



About PA User access controls

User access is done via the Users section of PA Setup, which can only be accessed by individuals with practice manager access.

Login

PA requires that each user login with their unique user name and password. For added security, the following rules are also in place:

- Passwords will expire if not used for 35 days – if this happens, the user will get a message that their login has been disabled and needs to be reset.
- Users will be prompted to create a new password every 12 weeks, which cannot be the same password as any of their prior 4 passwords.

Each user can be assigned to more than one practice, if required, without having to add new logins for the user.

User Access

Users are all assigned an access level, which determines their access to the different pages in PA, as well as their access to PA Billing, reports and some of the functionality in PA Billing.

| Access Level | Summary of tasks allowed |
|------------------------|--|
| Physician, Non-Manager | Physician who needs full read only access. |
| Physician, Manager | Physician who will also be performing billing related tasks. Full access |
| File Clerk, read only | Full access to all patient and claim history, read only. Limited reports access |
| Front Desk | Scheduling, Patient demographics. No access to add new insurance plans. Limited reports |
| Charge Entry 1 | Scheduling, Demographics and charge entry. No payment posting, no PA Today. Limited reports |
| Charge Entry 2 | Scheduling and scheduling setup. Charge entry, insurance lookup and entry, No payment posting. Claim summary on PA Today. More reports |
| Payment Poster | Access to Payment application, most billing functions. Most reports |
| Billing Specialist | Full access to Billing, Payment Posting, all reports. Limited setup access |
| Practice Manager | Full access to all billing, payment, reports. Full access to PA Setup |



Understanding the Users management interface

This is accessible to practice managers, under PA Setup/Users.

The screenshot shows the PA Setup/Users interface. At the top, there are navigation tabs: PA Billing, PA Schedule, PA Setup (selected), and Admin. Below these are links for General, <Users>, Facilities, Providers, Statements, and Fees. The practice name is MRM DEMO ACCOUNT. The main area is titled 'Users' and contains a table with the following columns: Name, Security Level, Email, Active, Active for this practice, CC To Manager, and Last Login & Password Status. The table has two rows: one for 'User, Guest' and one for 'User, New'. The 'User, New' row is highlighted in yellow and has a dropdown menu for 'Billing Specialist' and radio buttons for 'Active' and 'Active for this practice'. The 'Last Login & Password Status' column for the 'User, New' row has links for 'Reset Password' and 'Enable Account'. Numbered callouts 1 through 6 are placed over the Security Level dropdown, the 'Active' and 'Active for this practice' radio buttons, the 'CC To Manager' dropdown, the 'Last Login & Password Status' column, and the 'Reset Password' and 'Enable Account' links respectively.

| | Name | Security Level | Email | Active | Active for this practice | CC To Manager | Last Login & Password Status |
|--|-------------|--------------------|-----------------------------|--|--|--|--|
| Edit | User, Guest | Practice Manager | GuestUser@practiceadmin.com | Yes | Yes | Yes | Last Login: Last P/W change: Password reset?: Yes |
| Update Cancel | User, New | Billing Specialist | | <input checked="" type="radio"/> Yes <input type="radio"/> No | <input checked="" type="radio"/> Yes <input type="radio"/> No | <input checked="" type="radio"/> Yes <input type="radio"/> No | Reset Password Enable Account |

1. Security Level

This is assigned when adding a new user, and can be edited. A summary of the tasks available for each level is displayed below the drop down when you change the security level displayed. Each user can be assigned a different security level for each practice they have access to.

The dropdown menu shows 'Billing Specialist' selected. Below it, the permissions are listed: Full access to Billing, Payment Posting, all reports. Limited setup access.

2. Active

This field controls the user's master account for all practices they are assigned to. Adjusting a user record to "No" here would lock that user completely out of PA. If your organization has access to multiple practices in PA, and you need to change a user's access for a single practice, then select that practice in the drop down at the top right of the screen, and use the field "Active for this practice", next.

3. Active for this practice

This flag applies to the user's access to the specific practice selected.

4. CC to Manager

If set to "yes", the system will automatically CC manager(s) on all system generated email to the user. (This would apply currently to emails about insurance validation, and ERA's pending in PA)

5. Last Login & Password Status

Displays when user last logged in, etc. If the user's password has been reset by a manager, then it would say "Yes" here, meaning that the user would be prompted to create a new password on their next login attempt. After a successful login, the password-reset flag would change back to "No". If, as in this example, it says that the account is disabled, use the Edit link to access the user record, and the enable account link, next.

The field shows: Last Login: 10/21/2003 5:36:08 PM, Last P/W change: 9/10/2003 12:31:09 PM, Password reset?: No, Disabled due to inactivity.

6. Reset Password / Enable Account

Reset the password if a user has forgotten their password, or their password has expired. The system will assign a random temporary password that you **must make a note of right then, or it will be gone from view**, and give to the user. When they login, they will be prompted to



create their own confidential and secure password. Enable account is used if the account has been disabled due to inactivity.

Adding a new user

Scroll down to the bottom of the page, to the drop down that allows you to link or add new users to the practice – if you work with multiple practices, the drop down will show all the user names for other practices in your “group” of practices who are not already linked the practice you are working on. To link one of them to the practice, select the appropriate parameters, and click on “Link user to practice”

| | | | | | |
|------------------|------------------------|--------------------------------------|--------------------------------------|--------------------------------------|---------------------------------------|
| User, Test s | Physician, Non-Manager | <input checked="" type="radio"/> Yes | <input checked="" type="radio"/> Yes | <input checked="" type="radio"/> Yes | Link User to Practice |
| User, Test s | | <input type="radio"/> No | <input type="radio"/> No | <input type="radio"/> No | |
| --Add new user-- | | | | | |

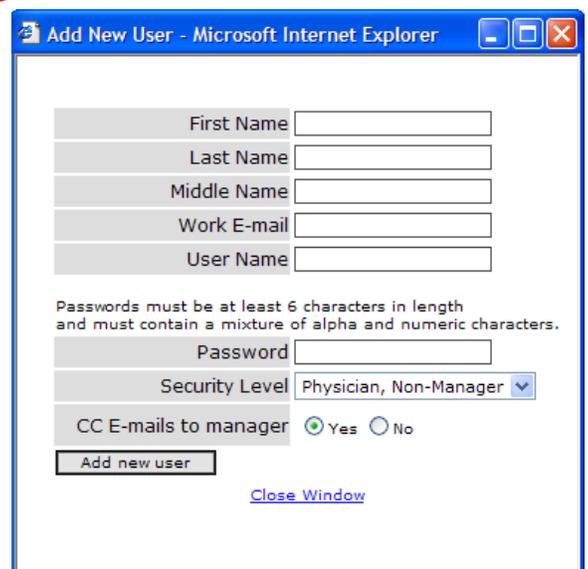
If you need to add a new user, select “Add new user” which will be at the bottom of the list, which will then change the field as follows:

| | | | | | |
|------------------|------------------------|--------------------------------------|--------------------------------------|--------------------------------------|------------------------------|
| --Add new user-- | Physician, Non-Manager | <input checked="" type="radio"/> Yes | <input checked="" type="radio"/> Yes | <input checked="" type="radio"/> Yes | Add new user |
| | | <input type="radio"/> No | <input type="radio"/> No | <input type="radio"/> No | |

Click on the link for “Add new user”, which will open a form for you to enter the New User’s details.

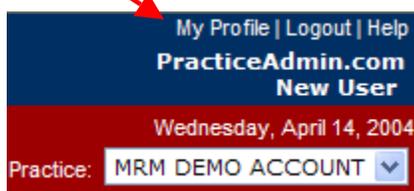
Enter at least their First and Last Name, a user name and last name.

Create a password for the user, which will be a temporary password – they will be prompted to create their own secure password when they first login.



Modifying a user profile

Each user can access their profile by clicking on the “My Profile” link up in the top right hand corner of the PA interface.



Note that each user can make changes to their name, email and user name, but not their user access level. This can only be modified by the practice manager.

