





Roles

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Introduction

A **Role** is a pre-defined collection of permissions that account owners can create in order to easily assign the same set of permissions to various users. *Roles do not replace permissions*, but are a useful complement to assign more than one user with the same set of permissions **with just a few clicks**. Users can also have additional permissions outside the ones provided by a given role.

This training document presents the step-by-step process to create, edit, assign and delete roles.

Create a New Role

In this section you will learn how to add new roles.

In order to create a new role, go to the **Admin** module on the top navigation bar and select **Users** from the menu on the left. Click **Roles** from the dropdown menu

escribeHOST	Q Pt Name, DOB or MRN (?) (?)	Debug OFF $()$ daberdale (CCA) $()$
	Roles	
Users >	Users e	
Reports >	PHR Users Roles	
Providers		View Users 😁
Tasks ►	CALLER	View Users 🖀

Click the **Add Role** button to add a new role.

escribeHOS	Q Pt Name, DOB or MRN (? (8)	📽 🖻 🏝 📩 🐻	Debug OFF () deberdale (CCA)	⊖
	Roles			
Users 🕨	Add Role			
Reports ►	Role			
Providers >	ALL_PMS		View Users	
Tasks 🕨	CALLER		View Users 👘	
	DERLIG E		View Deave	

A popup will display. Write the **Role Name** in the field provided.

<u>NOTE</u>: All roles must have a name. The role name cannot exceed 7 characters, and can include only uppercase letters A-Z, digits 0-9, and underscores.

Tasks 🕨						
MQ Admin ►	DEBUG_E	Add Role		×		
Scheduling >						
Orders Config 🛛 🕨		Role Name *	DOCTOR	_		
Cardiac Devices 🔺						
Admin Tools 🔹 🕨						
Account Config 🔹 🕨						
		* Required		Close Save		

Edit a Role

In this section you will learn how to edit role names and permissions.

Click the role name to edit the permissions.

Tasks	CALLER	View Users	8
MQ Admin	▶ DEBUG_E	View Users	Ť
Scheduling		View Users	Ť
Orders Config			
Cardiac Device	5		

A pop-up displays that allows you to add or remove permissions to that role. Click and select the checkbox next to the permissions of your choice.

<u>NOTE</u>: You cannot remove a permission for which there are nested permissions or add a nested permission without its parent permission.

Isor	Edit Role		×
tepi	Role Name * DOCTOR 🗹		
rov	Permissions		
40.	TASKS View tasks View tasks Greate new tasks Own and require feedback on tasks Owning and requiring feedback on tasks prevents others on the task from resolv- ing it. Manage tasks recipients Show All Tasks Manage Task Limit Selector	MEDICATIONS View Medications Manage Medications Create. edit, and delete meds and therapies. Manage Rxs Create. edit, and delete rns. Authorize Rxs Issue and print new rns. Send eRxs Send erxs to pharmacies. Approve and deny electronic refill requests.	 Debug Emergency Access View Documents in an emergency. View Medications in an emergency. View Problems in an emergency. View Med Concerns in an emergency. View Lab Results in an emergency.
	PATIENT MANAGEMENT Patient Charts View Patient Info Create charts and edit Patient Info Delete patient charts Retrieve patient eligibility information on demand View Problems Manage Problems View Vitals Manage Vitals View Witals View Misc Devices	Manage Rx Favorites Create and delete rx favorites. PROVIDER MANAGEMENT Create and edit providers Modify provider's erx privileges RESLARCH STUDY MANAGEMENT Create new research studies View research studies Manage research studies Modify each study's description, sites, and patient enrollment.	 View Admin Module Manage task user groups Manage tasks sub areas Receive Admin Tasks View Audit Log • Manage user permissions Manage losurance Plans Manage Location Settings Manage Problem Mapping Manage Procedure Mapping

The changes apply automatically when clicking on checkboxes. Users need to log out and log back in for changes to be reflected to their user permissions.

Edit Role		
Role Name * DOCTOR 🗹		
Permissions		
TASKS View tasks Manage tasks Create new tasks Own and require feedback on tasks Owning and requiring feedback on tasks prevents others on the task from resolv- ing it. Manage tasks recipients Show ALI Tasks	MEDICATIONS View Medications Manage Medications Create, edit, and delete mds and therapies. Manage Rus Create, edit, and delete rxs. Authorize Rus Issue and print new rxs. Send eRus	 Debug Emergency Access View Documents in an emergency. View Medications in an emergency. View Problems in an emergency. View Med Concerns in an emergency. View Lab Results in an emergency.
Manage Task Limit Selector PATIENT MANAGEMENT PATIENT Charts View Patient Info Create charts and edit Patient Info Delete patient charts	Send erxs to pharmacies. Approve and deny electronic refill requests.	🔲 View Admin Module
	Create and delete rx favorites. PROVIDER MANAGEMENT Create and edit providers Modify provider's erx privileges	 Manage task user groups Manage tasks sub areas Receive Admin Tasks View Audit Log ●
Retrieve patient eligibility information on demand View Problems Manage Problems View Vitals Manage Vitals View Misc Devices	RESEARCH STUDY MANAGEMENT Create new research studies View research studies Manage research studies Modify each study's description, sites, and patient enrollment.	Manage user permissions Manage Insurance Plans Manage Location Settings Manage Problem Mapping Manage Procedure Mapping

You can edit the name of the role in this step, as long as you meet all the requirements mentioned above.

Edit Role		
Role Name * DOCTOR Close Save		
Permissions		
TASKS View tasks Manage tasks Create new tasks	MEDICATIONS View Medications Manage Medications Create, edit, and delete meds and therapies.	 Debug Emergency Access View Documents in an emergency. View Medications in an emergency.

Assign Roles to Users

In this section you learn how to assign existing roles to users.

In the Admin module, go to **Users** and select **Users** from the dropdown menu.

PescribeHOST	Q Pt Name, DOB or MRN	08 1	21 22 24 45		Debug OFF (!) daberdale (CCA) [→
	Users				
Users 🕨	ser				Edit User Add User
Reports >	PHR Users - Roles				
Providers N			Plea	se select a user to edit	

Use the **Find User...** search function to find the user you want to assign to a role.

PescribeHOS d1b10es	Q Pt Name, DOB or MRN	08 🗈 🏙 📝	À 🕇 불 🛜 🔁	Debug OFF () daberdale (CCA)
	Users			
Users 🕨	Q Find User			Edit User Add User
Reports ►		_		
Providers			Please select a user to edit	
Tasks 🕨				
MQ Admin 🕨				

Click the **User** name to select it.

PescribeHOST d1b10ea	Q Pt Name, DOB or MRN ?	2 & 6		Debug OFF (1) daberdale (CCA) [→
	Users			
Users 🕨	Q adk			Edit User Add User
Reports >	Adkins, Joy (jadkinscca)			
Providers >		Pleas	e select a user to edit	
Tasks 🕨				
MQ Admin ►				

Select a **Role** from the dropdown menu.

	Users		
Users 🕨	Q Find User		Edit User Add User
Reports ►	1 Adhina (induineana)		
Providers •	Joy Adkins (jadkinscca) cindy.putorti@lillegroup.com		Set Provider Link 📄 Reset Password 📝 Allow user login
Tasks 🕨	Test Note		
MQ Admin 🕨			
Scheduling +			4
Orders Config 🕨	Role Select one 🗢 Add		
Cardiac Devices 🕨	Perm ALL_PMS CALLER		
Admin Tools 🔹 🕨	TASKS DEBUG_E		
Account Config 🕨			
	<u>Honoge costs</u> Create new tasks	 Manage medications Create, edit, and delete meds and therapies. 	View Documents in an emergency.
	Own and require feedback on tasks	Manage Rxs	 View Medications in an emergency.
	Owning and require recoback on tasks prevents others on the task from re-	Create, edit, and delete rxs.	View Problems in an emergency.

Click the **Add** button to assign that role to the user.

	Users		
Users 🕨	Q Find User		Edit User Add User
Reports ►	• • • • • • • • • •		
Providers ►	Joy Adkins (jadkinscca) cindy.putorti@lillegroup.com	s	et Provider Link] 👔 Reset Password 🛛 🗹 Allow user login
Tasks 🕨	Test Note		
MQ Admin 🕨			
Scheduling 🕨			4
Orders Config 🕨	Role DOCTOR × Add		
Cardiac Devices 🕨	Permissions		
Admin Tools 🔹 🕨	TASKS	MEDICATIONS	
Account Config 🕨	View tasks	Uiew Medications	Debug Emergency Access
	Manage tasks	Manage Medications	 View Documents in an emergency.
	Create new tasks	Create, edit, and delete meds and therapies.	and Bandy.

The permissions assigned to that role are now assigned to that user. A label with the role name displays next to the permission.

Scheduling >	Role Selectione		<i>h</i>
Orders Config 🕨			
Cardiac Devices 🕨	DOCTOR O		
Admin Tools 🛛 🕨	Permissions		
Account Config 🕨	TASKS	MEDICATIONS	📮 Debug
	View tasks DOCTOR	View Medications DOCTOR	
	Manage tasks DOCTOR	Manage Medications DOCTOR	Emergency Access
	Create new tasks DOCTOR	Create, edit, and delete meds and therapies.	 View Documents in an emergency.
	Own and require feedback on tasks	Manage Rxs DOCTOR	 View Medications in an emergency.
	Owning and requiring feedback on tasks prevents others on the task from re-	Create, edit, and delete rxs.	 View Problems in an emergency.
	solving it.	Authorize Rxs DOCTOR	
	Manage tasks recipients	Issue and print new rxs.	 View Med Concerns in an emergency.
	Show All Tasks	Send eRxs	View Lab Results in an emergency.

It is possible to assign two or more roles to the same user. All the roles assigned to a user display on a ribbon below the **Role** dropdown.

Scheduling > Orders Config > Cardiac Devices > Admin Tools >	Role Select one 2 Add DOCTOR • RX • Permissions		*
Account Config >	TASKS View tasks DOCTOR, Manage tasks DOCTOR, Create new tasks DOCTOR Owning and requiring feedback on tasks Owning and requiring feedback on tasks prevents others on the task from re- solving it. Manage tasks recipients Show All Tasks Manage Task Limit Selector PATIENT MANAGEMENT Patient Charts DOCTOR View Patient Info	MEDICATIONS View Medications DOCTOR, Manage Medications DOCTOR, Create, edit, and delete meds and therapies. Manage Rxs DOCTOR, Create, edit, and delete rxs. Authorize Rxs DOCTOR, Issue and print new rxs. Send ensis to pharmacles. Approve and deny electronic refill requests. Manage Rx Favorites RX Create and delete rx favorites.	 Debug Emergency Access View Documents in an emergency. View Medications in an emergency. View Problems in an emergency. View Med Concerns in an emergency. View Lab Results in an emergency. View Lab Results un an emergency. View Admin Module Manage task user groups

Unassign Roles

In this section you will learn how to remove a role and its attached permissions from a user account.

In order to unassign a role, go to the user and click the **X** next to the role.

Scheduling Orders Config	Role Select one Add		h
Cardiac Devices 🕨	DOCTOR		
Admin Tools 🔹 🕨	Permissions		
Account Config 🕨	TASKS View tasks DOCTOR Manage tasks DOCTOR Create new tasks DOCTOR Own and require feedback on tasks Owning and requiring feedback on tasks prevents others on the task from resolving it.	MEDICATIONS View Medications DOCTOR Manage Medications DOCTOR Create, edit, and delete meds and therapies. Manage Rxs DOCTOR Create, edit, and delete rxs. Authorize Rxs DOCTOR	 Debug Emergency Access View Documents in an emergency. View Medications in an emergency. View Problems in an emergency.

A pop up will display with the list of permissions you will remove.

<u>NOTE</u>: If the user has more than one role and those roles share permissions, the shared permissions will not be removed.

Click the **Remove** button to accept the change. It will be effective immediately but the user might need to log in and out to see it reflected on their account.

	Remove Role	×
	Removing RX role from JADKINSCCA.	
	The following permissions will be removed: PROVIDERS_SURESCRIPTS_	
DOCTOR . RX .	MANAGE, MEDS_SEND_ERXS, MEDS_MANAGE_RXFAVS, PROVIDERS_MANAGE	
Provident and	The following permissions are part of other roles and will NOT be re-	
Permissions	moved: MEDS_AUTH_RXS, MEDS_MANAGE_RXS, MEDS_MANAGE, TASKS MANAGE, TASKS_VIEW, MEDS_VIEW	<u> </u>
Wiew tasks DOCTOR,		
Manage tasks DOCTOR,		_
Greate new tasks DOCTOR	Cancel Remo	ove

Delete a Role

In this section you learn how to delete roles.

Before deleting a role, make sure it is not assigned to any users. Go to the **Roles** section in the **Users** dropdown and click the **View Users** link next to a Role.

MQ Admin 🕨	DEBUG_E			-
		View Users	×	Ŧ
	RX	JADKINSCCA		\$ (
Orders Config 🔹 🕨				
Cardiac Devices 🕨				
Admin Tools 🛛 🕨				
Account Config 🛛 🕨				
			l	
		Clo	se	

	Roles		
Users 🕨	Add Role		
Reports ►	Role		
Providers 🕨	ALL_PMS Y	ew Users	÷
Tasks 🕨	CALLER	ew Users	Ť
MQ Admin 🕨	DEBUG_E	ew Users	÷
Scheduling ►	DOCTOR	ew Users	8
	RX M	ew Users	Ŧ

You cannot delete a role that is currently assigned to users.

Cardiac Devices >		
Admin Tools		Alert ×
Account Config >	Admin Tools 🛛 🕨	Cannot delete this role. It is assigned to 1 users.
		Dismiss

Once the role is not assigned to any users, click the **Bin** icon next to the role to delete it.

		Roles		
Users	►	Add Role		
Reports	Þ	Role		
Providers	۲	ALL_PMS	View Users	Ŧ
Tasks	۲	CALLER	View Users	8
MQ Admin	Þ	DEBUG_E	View Users	Ť
Scheduling	•	DOCTOR	View Users	Ť

A pop-up will display. Click the **Delete** button to complete the process

Scheduling 🕨 🕨				
	RX	Delete	×	3 .
Orders Config ►				
Cardiac Devices ►		Are you sure you want to delete this role?		
Admin Tools 🔹 🕨				
Account Config 🛛 🕨				
		Cancel Dele		