

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.

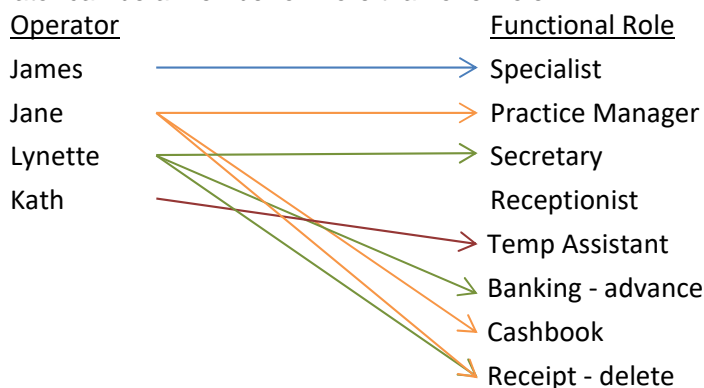
Operators can be given access rights to a function when performing work for one Provider (A), but restricted from the same function when performing work for another Provider (B).

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

<p>Operator A as Secretary for Provider A</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p style="text-align: center; background-color: #f4a460; color: white; padding: 2px;">Office</p> <ul style="list-style-type: none"> Banking 🏦 Invoices Receipts Schedules Unrelated Letters Cashbook Expenses Recalls Cost Centres <p style="text-align: center; background-color: #f4a460; color: white; padding: 2px;">New ▾ Edit ▾ Delete Label</p> </div>	<p>Operator A as Receptionist for Provider B</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p style="text-align: center; background-color: #f4a460; color: white; padding: 2px;">Office</p> <ul style="list-style-type: none"> Banking 🏦 Invoices Receipts Schedules Unrelated Letters Cashbook Expenses Recalls Cost Centres <p style="text-align: center; background-color: #f4a460; color: white; padding: 2px;">New ▾ Edit ▾ Delete Label</p> </div>
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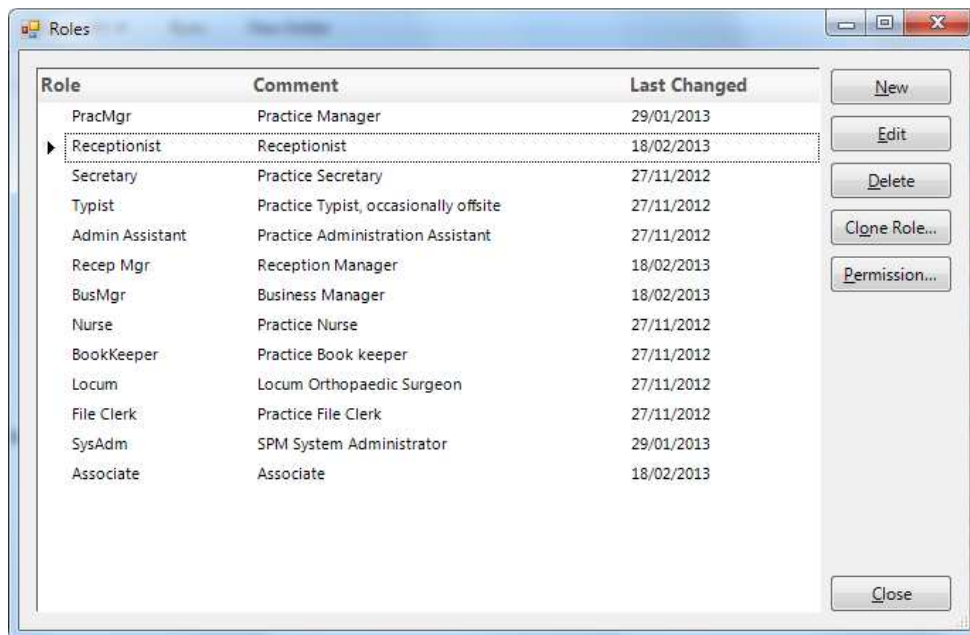
An Operator can be a member of more than one Role.



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.



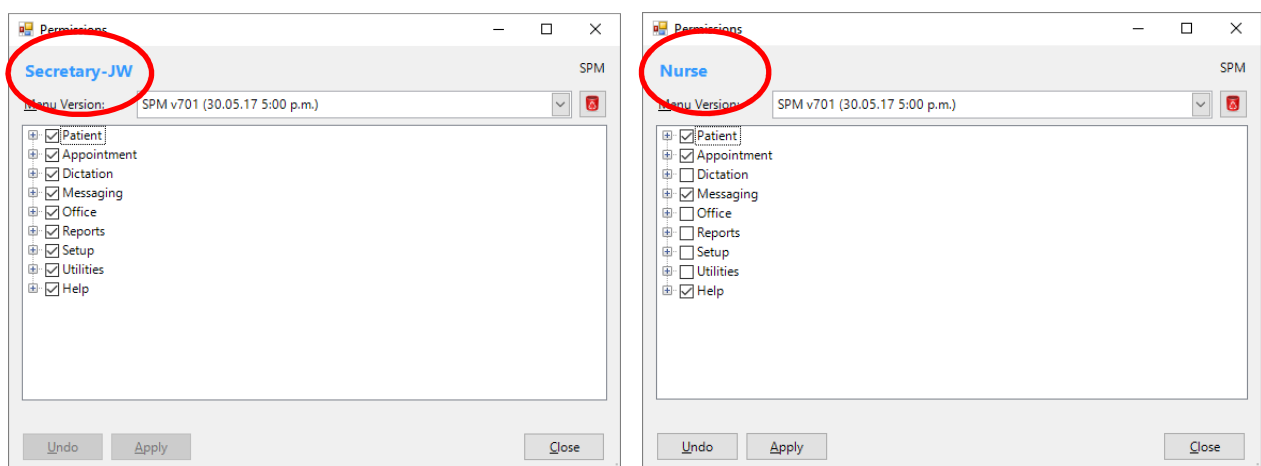
As new functions are added to the application Incisive may provide a modified menu structure. The new menu can be imported into the program and permissions granted for the new menu items to the various Roles.

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.

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 to 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.

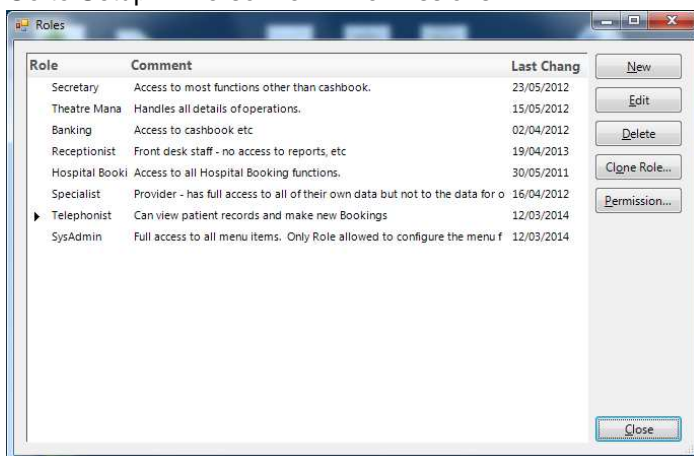
As the Role of 'Close-off banking' only had access to the Office -> Banking -> Close-off menu, it wouldn't be much use if it was the only Role allocated to an Operator – but is relevant if they also have all menu permissions given to them by belonging to the 'Base Administration' Role as well.

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.

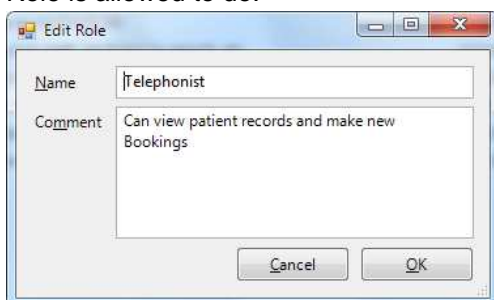
Creating a Role

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

1. Go to Setup -> Personnel -> Permissions



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.



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.

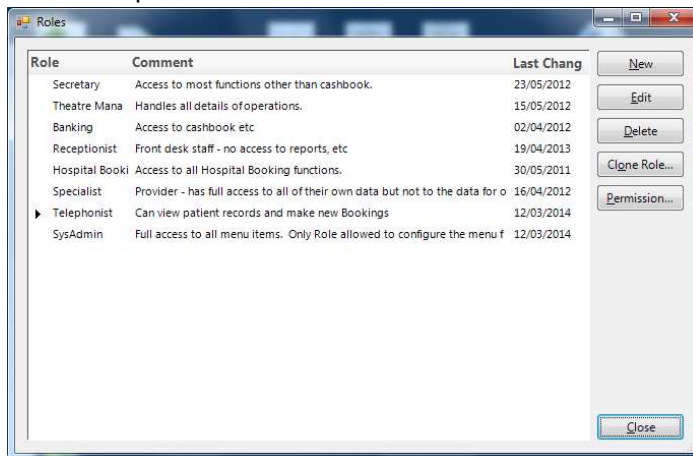
For a hospital, the following Roles are often used as an initial template.

SysAdmin	System Administrator. This Role should be given to one person who has the authority to assign access rights to all Operators for all Providers.
Manager	Needs BaseAdmin role. Can perform all business and admin related functions. Cannot remove patients 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 stock-take. Can access inventory related reports
Technician	Access to configure functions that interact with external devices/hardware. Cannot change Permissions.
Kitchen	Access limited to Dietary requirement report and internal messaging.

Allocating Permissions to a Role

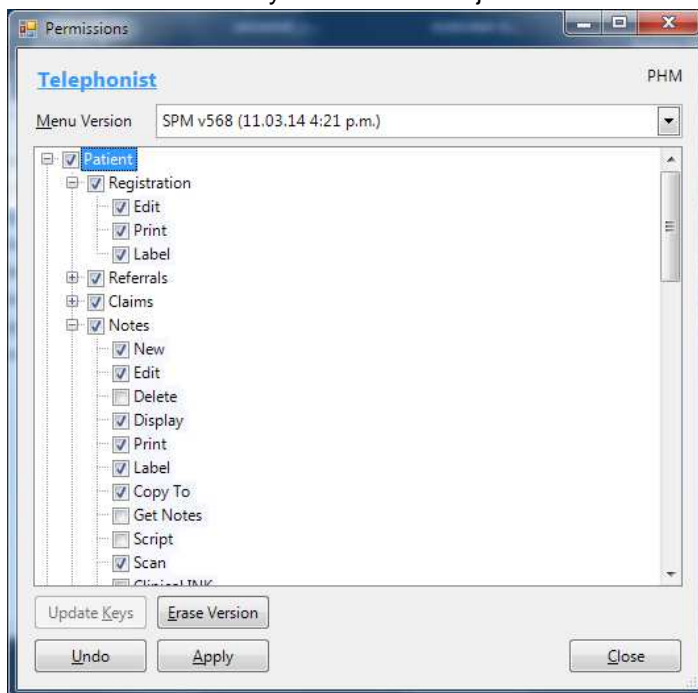
Once a Role has been created the menu items and buttons that it allowed to access can be allocated.

1. Go to Setup -> Personnel -> Permissions



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.



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	SysAdmin	Telephonist
PHM.Patient.Claims.Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PHM.Patient.Claims.Label	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PHM.Patient.Claims.New	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PHM.Patient.Claims.Print	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PHM.Patient.Claims.WorkCover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Financial	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PHM.Patient.Financial.Charge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Financial.Delete	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Financial.Display	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Financial.Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Financial.HIC Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Financial.Label	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Financial.Maternity/Obst	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Financial.New	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Financial.Print/Send	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Financial.Quote	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Financial.Receipt	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Financial.Resend	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Forms	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Forms.Delete	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Forms.Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Forms.Label	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Forms.New	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Forms.Print	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Images	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Images.Annotate	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Images.Assign	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Images.Delete	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHM.Patient.Images.Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

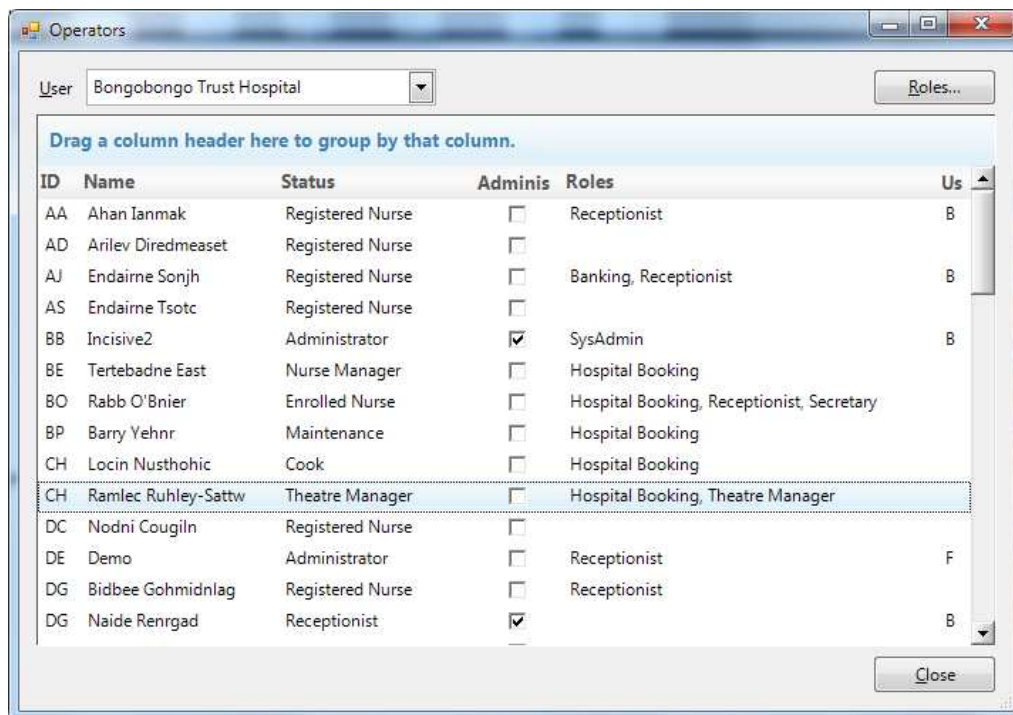
All menu items are listed with their full path, which is the same order as is displayed in the application.

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

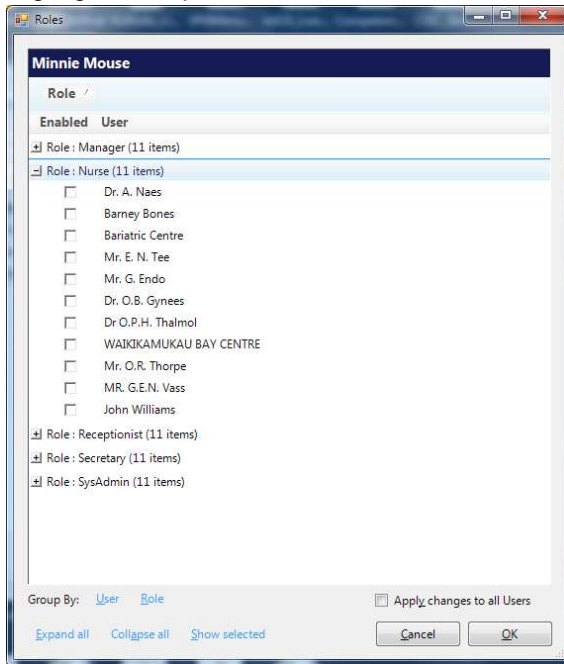


The screenshot shows a window titled "Operators" with a dropdown menu for "User" set to "Bongobongo Trust Hospital". Below the menu is a "Roles..." button. The main area contains a table with the following columns: ID, Name, Status, Adminis (with a checkbox), Roles, and Us (with a dropdown arrow). A blue instruction bar above the table says "Drag a column header here to group by that column." The table lists 15 operators, with the row for "CH Ramlec Ruhley-Sattw" highlighted. A "Close" button is at the bottom right.

ID	Name	Status	Adminis	Roles	Us
AA	Ahan Ianmak	Registered Nurse	<input type="checkbox"/>	Receptionist	B
AD	Arilev Diredmeaset	Registered Nurse	<input type="checkbox"/>		
AJ	Endairne Sonjh	Registered Nurse	<input type="checkbox"/>	Banking, Receptionist	B
AS	Endairne Tsotc	Registered Nurse	<input type="checkbox"/>		
BB	Incisive2	Administrator	<input checked="" type="checkbox"/>	SysAdmin	B
BE	Tertebadne East	Nurse Manager	<input type="checkbox"/>	Hospital Booking	
BO	Rabb O'Bnier	Enrolled Nurse	<input type="checkbox"/>	Hospital Booking, Receptionist, Secretary	
BP	Barry Yehnr	Maintenance	<input type="checkbox"/>	Hospital Booking	
CH	Locin Nusthohic	Cook	<input type="checkbox"/>	Hospital Booking	
CH	Ramlec Ruhley-Sattw	Theatre Manager	<input type="checkbox"/>	Hospital Booking, Theatre Manager	
DC	Nodni Cougilm	Registered Nurse	<input type="checkbox"/>		
DE	Demo	Administrator	<input type="checkbox"/>	Receptionist	F
DG	Bidbee Gohmidnlag	Registered Nurse	<input type="checkbox"/>	Receptionist	
DG	Naide Renrgad	Receptionist	<input checked="" type="checkbox"/>		B

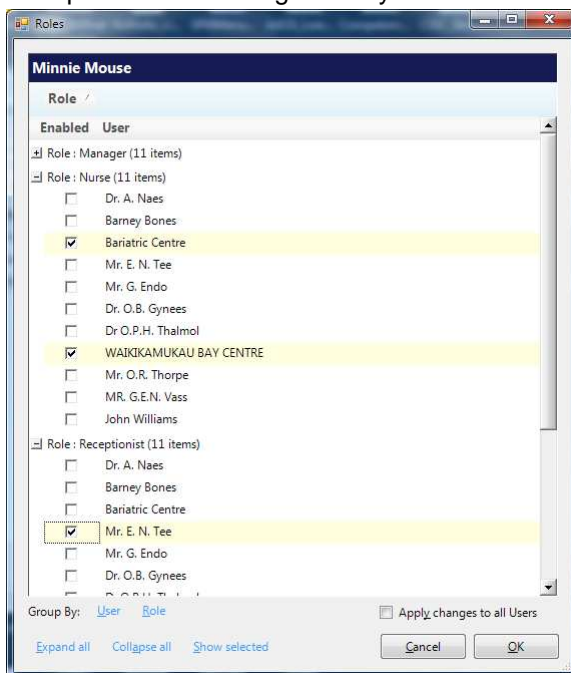
Allocate an Operator to a Role

1. Highlight the Operator and click on the Roles button



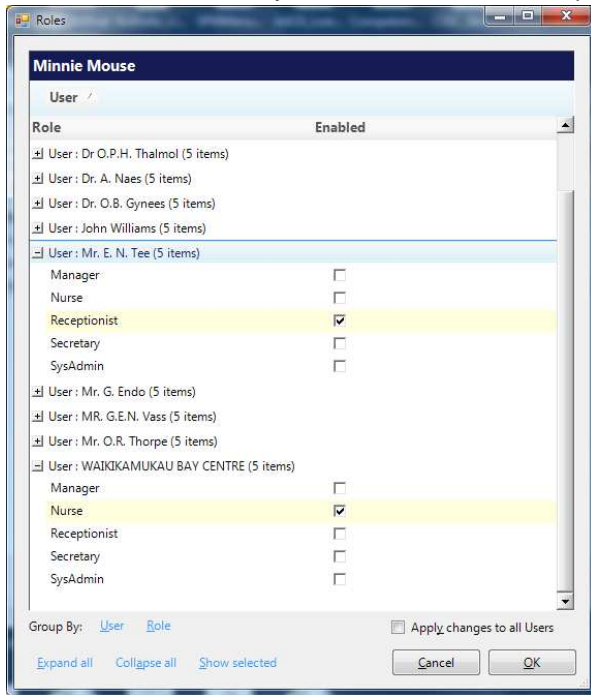
The Roles are in the left column and the Providers (the Hospital and any specialists in attached consulting suites) are shown in the right column.

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



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)

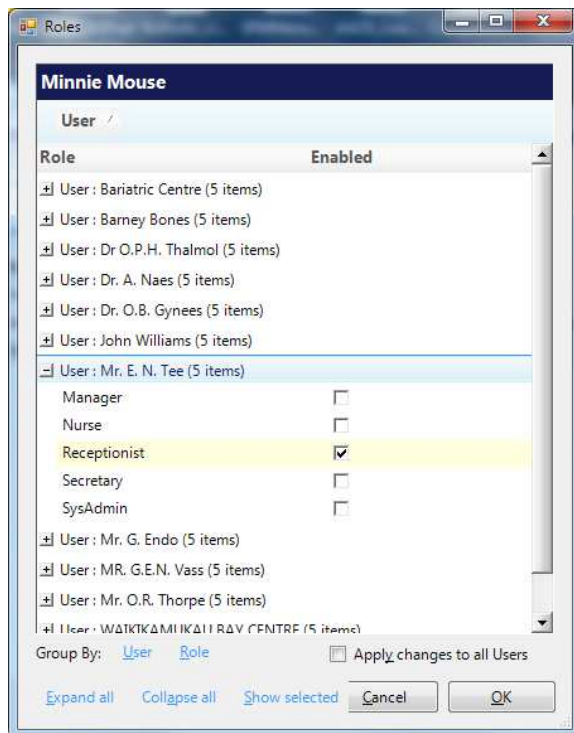


4. Click OK to save

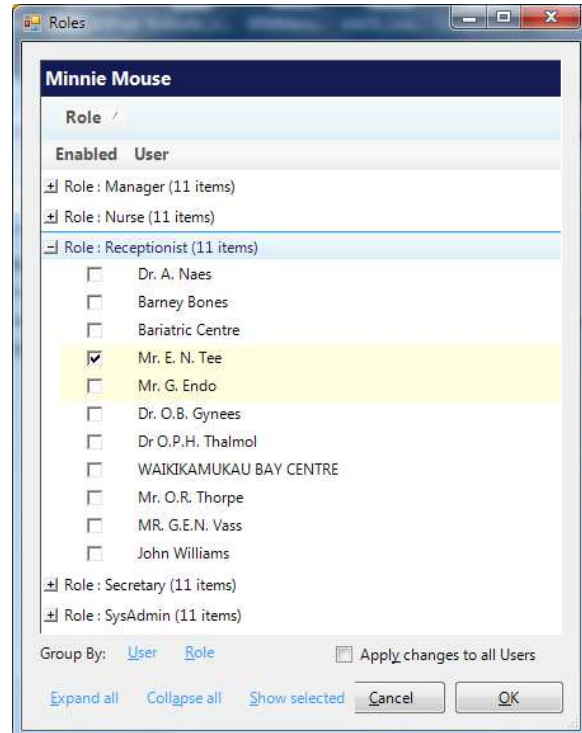
Filtering and sorting the selection options.

Group By:

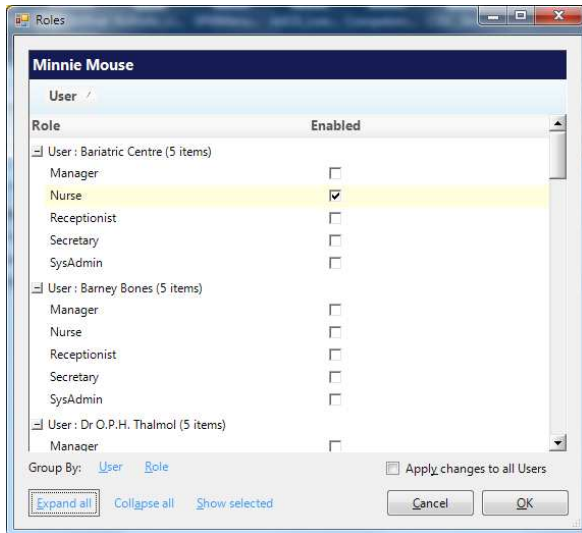
User



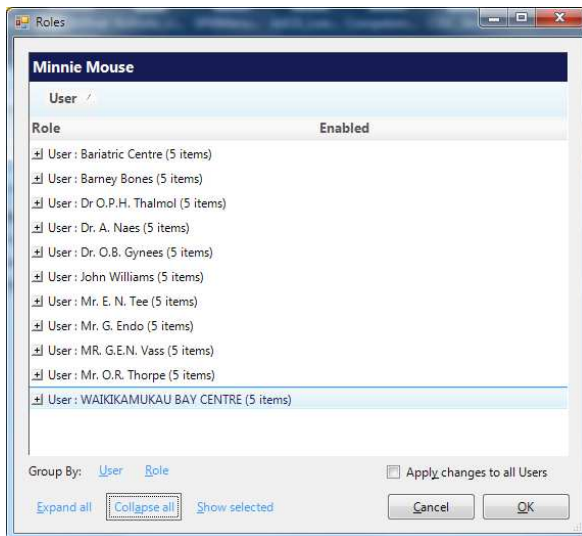
Role



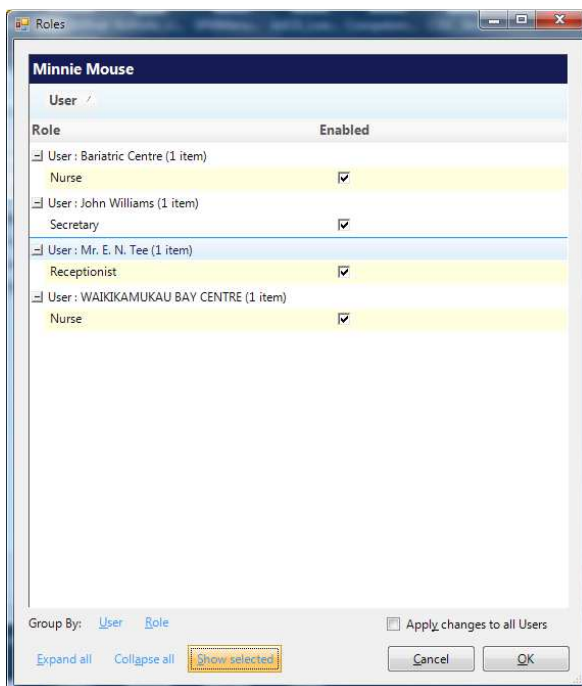
Expand All



Collapse All

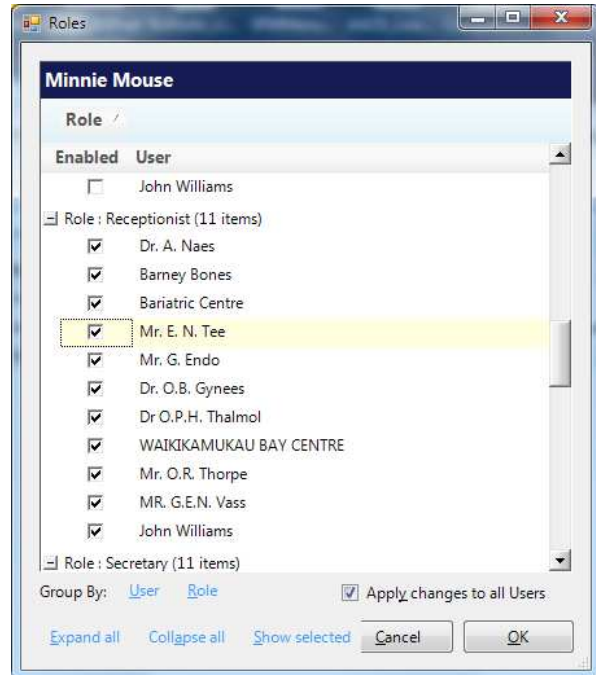
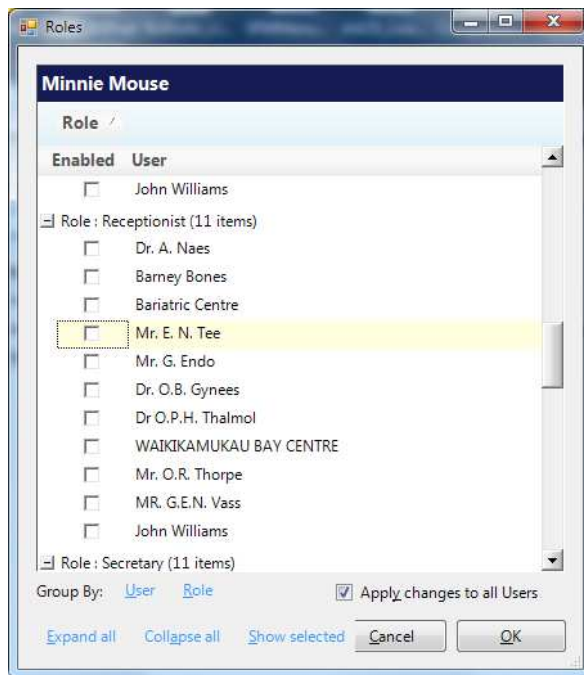


Show Selected



Apply changes to all Users

This is a dangerous option – use with extreme caution.

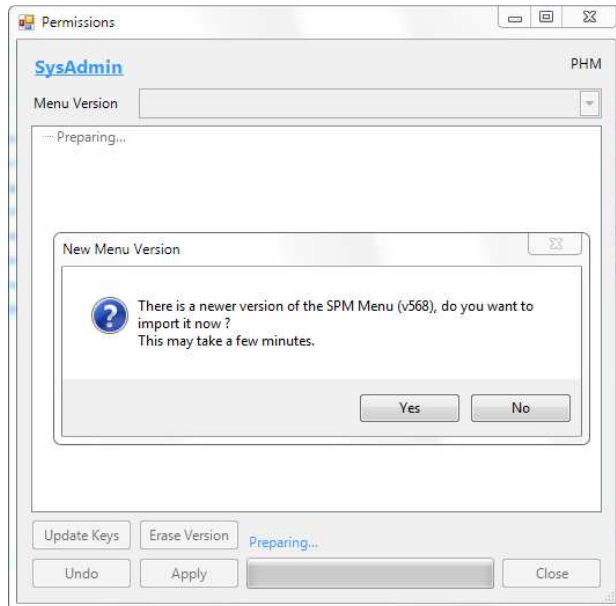


Updating the menu

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.



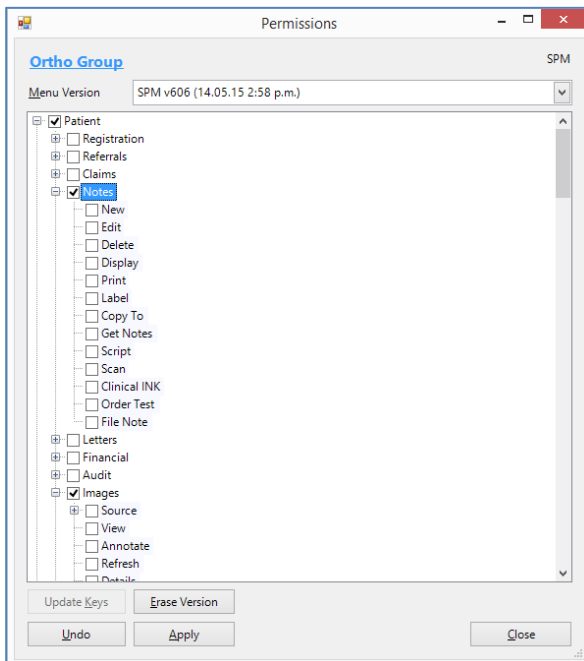
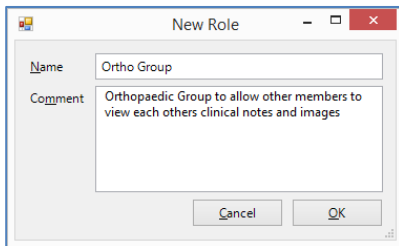
The menu can be imported when other Operators are still using SPM/PHM but generally it is best-practice to perform this task when the application is not being used.

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.

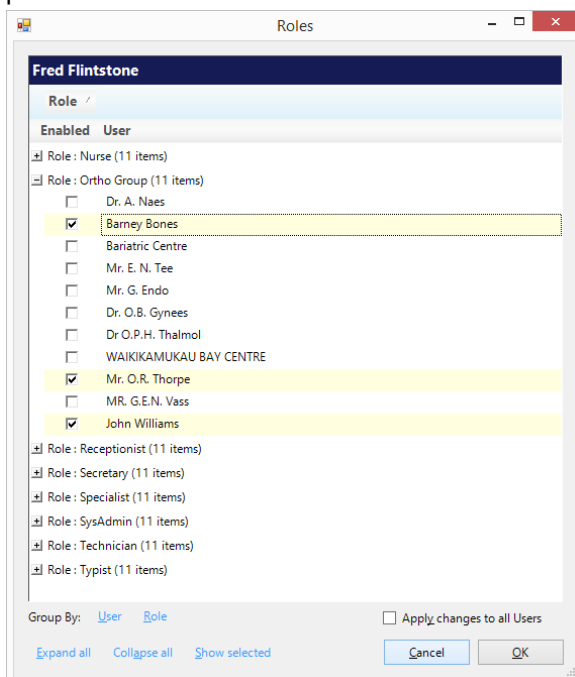
Troubleshooting

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.