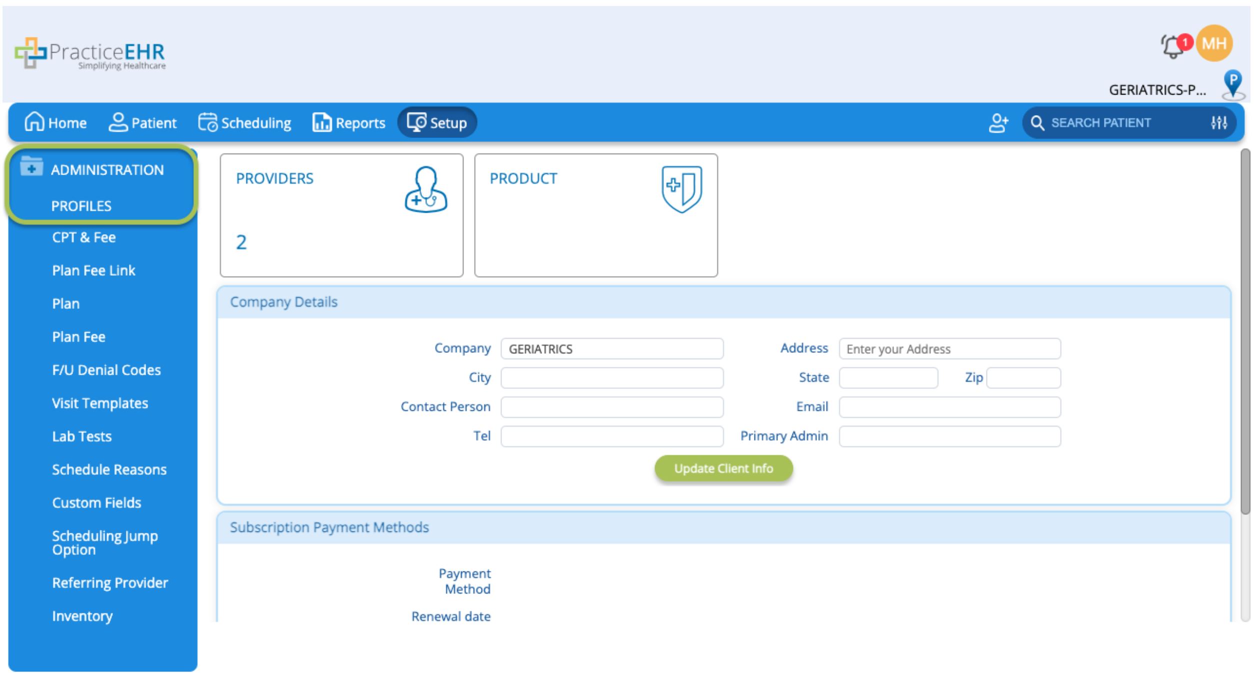
Practice EHR | User Guide

Setup Module | Part 1

Setup Module

The Setup module within Practice EHR can be used to manage and customize the environment based on a practice's specific needs. The Setup module is basically divided into two parts:

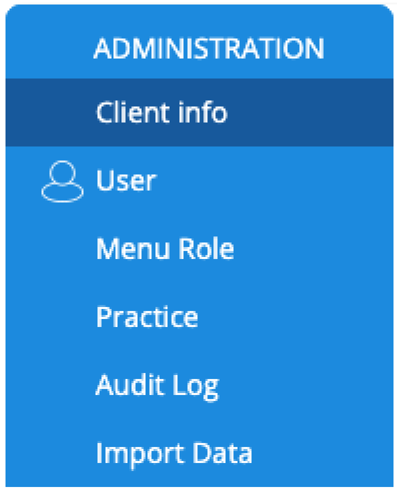
1. Administration
2. Profiles



These can be accessed from the navigation bar on the left-hand side of the screen.

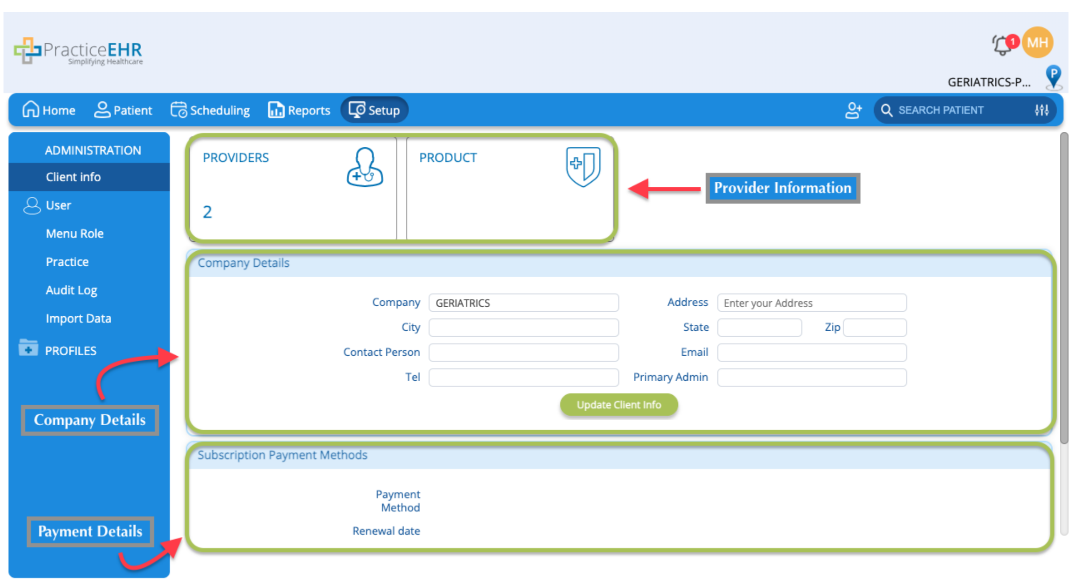
1. Administration

The Administration section of the Setup module contains various buckets related to the practice's setup.



1.1. Client Info

This client info section of the Setup module is populated once a client signs up for a Practice EHR trial.



1.1.1. Providers Information

This section will display the number of providers that have been provided a specific license in the modules EHR, PM, or RCM that have been included in that license.

1.1.2. Company Details

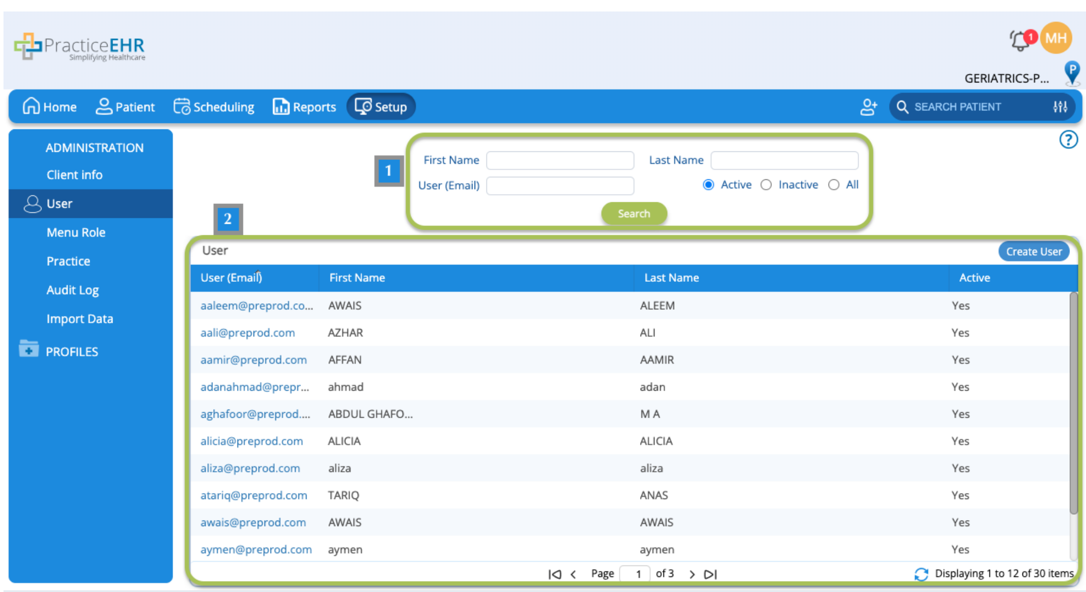
This section can be used to edit and update the client's information, such as the company's name, address, and contact.

1.1.3. Payment Methods

This section will display the payment information added by the client while signing up for Practice EHR.

1.2. User

The practice can create a user or manage user access through this section of the Setup module.

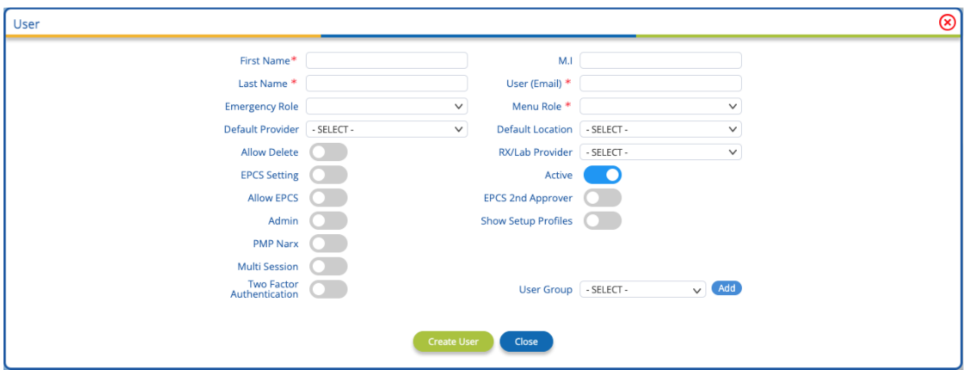


1.2.1. Search User

To search for a user, enter the first and/or last name of the user and click "**Search**." The user's email address can also be entered in the designated field to search for the user.

1.2.2. Search Result

Once the search is performed, the search result will be displayed as a list. To manage user access, click on the user name or click "**Create User**" to add a new user, which will open the following box.



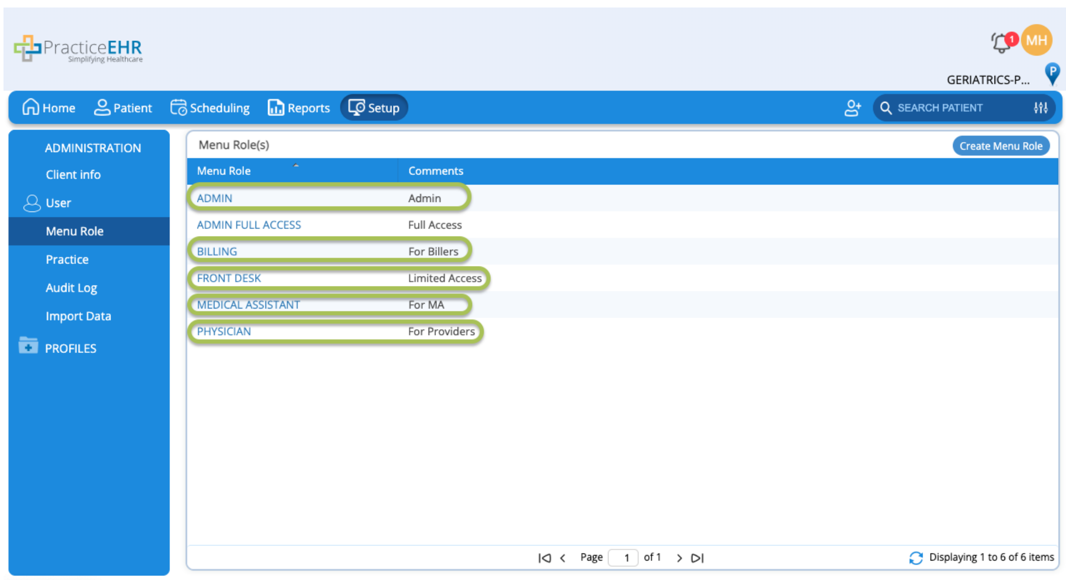
- Enter the user's first and last name and email, and assign a menu role to the user using the "**Menu Role**" drop-down menu. The system will send a link to the given email of the user to create a password.
- To assign the user to a specific provider, select the provider from the "**Default Provider**" drop-down menu. You may do the same for the default location.
- Check the "**Active**" box to activate the menu role, or uncheck it when the user becomes inactive.
- Check the "**Admin**" box to override any menu role assigned to the user and give complete access to the features within Practice EHR.
- Check the "**Show Setup Profiles**" box if the user will need access to add the insurance plans, practice fee schedule, update

scheduling reasons, or other similar administrative tasks listed in the Profile section within the Setup module.

- If the user has a reason to be logged into two different devices, check the "**Multi Session**" box.
- Click "**Create/Update User**" as appropriate from the bottom of the screen.

1.3. Menu Role

All the users are assigned menu roles to align their security with the tasks they are supposed to perform within Practice EHR.

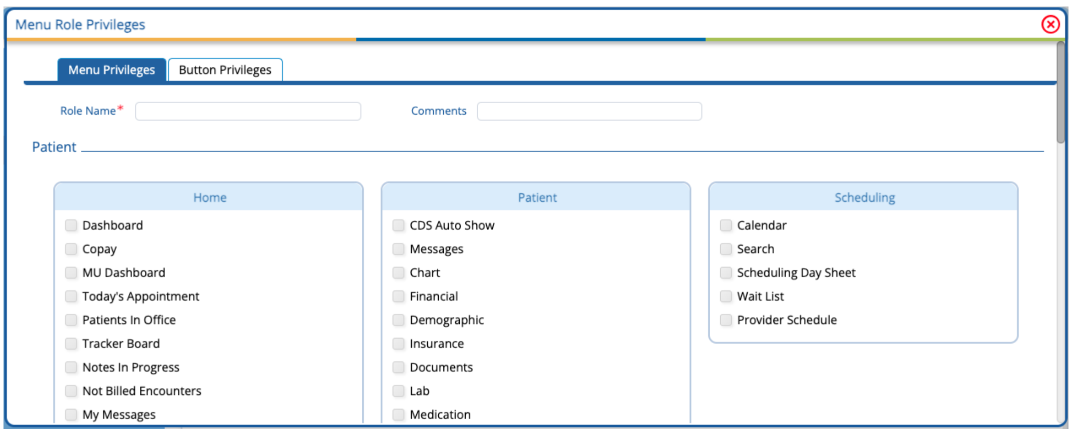


There are five key menu roles assigned within Practice EHR:

1. **Admin Full Access:** Assigning this role to a user will give them full access to the system.
2. **Billing:** Assigning this role to a user will limit their access to clinical tasks but will allow them to submit claims, print statements, and manage claim denials.

3. **Front Desk:** Assigning this role to a user will limit them to tasks like checking patients in and out, collecting co-payments, and scheduling patients.
4. **Medical Assistant:** Assigning this role to a user will limit their access to the billing functions but will allow them to enter clinical data within their scope of practice.
5. **Physician:** Assigning this role to a user will limit them to clinical tasks.

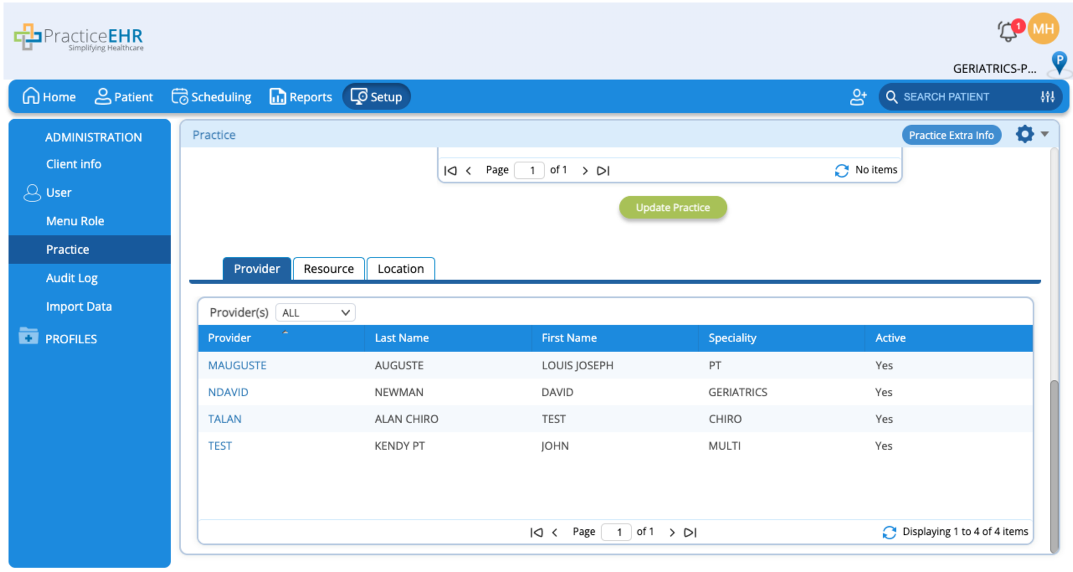
If the user wants to customize a menu role, they can click on the menu role, which will open a window.



The user can then customize the menu role by allowing or restricting access to specific tasks.

1.4. Practice

This section of the Setup module deals with the information on the practice related to the providers, resources, and locations.

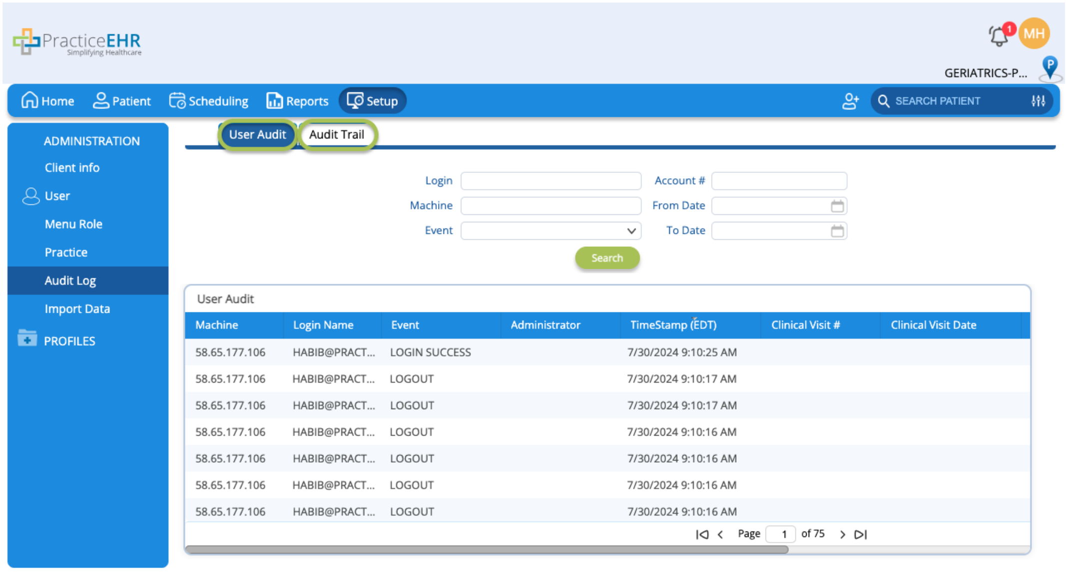


There are three primary tabs in the Practice section of the Setup module:

1. **Provider:** This tab enlists the registered providers and is managed by the support team of Practice EHR. The user can also add a provider by clicking "**Create Provider**" on the top left-hand side of the tab.
2. **Resource:** This tab enlists the resources registered within the practice. The user can create a resource by clicking "**Create Resource**" on the top left-hand side of the tab.
3. **Location:** This tab enlists the locations created for the practice within Practice EHR. The user can create a location by clicking "**Create Location**" on the top left-hand side of the tab.

1.5. Audit Log

This section of the Setup module tracks all the activities performed within the system, such as login, logout, patient visit open, patient chart open, etc.



There are two primary tabs in the Audit Log section:

1. **User Audit:** This tab can be used to track the activity of an individual user using the search tabs. Leaving the search tabs empty will provide details on the activities of all the users.
2. **Audit Trail:** This tab allows a user to track user activities by a specific section of the system or audit type.