





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

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Providers >			View Users 😁
Tasks 🕨	CALLER		View Users 🖀

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

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	Roles						
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	DERLIG E					Manulleon	-

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.

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		* 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.

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Cardiac Devices 🕨			

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.

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tepi	Role Name * DOCTOR 🗹		
Prov	Permissions		
iask AQ iche Drde Larc	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 rxs. Authorize Rxs Issue and print new rxs. Send eRxs Send erxs to pharmacies. Approve and deny electronic refull 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 RESLARCK 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 insurance 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.

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Acco	PATIENT MANAGEMENT PATIENT MANAGEMENT Patient Charts Use Watient Info Create charts and edit Patient Info Delete patient charts	requests. Manage R& Favorites Create and delite nx favorites. PROVIDER MANAGEMENT Create and edit providers Modify provider's enx privileges	 View Admin Module 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		×
Rep Role Name * DOCTOR Close Save		
Prov Permissions		
TASKS View tasks View tasks View tasks View tasks View tasks Own and require feedback on tasks	MEDICATIONS View Medications Manage Medications Create, edit, and delete meds and therapies. Manage Rxs	 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.

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	Users		
Users >	Users ser		Edit User Add User
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Droviders b		Please select a user to edit	

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

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	Users		
Users 🕨	Q Find User		Edit User Add User
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Click the **User** name to select it.

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

	Users		
Users 🕨	Q Find User		Edit User Add User
Reports ►	1 Adhina (induineana)		
Providers ►	cindy.putorti@lillegroup.com		Set Provider Link 📄 Reset Password 📝 Allow user login
Tasks 🕨	Test Note		
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Scheduling •			4
Orders Config 🕨	Role Select one 💠 Add		
Cardiac Devices 🕨	Perm ALL_PMS CALLER		
Admin Tools 🔹 🕨	TASKS DEBUG_E		
Account Config 🕨			
	Create new tacks	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 requiring feedback 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
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Scheduling ►			4
Orders Config 🕨	Role DOCTOR × Add		
Cardiac Devices 🕨	Permissions		
Admin Tools 🕨 🕨	TASKS	MEDICATIONS	
Account Config 🕨	View tasks	Uiew Medications	Emergency Access
	Manage tasks	Manage Medications	View Documents in an emergency.
	Create new tasks	create, edit, and delete meds and therapies.	J

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

Scheduling >			1
Orders Config 🕨			
Cardiac Devices 🕨	DOCTOR O		
Admin Tools 🕨 🕨	Permissions		
Account Config 🕨	View tasks DOCTOR	MEDICATIONS	Debug
	Manage tasks DOCTOR Create new tasks DOCTOR Own and require feedback on tasks	Manage Medications DOCTOR Create, edit, and delete meds and therapies. Manage Rxs DOCTOR	 View Documents in an emergency. View Medications in an emergency.
	Owning and requiring feedback on tasks prevents others on the task from re- solving it. Manage tasks recipients Show All Tasks	Create, edit, and delete rxs.	 View Problems in an emergency. View Med Concerns in an emergency. 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 🕨	TXSKS View tasks DOCTOR Manage tasks DOCTOR Create new 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. Data tasks recipients Data tasks Doctor Show All Tasks DATENT MANAGEMENT PATIENT MANAGEMENT View Patient Lofts DOCTOR Using Wainap Lafts	MEDICATIONS Weiew Medications DOCTOR, Manage Medications DOCTOR, Create, edit, and delete meds and therapies. Manage Rxs DOCTOR, Create, edit, and delete rxs. Manage Rxs DOCTOR, Issue and print new rxs. Manage Rxs FOOTOR, Send erxs to pharmacies. 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 in 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.	View Medications DOCTOR View 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 JADKINSCO	CA.
	The following permissions will be	removed: PROVIDERS_SURESCRIPTS
DOCTOR . RX .	PROVIDERS_MANAGE	S_MANAGE_RXFAVS,
Permissions	The following permissions are par moved: MEDS_AUTH_RXS, MEDS_M	t of other roles and will NOT be re- MANAGE_RXS, MEDS_MANAGE, TASKS_
	MANAGE, TASKS_VIEW, MEDS_VIEV	N
🖌 View tasks DOCTOR,		
	·	
		Cancel

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.

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	RX	JADKINSCCA		
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	Roles		
Users 🕨	Add Role		
Reports 🕨	Role		
Providers >	ALL_PMS	View Users	÷
Tasks 🕨	CALLER	View Users	÷
MQ Admin 🕨	DEBUG_E	View Users	÷
Scheduling •	DOCTOR	View Users	Ŧ
Orders Config 🕨	RX	View Users	Ť

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

Cardiac Devices Admin Tools Account Config Dismiss		
Admin Tools Cannot delete this role. It is assigned to 1 users.		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 >	Role		
Providers	ALL_PMS	View Users	Ť
Tasks 🕨	CALLER	View Users	8
MQ Admin 🕨	DEBUG_E	View Users	Ť
Scheduling ►	DOCTOR	View Users	Ť

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

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Orders Config 🕨				
Cardiac Devices ►		Are you sure you want to delete this role?		
Admin Tools 🔹 🕨				
Account Config 🛛 🕨				
		Cancel Dele		