Creating a User with Access to Select List of Clients

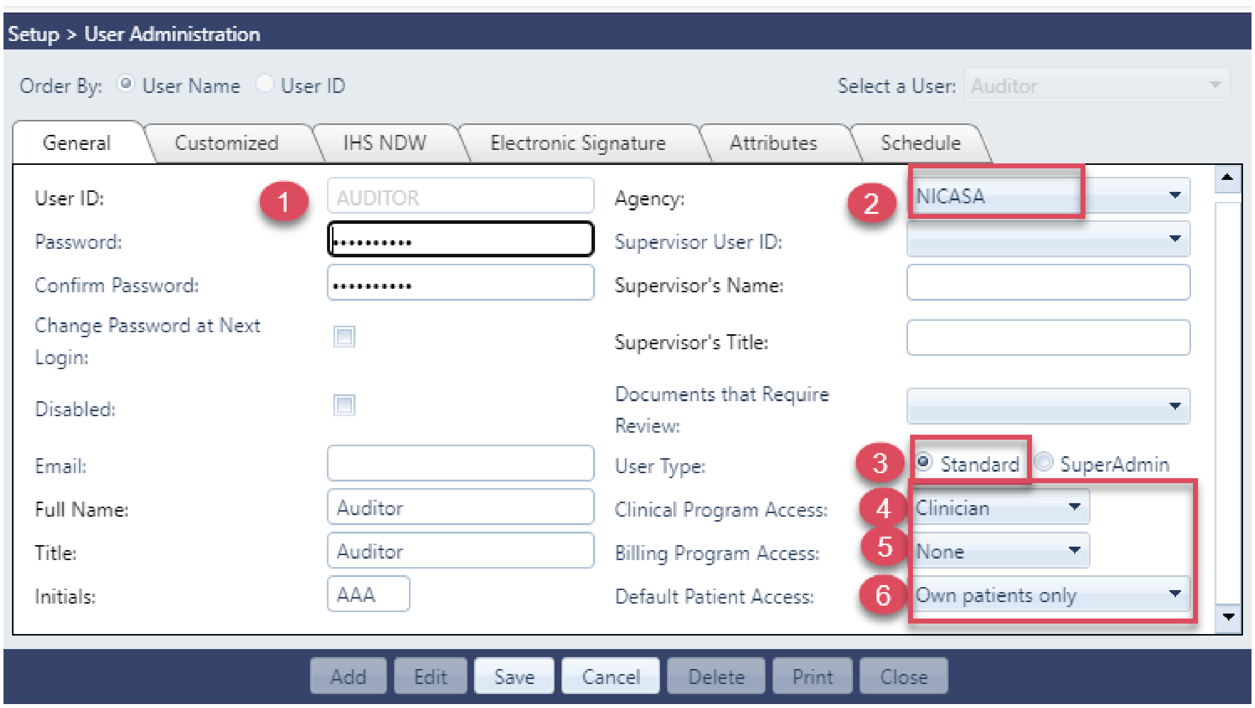
Problem: **How do I set up a user to see reports for a selected list of clients?**

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

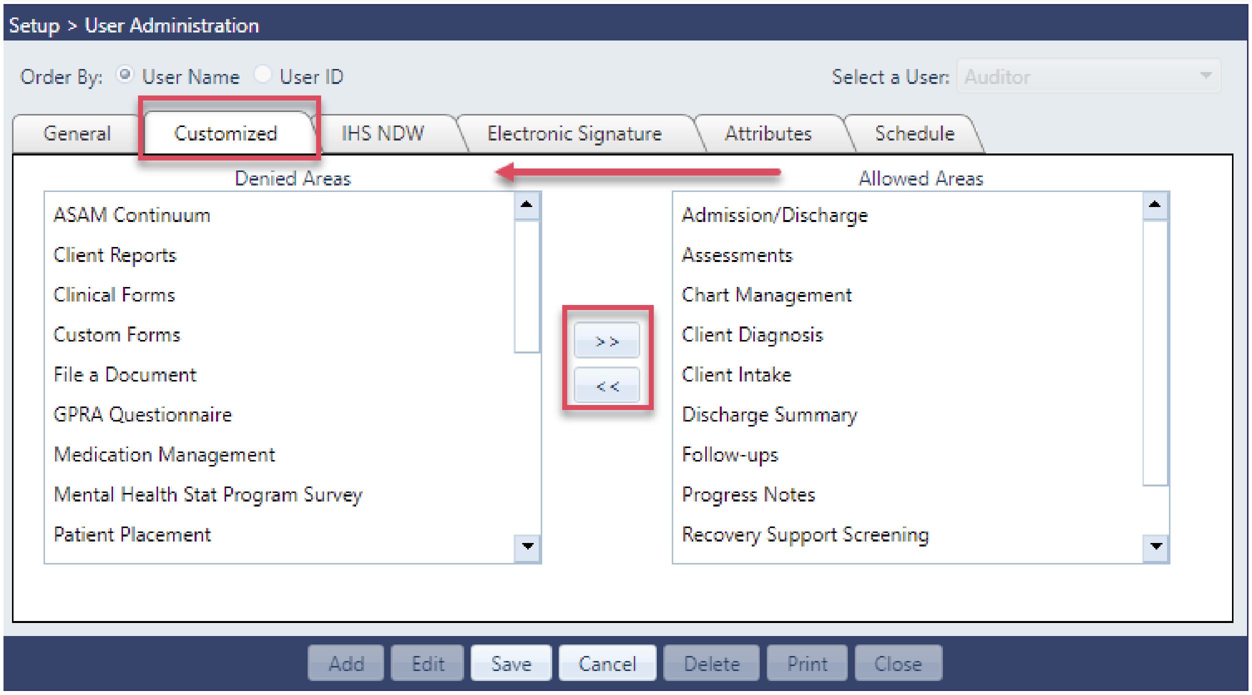
Steps for Solution:

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**

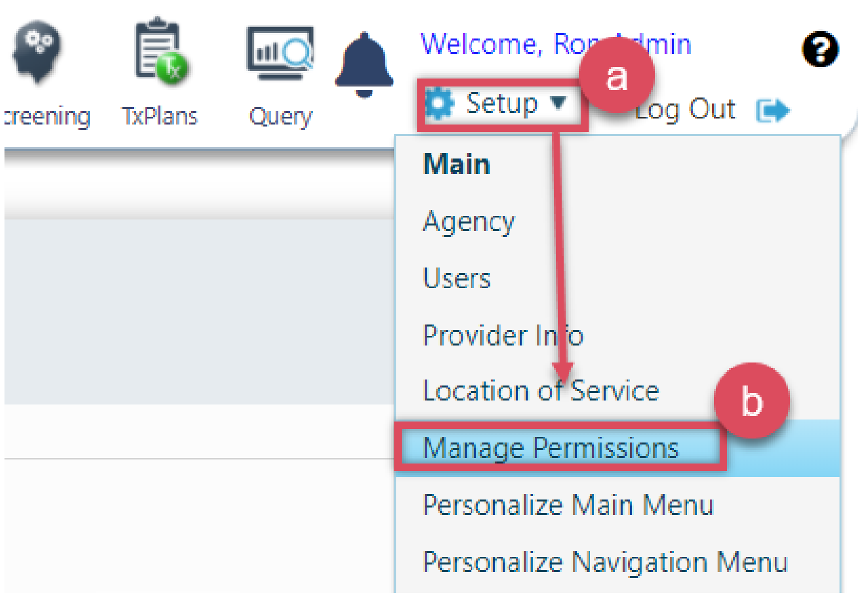


B. **(Optional)** if you wish to limit the areas this user would be able to see once they log in click the Customize Tab to Deny those reports

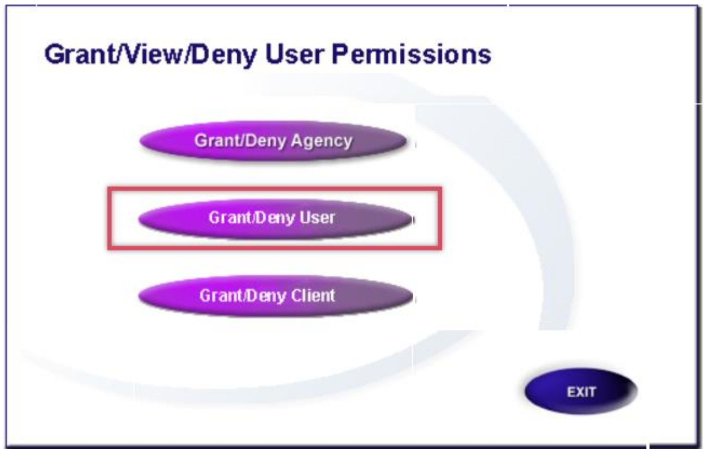


C. Go to Manage Permissions

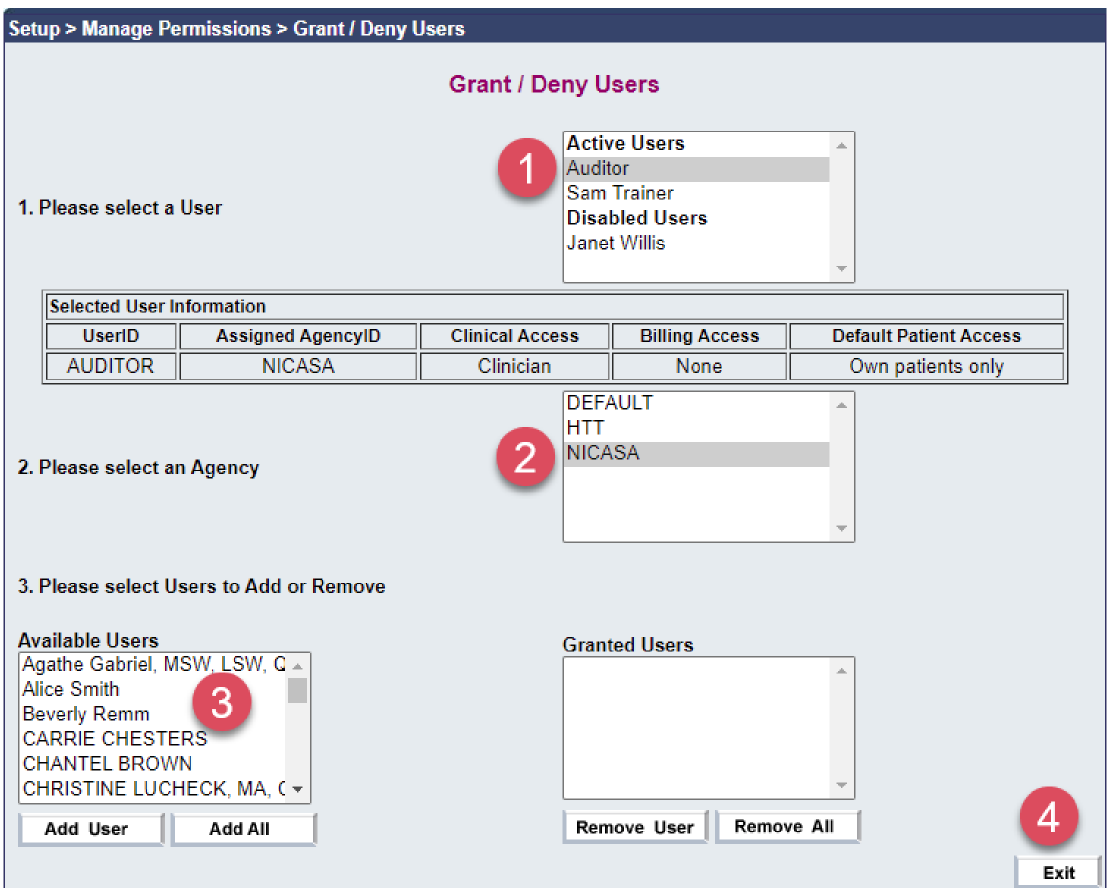
a) Go to Setup on Ribbon
b) Click on Managed Permission



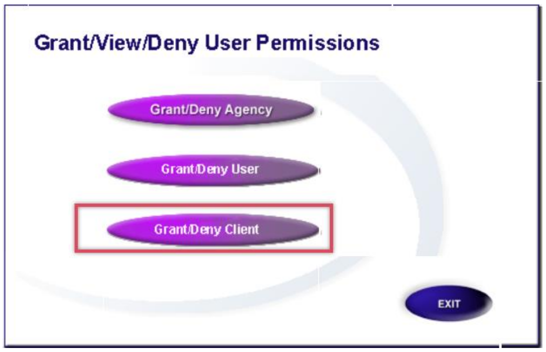
D) Select Grant/Deny User – (Verification Step)



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

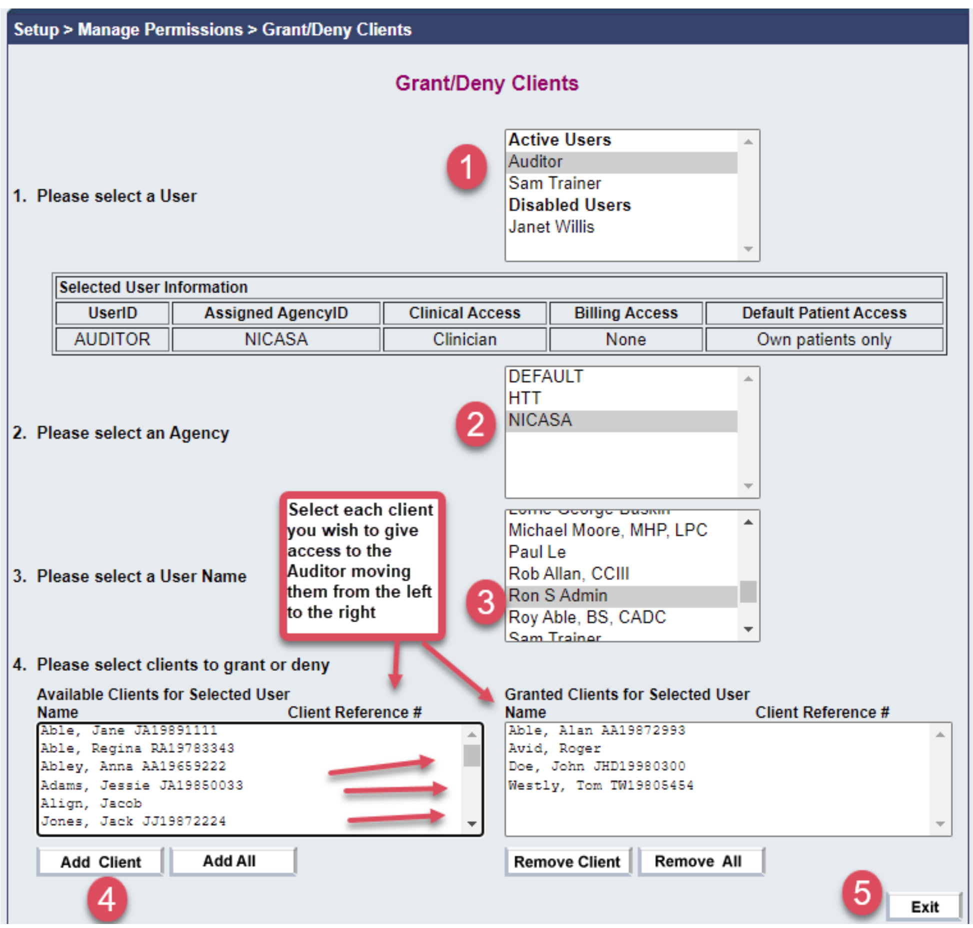


E. Select Grant/Deny Client – (This is where you set access to specific clients)



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**

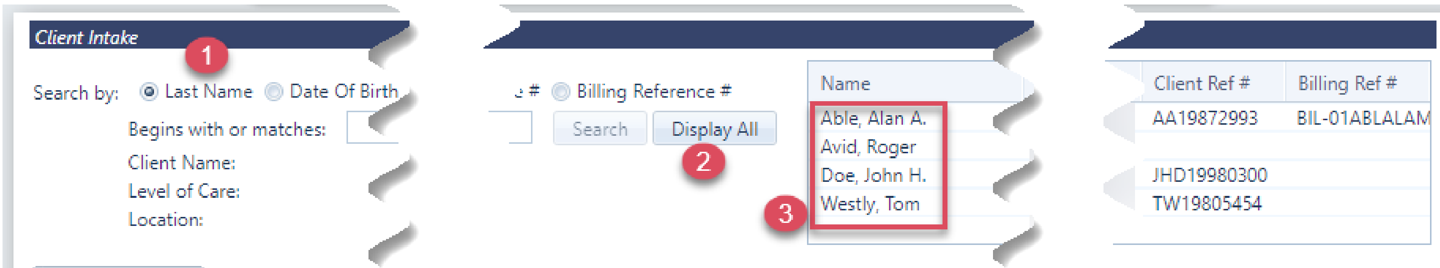


G. To Verify - Login as Auditor

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



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