Permission based security

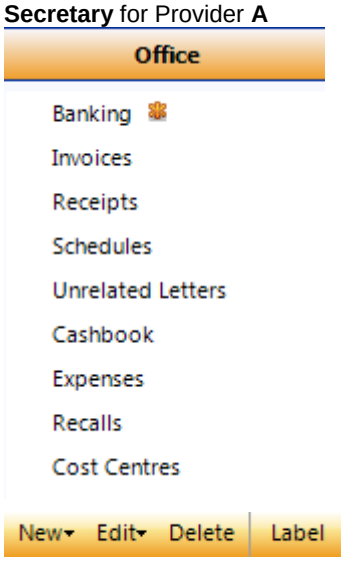
The security mechanism to allow Operators (staff members) access to various functions with the SPMi or PHMi application is based on the Operator's membership of Roles. The Roles are defined by your business functions and each Role can be configured to have access to the menu items and toolbar buttons 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).

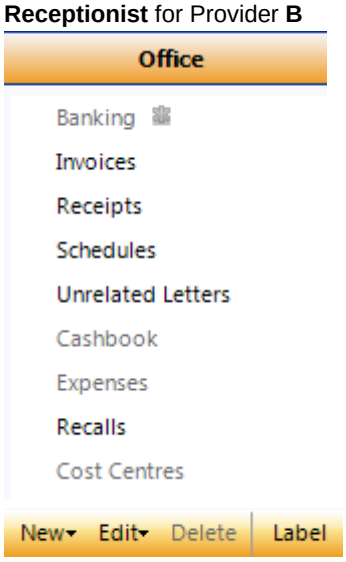
A good example for this is where the secretary of a specialist may have full access to areas relating to their practice – the Secretary role - but for another specialist they may only have the restricted rights of the Receptionist role.

Example of menu restrictions

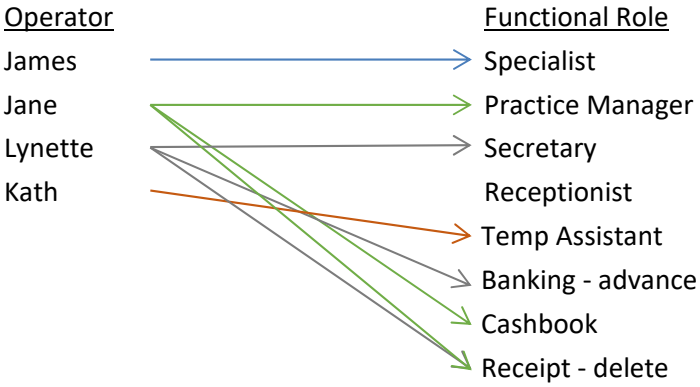
Operator A as **Secretary** for Provider **A**



Operator A as **Receptionist** for Provider **B**



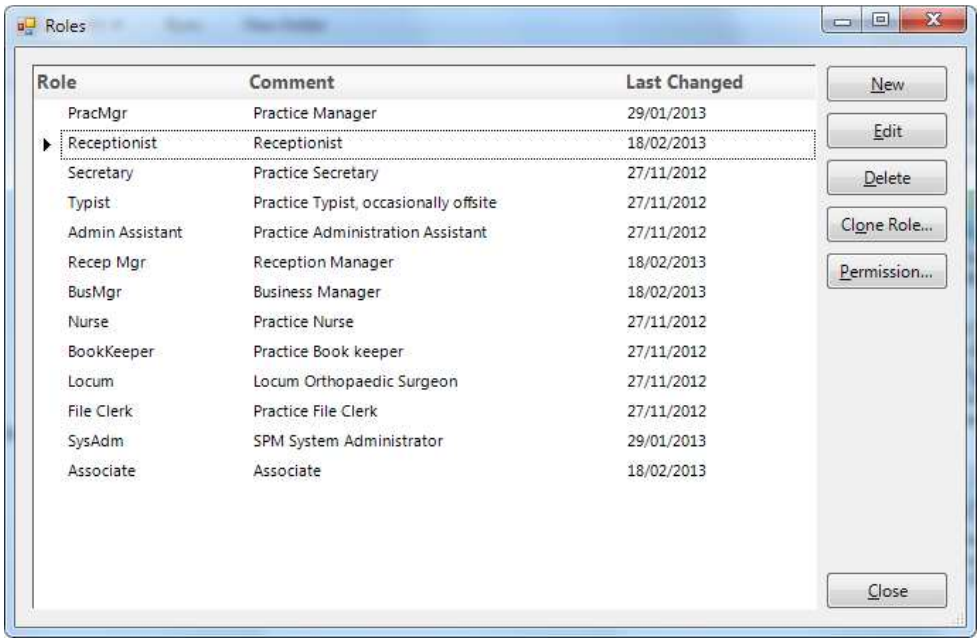
An Operator can be a member of more than one Role.



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.



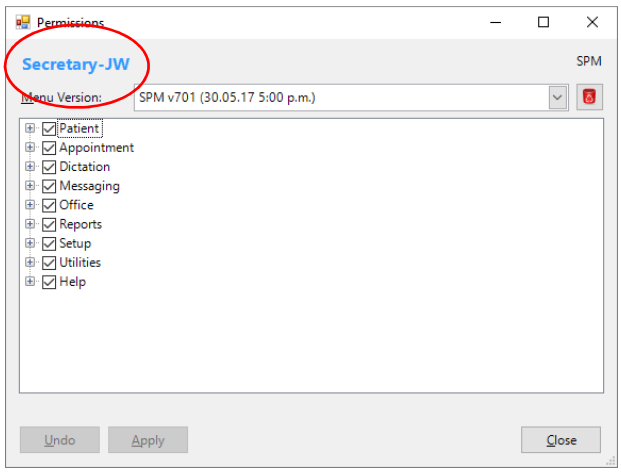
As new functions are added to the application Incisive may provide a modified menu structure. The new menu can be imported into the program and permissions granted for the new menu items to the various Roles.

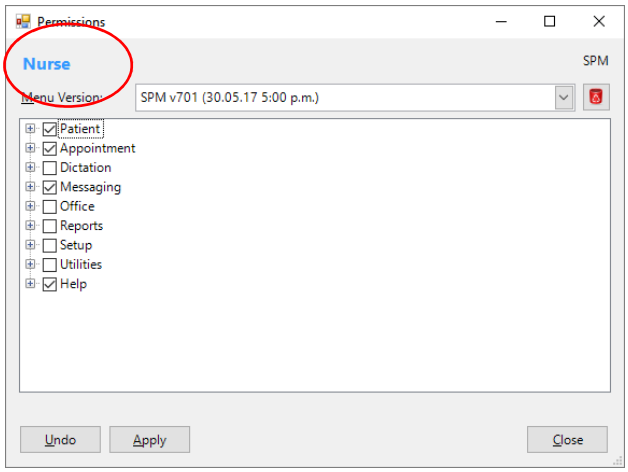
If an Operator does not have any permissions granted to them for a whole module e.g. patient, appointments etc., the module will not appear at all for them in the application menu. Other menu options will be inactive and greyed-out if they do not have permission to a particular menu item.

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.





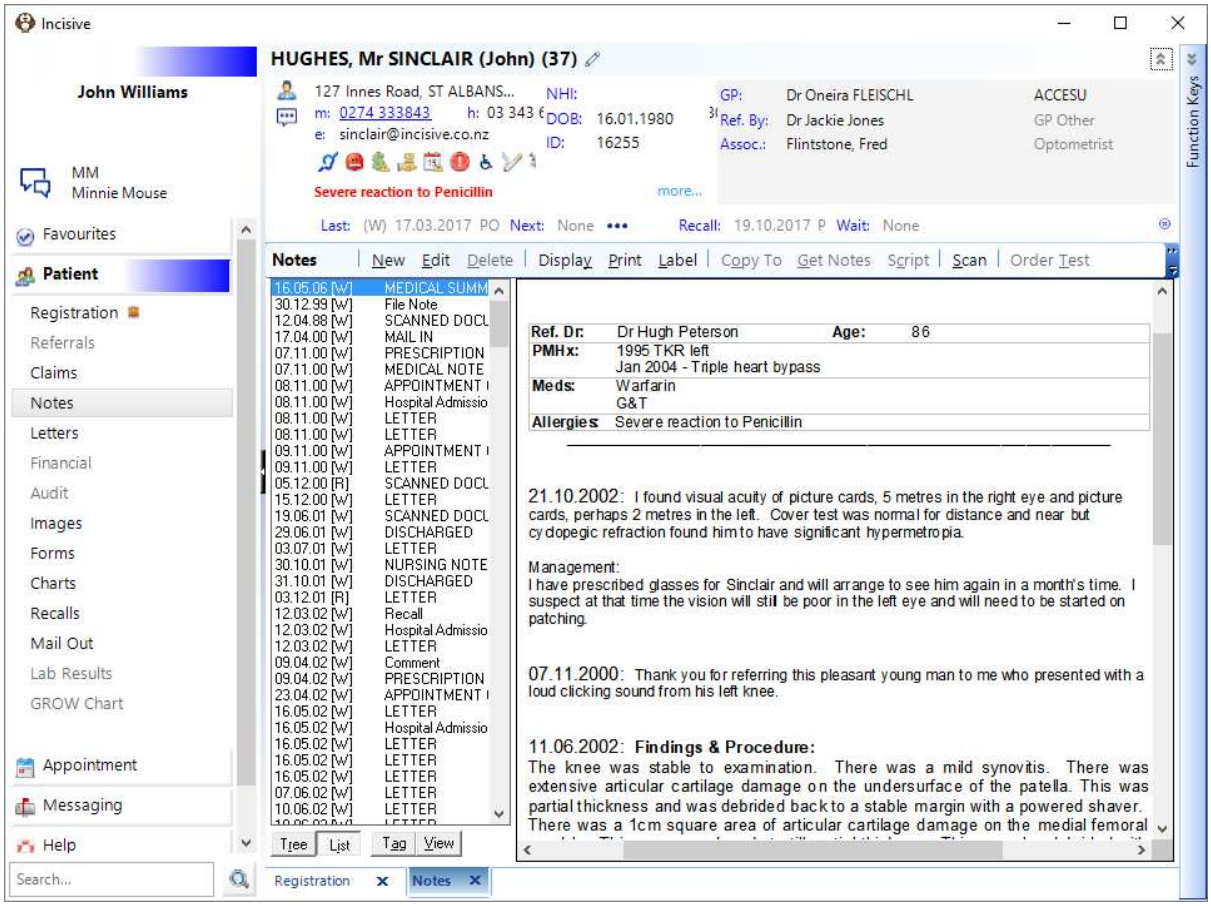
Incisive have a tool to allow a standard template of Roles and Permissions to be imported into an existing database.

For a small-medium sized specialist rooms, the following are the default Roles:

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 nor access Office. 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

All you need to do is assign Operators to the Roles for each Provider. You can, however, change the default permissions and also create new Roles.

An example of the menu options available using the above permissions granted to the Nurse role. Note the absence of some modules in the left-hand panel and also the inactive menu items.



You can start configuring the Roles and Permissions that will be used in the Integrated edition while you are still using the Classic edition.