

Permission based security

The security mechanism to allow Operators (staff members) access to various functions with the SPM or PHM application is based on the Operator's membership of Roles. The Roles are defined by the business functions and each Role can be configured to have access to the menu items and toolbar buttons in the application and for a specific User (Provider). When an Operator is assigned to a Role they will inherit the permissions allocated to the Role.

Operators can be given access rights to a function when performing work for one Provider (A), but restricted from the same function when performing work for another Provider (B).

A good example for this is where the secretary of a specialist may have full access to areas relating to their practice – the Secretary role - but for another specialist they may only have the restricted rights of the Receptionist role.

Example of menu restrictions

Operator A as Secretary for Provider A	Operator A as Receptionist for Provider B
Office	Office
Banking 📽	Banking 🎬
Invoices	Invoices
Receipts	Receipts
Schedules	Schedules
Unrelated Letters	Unrelated Letters
Cashbook	Cashbook
Expenses	Expenses
Recalls	Recalls
Cost Centres	Cost Centres
New• Edit• Delete Label	New- Edit- Delete Label

An Operator can be a member of more than one Role.



Some menu items are always available to the Operator, such as the ability to change their password and other Operator settings, and will over-ride any permissions assigned to their Roles.

This method of securing access rights to the application can be configured to be as simple or as complex as you require. At the simplest level all Operators could belong to one Role, which has permission to all menu items and buttons. In a larger facility you may have 12-16 different types of Roles and each Operator may be assigned membership of 2-6 of the Roles.

It gets more complex where a hospital (using PHM) also has specialist suites attached (using SPM), as the permissions for an Operator need to be configured not just for the hospital User but also for each specialist User.

Role	Comment	Last Changed	New
PracMgr	Practice Manager	29/01/2013	
Receptionist	Receptionist	18/02/2013	<u>E</u> dit
Secretary	Practice Secretary	27/11/2012	Delete
Typist	Practice Typist, occasionally offsite	27/11/2012	
Admin Assistant	Practice Administration Assistant	27/11/2012	Cl <u>o</u> ne Role
Recep Mgr	Reception Manager	18/02/2013	Permission
BusMgr	Business Manager	18/02/2013	Lennissienin
Nurse	Practice Nurse	27/11/2012	
BookKeeper	Practice Book keeper	27/11/2012	
Locum	Locum Orthopaedic Surgeon	27/11/2012	
File Clerk	Practice File Clerk	27/11/2012	
SysAdm	SPM System Administrator	29/01/2013	
Associate	Associate	18/02/2013	

As new functions are added to the application Incisive may provide a modified menu structure. The new menu can be imported into the program and permissions granted for the new menu items to the various Roles.

If an Operator does not have any permissions granted to them for a whole module e.g. patient, appointments etc., the module will not appear at all for them in the application menu. Other menu options will be inactive and greyed-out if they do not have permission to a particular menu item.

If an Operator does not have any permissions granted to them for a Provider they will not see the Provider in the selection list (F2) and therefore will not have any access to any of their data.

Delegating the ability to configure the menu permissions available to each Role should be restricted to one or two selected staff with high-level responsibilities.

Access to select which Operators belong to specific Roles can be delegated to the HR or Practice Manager role.

Permission -	- 🗆	×	Permissions X	
Secretary-JW		SPM	Nurse SPM	1
Incom Version: SPM v701 (30.05.17 5:00 p.m.) Patient Appointment Dictation Messaging Messaging Messaging Messaging Messaging Messaging Messaging Messaging Messaging Messaging		~ 8	Manu Version SPM v701 (30.05.17 5:00 p.m.) Image: Constraint of the second sec	
le			 ⊕ Setup ⊕ Utilities ⊕ Help 	
<u>U</u> ndo <u>A</u> pply	<u> </u>	lose	Undo Apply Close	

Incisive have a tool to allow a standard template of Roles and Permissions to be imported into an existing database.

Setting up Roles

Defining a Role will often broadly follow the employment roles that are used within the practice or hospital, but they can also be refined to a more specific function.

A good idea is to start off with a Role that everyone will belong to e.g. Base Clinical and/or Base Administration. These Roles would then be given quite general access rights (permissions) to the basic functions in the application, such as creating a new patient or entering an appointment/ booking. At the more extreme level you may make a Role for a single task such as 'Closing off the Banking'.

As you add more Roles you can assume that the Operator will already have access the all the menu functions assigned to them in the 'Base' Role and therefore you do not need to replicate the menu permissions for the subsequent Roles.

As the Role of 'Close-off banking' only had access to the Office -> Banking -> Close-off menu, it wouldn't be much use if it was the only Role allocated to an Operator – but is relevant if they also have all menu permissions given to them by belonging to the 'Base Administration' Role as well.

If some of the specialists are members of a Group and wish to allow other members to view their clinical notes and images for patients they have separately seen, you can create a Role for each Group and then choose which specialists (or staff) are provided access.

Creating a Role

We will assume you are using a Role that has sufficient permissions to perform this task.

1. Go to Setup -> Personnel -> Permissions

Role	Comment	Last Chang	New
Secretary	Access to most functions other than cashbook.	23/05/2012	-
Theatre N	ana Handles all details of operations.	15/05/2012	Edit
Banking	Access to cashbook etc	02/04/2012	Delete
Reception	ist Front desk staff - no access to reports, etc	19/04/2013	
Hospital B	looki Access to all Hospital Booking functions.	30/05/2011	Clone Role
Specialist	Provider - has full access to all of their own data but not to the data for	16/04/2012	Permission
Telephoni	st Can view patient records and make new Bookings	12/03/2014	
SysAdmin	Full access to all menu items. Only Role allowed to configure the menu	12/03/2014	

2. Select the New button and enter in the name of the Role and a brief description of what this Role is allowed to do.

<u>N</u> ame	Telephonist
Co <u>m</u> ment	Can view patient records and make new Bookings

3. Click OK to save

If you are wanting to make a new Role that is similar to another one, you can use the 'Clone Role' button. This option will also copy all of the permissions allocated to the original Role.

For a small-medium sized specialist rooms, the following Roles might be sufficient:

Specialist	Full access to all functions.
Secretary	Full access to admin functions for the Provider.
Receptionist	Add/Modify bookings; Add Notes and other similar patient related
	clinical records; Add invoices
Nurse	Access to all functions allowing them to record their care for the patient
	and make appropriate appointments. Cannot view financial reports.
	Has limited access to Setup.
Typist	Access limited to the Type Dictation function
SysAdmin	System Administrator. Full access rights to all functions, including the
	ability to set and assign access permissions.
Technician	Limited access to some Setup configuration functions only
Group A	Restricted to only viewing the Notes & Images tab in Patient section for
	the members of Group A

Larger practices may structure their Roles more like a hospital.

For a hospital, the following Roles are often used as an initial template.

SysAdmin	System Administrator. This Role should be given to one person who has
Managar	the authority to assign access rights to all Operators for all Providers.
Manager	functions. Cannot remove nations from or reorder theatre lists. Can
	access Setup -> Personnel to change Permissions and Roles
BaseAdmin	Basic permissions related to the administration of the business.
	Includes invoicing and booking. Very limited access to Setup & Reports.
BaseClinical	Basic permissions relating to a patient's care. No access to invoicing or
	financial related reports. Limited access to Setup & Reports.
ClinicalMgr	Needs BaseClinical role. Manages matters relating to the clinical
	management of the hospital. Can add and delete theatre sessions,
	waiting lists and resources. Can undischarge a patient.
Reg. Nurse	Needs BaseClinical role.Can add clinical Notes and see clinical reports.
	No access to Prescriptions. Can make appointments. No access to Office
	or Dictation.
FinanceMgt	Needs BaseAdmin role. Can access restricted financial functions and
	reports. Can delete invoices and receipts. Has access to Cashbook and
	Expense ledger.
InventoryMgr	Needs BaseAdmin role. Manages stock inventory. Can add and delete
	categories and items, create purchase orders, receipt arrivals, perform
Tachnician	stock-take. Can access inventory related reports
rechnician	Access to configure functions that interact with external
Kitchon	Access limited to Dietany requirement report and internal messaging
RICHEN	Access minited to Dictary requirement report and internal messaging.

Allocating Permissions to a Role

Once a Role has been created the menu items and buttons that it allowed to access can be allocated.

1. Go to Setup -> Personnel -> Permissions

Role	Comment	Last Chang	New
Secretary	Access to most functions other than cashbook.	23/05/2012	
Theatre Mana	Handles all details of operations.	15/05/2012	Edit
Banking	Access to cashbook etc	02/04/2012	Delete
Receptionist	Front desk staff - no access to reports, etc	19/04/2013	
Hospital Booki	Access to all Hospital Booking functions.	30/05/2011	Clone Role
Specialist	Provider - has full access to all of their own data but not to the data for o	16/04/2012	Permission
Telephonist	Can view patient records and make new Bookings	12/03/2014	
SysAdmin	Full access to all menu items. Only Role allowed to configure the menu f	12/03/2014	
			Close

- 2. Highlight the Role you want to work with and select the 'Permission' button. Note that it may take some time to load the menu options.
- 3. Work your way through the menu and button options choosing which of them you want to give access to.

Remember that you don't need to duplicate the menu selections if the Operator will always use this Role will always be used in conjunction with another 'Base' Role.

Telephonist	PHN
Menu Version SPM v568 (11.03.14 4:21 p.m.)	
E Patient	•
🕀 📝 Registration	
Edit	
- V Print	-
Label	
🕀 📝 Referrals	
🖭 📝 Claims	
🕀 📝 Notes	
V New	
Edit	
Delete	
Display	
V Print	
Label	
Get Notes	
Script	
Undate Keys	
Update Keys	

You need to take care with some menu items such as Patient -> Notes -> Scripts as no-one should have access to this item except for the User (Provider)

4. Click 'Apply' to save the menu items selected to the Role.

A special utility tool called ImportExportRoles.exe allows you to review the permissions of selected Roles and if necessary, to modify them. This makes it easy to check and ensure that some of the more specialised or restricted menu options do have the appropriate access rights.

Menu Location	Booking Admit	Secretary	Surgeon	Sys,Admin	Telephonist	1
PHM.Patient.Claims.Edit	-	~		~	~	L
PHM.Patient.Claims.Label	•	-		•	-	L
PHM.Patient.Claims.New	~	~		~	~	L
PHM.Patient.Claims.Print	•	-			•	
PHM.Patient.Claims.WorkCover				~		L
PHM.Patient.Financial	•	~		•	•	h
PHM.Patient.Financial.Charge				~		ľ
PHM.Patient.Financial.Delete		~		~		L
PHM.Patient.Financial.Display	•	~		~		L
PHM.Patient.Financial.Edit	•	~		•		L
PHM.Patient.Financial.HIC Status				•		L
PHM.Patient.Financial.Label	•	-		•		L
PHM.Patient.Financial.Matemity/Obst		~		~		
PHM.Patient.Financial.New	•	~		•		L
PHM.Patient.Financial.Print/Send	•	~		•		
PHM.Patient.Financial.Quote				•		L
PHM.Patient.Financial.Receipt	-	~		•		L
PHM.Patient.Financial.Resend	•	-		•		L
PHM.Patient.Forms	~	~	-	~		L
PHM.Patient.Forms.Delete		~	~	•		
PHM.Patient.Forms.Edit	•	~	~	~		L
PHM.Patient.Forms.Label	•	~	~	~		
PHM.Patient.Forms.New	•	~	-	~		L
PHM.Patient.Forms.Print	•	~	~	~		
PHM.Patient.Images		~	~	-		
PHM.Patient.Images.Annotate		~	~	•		
PHM.Patient.Images.Assign		~	~	•		
PHM.Patient.Images.Delete		~	~	•		
PHM Patient Images Details		J	~			1

All menu items are listed with their full path, which is the same order as is displayed in the application.

Assigning Roles

Once the permissions have been established in Setup -> Personnel -> Permissions to allow access to specific menu or button functions for the various roles, you then need to determine which Operators belong to, or are members of, the specified roles.

If an Operator is a member of two Roles, one of which does have permission to access a function and the other Role which does not have access permission to the same function, the right to have access overrides the restriction i.e. access to the function is allowed.

Selecting Setup \rightarrow Personnel \rightarrow Roles will provide you with a list of all the Operators (staff) who have logins created for either SPM or PHM.

<u>U</u> ser	Bongobongo Trust Ho	spital 💌			<u>R</u> oles	
Dra	ig a column header h	ere to group by that c	olumn.			
D	Name	Status	Adminis	Roles	Us	1.0
AA	Ahan Ianmak	Registered Nurse		Receptionist	В	
AD	Arilev Diredmeaset	Registered Nurse				
AJ	Endairne Sonjh	Registered Nurse		Banking, Receptionist	В	
AS	Endairne Tsotc	Registered Nurse				1
BB	Incisive2	Administrator	v	SysAdmin	В	
BE	Tertebadne East	Nurse Manager		Hospital Booking		
BO	Rabb O'Bnier	Enrolled Nurse		Hospital Booking, Receptionist, Secretary		
BP	Barry Yehnr	Maintenance		Hospital Booking		
СН	Locin Nusthohic	Cook		Hospital Booking		
СН	Ramlec Ruhley-Sattw	Theatre Manager	1	Hospital Booking, Theatre Manager		1
DC	Nodni Cougiln	Registered Nurse				20
DE	Demo	Administrator		Receptionist	F	
DG	Bidbee Gohmidnlag	Registered Nurse		Receptionist		
DG	Naide Renrgad	Receptionist			В	1
					Close	

Allocate an Operator to a Role

1. Highlight the Operator and click on the Roles button

winnie w	louse	
Role /		
Enabled	User	
+ Role : Ma	inager (11 items)	
🚽 Role : Nu	rse (11 items)	
	Dr. A. Naes	
	Barney Bones	
Г	Bariatric Centre	
	Mr. E. N. Tee	
	Mr. G. Endo	
	Dr. O.B. Gynees	
Г	Dr O.P.H. Thalmol	
	WAIKIKAMUKAU BAY CENTRE	
	Mr. O.R. Thorpe	
	MR. G.E.N. Vass	
Г	John Williams	
+ Role : Re	ceptionist (11 items)	
+ Role : Sec	cretary (11 items)	
+ Role : Sys	Admin (11 items)	
Group By:	<u>User</u> <u>R</u> ole	Apply changes to all Users

The Roles are in the left column and the Providers (the Hospital and any specialists in attached consulting suites) are shown in the right column.

2. For each User, choose the Roles that the Operator will belong to. An Operator can belong to many Roles.

Role /		
Parablad	The set	
Enabled	User	
+ Role : Ma	inager (11 items)	
- Role : Nu	rse (11 items)	
	Dr. A. Naes	
	Barney Bones	
2	Bariatric Centre	
	Mr. E. N. Tee	
	Mr. G. Endo	
	Dr. O.B. Gynees	
Г	Dr O.P.H. Thalmol	
V	WAIKIKAMUKAU BAY CENTRE	
	Mr. O.R. Thorpe	
	MR. G.E.N. Vass	
Г	John Williams	
- Role : Re	ceptionist (11 items)	
	Dr. A. Naes	
	Barney Bones	
	Bariatric Centre	
	Mr. E. N. Tee	
	Mr. G. Endo	
	Dr. O.B. Gynees	
-		-

In this example, Minnie Mouse, who is a registered Nurse, is made a member of the Nurse Role for both the Bariatric Centre and Waikikamukau Bay Centre, and is a Receptionist for Mr E.N. Tee.

3. To make select easier you can sort the list to display the roles by User (or all Users)

User /		
Role	Enabled	1
🛨 User : Dr O.P.H. Thalmol (5 items)		
± User : Dr. A. Naes (5 items)		
± User : Dr. O.B. Gynees (5 items)		
🛨 User : John Williams (5 items)		
🖃 User : Mr. E. N. Tee (5 items)		
Manager		
Nurse	Г	
Receptionist	V	
Secretary		
SysAdmin		
🛨 User : Mr. G. Endo (5 items)		
🛨 User : MR. G.E.N. Vass (5 items)		
+ User : Mr. O.R. Thorpe (5 items)		
- User : WAIKIKAMUKAU BAY CENTRE (5 iten	ns)	
Manager		
Nurse		
Receptionist		
Secretary		
SysAdmin		
Group By: User Role		- Apply changes to all Users

4. Click OK to save

Filtering and sorting the selection options. Group By:

Jser		Role
P Roles		ar Roles
Minnie Mouse		Minnie Mouse
User /		Role /
Role	Enabled	Enabled User
🛨 User : Bariatric Centre (5 i	tems)	± Role : Manager (11 items)
+ User : Barney Bones (5 ite	ems)	± Role : Nurse (11 items)
+ User : Dr O.P.H. Thalmol (5 items)	☐ Role : Receptionist (11 items)
H User : Dr. A. Naes (5 item:	5)	Dr. A. Naes
🛨 User : Dr. O.B. Gynees (5 i	items)	Barney Bones
± User : John Williams (5 ite	ems)	Bariatric Centre
- User : Mr. E. N. Tee (5 iter	ns)	Mr. E. N. Tee
Manager		Mr. G. Endo
Nurse		Dr. O.B. Gynees
Receptionist		Dr O.P.H. Thalmol
Secretary		WAIKIKAMUKAU BAY CENTRE
SysAdmin	F	Mr. O.R. Thorpe
🛨 User : Mr. G. Endo (5 item	15)	MR. G.E.N. Vass
H User : MR. G.E.N. Vass (5	items)	John Williams
H User : Mr. O.R. Thorpe (5	items)	+ Role : Secretary (11 items)
	AV CENTRE (5 items)	+ Role : SysAdmin (11 items)
Group By: User Role	Apply changes to all Use	rs Group By: User Role 🕅 Apply changes to all Users
Expand all Collapse all	Show selected Cancel OK	Expand all Collapse all Show selected Sancel

Expand All

WITTINE WOUSE			
User /			
Role	Enabled		1
🖃 User : Bariatric Centre (5 items)			
Manager			
Nurse	2		
Receptionist			
Secretary			
SysAdmin			
I User : Barney Bones (5 items)			
Manager			
Nurse			
Receptionist			
Secretary			
SysAdmin			
🖃 User : Dr O.P.H. Thalmol (5 items)			
Manager			
Group By: User Role		Apply changes	to all Users

Collapse All



Show Selected

Minnie Mouse	
User 🗸	
Role	Enabled
🖃 User : Bariatric Centre (1 item)	
Nurse	V
크 User : John Williams (1 item)	
Secretary	V
🚽 User : Mr. E. N. Tee (1 item)	
Receptionist	
- User : WAIKIKAMUKAU BAY CENTRE (1 item)	
Nurse	

Apply changes to all Users

This is a dangerous option – use with extreme caution.

Minnie M	louse	Minn	ie Mo	ouse
Role /	1	Rol	e /	
Enabled	User	Enat	led	User
	John Williams	1		John Williams
- Role : Rec	eptionist (11 items)		Rece	eptionist (11 items)
	Dr. A. Naes		7	Dr. A. Naes
Г	Barney Bones		7	Barney Bones
	Bariatric Centre		7	Bariatric Centre
	Mr. E. N. Tee		2	Mr. E. N. Tee
	Mr. G. Endo		7	Mr. G. Endo
Г	Dr. O.B. Gynees -		7	Dr. O.B. Gynees
	Dr O.P.H. Thalmol		7	Dr O.P.H. Thalmol
	WAIKIKAMUKAU BAY CENTRE		7	WAIKIKAMUKAU BAY CENTRE
	Mr. O.R. Thorpe	1	-	Mr. O.R. Thorpe
Г	MR. G.E.N. Vass		7	MR. G.E.N. Vass
	John Williams	3	7	John Williams
Role : Sec	retary (11 items)	- Role	: Secr	retary (11 items)
roup By:	User Role V Apply changes to all Users	Group I	y:	User Role 🛛 Apply changes to all Users

Updating the menu

When you select the Permissions button a dialog window might appear saying that there is a new version of the menu available and asking if you want to import it now.

If you say No, your menu will remain the same and you will not have any of the new menu options.

If you say Yes, the new menu options will be imported and then listed and you will need to choose whether you want this Role to have access to the new menu options. Use the Permission button for each Role to select the new menu items for the Roles.

Permissions		_						~~~~
<u>SysAdmin</u>								PHN
Menu Version	17							-
Preparing	211							
(_			25	
								_
?	There is a newer import it now ? This may take a	r version of th few minutes	ne SPM M	enu (v568)	, do you	want to	Þ	
2	There is a newer import it now ? This may take a	r version of tl few minutes	ne SPM M	enu (v568) Yes	, do you v	want to No	0]
	There is a newer import it now ? This may take a	r version of th	ne SPM M	enu (v568) Yes), do you v	want to	0	
Update Keys	There is a newer import it now ? This may take a Erase Version	r version of the few minutes	ne SPM M	enu (v568) Yes), do you i	No	D	

The menu can be imported when other Operators are still using SPM/PHM but generally it is bestpractice to perform this task when the application is not being used.

As Incisive provide new releases of their software in the future you will be provided with information on any changes that are included to the menu options. If new menu options are added, or existing ones modified, you will need to update the permissions for the roles as they are not automatically included in the update process.

Troubleshooting

How to allow other specialists to see the notes & images for the other doctors?

1. In Setup -> Personnel -> Permissions, create a Role called something like 'Group 'A' then and give it permissions to only view the Notes and Images in the Patient section.



2. In Setup -> Personnel -> Roles select the Operators that are allowed these special permissions for the other members of their Group.



In this example, the Operator (identified at the top of the form) is being given the limited access to the notes & images of the three Providers in the list.