

### 3. USER SETUP

The screenshot shows a software window titled "Edit New User". It is divided into three main sections. The top section, "User Data", contains input fields for "Last Name", "First Name", "MI", "Login ID", and "Password". The middle section, "User Rights", contains a grid of checkboxes for various permissions: "Super User", "Access to Security", "Claims", "Edit Data", "Delete Data", "Schedule", "Edit Data", "Delete Data", "Patient Data", "Pay & Adj", "Edit Data", "Delete Data", "Setup", "Run Reports", and a "Customize" button. The bottom section, "Available Providers", has radio buttons for "All Providers" (which is selected) and "Selected Providers", followed by a table with columns "Select", "Code", "Last Name", and "First Name". At the bottom right of the window are "Save" and "Cancel" buttons.

HIPAA mandates that each user accessing Patient data have a unique user name and a password assigned to them. In order to remain HIPAA compliant, you must delete the default user name and password and select both a user name and password that is unique to each individual that will have access to the program and its data.

The first user to be entered will be for the **Program Administrator** (in a small office, this may very well be yourself). The Program Administrator (known as the **“Super User”**) will have all the necessary rights to create and delete users as well as to grant certain privileges to certain users individually. They can also assist users in getting resetting user names and passwords when forgotten by the user.

**Note: More than one user can be set up as a “Super User”. Additionally, if the Program Administrator is unable to access the program, please call our support desk to restore access.**

- 1) From the Top Navigational Menu, select **“Security”**, then **“Users”**.
- 2) Left click to on the word **“Demo”** (originally set as the default master account) to highlight it, and then click on the **“Edit”** button to open the new window **“Edit User Info and Rights”**.
- 3) Enter the user’s **Last Name**, **First Name**, and **Middle Name** in the fields provided.

- 4) Have the user select a **User** name and **Password** that only they will know and have them enter it in the fields provided. Most users tend to select the same User name and Password that they currently use for other computer applications such as a personal email account in order to make it easy to remember. The User name and Password fields **are not** case sensitive.
- 5) Select each of the settings that will apply to the user from the available boxes. For Program Administrators, click both “**Super User**” and “**Access Security**”. For all other users, select the box next to each access option applicable to them.

**Access to Security:** Ability to Add Data, **Delete Data**, or **Edit Data** on all records, **Run Reports**, and can add, delete, or lock another person out of the software entirely. This option is only modifiable by users who have been given “**Super User**” status.

- 6) **Available Providers:** For each user, choose the name of the provider that the user will be allowed access to the provider’s data and their Patient’s data. **Program Administrators** should be given access to “**All Providers**”.
- 7) Click “**Save**” when done.