

Assign User Roles

Oaktree (v 3.1)

PURPOSE:

User Roles Setup allows specific Roles to be setup and defined. Once a role is setup it can be assigned to a user in the Manage Users.

NOTE: If a user has Super Admin (User Level) they will not recognize any Roles assigned. This is for only users that have a User Level that is not Super Admin.

SETUP - Roles Setup Steps:

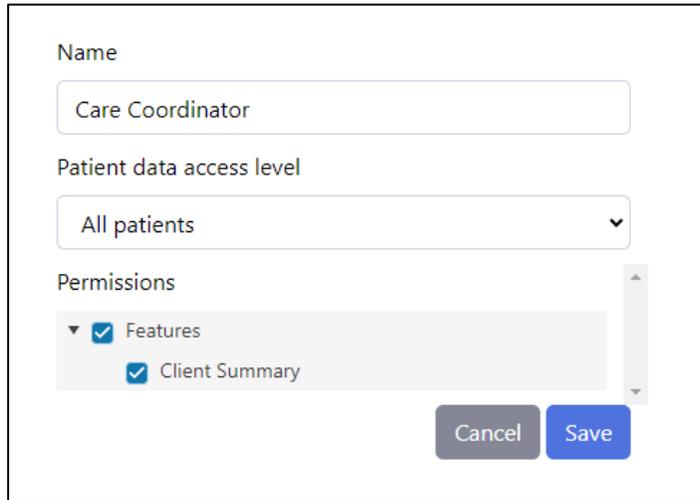
1. Create a name/label for the role.
2. Assign Client Access to the role.
 - a) Own patients: the user will only be able to view clients that they are assigned as a Case Management team member.
 - b) All patients: the user will be able to view all clients in the system.
3. Select what Features this role has permissions to access
 - a) At this time the only feature to grant or restrict access to is the "Client Summary" (Client Summary allows a user to view all records/documents/forms entered for a client.)

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USE CASES FOR ROLE SETUPS:

Scenario #1

Role Name: Care Coordinator
Assign Patient data access level to “All patients”
Assign Permissions > Features to include Client Summary



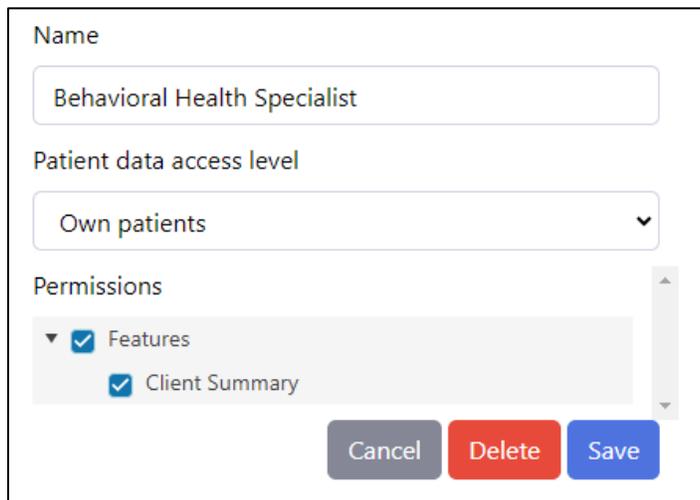
The screenshot shows a role setup form with the following fields and options:

- Name:** Care Coordinator
- Patient data access level:** All patients
- Permissions:** Features (checked), Client Summary (checked)
- Buttons:** Cancel, Save

Example for Role Setup – Scenario #1

Scenario #2

Role Name: Behavioral Health Specialist
Assign Patient data access level to “Own patients”
Assign Permissions > Features to include Client Summary



The screenshot shows a role setup form with the following fields and options:

- Name:** Behavioral Health Specialist
- Patient data access level:** Own patients
- Permissions:** Features (checked), Client Summary (checked)
- Buttons:** Cancel, Delete, Save

Example for Role Setup – Scenario #2

NOTE: Each of the above scenarios can be interchanged to include or not include the Client Summary. The Role Name can be a specific or generically named as desired.

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SETUP *Continued* - Manage User Steps:

In the Manage Users assign a Role to a user.

Users with a Super Admin User Level, DO NOT need to have roles assigned.

Scenario #1

User: Aunt Em is a Care Coordinator

The User Level assigned = Supervisor All Records

The User Role selected = Care Coordinator

This means that when Aunt Em logs in as a user, they will be able to see All Patients and have access to the Client Summary.

Manage Users

First Name	Supervisor
<input type="text" value="Aunt"/>	<input type="text" value="N/A"/>
Middle Name	Email
<input type="text"/>	<input type="text" value="woz@kansas.com"/>
Last Name	Password
<input type="text" value="Em"/>	<input type="password" value="*****"/>
Job Title	Confirm Password
<input type="text" value="Care Coordinator"/> <input type="button" value="Add"/> <input type="button" value="Edit"/>	<input type="password" value="*****"/>
Employee #	User Status
<input type="text"/>	<input checked="" type="radio"/> Active <input type="radio"/> Disabled
Agency ID	User Level
<input type="text" value="Default"/>	<input type="text" value="Supervisor All Records"/>
User Roles	
<input type="checkbox"/> Behavioral Health Specialist <input checked="" type="checkbox"/> Care Coordinator	
Credential Hours Require Approval	Access to All User Calendars
<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No

Example for Manage Users – Scenario #1

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Scenario #2

User: Uncle Henry is a Behavioral Health Specialist
The User Level assigned = Supervisor All Records
The User Role selected = Behavioral Health Specialist

This means that when Uncle Henry logs in as a user, they will only be able to see their own patients and have access to the Client Summary.

Manage Users

First Name	Supervisor
Uncle	N/A
Middle Name	Email
	unclehenry@woz.com
Last Name	Password
Henry	*****
Job Title	Confirm Password
Behavioral Health Specialist Add Edit	*****
Employee #	User Status
	<input checked="" type="radio"/> Active <input type="radio"/> Disabled
Agency ID	User Level
Default	Supervisor All Records
User Roles	
<input checked="" type="checkbox"/> Behavioral Health Specialist <input type="checkbox"/> Care Coordinator	
Credential Hours Require Approval	Access to All User Calendars
<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No

Example for Manage Users – Scenario #2

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User Role Matrix

Role Name	Patient data access level	Feature Permissions	Outcome
A	Own patients	Client Summary = Yes	User will only see the clients that they are part of the Case Management Team. User will be able to access the Client Summary area.
B	Own patients	Client Summary = No	User will only see the clients that they are part of the Case Management Team. User will not be able to access the Client Summary area.
C	All patients	Client Summary = Yes	User will be able to see all clients in the system. User will be able to access the Client Summary area.
D	All patients	Client Summary = No	User will be able to see all clients in the system. User will not be able to access the Client Summary area.