

Creating a User with Access to Select List of Clients

Problem: How do I set up a user to see reports for a selected list of clients?

Conditions: Access level must be Super Admin to complete this task

Steps for Solution:

A. Created the Auditor user in User Administration with the following settings:

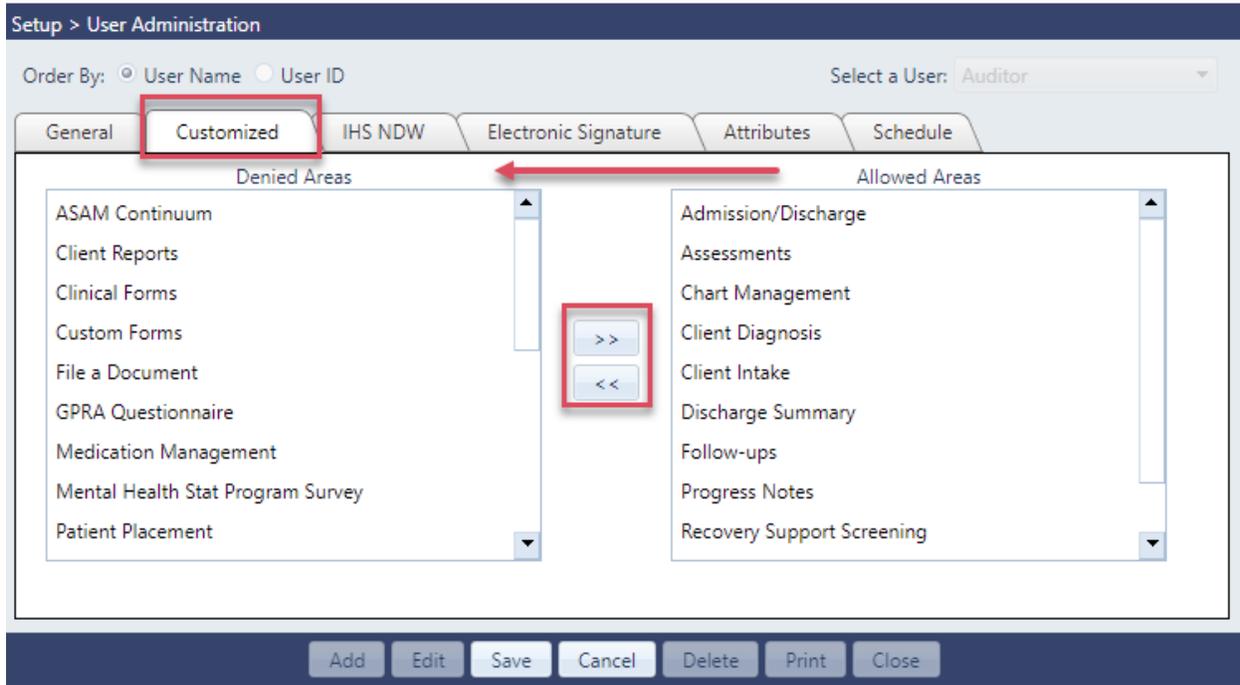
1. Create a user called Auditor or whatever is applicable
2. Connect the Auditor user to the main Agency ID used by everyone
3. Selected User Type - Standard
4. Clinical Program Access - Clinician
5. Billing Program Access - None
6. Default Patient Access – Own patients only

The screenshot displays the 'User Administration' interface. At the top, there is a breadcrumb 'Setup > User Administration' and a 'Select a User:' dropdown menu set to 'Auditor'. Below this are tabs for 'General', 'Customized', 'IHS NDW', 'Electronic Signature', 'Attributes', and 'Schedule'. The 'General' tab is active, showing a form with the following fields and values:

- User ID: **1** AUDITOR
- Agency: **2** NICASA
- Password: [Redacted]
- Supervisor User ID: [Redacted]
- Confirm Password: [Redacted]
- Supervisor's Name: [Redacted]
- Change Password at Next Login:
- Supervisor's Title: [Redacted]
- Disabled:
- Documents that Require Review: [Redacted]
- Email: [Redacted]
- User Type: **3** Standard SuperAdmin
- Full Name: Auditor
- Clinical Program Access: **4** Clinician
- Title: Auditor
- Billing Program Access: **5** None
- Initials: AAA
- Default Patient Access: **6** Own patients only

At the bottom of the form, there are buttons for 'Add', 'Edit', 'Save', 'Cancel', 'Delete', 'Print', and 'Close'.

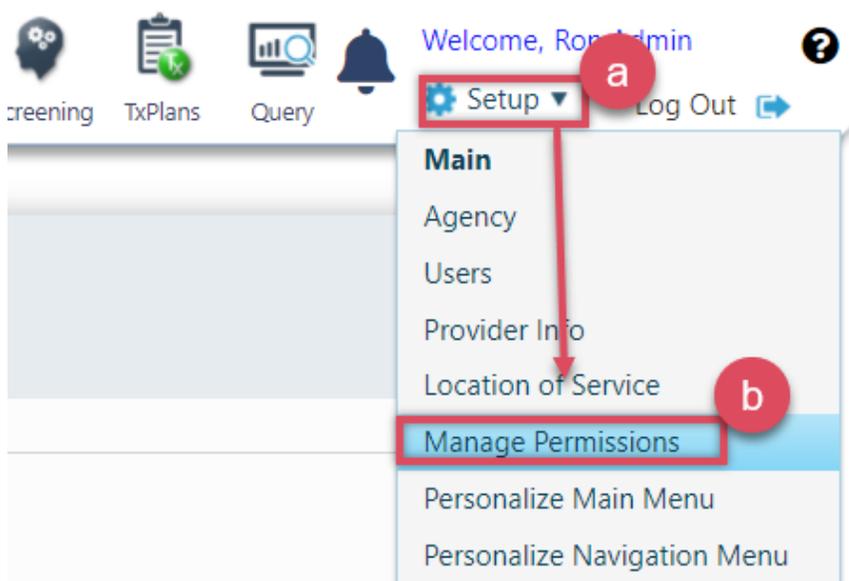
B. (Optional) if you wish to limit the areas this user would be able to see once they log in click the **Customize Tab** to Deny those reports



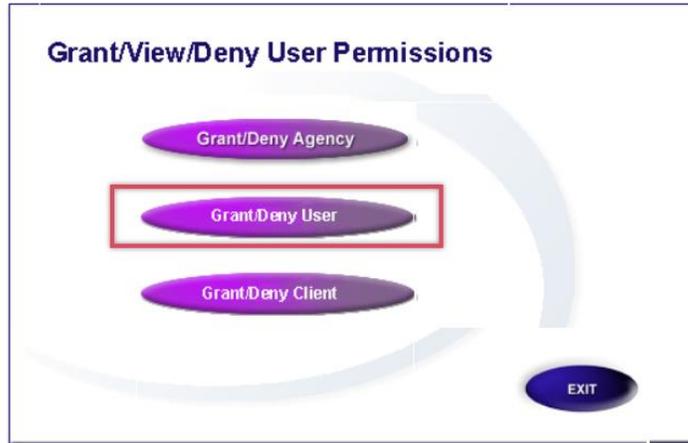
C. Go to Manage Permissions

a) Go to Setup on Ribbon

b) Click on Managed Permission



D) Select Grant/Deny User – (Verification Step)



- 1) Select Auditor
- 2) Select the main Agency
- 3) Ensure all users show in Available Users as seen below
- 4) Exit when done

Setup > Manage Permissions > Grant / Deny Users

Grant / Deny Users

1. Please select a User

1

Active Users
Auditor
Sam Trainer
Disabled Users
Janet Willis

Selected User Information				
UserID	Assigned AgencyID	Clinical Access	Billing Access	Default Patient Access
AUDITOR	NICASA	Clinician	None	Own patients only

2. Please select an Agency

2

DEFAULT
HTT
NICASA

3. Please select Users to Add or Remove

3

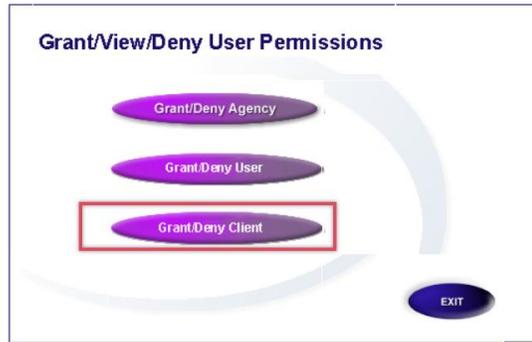
Available Users
Agathe Gabriel, MSW, LSW, C
Alice Smith
Beverly Remm
CARRIE CHESTERS
CHANTEL BROWN
CHRISTINE LUCHECK, MA, C

Granted Users

4

Add User Add All Remove User Remove All Exit

E. Select Grant/Deny Client – (This is where you set access to specific clients)



F. Select the following to Grant access

1. Active User - Auditor
2. Select the Agency - Main Agency used by all users
3. Select a Super Admin under this agency
4. Highlight a client on the left side (Available Clients) then click the [Add Client] button to add them to the right side (Grant Clients) repeat to add more clients
5. When done selecting the clients click the [Exit]button

Grant/Deny Clients

1. Please select a User

Active Users
Auditor
Sam Trainer
Disabled Users
Janet Willis

Selected User Information				
UserID	Assigned AgencyID	Clinical Access	Billing Access	Default Patient Access
AUDITOR	NICASA	Clinician	None	Own patients only

2. Please select an Agency

DEFAULT
HTT
NICASA

3. Please select a User Name

Some George Admin
Michael Moore, MHP, LPC
Paul Le
Rob Allan, CCIII
Ron S Admin
Roy Able, BS, CADC
Sam Trainer

4. Please select clients to grant or deny

Select each client you wish to give access to the Auditor moving them from the left to the right

Available Clients for Selected User		Granted Clients for Selected User	
Name	Client Reference #	Name	Client Reference #
Able, Jane JA19891111		Able, Alan AA19872993	
Able, Regina RA19783343		Avid, Roger	
Abley, Anna AA19659222		Doe, John JHD19980300	
Adams, Jessie JA19850033		Westly, Tom TW19805454	
Align, Jacob			
Jones, Jack JJ19872224			

Add Client Add All Remove Client Remove All

5 Exit

G. To Verify - Login as Auditor

1. Go to Client intake

2. Click the [Display All] button

3. You should only see those clients selected in Grant/Deny Clients for the Auditor to see

The screenshot shows the 'Client Intake' interface. On the left, there are search filters: 'Search by:' with radio buttons for 'Last Name' (selected) and 'Date Of Birth', a text input for 'Begins with or matches:', and fields for 'Client Name:', 'Level of Care:', and 'Location:'. A red circle '1' is next to the 'Last Name' radio button. In the center, there are two buttons: 'Search' and 'Display All'. A red circle '2' is next to the 'Display All' button. To the right of the 'Display All' button is a dropdown menu with a red circle '3' next to it. The dropdown menu is open, showing a list of names: 'Able, Alan A.', 'Avid, Roger', 'Doe, John H.', and 'Westly, Tom'. On the far right, there is a table with two columns: 'Client Ref #' and 'Billing Ref #'. The table contains three rows of data.

Client Ref #	Billing Ref #
AA19872993	BIL-01ABLALAM
JHD19980300	
TW19805454	

For additional questions, contact AccuCare Support at 800-324-7966 or email support@orionhealthcare.com and we will be happy to assist you!