MANUAL: Volume II	**SUBJECT POLICY:** Security Groups Rights To EHR
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I. PURPOSE

The purpose of this document is to state the established Carolina Family Health Centers, Inc. (CFHC, Inc.) guidelines for security settings and individual/user group rights in the Patient Management System and Electronic Health Record (EHR).

II. POLICY

CFHC, Inc. is dedicated to maintaining the security of patient information recorded in the Patient Management System and EHR. Staff, locum tenums, and contractors will be assigned user group rights and/or individual rights based on job responsibilities and level of authority. Some individuals may be assigned to more than one user group depending on their position.

Supervisors must complete the *New Employee Access form* for each employee in order to document the employee's job responsibilities and security access needs. Per supervisor approval, certain users may be given additional rights beyond their user group depending on their responsibilities. This form will be used by Administrative members of the group to assign user and individual rights. User groups will consist of two categories: Patient Management System and Electronic Health Record. Refer to *PSN-117 Onboarding and Orientation*.

User Groups – Patient Management System

Administration: Administrative staff with the training and authority to set user group rights and individual rights in the Patient Management System and Electronic Health Record will be assigned to the Administrative user group.

Chief Operations Officer	Director of Information Technology	Health Information Technology Technician
Director of Clinical Services	Information Technology Technician	
Chief Compliance and Quality Officer	Director of Health Information Technology	

EHR Modules	Administration	
A/R Management	Assigned individually based on access needed	
Chart	• access confidential section of chart • access orders requisition • access restricted charts • access sensitive charts • access sensitive/restricted charts for emergency only occasions • access the patient charts page • allergy module-can modify serum sheet status • allergy module-override EP rules • documents-sign documents • access chart admin pages • access manage chart documents page • access the immunization admin page	• face sheet-manage problem list custom views • lab flowsheet-initial a lab or revoke initials • lab flowsheet-invoke lab flowsheet end of episode signing • orders-add to order favorite list • orders-edit/delete from orders favorite • face sheet-manage categories history wizard • face sheet-add history wizard • prenatal flowsheet-invoke prenatal flowsheet sign and close episode • view procedure charge on superbill summary • flowsheet-access admin pages • access the clinical alerts page
Registration	• add patients or persons to the system • view patient or person registration information • modify patient or person registration information • modify employers • view patient list • check-in patients • undo check-out • modify delivery information • modify the patient flags administration page • view and modify chart patient flags • view and modify general patient flags • view and modify financial patient flags	• view and modify collections patient flags • view clinical alerts flags • view referral management • modify in referral management • delete in referral management • access to referral management administration • edit the visit counter • view and modify eligibility administration • perform real time eligibility inquiries • add or inactivate pharmacies from the pharmacy search • view and modify custom field administration • edit patient notes

CAROLINA FAMILY HEALTH CENTERS, INC.

USER GROUP FOR PATIENT MANAGEMENT SYSTEM

EHR Modules	Administration	
Reporting	• access the report selection • document tracking report • obsolete drug list report • patient chart • expired vial • account information report • patient appointment report • delivery information report	• patient information sheet • patient summary report • access the report status page • access the flex reports page • access the patient appointment dataset • access the report designer page • access MU dashboard
Scheduling	• cancel block time • override may not schedule • view the appointment scheduling page • modify appointment scheduling page • modify schedule administration page • modify system default layout in patient information admin	• modify user defined layout in patient administration admin • override blocked time • override appointment rules and overbooks • set appointments in the past • delete recalls and appointment requests • delete schedule templates
System	• access document import • manage chart documents • delete chart documents or pages • edit chart document types • manage image library • manage image categories • view administrative documents • modify care provider and locations information • modify care provider eRx service level • view communications • view system settings • view eRx configuration • access patient tracking • manage message groups • receive general messages • receive administrative messages • receive clinical messages • access the task list administration page • enable send patient message or reply to patient	• access the patient tracking administration page • manage administrative documents • delete administrative documents or pages • edit administrative document types • access data share retrieval queue • access data share data retrieval • access data share data submission • modify user administration information • modify user rights • enable and disable other users • modify group administration information • members and modify group rights • view care provider and locations information • enable access to all tasks created and saved by any user • access patient reminders • ability to add custom reminders • ability to cancel reminds and edit message • schedule system upgrades • enable PrimePatient re-matching

CAROLINA FAMILY HEALTH CENTERS, INC.

USER GROUP FOR PATIENT MANAGEMENT SYSTEM

Front Office Supervisors:

Chief Operating Officer
Front Office Supervisors

Integrated Behavioral Health Care Coordinator
Practice Manager

EHR Modules	Front Office Supervisors	
A/R Management	• access the account information page • override the posting date to any date • override the posting date to a date within the current month • modify account notes • modify insurance plans • view A/R lookup tables	• enter patient and insurance payments • void payments originally created within the current month • void payments originally created today • void adjustments originally created within the current month • void adjustments originally created today
Chart	• access the patient charts page • documents-sign documents • customize the clinical visit summary document	• view procedure charge on superbill summary • access chart admin pages • import/export clinical templates
Registration	• add patients or persons to the system • view patient or person registration information • modify patient or person registration information • modify employers • view patient list • view and modify general patient flags • view and modify financial patient flags • view and modify collections patient flags • view referral management • modify in referral management • activate patients	• undo check-in • undo no show • edit the visit counter • add or inactivate pharmacies from the pharmacy search • edit patient notes • check-in patients • undo check-out • modify delivery information • view and modify chart patient flags • inactivate patients
Reporting	• access the report selection page • deposit slip report • transaction detail balancing report • superbill summary status report • account information report • patient appointment report • patient information sheet • patient summary report	• appointment detail patient report • daily schedule report • resource rules template report • visit tracking report • audit log report • demographic list • access the report status page • appointment analysis report

Scheduling	- cancel block time - override may not schedule - view the appointment scheduling page - modify appointment scheduling page - modify schedule administration page	- modify system default layout in patient information admin - modify user defined layout in patient administration admin - override blocked time - override appointment rules and overbooks - delete recalls and appointment requests
System	- access document import - view administrative documents - manage administrative documents - delete administrative documents or pages - edit administrative document types - view care provider and locations information	- view communications - access patient tracking - receive general messages - enable send patient message or reply to patient - enable PrimePatient re-matching - enable access to all tasks created and saved by any user

CAROLINA FAMILY HEALTH CENTERS, INC.

USER GROUP FOR PATIENT MANAGEMENT SYSTEM

Front Desk Staff: The front desk staff user group is responsible for the scheduling, documentation of patient demographics and insurance information. The user group will have access to the Patient Management System sections for registration and scheduling. All front office staff will be assigned to this group.

| Chief Operating Officer | Front Office Supervisor | Front Office Associate |

EHR Modules	Front Desk Staff	
A/R Management	• access the account information page • modify account notes • view A/R lookup tables	• modify A/R lookup tables • enter patient and insurance payments
Chart	• access the patient charts page • documents-sign documents • customize the clinical visit summary document	• view procedure charge on superbill summary • access chart admin pages • import/export clinical templates
Registration	• add patients or persons to the system • view patient or person registration information • modify patient or person registration information • modify employers • view patient list • check-in patients • undo check-out • modify delivery information • view and modify chart patient flags • view and modify general patient flags	• modify in referral management • undo check-in • undo no show • edit the visit counter • add or inactivate pharmacies from the pharmacy search • view and modify financial patient flags • view and modify collections patient flags • view referral management • inactivate patients • activate patients
Reporting	• access the report selection page • deposit slip report • transaction detail balancing report • superbill summary status report • account information report • patient appointment report • patient information sheet	• patient summary report • appointment analysis report • appointment detail patient report • daily schedule report • visit tracking report • demographic list • access the report status page

Scheduling	- cancel block time - override may not schedule - view the appointment scheduling page - modify appointment scheduling page	- override blocked time - override appointment rules and overbooks
System	- access document import - view administrative documents - manage administrative documents - delete administrative documents or pages - edit administrative document types - view communications	- access patient tracking - receive general messages - enable send patient message or reply to patient - enable PrimePatient re-matching - enable access to all tasks created and saved by any use

Referrals: Support staff involved in making, documenting, and tracking patient referrals.

Director of Clinical Services   Referrals Associate

EHR Modules	Referrals	
Chart	• access orders requisition • access restricted charts •	• access sensitive charts • access the patient charts page
Registration	• add patients or persons to the system • view patient or person registration information • modify patient or person registration information	• view referral management • modify in referral management • edit the visit counter
Reporting	• access the report selection page • referring provider report • document tracking report	• patient chart • patient information sheet
Scheduling	• view the appointment scheduling page	
System	• view communications • access patient tracking • receive clinical messages	• enable send patient message or reply to patient • enable PrimePatient re-matching • enable access to all tasks created and saved by any user

CAROLINA FAMILY HEALTH CENTERS, INC.

USER GROUP FOR PATIENT MANAGEMENT SYSTEM

Medical Records: Staff involved in managing medical records and scanning documents into the system.

Chief Operating Officer	Medical Records Supervisor	Medical Records Associate
Referrals Associate	Interpreter	Outreach Enrollment Specialist (Freedom Hill)

EHR Modules	Medical Records	
Chart	- access confidential section of chart - access orders requisition - access restricted charts - access sensitive charts - access sensitive/restricted charts for emergency only occasions - access the patient charts page - face sheet-manage problem list custom views - lab flowsheet-initial a lab or revoke initials - lab flowsheet-invoke lab flowsheet end of episode signing - face sheet-manage categories history wizard - face sheet-delete history wizard - face sheet-add history wizard - flowsheet/edit results-can edit display value of results - view procedure charge on superbill summary	- access chart admin pages - access manage chart documents page - access the clinical alerts page - access the immunization admin page - allergy module-manage allergen boards - allergy module-manage allergy lot number - flowsheet-access admin pages - flowsheet-create/edit - orders-add to order favorite list - orders-edit/delete from orders favorite list - results-can delete
Registration	- add patients or persons to the system - view patient or person registration information - modify patient or person registration information - view patient list - view and modify chart patient flags - view and modify general patient flags - view referral management - modify in referral management - inactivate patients	- access the report selection page - document tracking report - patient chart - clinical patient listing report - patient appointment report - appointment detail patient report - daily schedule report - access the orders dataset - activate patients

USER GROUP FOR PATIENT MANAGEMENT SYSTEM

Scheduling	• view the appointment scheduling page • modify appointment scheduling page	
System	• access document import • manage chart documents • delete chart documents or pages • edit chart document types • manage image library • manage image categories • view administrative documents • manage administrative documents	• delete administrative documents or pages • edit administrative document types • access data share retrieval queue • access data share data retrieval • access data share data submission • view communications • access patient tracking • receive clinical messages • access order status update utility

USER GROUP FOR PATIENT MANAGEMENT SYSTEM

Billing: All staff involved in billing and coding will be assigned to the Billing user group. The Billing user group will have access to the Patient Management System sections and Electronic Health Record.

Billing Supervisor   Billing Associates   Administrative Assistant – Ryan White Continuous Quality Improvement

EHR Modules	Billing	
A/R Manager	• view AR and E-Charge ticket configurations • view statements and finance charge configurations • access the account information page • create an E-Charge ticket • override the posting date to any date • override the posting date to a date within the current month • modify account notes • modify claims maintenance, claims processing, claims statuses, and printer configuration • view procedure information • view contracts/fee schedules • view A/R lookup tables • modify charges • override charge amount • view and modify collections work list • delete inbound charges	• enter patient and insurance payments • void charges originally created within any month • void charges originally created within the current month • void charges originally created today • void payments originally created within any month • void payments originally created within the current month • void payments originally created today • void adjustments originally created within any month • void adjustments originally created within the current month • void adjustments originally created today • access electronic remittance • access inbound charges exception list
Chart	• access confidential section of chart • access orders requisition • access restricted charts • access sensitive charts	• access sensitive/restricted charts for emergency only occasions • access the patient charts page • view procedure charge on superbill summary
Registration	• add patients or persons to the system • view patient or person registration information • modify patient or person registration information • modify employers • view patient list • check-in patients	• view and modify general patient flags • view and modify financial patient flags • view and modify collections patient flags • view referral management • undo check-in • undo check-out • undo no show

Reporting	• access the report selection page • adjustment analysis report • aging summary • applied analysis report • A/R summary • claims tracking report • collection adjustment summary • collection revenue report • deposit slip report • insurance analysis report • provider revenue summary • service analysis report • submitted claims report	• EDI batch submission detail report • EDI batch submission summary report • EDI claim clearinghouse and payer reports • EDI file creation error report • patient balance report • patient statement summary report • payment analysis report • procedure code analysis report • referring provider report • superbill summary status report • account information report • suspended charges report • transaction detail balancing report
Scheduling	• view the appointment scheduling page • modify appointment scheduling page	
System	• access document import • view administrative documents • manage administrative documents • view care provider and locations information • view communications	• access patient tracking • receive general messages • access small balance utility • enable send patient message or reply to patient • enable PrimePatient re-matching • enable access to all tasks created and saved by any user

Outreach Staff: Staff can check patients in for an appointment and complete the Sliding Fee Discount Application form en-route.

| Chief Operating Officer | Outreach/Enrollment Manager | Outreach Enrollment Specialists |

EHR Modules	Outreach	
A/R Management	• access the account information page • override the posting date to any date • override the posting date to a date within the current month • modify charges • override charge amount • enter patient and insurance payments	• void charges originally created within any month • void charges originally created within the current month • void charges originally created today • void adjustments originally created within the current month • void adjustments originally created today
Registration	• add patients or persons to the system • view patient or person registration information • modify patient or person registration information • modify employers	• view patient list • check-in patients • view and modify general patient flags • view and modify financial patient flags • edit patient notes
Reporting	• access the report selection page • adjustment analysis report • transaction detail balancing report • patient information sheet	
System	• view care provider and locations information • view communications • access patient tracking	

Affordable Care Act: ACA staff

      Chief Operating Officer   Outreach/Enrollment Manager   Outreach Enrollment Specialists

      Special Populations Eligibility Associates

EHR Modules	Affordable Care Act	
Registration	• view patient or person registration information • modify patient or person registration information • check-in patients • view and modify general patient flags	
Scheduling	• view the appointment scheduling page • modify appointment scheduling page • set appointments in the past	

CAROLINA FAMILY HEALTH CENTERS, INC.

USER GROUP FOR PATIENT MANAGEMENT SYSTEM

Finance: Staff will check patient schedules, patient demographic information and utilize the reporting modules.

Director of Finance	Grants Management Associate
Finance Associate	Administrative Assistant - Finance

EHR Modules	Finance	
A/R Management	• access the account information page	
Registration	• view patient or person registration information • modify patient or person registration information	
Reporting	• access the report selection page • adjustment analysis report • aging summary • applied analysis report • A/R summary • claims tracking report • collection adjustment summary • collection revenue report • deposit slip report • insurance analysis reported • EDI batch submission summary report • EDI batch submission detail report • EDI claim clearinghouse and payer reports • EDI file creation error report • patient balance report • patient statement summary report • payment analysis report • procedure code analysis report • referring provider report • service analysis report • submitted claims report • provider revenue summary • suspended charges report • transaction detail balancing report • account information report	• patient appointment report • delivery information report • patient information sheet • patient summary report • appointment analysis report • appointment detail patient report • daily schedule report • resource rules template report • schedule templates report • visit tracking report • audit log report • demographic list • user listing report • fee schedule listing report • employer list report • insurance plan listing report • insurance company listing report • charge schedule detail report • procedure master listing report. • access the report status page • access the flex report page • access the applied revenue dataset • access the charge analysis dataset • access the clinical patient listing dataset • access the collection dataset

	- access the immunization grid dataset - access the medications dataset - access the orders dataset - access the patient appointment dataset - access the patient demographics dataset - access the provider demographic dataset - access the immunizations dataset - access the recall dataset	- access the referral management dataset - access the resource schedule dataset - access the transportation detail dataset - access the report designer dataset - import report templates - export templates - import claim templates - import prescription templates
Scheduling	view the appointment scheduling page	
System	receive general messages	

Executive: This user has super-user rights.
       Chief Financial Officer

EHR Modules	Chief Financial Officer	
A/R Management	- view AR and E-Charge ticket configurations - modify AR and E-Charge ticket configurations - view and modify ERA profiles - modify statements and finance charge configurations - view statements and finance charge configurations - process patient statements - access the account information page - create an E-Charge ticket - override the posting date to any date - override the posting date to a date within the current month - modify account notes - modify claims maintenance - claims processing, claims statuses, and printer configuration - void charges originally created today - void payments originally created within any month - void payments originally created within the current month - void payments originally created today - void adjustments originally created within any month - void adjustments originally created within the current month - void adjustments originally created today - access electronic remittance	- view procedure information - modify procedure information - modify insurance plans - view contracts/fee schedules - modify contracts/fee schedules - view A/R lookup tables - modify A/R lookup tables - modify charges - override charge amount - enter patient and insurance payments - void charges originally created within any month - void charges originally created within the current month - view and modify charge edits admin - access GL export - view and modify GL configuration admin - access inbound charges exception list - delete inbound charges - view and modify all collection admin pages - view and modify collections work list
Chart	- access confidential section of chart - access orders requisition - access restricted charts - access sensitive/restricted charts for emergency only occasions	- access the patient charts page - view procedure charge on superbill summary - access chart admin pages - access sensitive charts

USER GROUP FOR PATIENT MANAGEMENT SYSTEM

Registration		
	• add patients or persons to the system • view patient or person registration information • modify patient or person registration information • modify employers • view patient list • check-in patients • undo check-out • modify delivery information	• view and modify chart patient flags • view and modify general patient flags • view and modify financial patient flags • view and modify collections patient flags • view clinical alerts flags • view referral management • view and modify eligibility administration • perform real time eligibility inquiries • view and modify custom field administration
Reporting		
	• access the report selection page • adjustment analysis report • aging summary • applied analysis report • A/R summary • claims tracking report • collection adjustment summary • collection revenue report • deposit slip report • insurance analysis report • EDI batch submission summary report • EDI batch submission detail report • EDI claim clearinghouse and payer reports • EDI file creation error report • patient balance report • patient statement summary report • payment analysis report • procedure code analysis report referring provider report • service analysis report • submitted claims report • provider revenue summary • suspended charges report • access the flex report page • access applied revenue flex dataset • access charge analysis flex dataset • access referral management flex dataset	• transaction detail balancing report • document tracking report • patient chart • superbill summary status report • clinical patient listing report • account information report • patient appointment report • delivery information report • patient information sheet • patient summary report • appointment analysis report • appointment detail patient report • daily schedule report • resource rules template report • schedule templates report • visit tracking report • audit log report • demographic list user listing report • fee schedule listing report • employer list report • insurance plan listing report • insurance company listing report • charge schedule detail report • procedure master listing report • access the report status page • access recall flex dataset

USER GROUP FOR PATIENT MANAGEMENT SYSTEM

	• access claims analysis flex dataset • access collections flex dataset • access fee schedule flex dataset • access immunizations flex dataset • access insurance analysis flex dataset • access medications flex dataset • access orders flex dataset • access patient appointment flex dataset • access patient listing flex dataset • access patient tracking flex dataset • access person demographic flex dataset •	• access resource schedule flex dataset • access service analysis flex dataset • access transaction detail flex dataset • access customs report • access the applied revenue dataset • access the charge analysis dataset • access the clinical patient listing dataset • access the collection dataset • access the immunizations dataset • access the immunization grid dataset • access the medications dataset
Scheduling	• cancel block time • override may not schedule • view the appointment scheduling page • modify appointment scheduling page • modify schedule administration page • modify system default layout in patient information admin	• override blocked time • override appointment rules and overbooks • set appointments in the past • delete recalls and appointment requests • delete schedule templates • modify user defined layout in patient administration admin
System	• access document import • manage chart documents • delete chart documents or pages • edit chart document types • manage image library • manage image categories • view administrative documents • manage administrative documents • delete administrative documents or pages • edit administrative document types • access data share retrieval queue • access data share data retrieval • access data share data submission • modify user administration information • view system configuration • manage message groups	• modify user rights • enable and disable other users • modify group administration information and members • modify group rights • view care provider and locations information • modify care provider and locations information • view communications • modify communications • modify system configuration • modify system defaults • view and modify visit types • view and modify superbill types • view system settings • access patient tracking • access the patient tracking administration page • access suspend from claim utility

	• create message groups from security groups • receive general messages • receive administrative messages • receive clinical messages • can access the PrimeDATACLOUD • access superbill status utility • access small balance utility	• access the task list administration page • enable send patient message or reply to patient • enable PrimePatient re-matching • enable access to all tasks created and saved by any user • access shared mediations favorites • access order status update utility

User Groups-Electronic Health Record

Providers (prescribing clinicians): Staff responsible for direct patient care that also has prescriptive authority will be assigned to the Provider user group. The Provider user group will have full access to the chart including prescriptions and the chart admin.

Chief Medical Officer	Chief Pharmacy Officer	Clinical Pharmacist Practitioner
Chief Dental Officer	Dentists	Physicians Assistants
Director of Clinical Pharmacy Services	Medical Doctors (MD, DO)	Nurse Practitioners

EHR Modules	Providers	
Chart	- access confidential section of chart - access orders requisition - access restricted charts - access sensitive charts - access sensitive/restricted charts for emergency only occasions - access the patient charts page - allergy module-can modify serum sheet status - allergy module-override EP rules - documents-sign documents - face sheet-delete vitals - face sheet-manage problem list custom views - lab flowsheet-initial a lab or revoke initials - lab flowsheet-invoke lab flowsheet end of episode signing - orders-add to order favorite list - orders-edit/delete from orders favorite list - prescriptions-access ePrescribe - prescriptions-can edit medication alert override - prescriptions-create prescription	- prescriptions-if a digital signature other than this user is saved with a prescriptions allow printing of the signature - prescriptions-create prescriptions on behalf of - prescriptions-print prescriptions - results-can delete - customize the clinical visit summary document - access renewal request for all prescribers - prenatal flowsheet-invoke prenatal flowsheet sign and close episode - view procedure charge on superbill summary - access chart admin pages - access the clinical alerts page - access the immunization admin page - allergy module-manage allergen boards - allergy module-manage allergy lot number - flowsheet-access admin pages - import/export clinical admin files - import/export clinical templates
Registration	- add patients or persons to the system - view patient or person registration information - modify patient or person registration information - view patient list - check-in patients - modify delivery information - view and modify custom field administration - edit patient notes	- view and modify chart patient flags - view and modify general patient flags - view clinical alerts flags - view referral management - modify in referral management - edit the visit counter - add or inactivate pharmacies from the pharmacy search

Reporting	- access the report selection page - document tracking report - obsolete drug list report - patient chart - superbill summary status report - allergy performance reports - ePrescribe medication frequency - ePrescribed medications - pharmacy listings	- overdue patients for allergy shots - allergy lot # recall - clinical patients listing report - expired vial - patient appointment report - patient information report - access MU dashboard - top allergens per allergen type - Ohio medication report
Scheduling	- view the appointment scheduling page - modify appointment scheduling page - set appointments in the past	
System	- access document import - view communications - modify communications - view eRx configuration - access patient tracking - enable PrimePatient re-matching	- receive clinical messages - access pharmacy download - access shared mediations favorites - access Greenway Marketplace - enable send patient message or reply to patient - enable access to all tasks created and saved by any user

CAROLINA FAMILY HEALTH CENTERS, INC.

USER GROUP FOR PATIENT MANAGEMENT SYSTEM

Non-Prescribing Clinicians: Staff responsible for direct patient care that <u>does not</u> have prescriptive authority will be assigned to the Non-Prescribing Clinician user group. The only group with prescriptive authority are the retail pharmacists.

This group will have access to the chart and chart administration, but will not have access to prescribing section of the medical record. There will be access to certain sections of the medical record pertinent to his/her job as well as access to scheduling.

Chief Pharmacy Officer	Director of Clinical Pharmacy Services	Director of Medication Adherence Clinic
Pharmacists	Pharmacist Managers	Pharmacy Technician
Integrated Behavioral Health Manager	Integrated Behavioral Health Clinicians	Director of Clinical Services
Care Coordination/Transition Manager	Medical Case Manager Supervisor	Case Managers
Patient Navigator	Special Populations Eligibility Associates	Peer Counselor
Integrated Behavioral Health Care Coordinator	Pharmacy Eligibility Associates	

EHR Modules	Non-Prescribing Clinicians	
A/R Management	• access the account information page (Case Managers only)	
Chart	• access confidential section of chart • access orders requisition • access restricted charts • access sensitive charts • access sensitive/restricted charts for emergency only occasions • access the patient charts page • allergy module-can modify serum sheet status • allergy module-override EP rules • documents-sign documents • view procedure charge on superbill summary	• face sheet-manage problem list custom views • lab flowsheet-initial a lab or revoke initials • lab flowsheet-invoke lab flowsheet end of episode signing • orders-add to order favorite list • flowsheet/edit results-can edit display value of results • access chart admin pages • access the clinical alerts page • import/export clinical admin files • import/export clinical templates
Registration	• add patients or persons to the system • view patient or person registration information • modify patient or person registration information • view patient list • check-in patients • undo check-out (Case Managers only) • view and modify chart patient flags • modify in referral management • undo check-in (Case Managers only)	• undo no show (Case Managers only) • edit the visit counter • view and modify general patient flags • view and modify financial patient flags • view and modify collections patient flags • view clinical alerts flags • view referral management • add or inactivate pharmacies from the pharmacy search • edit patient notes

Reporting	• access the report selection page • patient chart • patient appointment report	• appointment analysis report • appointment detail patient report • daily schedule report
Scheduling	• view the appointment scheduling page • modify appointment scheduling page	• modify schedule administration page • set appointments in the past
System	• access document import • manage chart documents • edit chart document types • manage image library • manage image categories • view administrative documents • access patient tracking • receive clinical messages	• manage administrative documents • view care provider and locations information • view communications • view system configuration • view and modify visit types • view and modify superbill types • view system settings

CAROLINA FAMILY HEALTH CENTERS, INC.

USER GROUP FOR PATIENT MANAGEMENT SYSTEM

Pharmacists: Pharmacists have access to the prescribing section of the patient chart.

Chief Pharmacy Officer	Pharmacist Managers	Director of Clinical Pharmacy Services
Pharmacists	Clinical Pharmacist Practitioner	

EHR Modules	Pharmacists	
A/R Management	• access the account information page	
Chart	• access the patients chart page • prescriptions-access ePrescribe • access chart admin pages	
Registration	• view patient or person registration information • modify patient or person registration information • view patient list	• check-in patients • undo check-out • view referral management
Reporting	• access the report selection page • account information report • patient appointment report	• patient information sheet • appointment detail patient report • daily schedule report
Scheduling	• cancel block time • override may not schedule • view the appointment scheduling page	• modify appointment scheduling page • override blocked time • set appointments in the past
System	• view care providers and locations information	

CAROLINA FAMILY HEALTH CENTERS, INC.

USER GROUP FOR PATIENT MANAGEMENT SYSTEM

Pharmacy: Pharmacy staff
Chief Pharmacy Officer   Pharmacists   Director of Clinical Pharmacy Services
Director of Medication Adherence Clinic   Pharmacist Manager   Quality Assurance Pharmacy Technician
Clinical Pharmacist Practitioner   Pharmacy Eligibility Associate   Pharmacy Technicians
Special Populations Eligibility Associate

EHR Modules	Pharmacy	
A/R Management	• access the account information page	
Chart	• access confidential section of chart • access orders requisition • access the patient charts page • allergy module-can modify serum sheet status	• documents-sign documents • facesheet-manage problem list custom views • prescriptions-print prescriptions • access chart admin pages
Registration	• view patient or person registration information • modify patient or person registration information • modify employers • view patient list • check-in patients • undo check-out	• view and modify chart patient flags • view and modify general patient flags • view clinical alerts flags • view referral management • add or inactivate pharmacies from the pharmacy search
Reporting	• access the report selection page • patient chart • allergy performance reports • ePrescribe medication frequency • ePrescribed medications	• pharmacy listings • account information report • patient appointment report • patient information sheet • appointment detail patient report
Scheduling	• cancel block time • override may not schedule • view the appointment scheduling page • modify the appointment scheduling page	• override blocked time • override appointment rules and overbooks • set appointments in the past
System	• view administrative documents • view care provider and locations information • view communications • modify communications • view eRx configuration	• access patient tracking • receive clinical messages • access pharmacy download • enable PrimePatient re-matching

Pharmacy Support: Staff that support the Pharmacy, prepare applications for the Medication Assistant Programs (MAP), and are responsible for scheduling appointments for MAP visits, will be assigned to the Pharmacy Support user group.

Pharmacy Technicians   Special Populations Eligibility Associates   Pharmacy Eligibility Associates

EHR Modules	Pharmacy Support Staff	
Chart	• access confidential section of chart • access orders requisition • access sensitive/restricted charts for emergency only occasions	• access the patient charts page • documents-sign documents • face sheet-manage problem list custom views
Registration	• view patient or person registration information • modify patient or person registration information • view patient list • check-in patients • view and modify chart patient flags • view and modify general patient flags	• view and modify financial patient flags • view clinical alerts flags • view referral management • modify in referral management • add or inactivate pharmacies from the pharmacy search
Reporting	• access the report selection page • patient appointment report • appointment analysis report	• appointment detail patient report • daily schedule report
Scheduling	• view the appointment scheduling page • modify appointment scheduling page	
System	• access document import • manage chart documents • delete chart documents or pages • edit chart document types • access patient tracking • receive clinical messages	• manage image library • manage image categories • view administrative documents • view care provider and locations information • view communications

Nurses and Medical Assistants: Registered Nurses, Licensed Practical Nurses and Medical Assistants involved in direct patient care will be assigned to the Nursing/Medical Assistant group. Due to the responsibilities of the nursing staff, this group will have access to the patient charts and some areas of chart administration.

Clinical Site Managers	Medical Assistants	Nurses

EHR Modules	Nurses and Medical Assistants	
Chart	• access confidential section of chart • access orders requisition • access restricted charts • access sensitive charts • access sensitive/restricted charts for emergency only occasions • access the patient charts page • allergy module-can modify serum sheet status • allergy module-override EP rules • documents-sign documents • face sheet-delete vitals • face sheet-manage problem list custom views • lab flowsheet-initial a lab or revoke initials • flowsheet-access admin pages • import/export clinical admin files • import/export clinical templates • create note on behalf of provider	• lab flowsheet-invoke lab flowsheet end of episode signing • orders-add to order favorite list • prescriptions-access ePrescribe • prescriptions-create prescriptions • prescriptions-create prescriptions on behalf of • prescriptions-print prescriptions • results-can delete • customize the clinical visit summary document • access renewal request for all prescribers • flowsheet/edit results-can edit display value of results • view procedure charge on superbill summary • access chart admin pages • access the clinical alerts page • access the immunization admin page • allergy module-manage allergy lot number
Registration	• add patients or persons to the system • view patient or person registration information • modify patient or person registration information • view patient list • check-in patients • add or inactivate pharmacies from the pharmacy search • edit patient notes	• view and modify chart patient flags • view and modify general patient flags • view clinical alerts flags • view referral management • modify in referral management • edit the visit counter

Reporting	- access the report selection page - document tracking report - obsolete drug list report - patient chart - superbill summary status report - allergy performance reports - ePrescribe medication frequency - ePrescribed medications	- pharmacy listings - top allergens per allergen type - overdue patients for allergy shots - allergy lot # recall - clinical patient listing report - expired vial - patient appointment report - daily schedule report - visit tracking report
Scheduling	view the appointment scheduling page	
System	- access document import - manage chart documents - delete chart documents or pages - edit chart document types - manage image library - manage image categories - view administrative documents - view care provider and locations information - modify care provider and locations information	- modify communications - access patient tracking - receive clinical messages - access pharmacy download - access shared medications favorites - enable send patient message or reply to patient - enable PrimePatient re-matching - enable access to all tasks created and saved by any user - view communications

Nursing Support Staff: Staff involved in interpreting services and minimal patient care activities, but may need access to a patient record for documenting a phone message, patient history, patient reminder module, reporting modules, etc.

Certified Nursing Assistants	Care Coordinators
Interpreters	Administrative Assistant – Clinical Services
Integrated Behavioral Health Care Coordinator	Administrative Assistant- Ryan White CQI

EHR Modules	Nursing Support Staff	
Chart	- access orders requisition - access the patient charts page - allergy module-can modify serum sheet status - allergy module-override EP rules - documents-sign documents - face sheet-manage problem list custom views - lab flowsheet-initial a lab or revoke initials	- lab flowsheet-invoke lab flowsheet end of episode signing - customize the clinical visit summary document - flowsheet/edit results-can edit display value of results. - access chart admin pages - import/export clinical admin files - import/export clinical templates - create note on behalf of provider (CNA)
Registration	- add patients or persons to the system - view patient or person registration information - modify patient or person registration information - view patient list - inactivate patients	- view and modify chart patient flags - view and modify general patient flags - view clinical alerts flags - view referral management - activate patients
Reporting	- access the report selection page - patient chart - patient appointment report	- appointment detail patient report - daily schedule report
Scheduling	view the appointment scheduling page	
System	- access document import - view care provider and locations information - modify care provider and locations information	- view communications - access patient tracking - receive clinical messages

Laboratory Technician: Laboratory Technician staff

Laboratory Technicians   Certified Nursing Assistants

EHR Modules	Lab Techs	
A/R Management	• access the account information page	
Chart	• access orders requisition • access the patient charts page • documents-sign documents • face sheet-manage problem list custom views • lab flowsheet-initial a lab or revoke initials • lab flowsheet-invoke lab flowsheet end of episode signing •	• orders-add to order favorite list • orders-edit/delete from orders favorite list • results-can delete • prenatal flowsheet-invoke prenatal flowsheet sign and close episode • view procedure charge on superbill summary
Registration	• view patient or person registration information • modify patient or person registration information • modify employers	• view patient list • view clinical alerts flags
Reporting	• access the report selection page • document tracking report • patient chart	• patient information sheet • daily schedule report
Scheduling	• view the appointment scheduling page	
System	• access document import • manage chart documents • delete chart documents or pages • edit chart document types	• view communications • access patient tracking • receive clinical messages • enable send patient message or reply to patient

Dental Assistant: Dental Assistant and Hygienist

Dental Assistants   Hygenists

EHR Modules	Dental Assistant/Hygienist	
A/R Management	- view AR and E-Charge ticket configurations - access the account information page - create an E-Charge ticket	- modify account notes - enter patient and insurance payments
Chart	- access confidential section of chart - access orders requisition - access restricted charts - access sensitive charts	- access the patient charts page - documents-sign documents - customize the clinical visit summary document
Registration	- add patients or persons to the system - view patient or person registration information - modify patient or person registration information - modify employers - view patient list - check-in patients - undo check-out	- view and modify chart patient flags - view and modify general patient flags - view and modify financial patient flags - view and modify collections patient flags - view clinical alerts flags - view referral management
Scheduling	- view the appointment scheduling page - modify appointment scheduling page	
System	- view communications - access patient tracking	- receive clinical messages - enable send patient message or reply to patient