Default, Reception
[Redacted]	User	10/06/2026 11:02	Doctor
[Redacted]	Contact		Reception
John Doe	User		POLAR Admin, Default, Practice Manager

Access: Yes ☐ No ☐

Name:

Reset:

Select user account to manage permissions

The Role Setup screen displays all available roles within the practice.

Select a role from the list on the left to view and manage its assigned reports.

Note: Available reports depend on the reports enabled for the clinic within POLAR.

For example, enabling the **Puffin Report** for the **Practice Manager** role will make Puffin available to all users assigned to that role.

The screenshot shows the 'roles setup' interface. On the left, under the 'Roles' section, a list of roles is displayed: POLAR Admin, Default, Doctor, Nurse, **Practice Manager** (highlighted with a red box), and Reception. On the right, the 'Reports' tab is active, showing a table of reports with checkboxes for access. The 'Puffin' report (GPACI Management Report) is highlighted with a red box, and its checkbox is currently unchecked. Other reports shown include Clinic Summary, Hospitalisation Avoidance Tool, PIPQI Clinic, and QIPC Clinic Report.

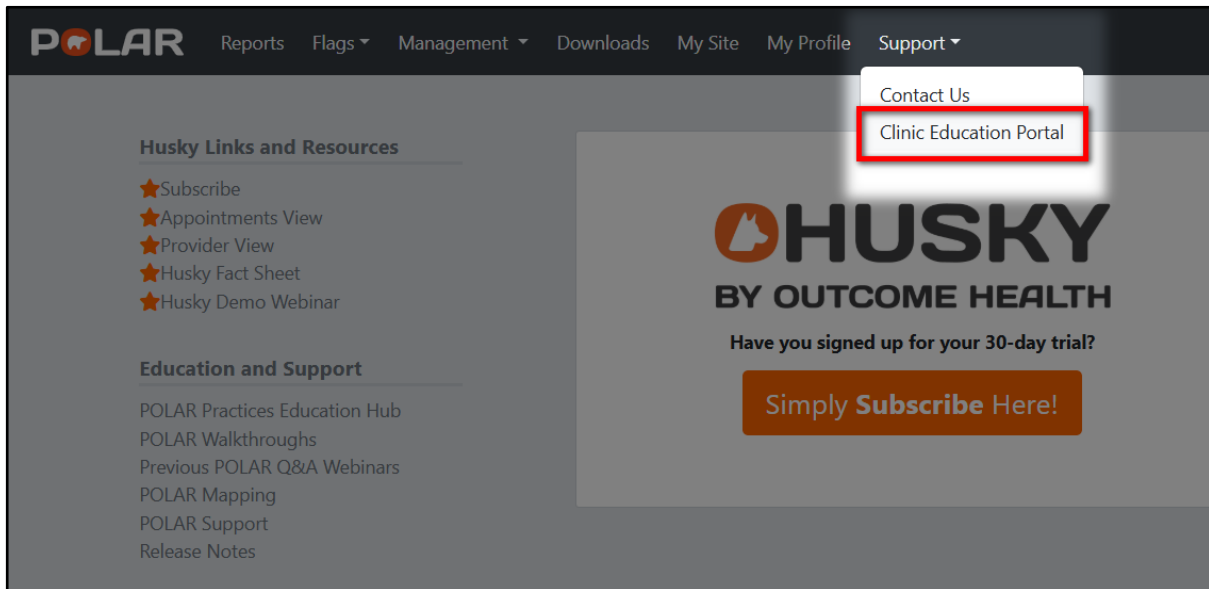
Access	Name
Yes ☒ No ☐	Clinic Summary Patient level data discovery report
☐	Hospitalisation Avoidance Tool POLAR Diversion 2 Calculation
☒	PIPQI Clinic PIPQI Clinic Report
☐	Puffin GPACI Management Report
☒	QIPC Clinic Report QIPC Report

Note: The same process applies to the **Mailed Reports**, **Walrus Sections**, and **Walrus Notifications** tabs when configuring default permissions for a role. Changes are applied automatically and do not require saving.

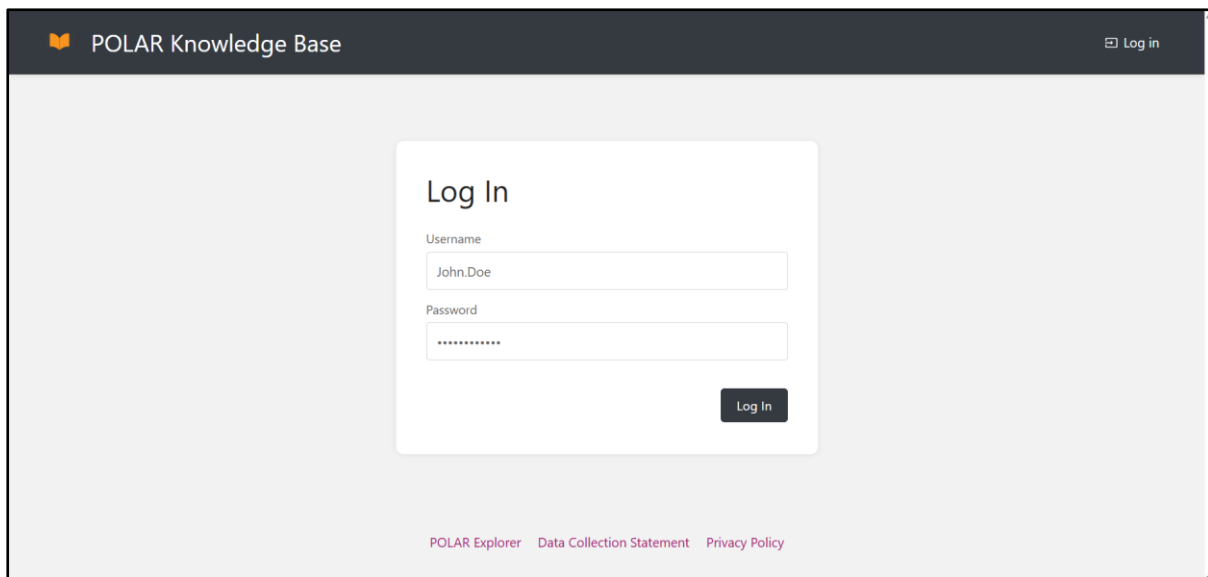
To return to the User Accounts management screen, select **User Accounts** in the top-right corner of the screen.

9 Accessing the Knowledge Base

The POLAR Knowledge Base contains user guides, installation instructions, troubleshooting articles, and other support resources. To access the Knowledge Base, select Clinic Education Portal from the Support menu in POLAR, or visit <https://kb.polarexplorer.org.au>



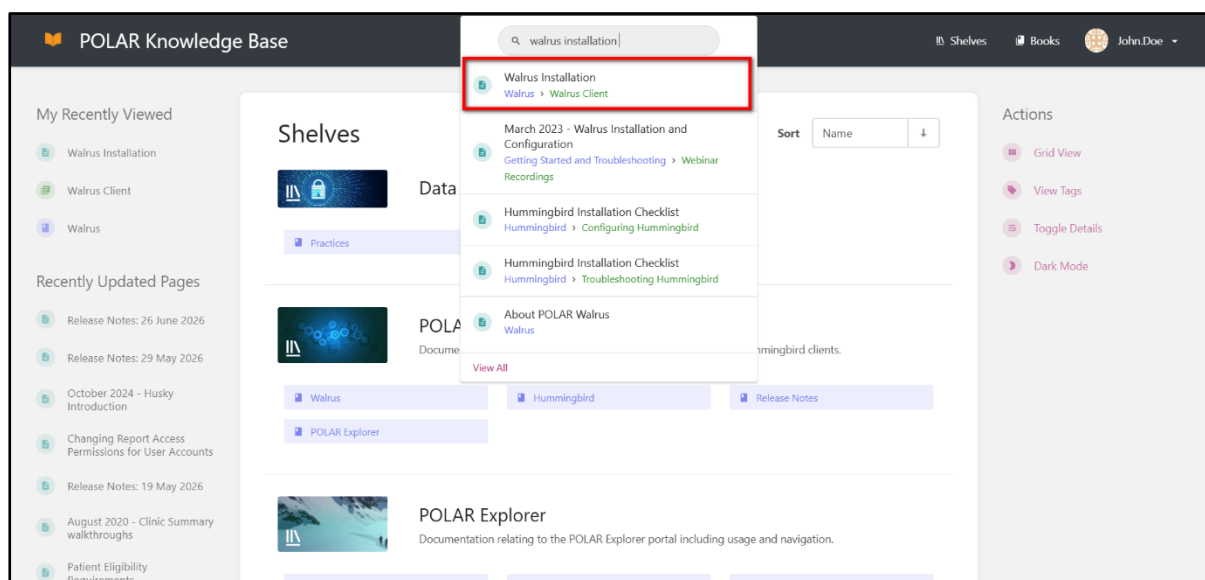
Sign in using your POLAR username and password.



To find an article, enter a keyword into the search bar.

For example, to install Walrus:

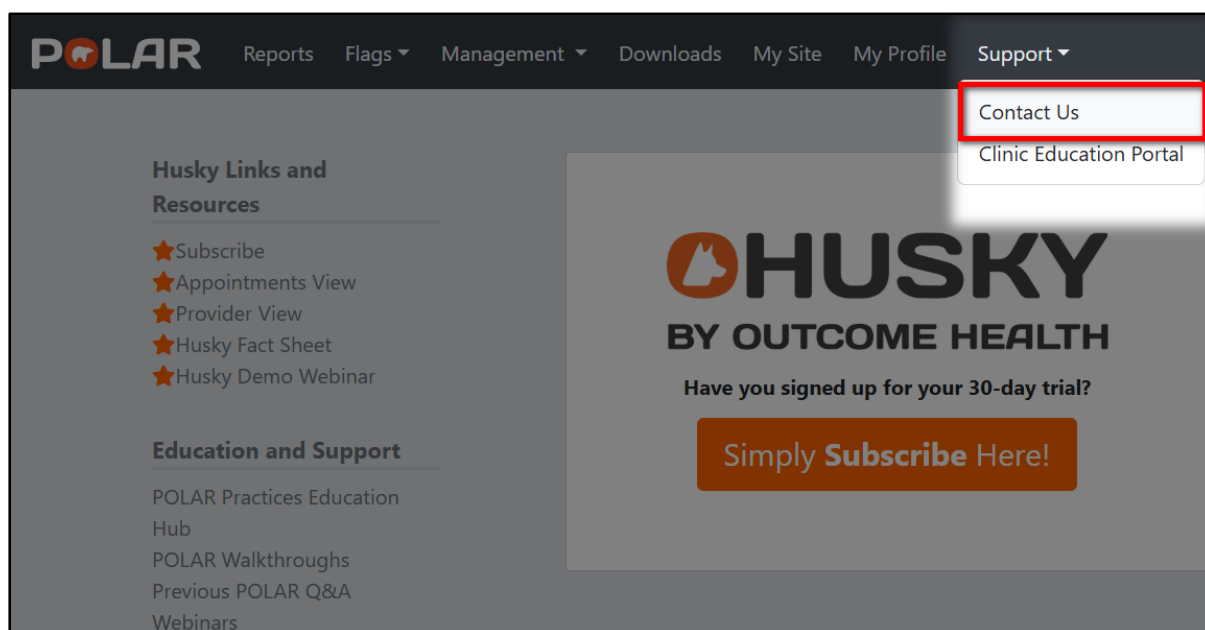
1. Type **Walrus Installation** into the search bar.
2. Select the **Walrus Installation** article.
3. Follow the installation guide.



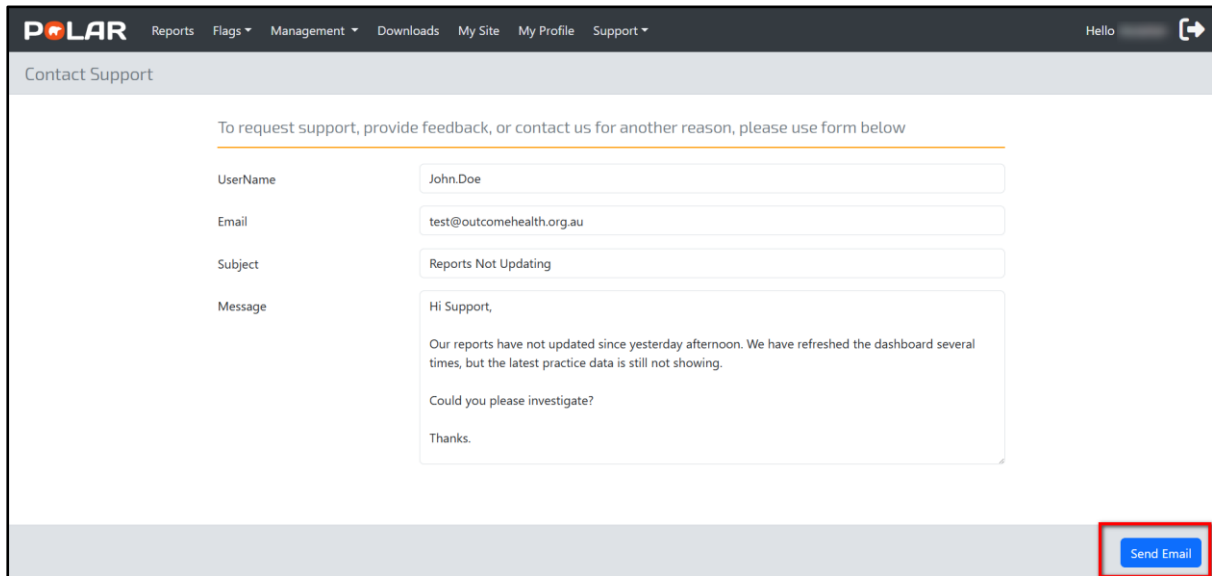
10 Support

If you require assistance with POLAR, the fastest way to contact the Outcome Health Support Team is by submitting a support request through the **Contact Us** form.

To submit a support request, select **Support > Contact Us** from the POLAR menu.



Complete the support request form by entering a **Subject** and **Message**, then select **Send Email**.



The screenshot shows the POLAR web interface. At the top is a navigation bar with the POLAR logo and links for Reports, Flags, Management, Downloads, My Site, My Profile, and Support. A 'Hello' greeting and a user icon are on the right. Below the navigation bar is a 'Contact Support' section. It contains a heading 'To request support, provide feedback, or contact us for another reason, please use form below'. The form has four fields: 'UserName' with the value 'John.Doe', 'Email' with 'test@outcomehealth.org.au', 'Subject' with 'Reports Not Updating', and 'Message' with a multi-line text area containing: 'Hi Support, Our reports have not updated since yesterday afternoon. We have refreshed the dashboard several times, but the latest practice data is still not showing. Could you please investigate? Thanks.' A blue 'Send Email' button is located at the bottom right of the form, highlighted with a red rectangle.

The Outcome Health Support Team will respond to your request via email. Please allow **24 hours** for a response.

Alternatively, you can contact the Outcome Health Support Team by email.

Email: servicedesk@outcomehealth.org.au

Thank you for using **POLAR**. We hope this guide has assisted you in managing user accounts and permissions effectively.

-END-