CREDIBLE

Security Matrix Settings Guide

Draft Version 1.0 – Last Updated July 15, 2016

Introduction

The purpose of this guide is to clearly illustrate the functionality of every Security Matrix option. This will include screenshots, as well as information on any additional settings that would need to be active in order for the Matrix setting to be relevant.

Version History:

Version	Created By	Details	Date Completed
1.0	Bill Chamberlain	Initial Draft	

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Settings that do not currently have documentation:

If you have any questions on the following settings, please feel free to submit a Task Ticket:

BillingAddCopay	PaymentControlReopen	TxPlusDocument
BillingRetrieveFiles	ClientVisitDeleteSignature	PrescriptionApproveAll
ClientPaymentAdd	ClientVisitLinkClient	MessagingHubAnswerMessages
ClientPayments	ClientVisitOverrideEmp	ToDoListEditOtherEmp
ClientPaymentView	ClientVisitViewExt	MyCWAdmin
EnrollmentBypass	ClientVisitViewSummary	MyCWDashboard
MatrixHistory	VisitEntryOtherEmpAsSelf	MyCWDashboardClient
PaymentControlAlter	VisitEntryOtherEmpNoSig	MyCWDashboardEmployee
PaymentControlClose	UnmatchedLabResults	MyCWManager
PaymentControlDelete	TxPlusActivate	PhysicianOrderLineComplete
CustomExportEdit	PlannerCopyAll	PlannerUpdate

Matrix Section: Admin

AdminLookupUpdate

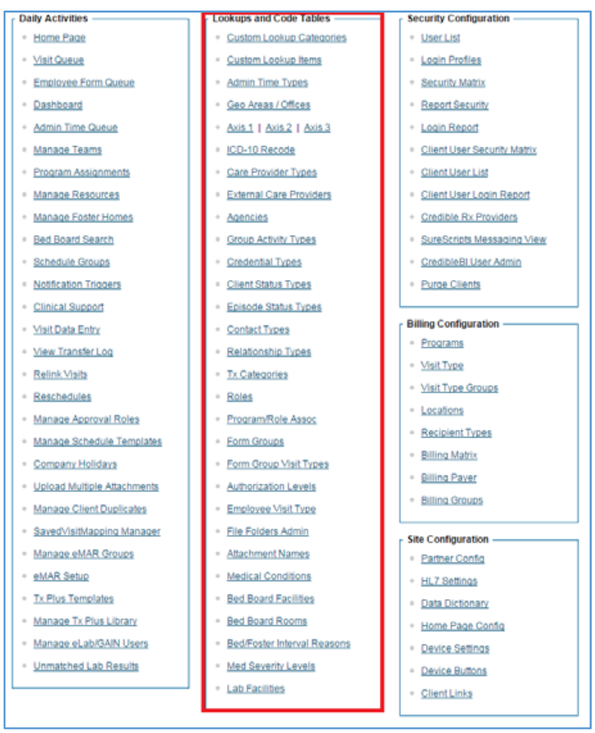
Function:

- This setting controls whether the “Lookups and Code Tables” section of the Admin tab will be displayed.
- Also controls whether the User will be able to access the “Accounting Periods” and “835 Adjustment Codes” page from the Billing Tab.
    - Users will still be able to see the Accounting Periods link if this setting is disabled, but clicking the link to enter the page will display an “Insufficient Rights” notification.

Location(s) this setting affects:

- Admin Tab
- Billing Tab -> Accounting Periods
- Billing Tab -> 835 Adjustment Codes

Screenshots:



Admin Tab with AdminLookupUpdate ENABLED

Admin Tab with AdminLookupUpdate DISABLED

AdminView

Function:

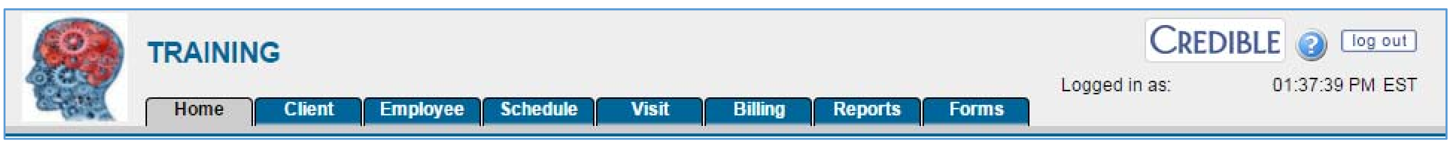
- Controls whether the "Admin" tab displays for users under that Profile.
    - NOTE: This setting supercedes any Matrix setting that controls links within the Admin Tab, since that tab will no longer be visible.

Location(s) this setting affects:

- The tabs that typically display at the top of the page.

Screenshots:

With AdminView ENABLED



With AdminView DISABLED

BedBoardAdmin

Function:

- Controls whether three links in the Admin Tab display in the “Lookups and Code Tables” section:
    - Bed Board Facilities
    - Bed Board Rooms
    - Bed Board Interval Reasons
- NOTE: If the AdminLookupUpdate Matrix setting is disabled, this setting will be irrelevent, since the entire “Lookups and Code Tables” section will be removed.

Location(s) this setting affects:

- Admin Tab

Screenshots:

With BedBoardAdmin ENABLED

With BedBoardAdmin DISABLED

ClinicalSupportAdmin

Function:

- Controls whether a user will be able to access the “Clinical Support” page from the Admin Tab.
    - If disabled, the user will still be able to see the link, but after clicking it, they will only see an “insufficient rights” message.

Location(s) this setting affects:

- Admin Tab

Screenshots:

Where the ‘Clincial Support’ Link displays from the Admin Tab

DataDictionary

Function:

- Controls whether the “Data Dictionary” link in the Admin tab is viewable.

Location(s) this setting affects:

- Admin Tab

Screenshots:

With DataDictionary ENABLED

With DataDictionary DISABLED

FosterHomeAdmin

Function:

- Controls whether the “Manage Foster Homes” link in the Admin tab is viewable.
    - NOTE: Within the Partner Config, the Partner must also have “Use Foster Homes” enabled. Otherwise, this Matrix setting will be irrelevant.

Location(s) this setting affects:

- Admin Tab

Screenshots:

With FosterHomeAdmin ENABLED

With FosterHomeAdmin DISABLED

ManageApprovalRoles

Function:

- Controls whether the “Manage Approval Roles” link in the Admin tab is viewable.

Location(s) this setting affects:

- Admin Tab

Screenshots:

With ManageApprovalRoles ENABLED

With ManageApprovalRoles DISABLED

NotificationTriggers

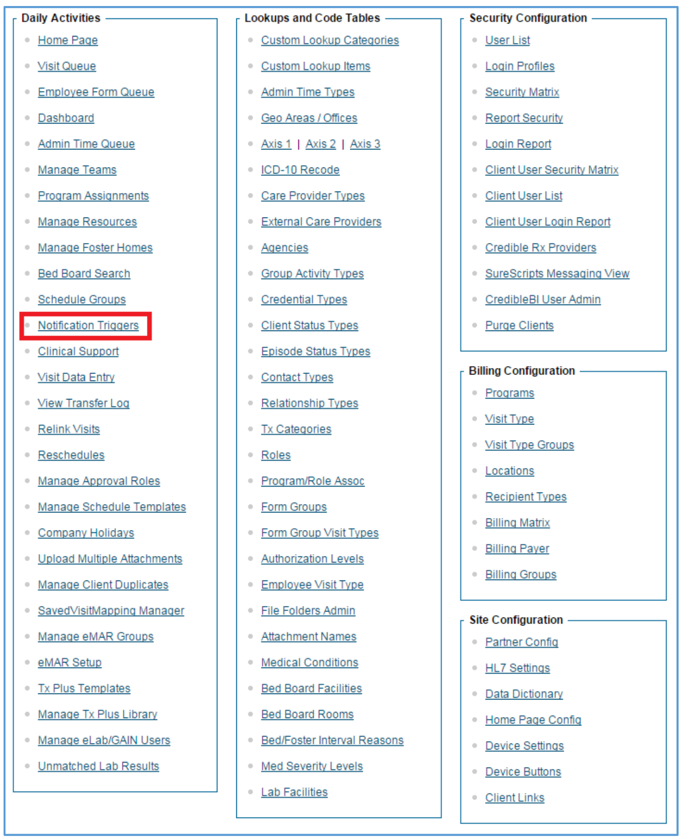
Function:

- Controls whether the “Notification Triggers” link in the Admin tab is viewable.

Location(s) this setting affects:

- Admin Tab

Screenshots:



With NotificationTriggers ENABLED

With NotificationTriggers DISABLED

PartnerConfig

Function:

- Controls whether the “Partner Config” link in the Admin tab is viewable.

Location(s) this setting affects:

- Admin Tab

Screenshots:

With PartnerConfig ENABLED

With PartnerConfig DISABLED

PurgeClients

Function:

- Controls whether the "Purge Clients" link in the Admin tab is viewable.
    - RECOMMENDED only for Admin staff as Purging a Client results in that Client record being permanently removed, which is irreversible.

Location(s) this setting affects:

- Admin Tab

Screenshots:

With PurgeClients ENABLED

With PurgeClients DISABLED

SavedVisitMappingManager

Function:

- Controls whether the “SavedVisitMapping Manager” link in the Admin tab is viewable.
    - This page allows access to the SavedVisitMapping Table, which shows the ID’s of failed visit mappings.

Location(s) this setting affects:

- Admin Tab

Screenshots:

With SavedVisitMappingManger ENABLED

With SavedVisitMappingManger DISABLED

SecurityUpdate

Function:

- Controls whether three links in the Admin Tab display in the “Security Configuration” section:
    - Login Profiles
    - Security Matrix
    - Report Security

Location(s) this setting affects:

- Admin Tab

Screenshots:

When SecurityUpdate is ENABLED

When SecurityUpdate is DISABLED

SubmitLibraryTicket

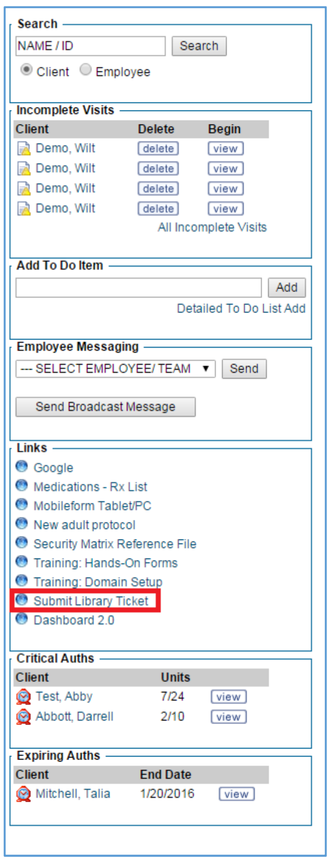
Function:

- Allows access to the "Submit Library Ticket" link on the "Home Tab – Links" section, giving the Profile the ability to submit Knowledge Share Information details to the LIBRARY domain.

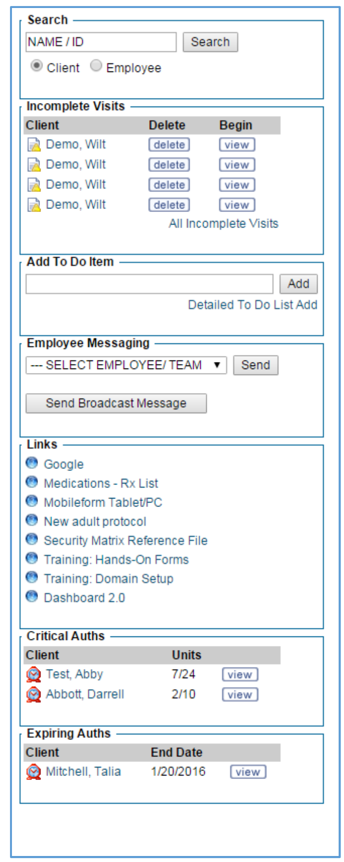
Location(s) this setting affects:

- Home Page

Screenshots:



With SubmitLibraryTicket ENABLED



With SubmitLibraryTicket DISABLED

SubmitTaskTicket

Function:

- This setting is no longer utilized. Task Ticket submission control is now controlled through individual Employee Configs.

SuperviseAll

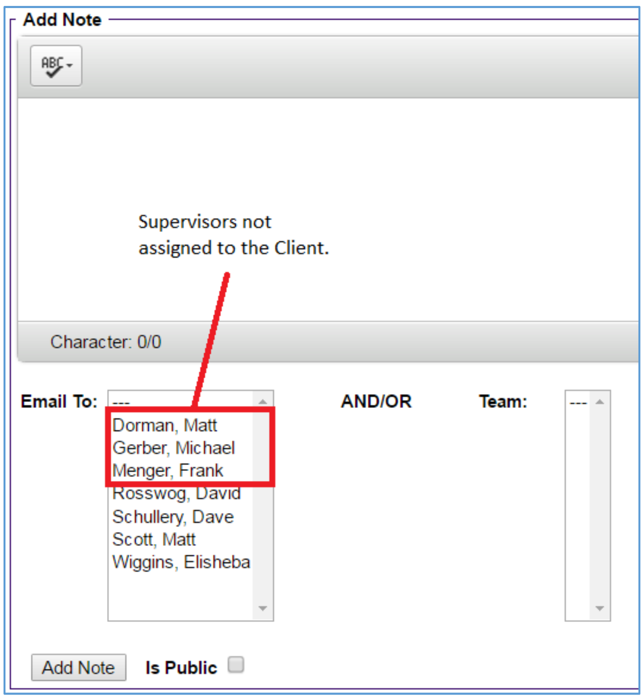
Function:

- Determines whether extra Employees will display on the "Email To:" section within the Client's Notes page. If enabled, Employee's that are a Supervisor will display, even if they are not assigned to the Employee.
  - NOTE: The description to this setting mentions the Dashboard, however this description is not valid since the release of Dashboard 2.0.

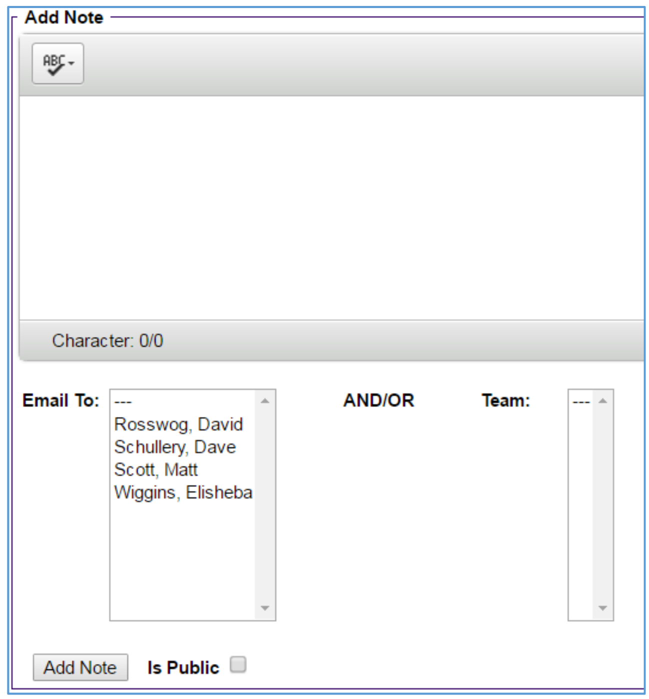
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Notes Button -> Email To Section

Screenshots:



When SuperviseAll is ENABLED



When SuperviseAll is DISABLED

TransferLogList

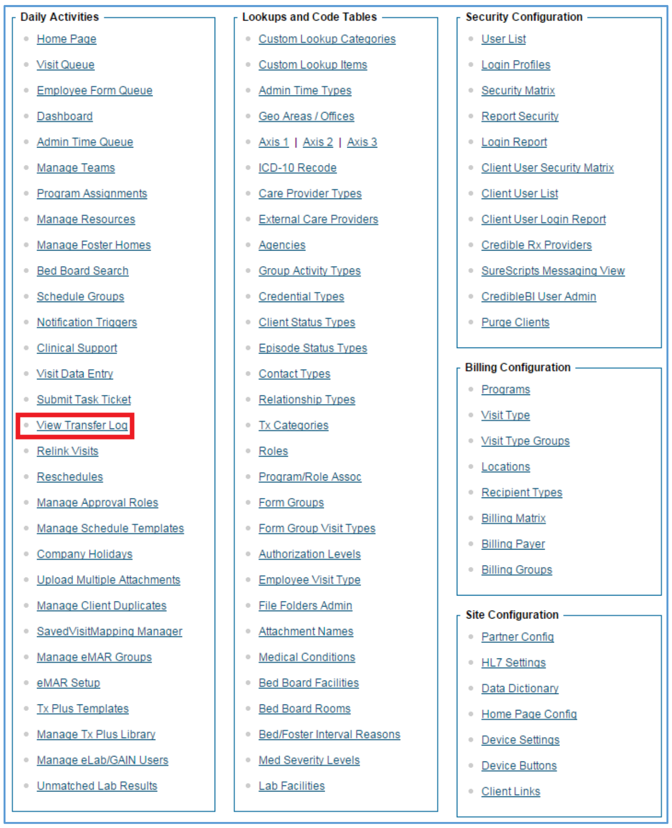
Function:

- Controls whether the “View Transfer Log” link in the Admin tab is viewable.

Location(s) this setting affects:

- Admin Tab -> View Transfer Log

Screenshots:



With TransferLogList ENABLED

With TransferLogList DISABLED

TransferLogView

Function:

- Controls whether the details in the "Transfer Log" page are viewable, by clicking on the timestamp that shows on one of the entries.
  - NOTE: If disabled, an "Insufficient Rights" message or an error message will display when clicking one of the timestamps.

Location(s) this setting affects:

- Admin Tab -> View Transfer Log -> Click on one of the timestamps

Screenshots:

Transfer Log:
Showing 1 to 7 of 7.

#	Transfer Date	Status	Type	Partner Name
1	6/20/2016 2:57:49 PM	success	visit	CWTRAINING
2	6/20/2016 2:52:53 PM	success	admintime	CWTRAINING
3	6/20/2016 2:52:52 PM	success	visit	CWTRAINING
4	6/20/2016 2:31:38 PM	success	visit	CWTRAINING
5	6/20/2016 2:31:35 PM	success	visit	CWTRAINING
6	6/20/2016 2:31:26 PM	success	cancel	CWTRAINING
7	6/20/2016 2:20:37 PM	success	visit	CWTRAINING

Matrix Section: Admin Time

AdminTimeAdd

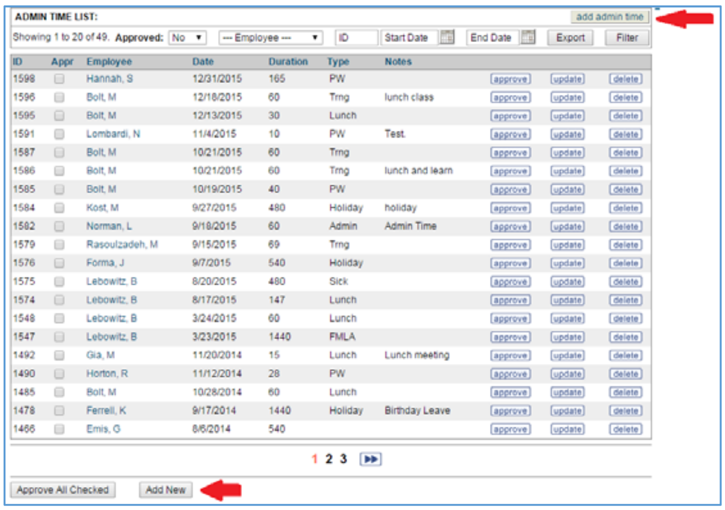
Function:

- Controls whether the “add admin time” button as well as the “Add New” button will display on the Admin Time List page.

Location(s) this setting affects:

- The Admin Time List page, which is accessible in two different ways:
  - Admin Tab -> Admin Time Queue
  - Employee Page -> Employee Nav Bar -> Admin Time

Screenshots:


ADMIN TIME LIST: add admin time

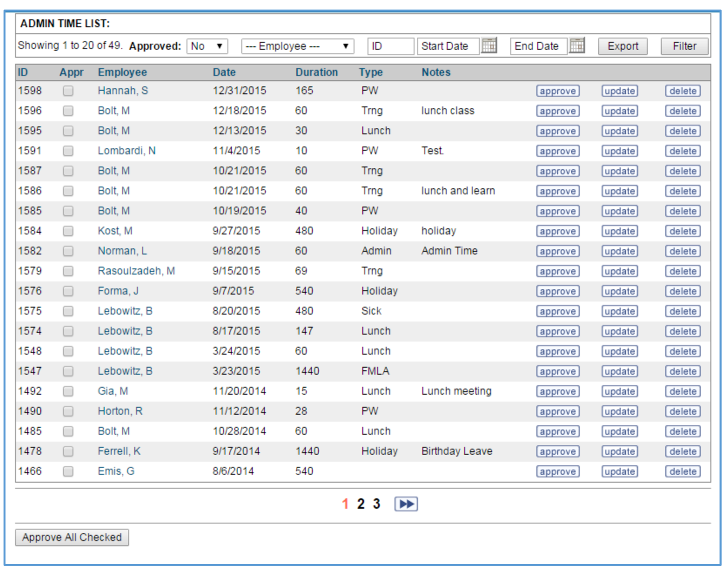
Showing 1 to 20 of 49. Approved: No --- Employee --- ID Start Date End Date Export Filter

ID	Appr	Employee	Date	Duration	Type	Notes			
1598		Hannah, S	12/31/2015	165	PW		approve	update	delete
1596		Bolt, M	12/18/2015	60	Trng	lunch class	approve	update	delete
1595		Bolt, M	12/13/2015	30	Lunch		approve	update	delete
1591		Lombardi, N	11/4/2015	10	PW	Test.	approve	update	delete
1587		Bolt, M	10/21/2015	60	Trng		approve	update	delete
1586		Bolt, M	10/21/2015	60	Trng	lunch and learn	approve	update	delete
1585		Bolt, M	10/19/2015	40	PW		approve	update	delete
1584		Kost, M	9/27/2015	480	Holiday	holiday	approve	update	delete
1582		Norman, L	9/18/2015	60	Admin	Admin Time	approve	update	delete
1579		Rasoulzadeh, M	9/15/2015	69	Trng		approve	update	delete
1576		Forma, J	9/7/2015	540	Holiday		approve	update	delete
1575		Lebowitz, B	8/20/2015	480	Sick		approve	update	delete
1574		Lebowitz, B	8/17/2015	147	Lunch		approve	update	delete
1548		Lebowitz, B	3/24/2015	60	Lunch		approve	update	delete
1547		Lebowitz, B	3/23/2015	1440	FMLA		approve	update	delete
1492		Gia, M	11/20/2014	15	Lunch	Lunch meeting	approve	update	delete
1490		Horton, R	11/12/2014	28	PW		approve	update	delete
1485		Bolt, M	10/28/2014	60	Lunch		approve	update	delete
1478		Ferrell, K	9/17/2014	1440	Holiday	Birthday Leave	approve	update	delete
1466		Emis, G	8/6/2014	540			approve	update	delete

1 2 3

Approve All Checked Add New

With AdminTimeAdd ENABLED


ADMIN TIME LIST:

Showing 1 to 20 of 49. Approved: No --- Employee --- ID Start Date End Date Export Filter

ID	Appr	Employee	Date	Duration	Type	Notes			
1598		Hannah, S	12/31/2015	165	PW		approve	update	delete
1596		Bolt, M	12/18/2015	60	Trng	lunch class	approve	update	delete
1595		Bolt, M	12/13/2015	30	Lunch		approve	update	delete
1591		Lombardi, N	11/4/2015	10	PW	Test.	approve	update	delete
1587		Bolt, M	10/21/2015	60	Trng		approve	update	delete
1586		Bolt, M	10/21/2015	60	Trng	lunch and learn	approve	update	delete
1585		Bolt, M	10/19/2015	40	PW		approve	update	delete
1584		Kost, M	9/27/2015	480	Holiday	holiday	approve	update	delete
1582		Norman, L	9/18/2015	60	Admin	Admin Time	approve	update	delete
1579		Rasoulzadeh, M	9/15/2015	69	Trng		approve	update	delete
1576		Forma, J	9/7/2015	540	Holiday		approve	update	delete
1575		Lebowitz, B	8/20/2015	480	Sick		approve	update	delete
1574		Lebowitz, B	8/17/2015	147	Lunch		approve	update	delete
1548		Lebowitz, B	3/24/2015	60	Lunch		approve	update	delete
1547		Lebowitz, B	3/23/2015	1440	FMLA		approve	update	delete
1492		Gia, M	11/20/2014	15	Lunch	Lunch meeting	approve	update	delete
1490		Horton, R	11/12/2014	28	PW		approve	update	delete
1485		Bolt, M	10/28/2014	60	Lunch		approve	update	delete
1478		Ferrell, K	9/17/2014	1440	Holiday	Birthday Leave	approve	update	delete
1466		Emis, G	8/6/2014	540			approve	update	delete

1 2 3

Approve All Checked

With AdminTimeAdd DISABLED

AdminTimeApprove

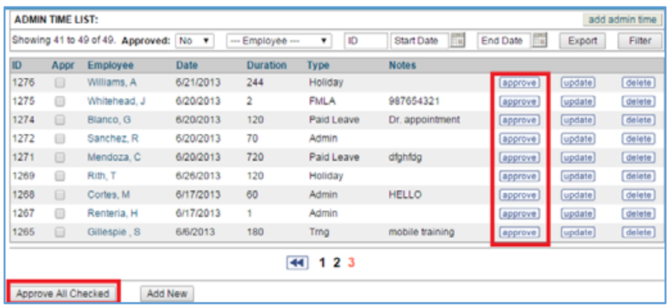
Function:

- Controls whether the “approve” and “Approve All Checked” buttons appear on the Admin Time List.
- Also controls whether the “Approved” checkbox appears while updating an individual Admin Time entry.

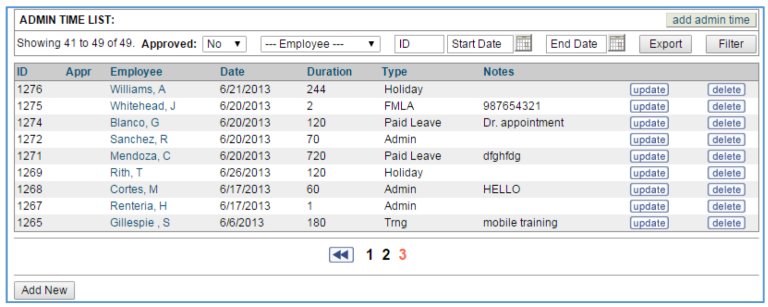
Location(s) this setting affects:

- The Admin Time List page, which is accessible in two different ways:
  - Admin Tab -> Admin Time Queue
  - Employee Page -> Employee Nav Bar -> Admin Time
- Individual Admin Time entry pages, accessed by clicking “update” on an entry from the Admin Time List.

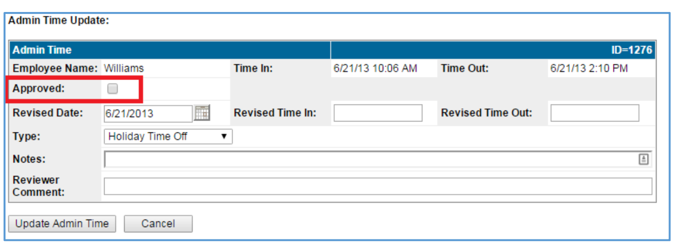
Screenshots:



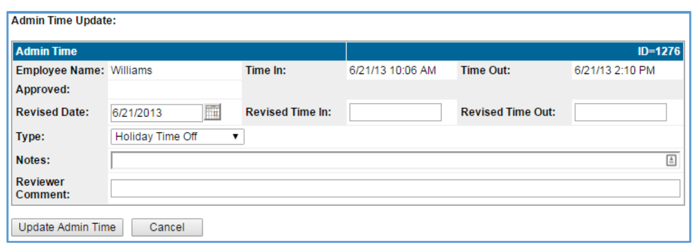
With AdminTimeAdd ENABLED



With AdminTimeAdd DISABLED



With AdminTimeAdd ENABLED



With AdminTimeAdd DISABLED

AdminTimeDelete

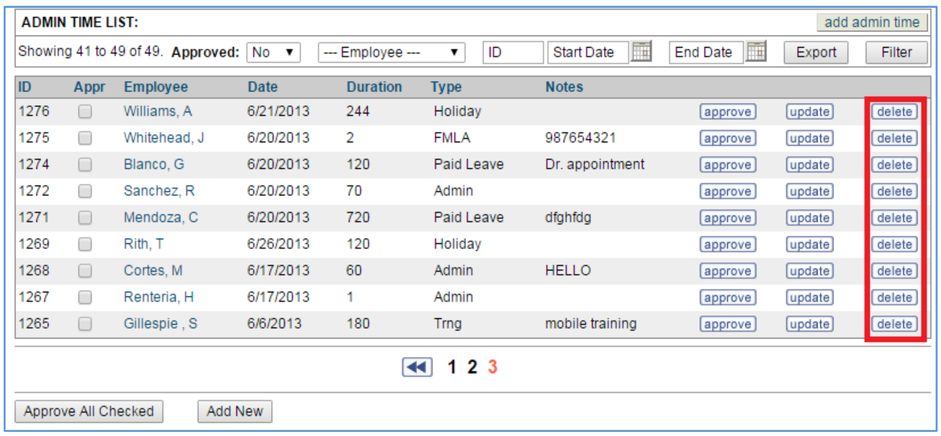
Function:

- Controls whether the "delete" button appear on the Admin Time List.

Location(s) this setting affects:

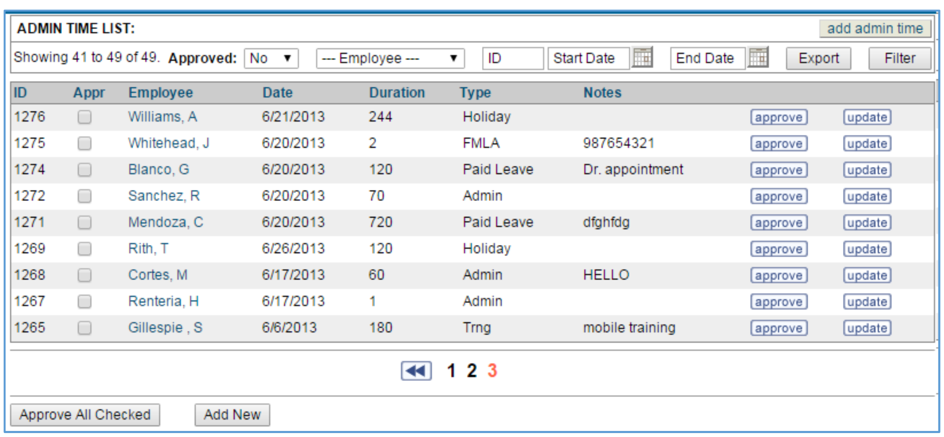
- The Admin Time List page, which is accessible in two different ways:
    - Admin Tab -> Admin Time Queue
    - Employee Page -> Employee Nav Bar -> Admin Time

Screenshots:



ID	Appr	Employee	Date	Duration	Type	Notes			
1276		Williams, A	6/21/2013	244	Holiday		approve	update	delete
1275		Whitehead, J	6/20/2013	2	FMLA	987654321	approve	update	delete
1274		Blanco, G	6/20/2013	120	Paid Leave	Dr. appointment	approve	update	delete
1272		Sanchez, R	6/20/2013	70	Admin		approve	update	delete
1271		Mendoza, C	6/20/2013	720	Paid Leave	dfghfdg	approve	update	delete
1269		Rith, T	6/26/2013	120	Holiday		approve	update	delete
1268		Cortes, M	6/17/2013	60	Admin	HELLO	approve	update	delete
1267		Renteria, H	6/17/2013	1	Admin		approve	update	delete
1265		Gillespie , S	6/6/2013	180	Trng	mobile training	approve	update	delete

With AdminTimeDelete ENABLED



ID	Appr	Employee	Date	Duration	Type	Notes		
1276		Williams, A	6/21/2013	244	Holiday		approve	update
1275		Whitehead, J	6/20/2013	2	FMLA	987654321	approve	update
1274		Blanco, G	6/20/2013	120	Paid Leave	Dr. appointment	approve	update
1272		Sanchez, R	6/20/2013	70	Admin		approve	update
1271		Mendoza, C	6/20/2013	720	Paid Leave	dfghfdg	approve	update
1269		Rith, T	6/26/2013	120	Holiday		approve	update
1268		Cortes, M	6/17/2013	60	Admin	HELLO	approve	update
1267		Renteria, H	6/17/2013	1	Admin		approve	update
1265		Gillespie , S	6/6/2013	180	Trng	mobile training	approve	update

With AdminTimeDelete DISABLED

AdminTimeList

Function:

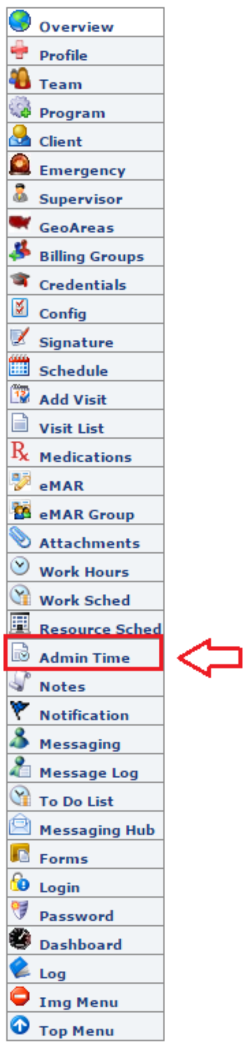
- Controls whether the user will be able to access the Admin Time List. If disabled, the following links are removed:
    - Admin Tab -> Admin Time Queue
    - Employee Page -> Employee Nav Bar -> Admin Time

Location(s) this setting affects:

- The Admin Tab
- Employee Nav Bar

Screenshots:

The following links will be removed if AdminTimeList is marked as DISABLED:



From the Admin Tab

AdminTimeListAll

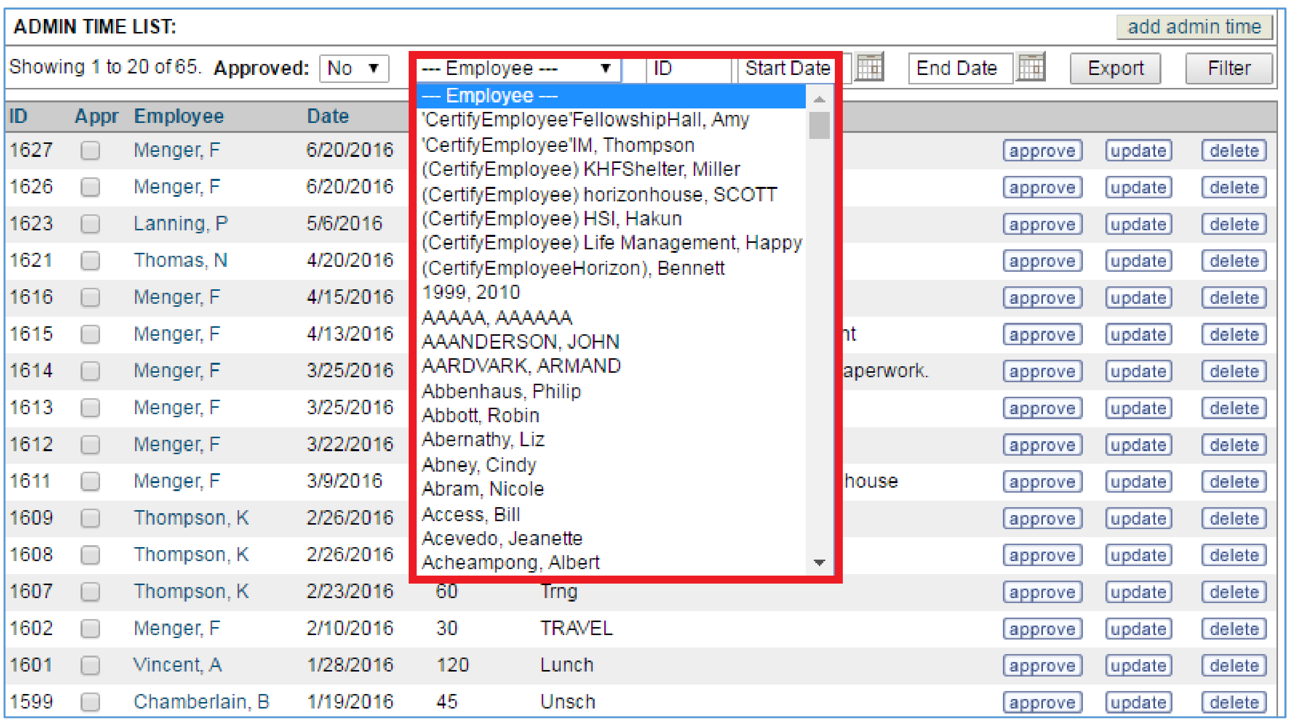
Function:

- Determines whether you can see the Admin Time entries for ALL Employees. If disabled, you will only see your own Admin Times, assuming the AdminTimeListOwn Security Matrix setting is enabled.
    - In addition, the dropdown in the Admin Time List that is used to select Employees will only display your name when this setting is disabled.
- NOTE: This Matrix setting supersedes the AdminTimeListOwn setting. AdminTimeListOwn is only relevent when this Matrix setting is disabled.

Location(s) this setting affects:

- The Admin Time List page, which is accessible in two different ways:
    - Admin Tab -> Admin Time Queue
    - Employee Page -> Employee Nav Bar -> Admin Time

Screenshots:



When AdminTimeListAll is ENABLED

AdminTimeListOwn

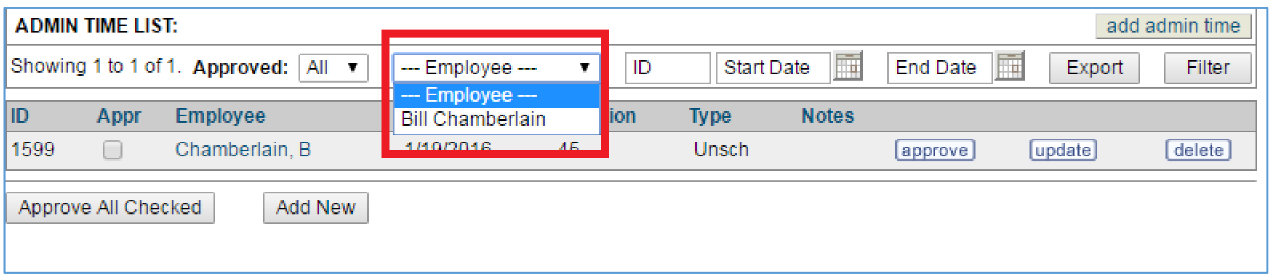
Function:

- Determines whether you can see Admin Time entries for your Employee account only.
    - NOTE: Even if enabled, this setting will not function unless AdminTimeListAll is disabled.

Location(s) this setting affects:

- The Admin Time List page, which is accessible in two different ways:
    - Admin Tab -> Admin Time Queue
    - Employee Page -> Employee Nav Bar -> Admin Time

Screenshots:



When AdminTimeListOwn is ENABLED, and AdminTimeListAll is DISABLED

AdminTimeUpdate

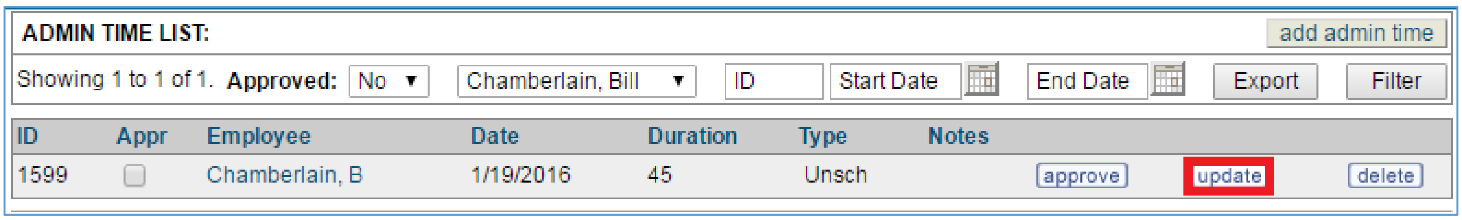
Function:

- Determines whether you can make updates on Admin Time entries. Updates include altering the times or adding notes.

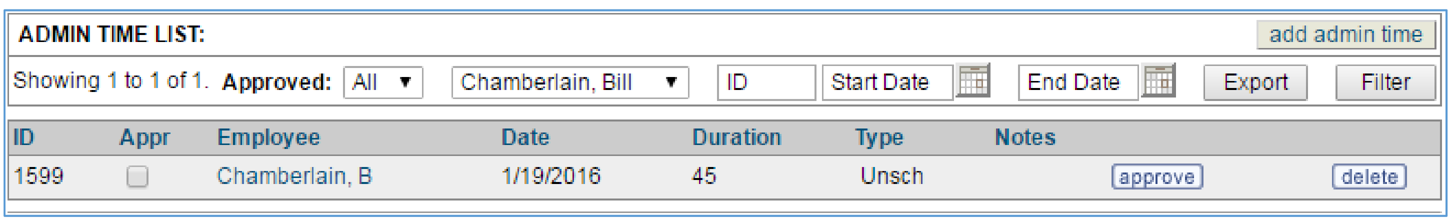
Location(s) this setting affects:

- The Admin Time List page, which is accessible in two different ways:
  - Admin Tab -> Admin Time Queue -> Update Button
  - Employee Page -> Employee Nav Bar -> Admin Time -> Update Button

Screenshots:



When AdminTimeUpdate is ENABLED



When AdminTimeUpdate is DISABLED

Matrix Section: Assignments

AssignClientGeoAreas

Function:

- Determines whether the “Geo Areas” link appears in the Client Nav Bar.

Location(s) this setting affects:

- Client Page -> Client Nav Bar

Screenshots:

This link would not appear if AssignClientsGeoAreas is disabled.

AssignClientPrograms

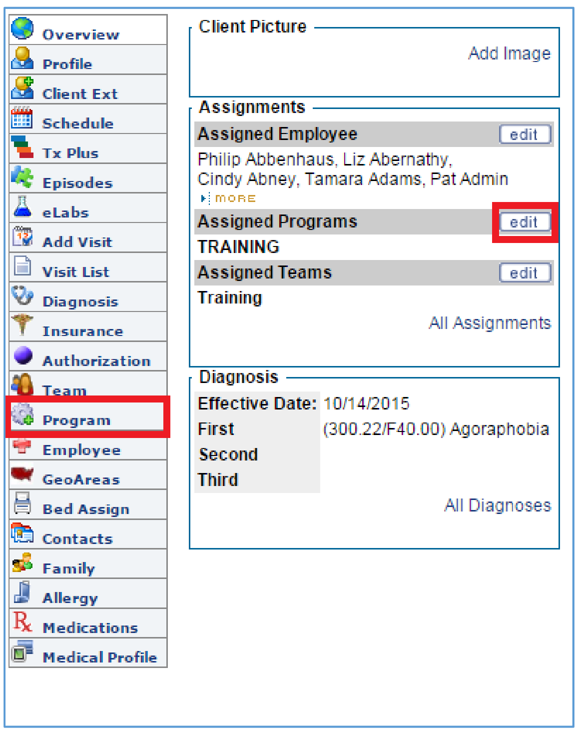
Function:

- Allows/restricts access to editing the Programs on a Client from the following two locations:
    - The “Program” link on the Client Nav Bar.
    - The edit button near the Assigned Programs section of the Assignments window.
- If unchecked the following message will appear when trying to edit Programs: You do not have sufficient access rights to use this function. Please contact the system administrator or Credible support.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Programs
- Client Page -> Assignments -> Assigned Programs

Screenshots:



If AssignClientPrograms is disabled, you’ll get the above message when trying to access Programs:

AssignClients

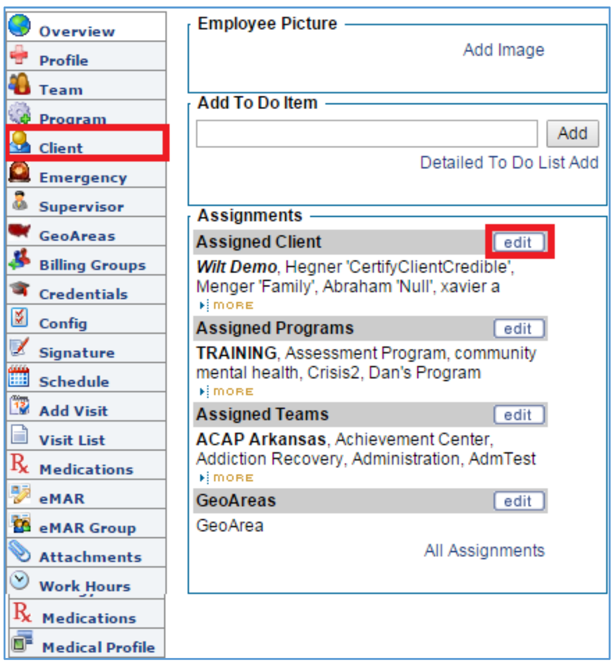
Function:

- Allows/restricts the right to assign Clients to Employees while on an Employee page.
  - NOTE: This setting does not affect the user's ability to assign Employees to Clients when on a Client page. That is affected by the AssignEmployees matrix setting.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Programs
- Client Page -> Assignments -> Assigned Client

Screenshots:



AssignClientTeams

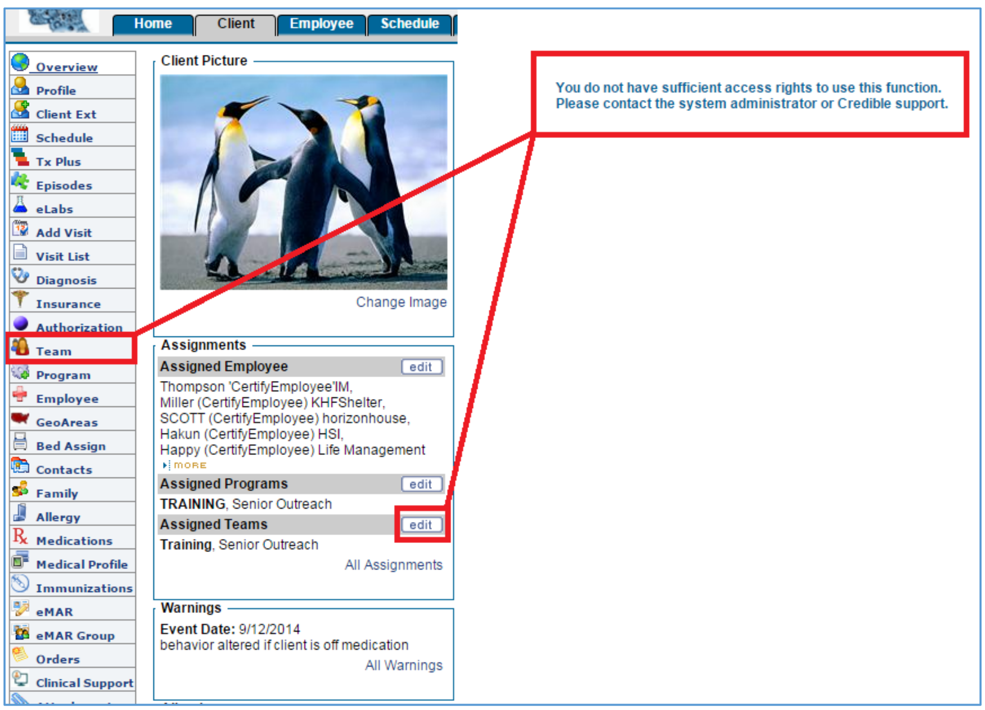
Function:

- Allows/restricts the right to assign Clients to Teams.
  - If this setting is disabled, the Team and Edit button will still display on Client pages, but attempting to access them will result in an Insufficient Rights error.
  - This setting will not affect the ability to edit Teams for Employees.
  - NOTE: The AssignTeams Matrix setting will need to be enabled for this setting to be relevant.
  - NOTE: This setting is superceded by the AssignClientTeamsSameOnly setting.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Team
- Client Page -> Assignments -> Assigned Teams

Screenshots:



If AssignClientTeams is DISABLED

AssignClientTeamsSameOnly

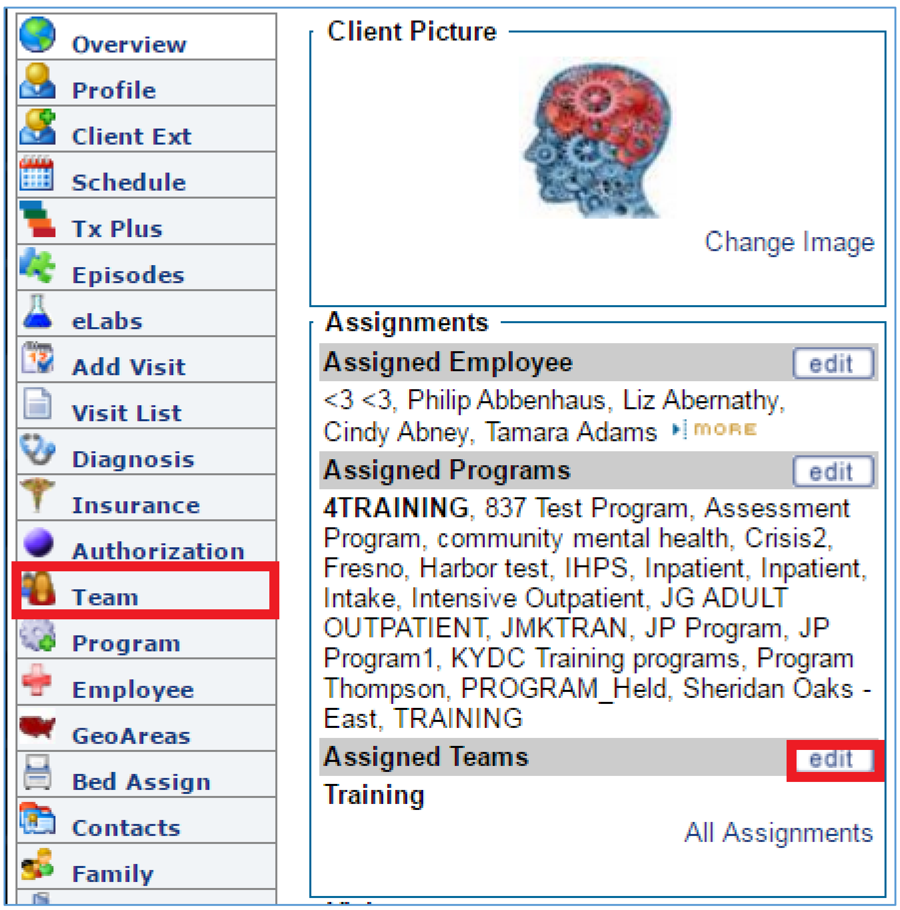
Function:

- When enabled, the user will only be able to assign Clients to Teams that the user is currently assigned to. For example, if the user is assigned to the Intake and Substance Abuse Teams, they will only be able to assign Clients to those two Teams. Any other Teams that exist will not display as options.
    - NOTE: This setting supercedes the AssignClientTeams setting.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Team Button
- Client Page -> Assignments Module -> Assigned Teams -> Edit Button

Screenshots:



AssignEmployeeCredentials

Function:

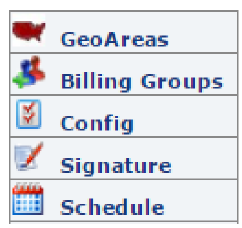
- Allows the user the ability to assign Credentials for all other Employees. Controls whether the "Credentials" button will display on all Employee Nav Bars.
    - NOTE: This setting supercedes AssignEmployeeCredentialsOwn.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Credentials Button

Screenshots:

When AssignEmployeeCredentials is ENABLED



When AssignEmployeeCredentials is DISABLED

AssignEmployeeCredentialsOwn

Function:

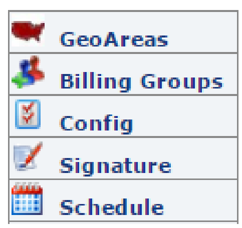
- Allows the user the ability to assign Credentials for ONLY their own Employee account. Controls whether the "Credentials" button displays on their Employee Nav Bar.
  - NOTE: If AssignEmployeeCredentials is enabled, this setting will have no effect.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Credentials Button

Screenshots:

When AssignEmployeeCredentials is ENABLED



When AssignEmployeeCredentials is DISABLED

AssignEmployeeGeoAreas

Function:

- Allows the user the ability to assign GeoAreas for Employees. Controls whether the “GeoAreas” button displays on the Employee Nav Bar.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> GeoAreas Button

Screenshots:

When AssignEmployeeGeoAreas is ENABLED

When AssignEmployeeGeoAreas is DISABLED

AssignEmployeePrograms

Function:

- Allows the user the ability to assign Programs for Employees. Controls whether the "Programs" button displays on the Employee Nav Bar.
    - When disabled, the Client will receive an "Insufficient Rights" message when trying to access the Employee Programs.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Programs Button
- Employee Page -> Assignments Module -> Assigned Programs -> Edit Button

Screenshots:

When AssignEmployeePrograms is DISABLED

AssignEmployees

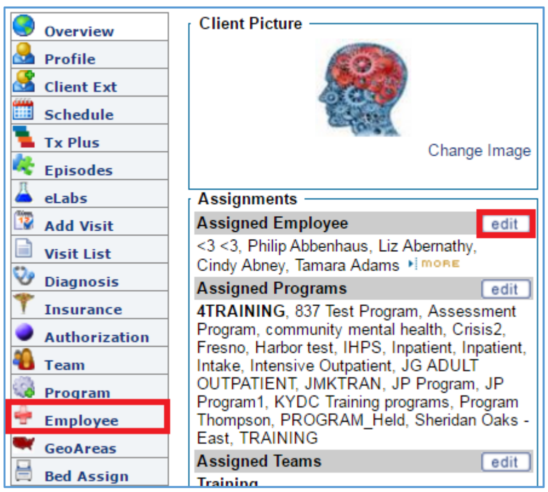
Function:

- Determines whether the user can assign Employees to Clients when on a Client's page.
  - NOTE: This setting does not affect the user's ability to assign Clients to Employees when on an Employee page. That is affected by the AssignClients matrix setting.

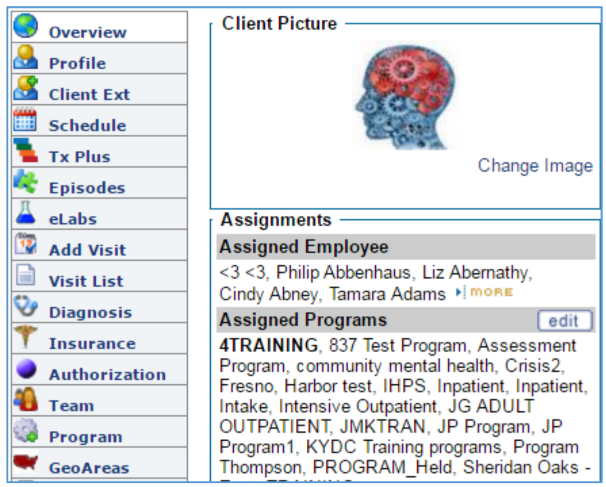
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Employee Button
- Client Page -> Assignments Module -> Assigned Employee -> Edit Button

Screenshots:



When AssignEmployees is ENABLED



When AssignEmployees is DISABLED

AssignEmployeeTeams

Function:

- Determines whether the user can assign Employees to Teams when accessing an Employee's Page.
    - NOTE: If disabled, an Insufficient Rights message will appear when clicking either the "Team" button on the Employee Nav Bar, or the "Edit" button near Assigned Teams on the Assignments module.
    - NOTE: The AssignEmployeeTeamsSameOnly setting will supercede this setting.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Team Button
- Employee Page -> Assignments Module -> Assigned Teams -> Edit Button

Screenshots:

When AssignEmployeeTeams is DISABLED

AssignEmployeeTeamsSameOnly

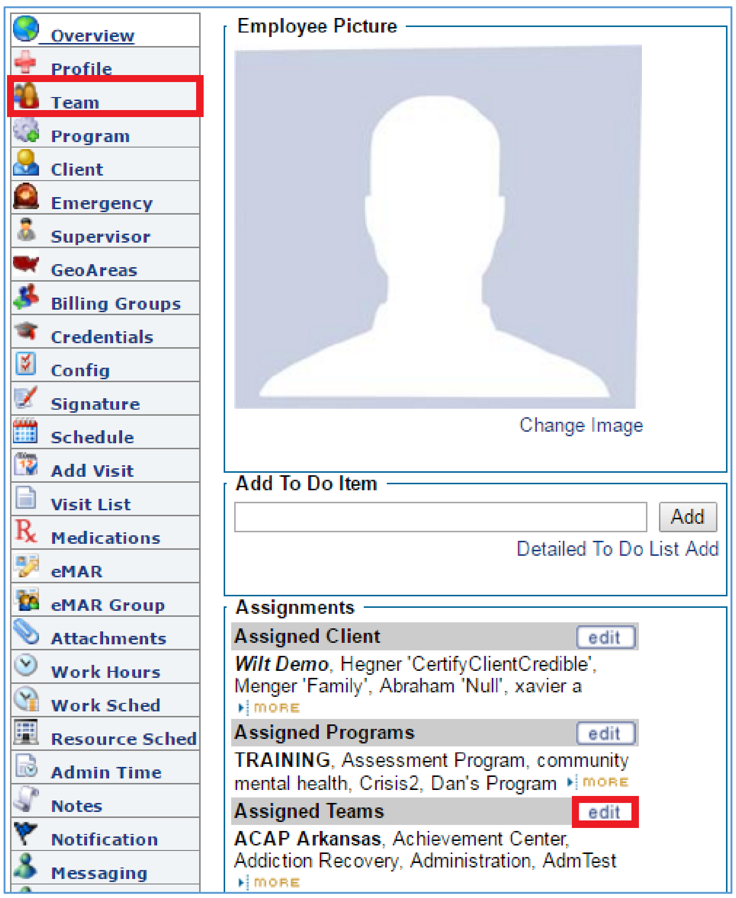
Function:

- When enabled, the user will only be able to assign other Employees to Teams that the user is currently assigned to. For example, if the user is assigned to the Intake and Substance Abuse Teams, they will only be able to assign Employees to those two Teams. Any other Teams that exist will not display as options.
    - NOTE: This setting supercedes the AssignEmployeeTeams setting.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Team Button
- Employee Page -> Assignments Module -> Assigned Teams -> Edit Button

Screenshots:



AssignPlannerGroups

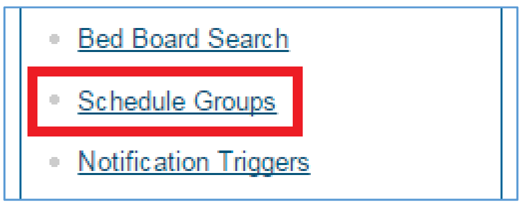
Function:

- Determines whether the user will be able to access the "Schedule Grp" button on the Client Nav Bar, as well as the "Schedule Groups"

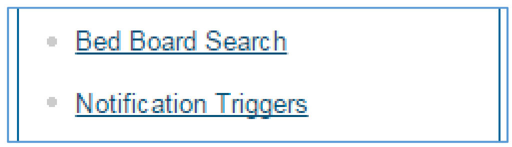
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Schedule Grp Button
- Admin Tab -> Daily Activities Section -> Schedule Groups

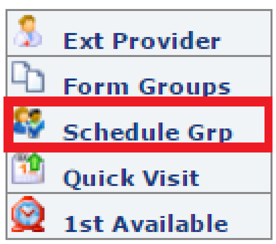
Screenshots:



When AssignPlannerGroups is ENABLED



When AssignPlannerGroups is DISABLED



When AssignPlannerGroups is ENABLED

When AssignPlannerGroups is DISABLED

AssignPrograms

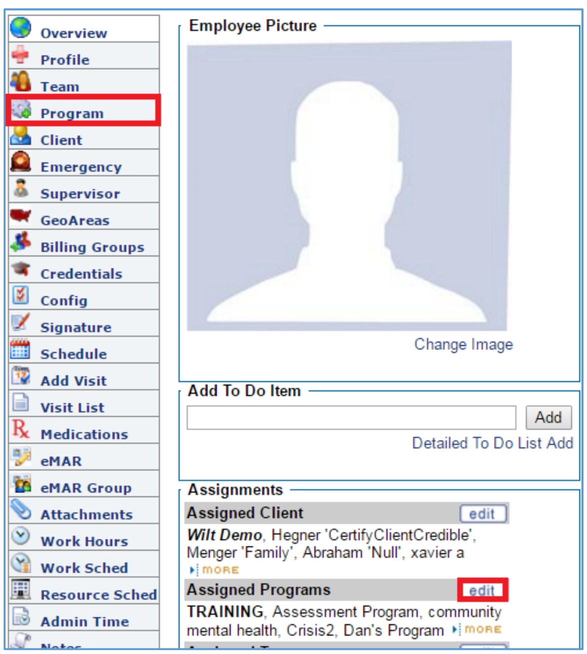
Function:

- Determines whether the user will be able to assign Programs to Clients or Employees from the Nav Bar, the Assignments Module, or the “Program Assignments” link on the Admin Tab.

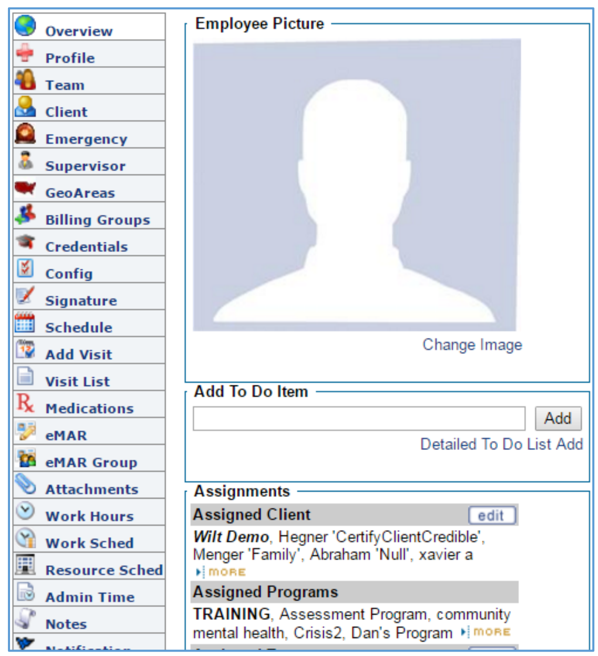
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Program Button
- Client Page -> Assignments Module -> Assigned Programs -> Edit Button
- Employee Page -> Employee Nav Bar -> Program Button
- Employee Page -> Assignments Module -> Assigned Programs -> Edit Button
- Admin Tab -> Daily Activities Section -> Program Assignments

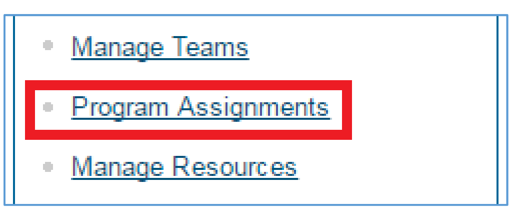
Screenshots:



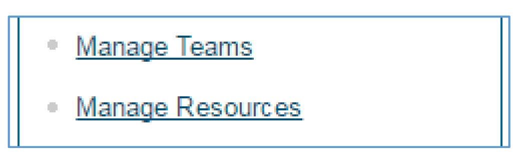
When AssignPrograms is ENABLED



When AssignPrograms is DISABLED



When AssignPrograms is ENABLED



When AssignPrograms is DISABLED

AssignResources

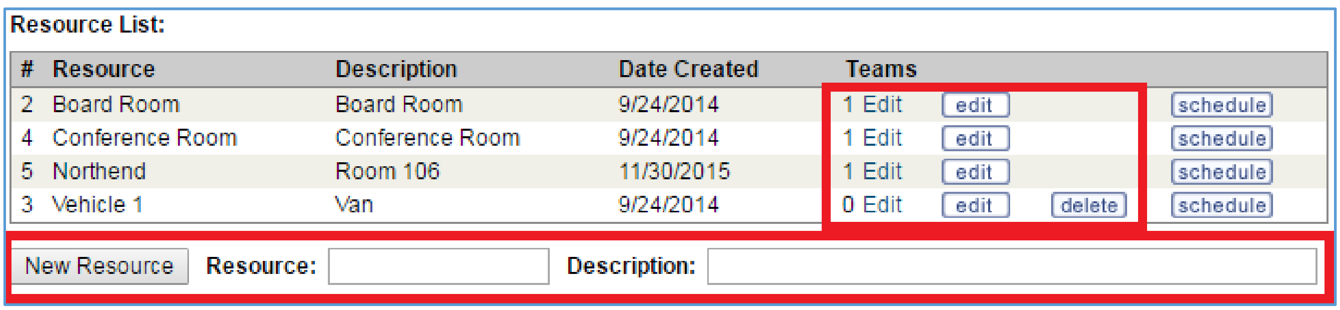
Function:

- Determines whether the “Edit” and “Delete” buttons will display on Resources.
- Determines whether the user can assign Teams to Resources.
- Determines whether the user can create new Resources.
- This setting also controls what Resources the user will be able to see. If disabled, the user will only be able to view Resources that are assigned to the same Team as the user. Any resources that are assigned to different Teams, or assigned to 0 teams will not display.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Resource Sched Button
- Admin Tab -> Daily Activities Section -> Manage Resources

Screenshots:

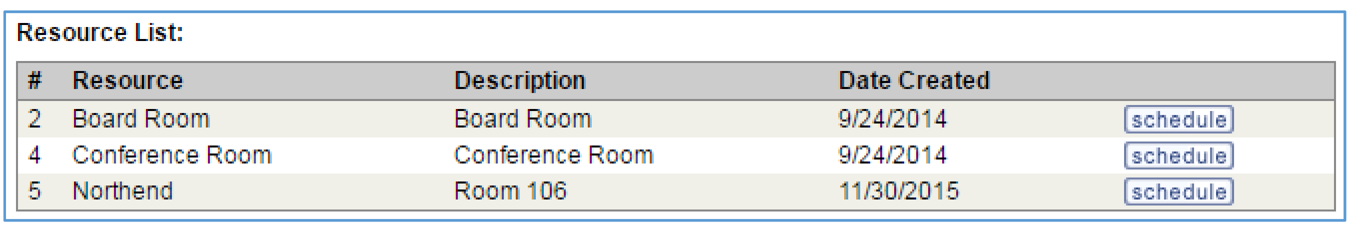


Resource List:

#	Resource	Description	Date Created	Teams			
2	Board Room	Board Room	9/24/2014	1 Edit	edit		schedule
4	Conference Room	Conference Room	9/24/2014	1 Edit	edit		schedule
5	Northend	Room 106	11/30/2015	1 Edit	edit		schedule
3	Vehicle 1	Van	9/24/2014	0 Edit	edit	delete	schedule

New Resource Resource: Description:

When AssignResources is ENABLED



Resource List:

#	Resource	Description	Date Created	
2	Board Room	Board Room	9/24/2014	schedule
4	Conference Room	Conference Room	9/24/2014	schedule
5	Northend	Room 106	11/30/2015	schedule

When AssignResources is DISABLED

AssignSupervisor

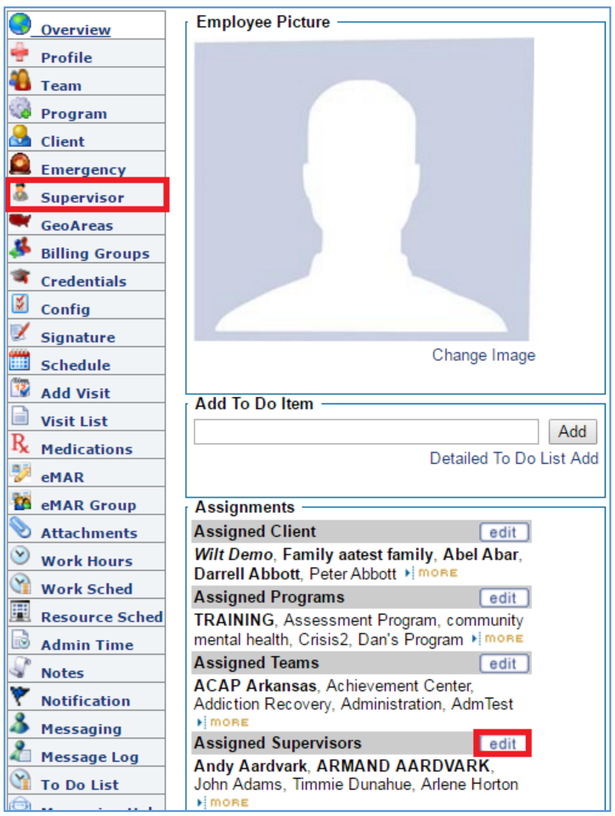
Function:

- Determines whether the user can assign Supervisors to an Employee using either the “Supervisor” button on the Employee Nav Bar, or the “Edit” button in the Assignments module near Assigned Supervisors.

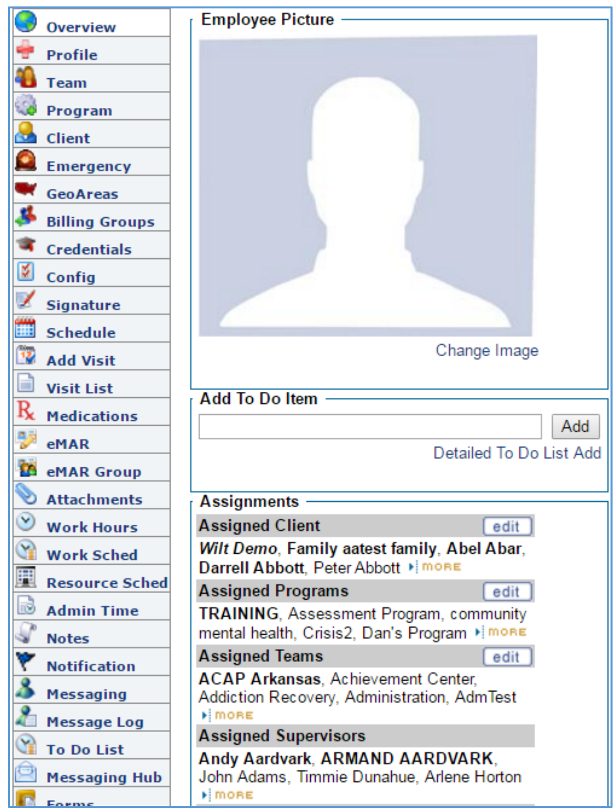
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Supervisor Button
- Employee Page -> Assignments Module -> Assigned Supervisors -> Edit Button

Screenshots:



When AssignSupervisor is ENABLED



When AssignSupervisor is DISABLED

AssignTeams

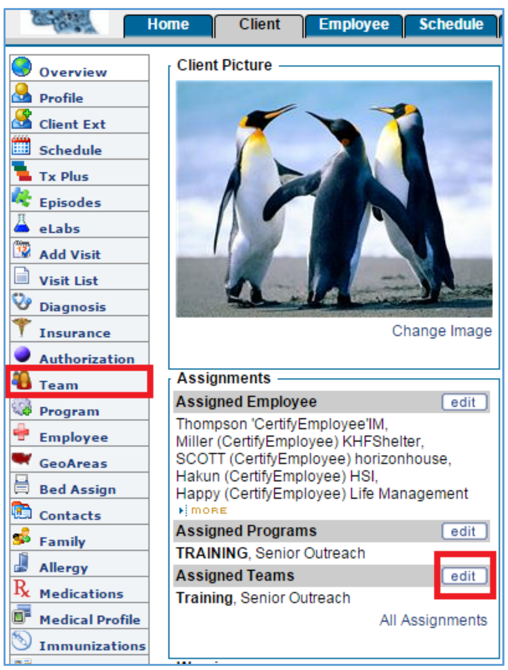
Function:

- Controls whether the user will be able to access the "Manage Teams" page on the Admin Tab.
    - If unchecked, the user will receive an Insufficent Rights message when clicking the "Manage Teams" link.
- On the Assignments section of a Client or Employee page, determines whether an "Edit" button will display near teams. If this Matrix setting is unchecked, no Edit button will display.
- On the Client or Employee Nav Bar, the "Team" button will not display if this setting is unchecked.

Location(s) this setting affects:

- Admin Tab -> Manage Teams
- Client Home Page -> Assignments Section
- Client Nav Bar
- Employee Home Page -> Assignments Section
- Employee Nav Bar

Screenshots:



With AssignTeams ENABLED

With AssignTeams DISABLED

With AssignTeams DISABLED

BillingGroupsAssign

Function:

- Determines whether the user will be able to assign Billing Groups to an Employee.
- Determines whether the user will be able to label an assigned Billing Group as the Default for an Employee.
  - NOTE: If disabled, the “Assign” and “Default” buttons will still display, however nothing will occur when the user clicks on them.
  - NOTE: If the BillingGroupsView setting is disabled, this setting will have no effect.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Billing Groups Button -> Assign Button
- Employee Page -> Employee Nav Bar -> Billing Groups Button -> Default Button

Screenshots:

EMPLOYEE BILLING GROUPS: Bill Chamberlain

Billing Group	Assign	Default
837 Test Group	assign	no
BillingGroupName	assign	no
CBH Main A	assign	no
CBH Main B	assign	no
CBH North A	assign	no
CBH North B	assign	no
CBH North C	assign	no
CBH South A	assign	no
CBH South B	assign	no
Credible NC	assign	no
Credible NH	assign	yes
Fresno	assign	no
JG COMMUNITY GROUP	assign	no
Logisticare Vans	assign	no
QA Billing Group	assign	no
RCJ Billing Group	assign	no
Transportation	assign	no

If BillingGroupsAssign is DISABLED, nothing will occur when the user clicks these buttons.

BillingGroupsView

Function:

- Determines whether the user will be able to view the "Billing Groups" button on the Employee Nav Bar.
  - NOTE: In order to utilize the BillingGroupsAssign setting, this setting must be enabled.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Billing Groups Button

Screenshots:

When BillingGroupsView is ENABLED

When BillingGroupsView is DISABLED

Matrix Section: Attachments

AttachmentFreeText

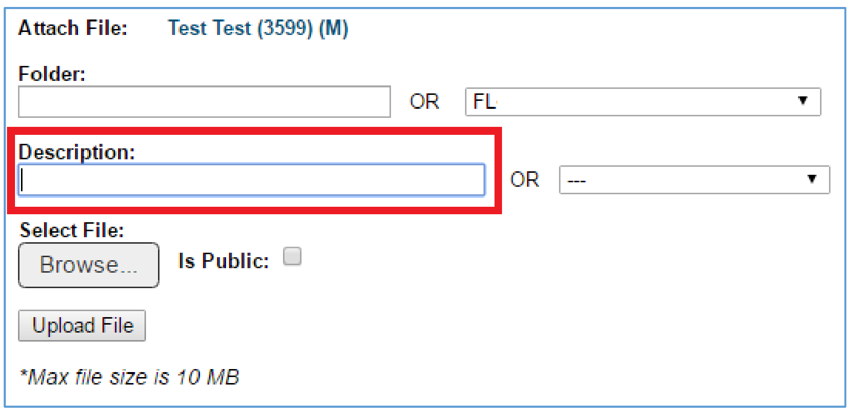
Function:

- Determines whether the user will be able to use a free text description on a Client or Employee.
    - If disabled, the user will only be able to use descriptions that have been previously configured to appear in the description dropdown.

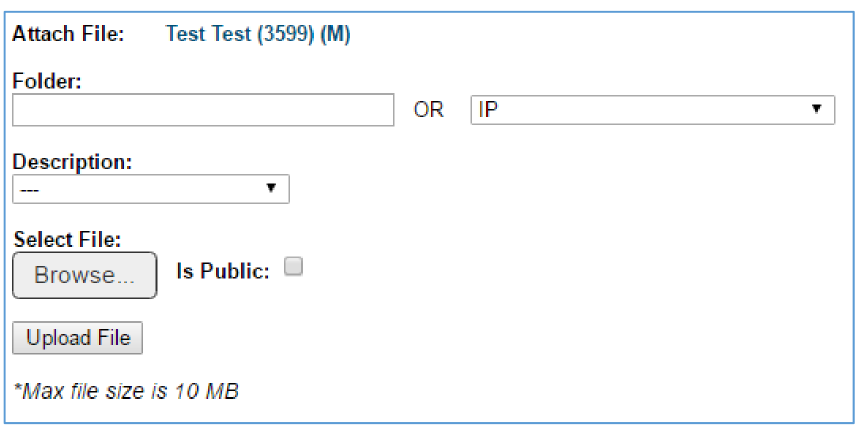
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Attachments Button -> Attach New or Scan New
- Client Page -> Client Nav Bar -> Attachments Button -> Attach New or Scan New

Screenshots:



When AttachmentFreeText is ENABLED



When AttachmentFreeText is DISABLED

ClientFileAdd

Function:

- Determines whether the user will be able to add a new attachment to a Client.
    - If disabled, the “Import Clinical Summary”, “Scan New”, and “Attach New” buttons will not appear on the Client’s Attachments page.
- NOTE: This setting is superceded by the ClientFileAddTeamFolderOnly setting.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Attachments Button

Screenshots:

When ClientFileAdd is ENABLED

When ClientFileAdd is DISABLED

CREDIBLE

ClientFileAddTeamFolderOnly

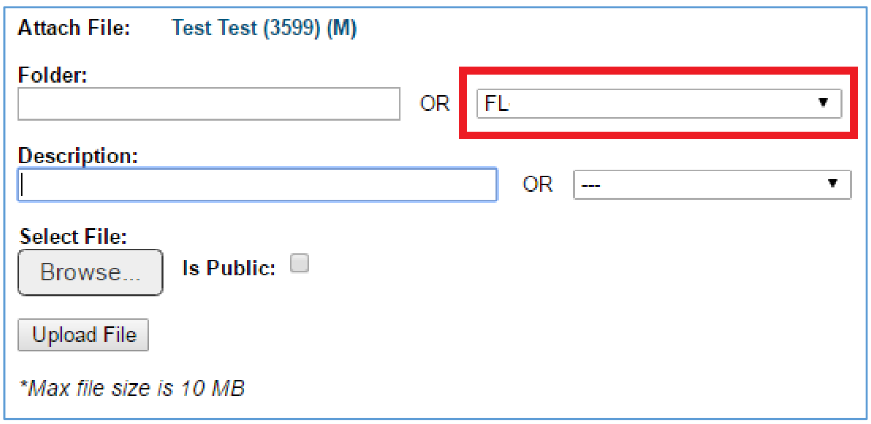
Function:

- When enabled, this setting allows the user to add Client files to ONLY folders that are either:
  - Assigned to the same team(s) as the Client
  - Are not assigned to teams
- NOTE: This setting supercedes the ClientFileAdd setting.
- NOTE: Assigning file folders to teams is done from: Admin Tab -> File Folders Admin

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Attachments Button -> Attach New or Scan New

Screenshots:



When ENABLED, this dropdown will only show folders that are assigned to the same team(s) as the Client, or folders that are not assigned to a team.

ClientFileDelete

Function:

- Determines whether the user will be able to delete a Client attachment.
  - If disabled, the “delete” button will not appear.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Attachments Button

Screenshots:

When ClientFileDelete is ENABLED

When ClientFileDelete is DISABLED

ClientFileEdit

Function:

- Determines whether the user will be able to edit a Client attachment.
    - If disabled, the “edit” button will not appear.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Attachments Button

Screenshots:

When ClientFileEdit is ENABLED

When ClientFileEdit is DISABLED

CREDIBLE

ClientFileView

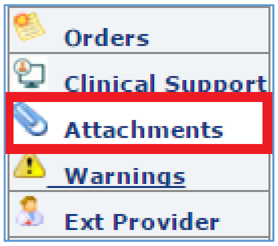
Function:

- Determines whether the user will be able to view the Client's attachments.
    - If disabled, the "Attachments" button will not appear on the Client Nav Bar.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Attachments Button

Screenshots:



When ClientFileView is ENABLED

When ClientFileView is DISABLED

ClientVisitFileAdd

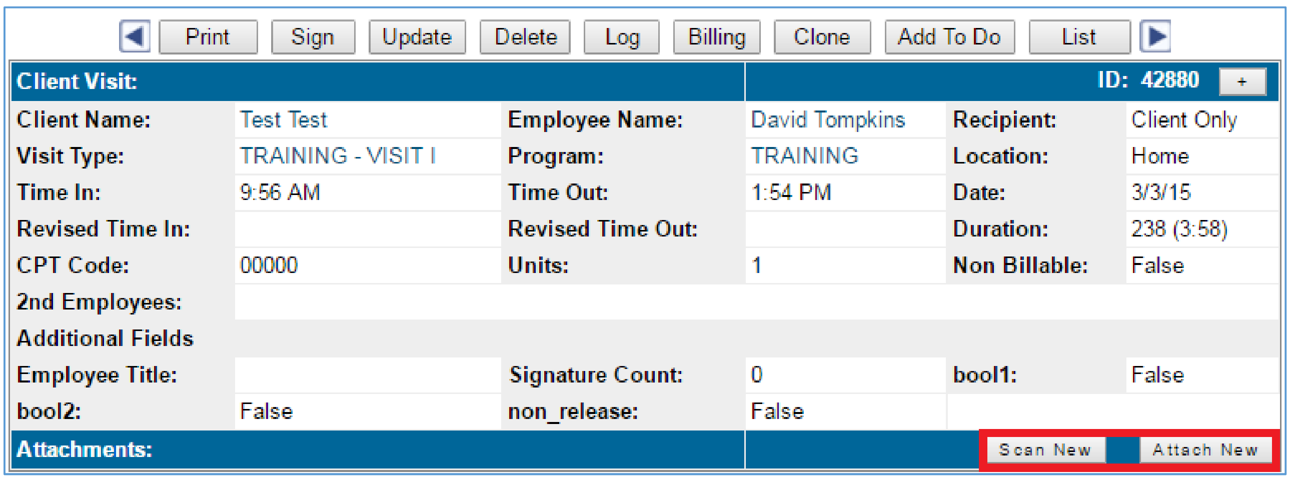
Function:

- Determines whether the user will be able to add a new attachment to a Client Visit.
  - If disabled, the “Scan New”, and “Attach New” buttons will not appear on the Client Visit summary.

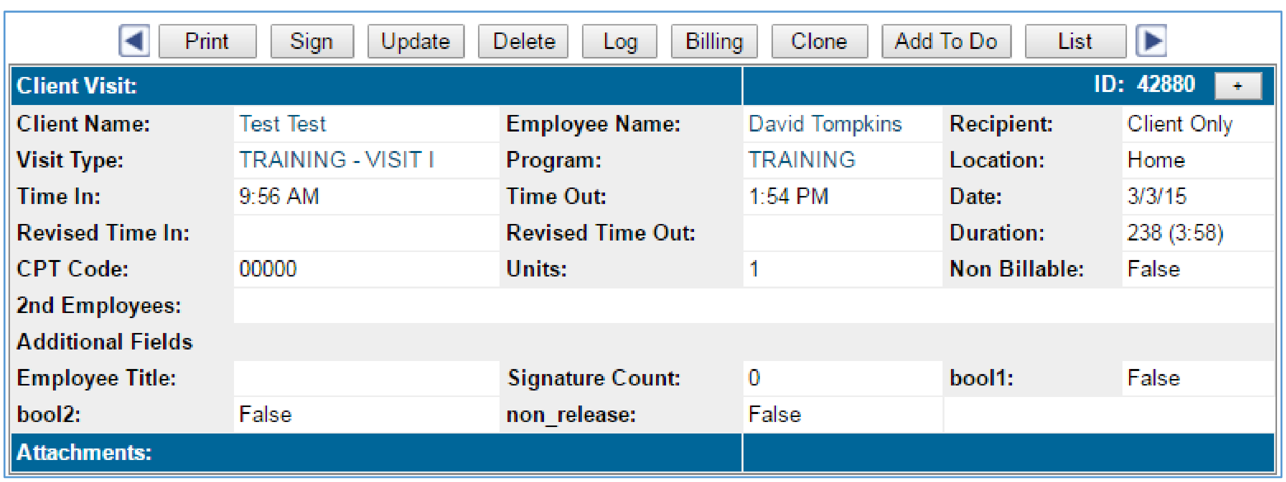
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Visit List Button -> View Button -> Attachments Module
- Visit Tab -> View Button -> Attachments Module

Screenshots:



When ClientVisitFileAdd is ENABLED



When ClientVisitFileAdd is DISABLED

ClientVisitFileDelete

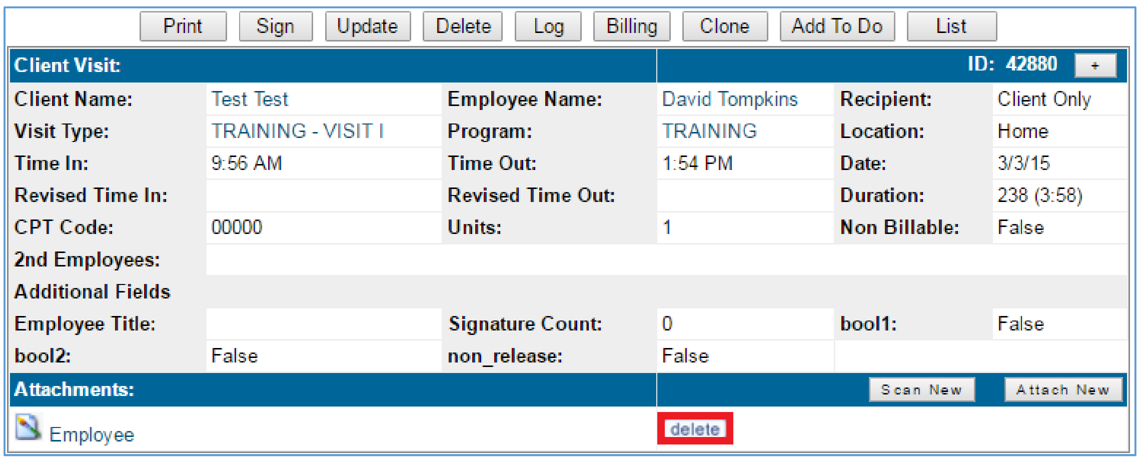
Function:

- Determines whether the user will be able to delete an attachment on a Client Visit.
    - If disabled, the "delete" button will not appear on the Client Visit summary.

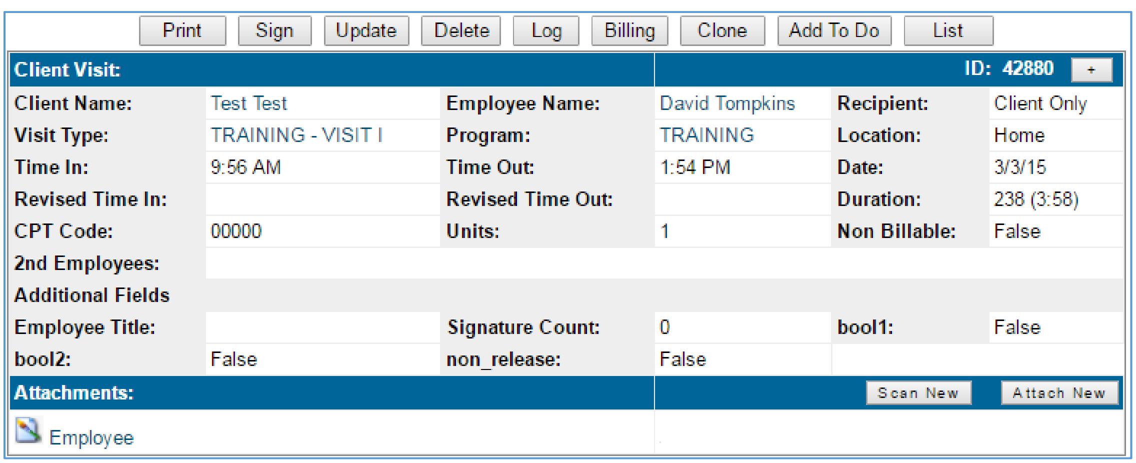
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Visit List Button -> View Button -> Attachments Module
- Visit Tab -> View Button -> Attachments Module

Screenshots:



When ClientVisitFileDelete is ENABLED



When ClientVisitFileDelete is DISABLED

ClientVisitFileView

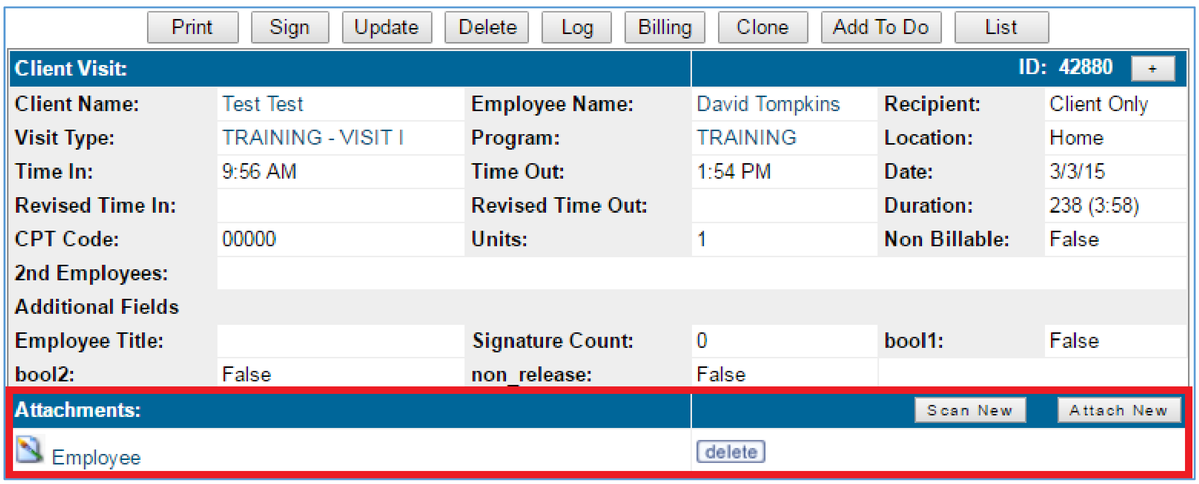
Function:

- Determines whether the user will be able to view attachments on a Client Visit.
    - If disabled, the attachments section will not display.

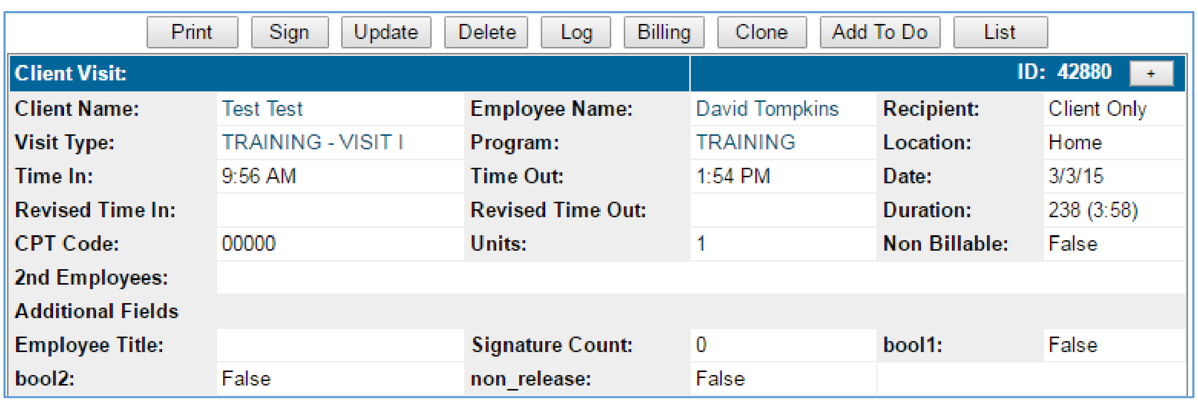
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Visit List Button -> View Button -> Attachments Module
- Visit Tab -> View Button -> Attachments Module

Screenshots:



When ClientVisitFileView is ENABLED



When ClientVisitFileView is DISABLED

CreateFolder

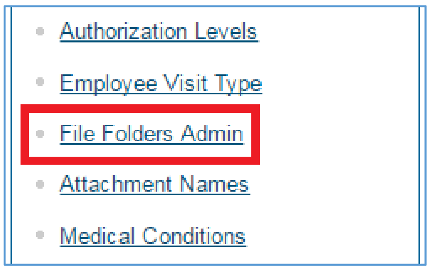
Function:

- Allows access to the “File Folders Admin” link in the “Lookups and Code Tables” section of the Admin Tab.
    - NOTE: This setting is superceded by the CreateFolderSameTeamOnly setting.

Location(s) this setting affects:

- Admin Tab -> Lookup and Code Tables Section -> File Folders Admin

Screenshots:



When CreateFolder is ENABLED

When CreateFolder is DISABLED

CreateFolderSameTeamOnly

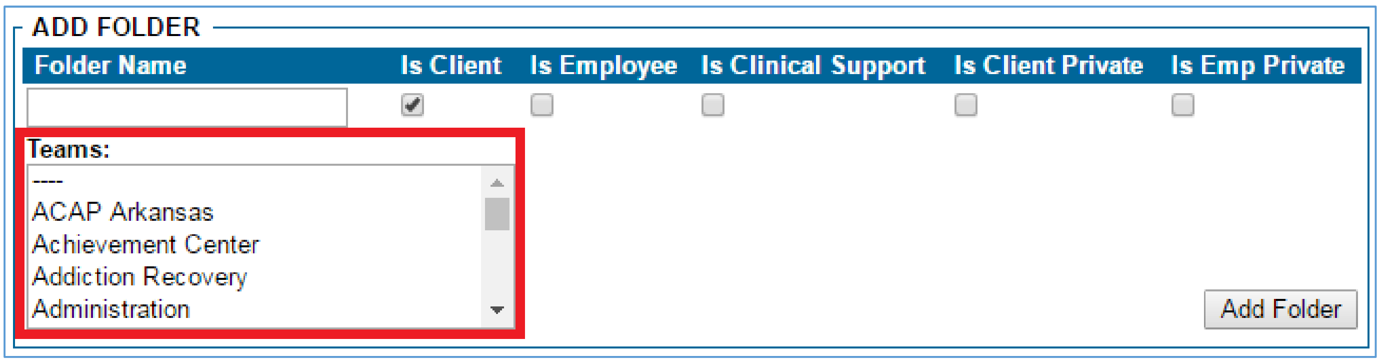
Function:

- If enabled, the user will only be able to assign a new file folder to teams they are attached to.
    - NOTE: The user will still be able to create a folder and not assign it to a team.
    - NOTE: This setting supercedes the CreateFolder setting.

Location(s) this setting affects:

- Admin Tab -> Lookup and Code Tables Section -> File Folders Admin

Screenshots:



When CreateFolderSameTeamOnly is ENABLED, the Teams that can be attached to a new folder will only be the Teams currently attached to the user creating the folder.

EmpFilesViewOwn

Function:

- Allows the user to view attachments on their own Employee Page. If disabled, the "Attachments" button will not display on your Employee Nav Bar.
  - NOTE: This is the recommended setting for Employees.
  - NOTE: This setting is superceded by EmployeeFileView. If EmployeeFileView is enabled, this setting will have no effect.

Location(s) this setting affects:

- Employee Page (your own) -> Employee Nav Bar -> Attachments Button

Screenshots:

When EmpFilesViewOwn is ENABLED

When EmpFilesViewOwn is DISABLED

EmployeeFileAdd

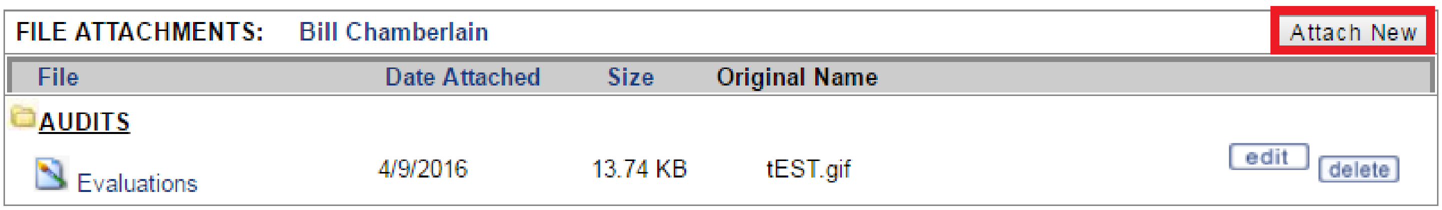
Function:

- Determines whether the user will be able to add an attachment to an Employee.
    - If disabled, the “Attach New” button will not display.

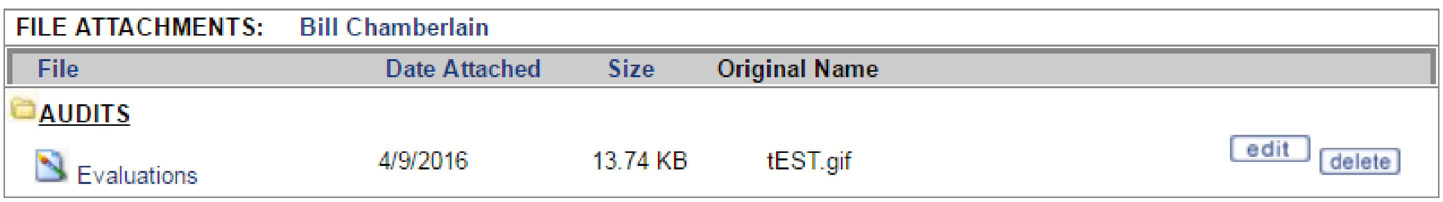
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Attachments Button

Screenshots:



When EmployeeFileAdd is ENABLED



When EmployeeFileAdd is DISABLED

EmployeeFileDelete

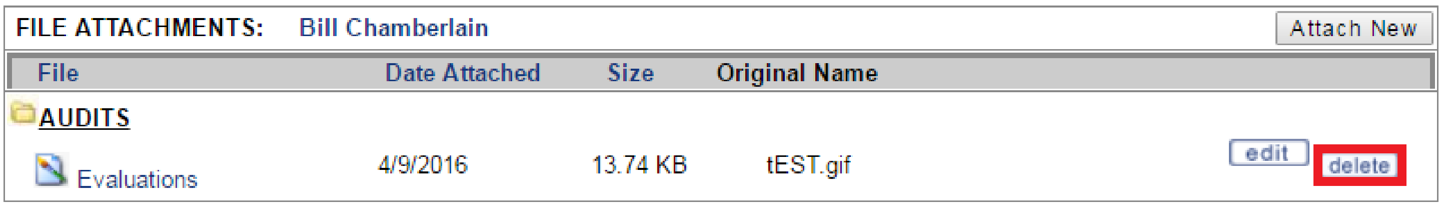
Function:

- Determines whether the user will be able to delete an Employee attachment.
    - If disabled, the “delete” button will not display.

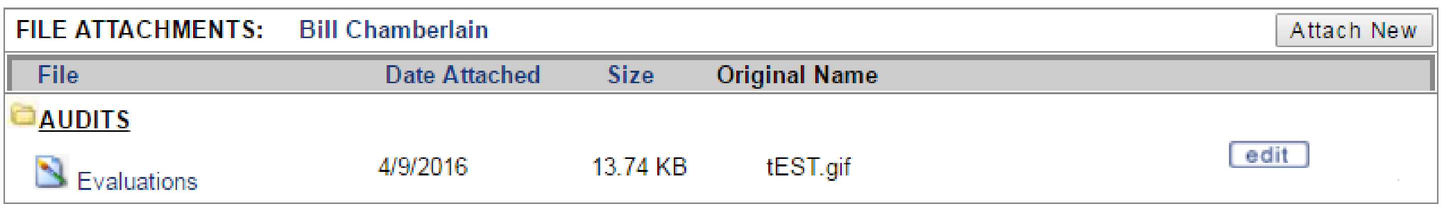
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Attachments Button

Screenshots:



When EmployeeFileDelete is ENABLED



When EmployeeFileDelete is DISABLED

EmployeeFileEdit

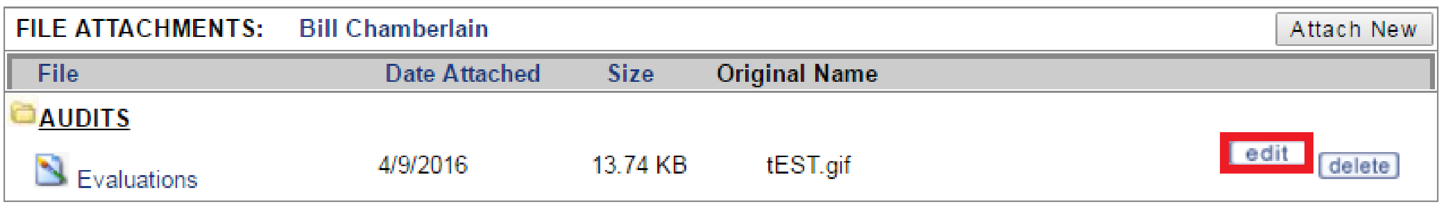
Function:

- Determines whether the user will be able to edit an Employee attachment.
    - If disabled, the “edit” button will not display.

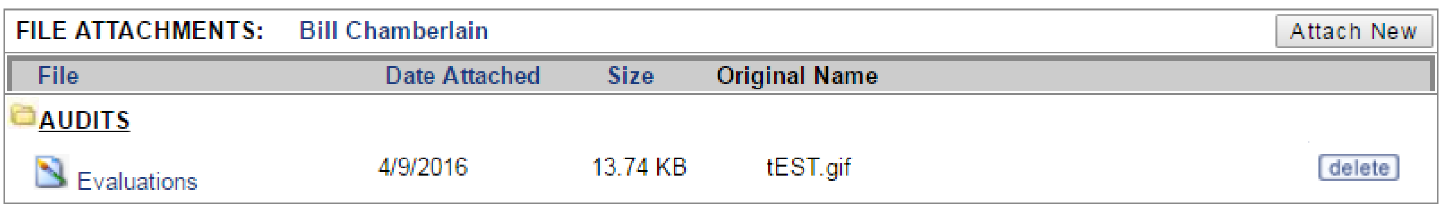
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Attachments Button

Screenshots:



When EmployeeFileDelete is ENABLED



When EmployeeFileDelete is DISABLED

EmployeeFileView

Function:

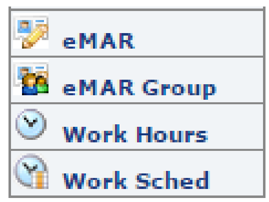
- Allows the user to view attachments on all Employee pages. If disabled, the "Attachments" button will not display on Employee Nav Bars.
    - NOTE: This setting supercedes the EmpFilesViewOwn setting.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Attachments Button

Screenshots:

When EmployeeFileView is ENABLED



When EmployeeFileView is DISABLED

EmployeeFormFileAdd

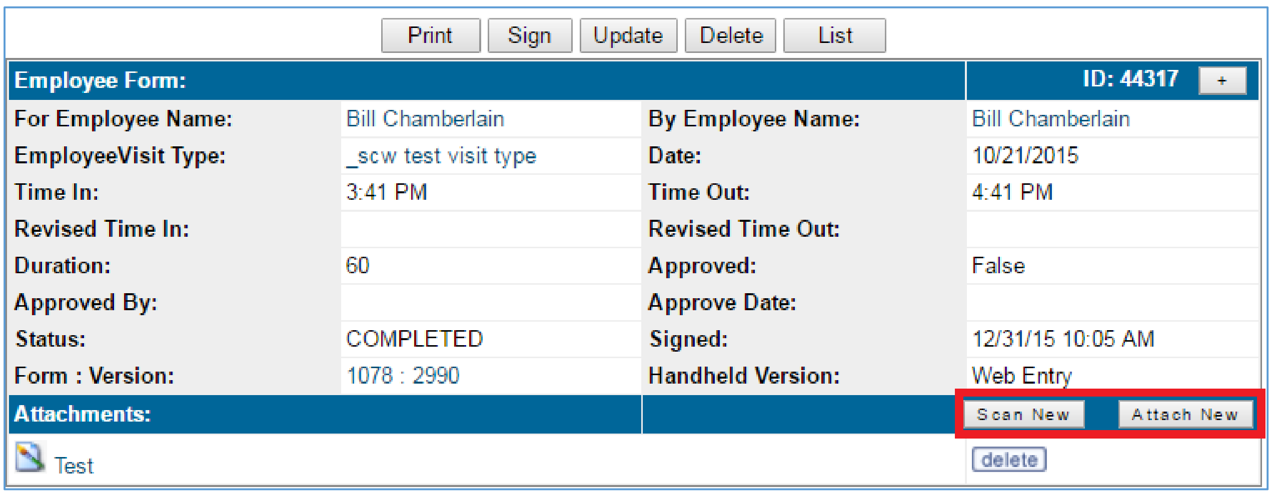
Function:

- Determines whether the user will be able to add an attachment to a completed Employee Form.
  - If disabled, the “Scan New” and “Attach New” buttons will not display.

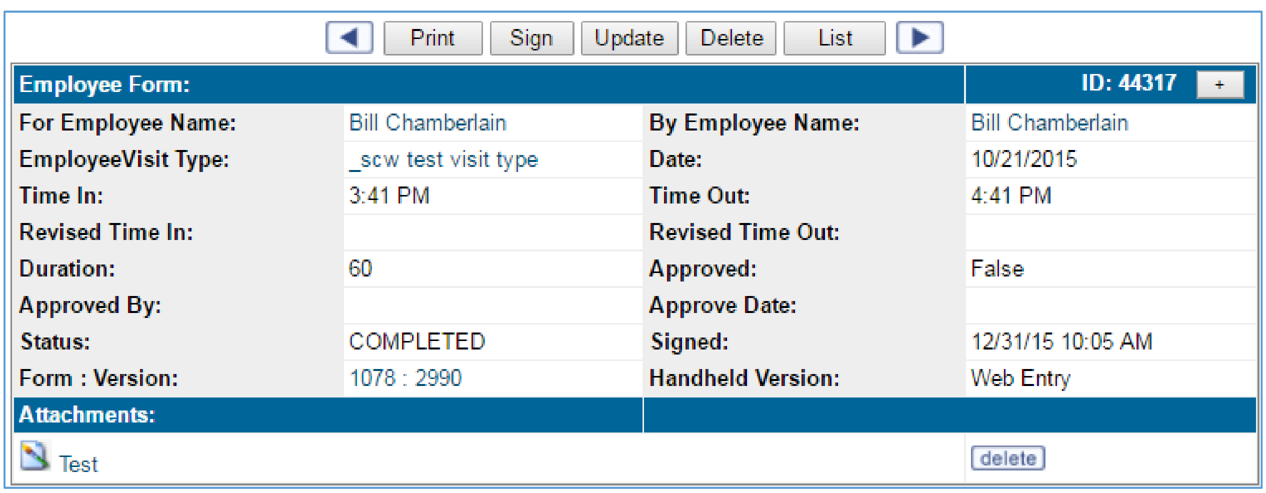
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms Button -> View Button
- Admin Tab -> Daily Activities Section -> Employee Form Queue -> View Button

Screenshots:



When EmployeeFormFileAdd is ENABLED



When EmployeeFormFileAdd is DISABLED

EmployeeFormFileDelete

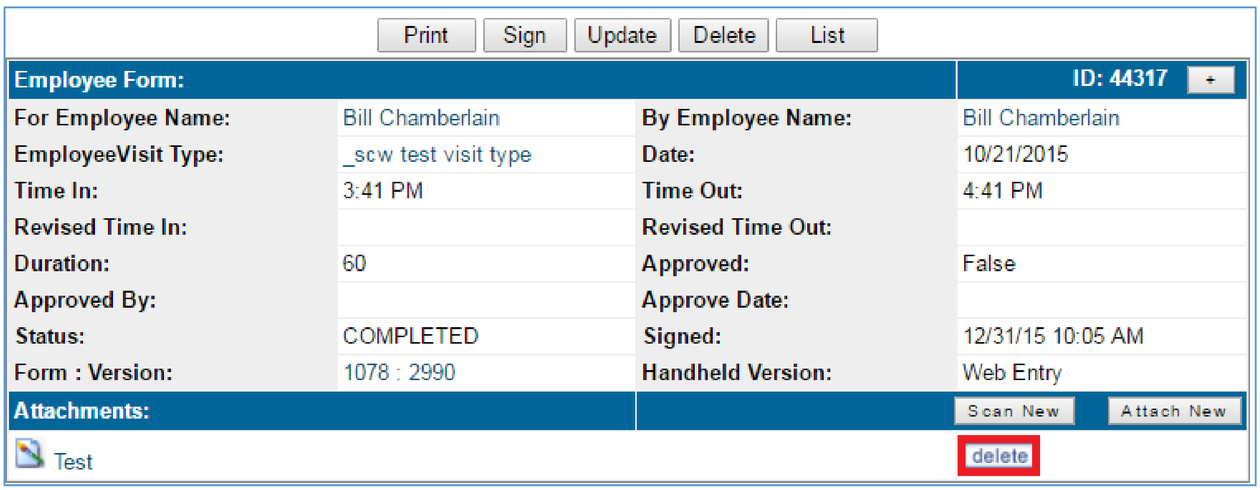
Function:

- Determines whether the user will be able to delete an attachment on a completed Employee Form.
    - If disabled, the “Delete” button will not display.

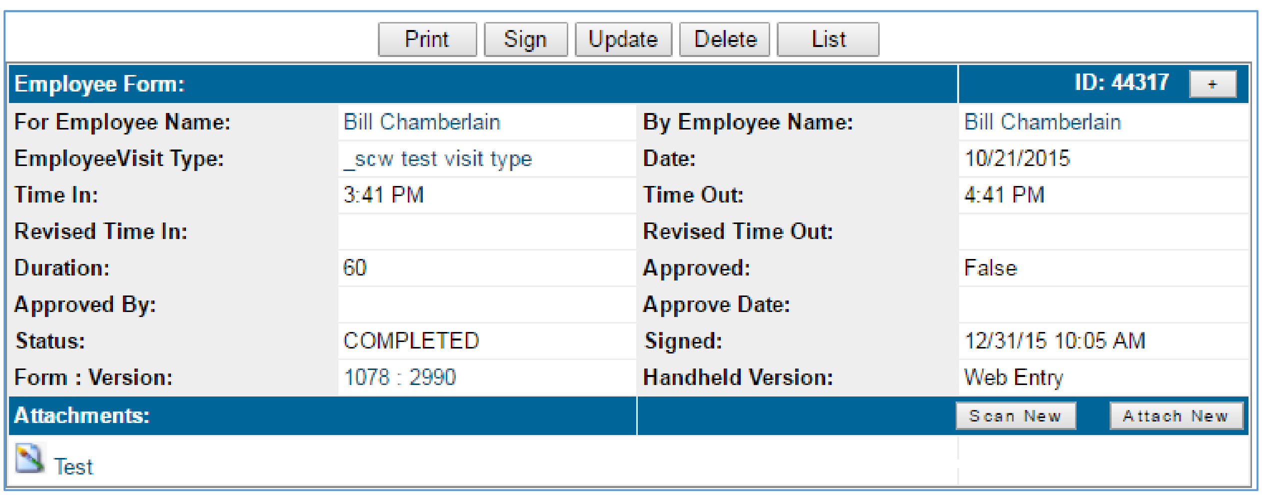
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms Button -> View Button
- Admin Tab -> Daily Activities Section -> Employee Form Queue -> View Button

Screenshots:



When EmployeeFormFileDelete is ENABLED



When EmployeeFormFileDelete is DISABLED

EmployeeFormFileView

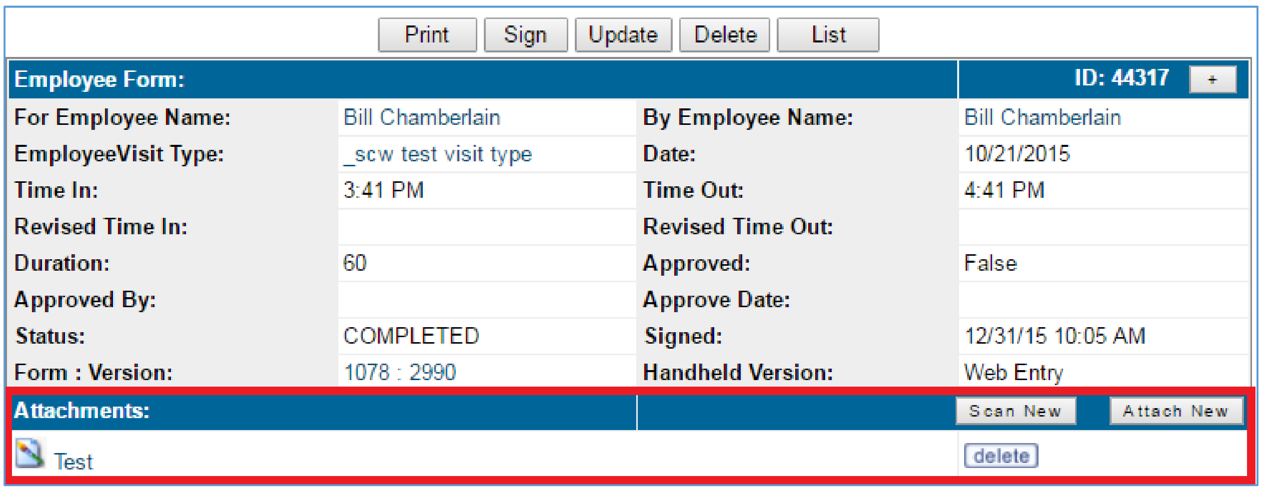
Function:

- Determines whether the user will be able to view attachments on a completed Employee Form.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms Button -> View Button
- Admin Tab -> Daily Activities Section -> Employee Form Queue -> View Button

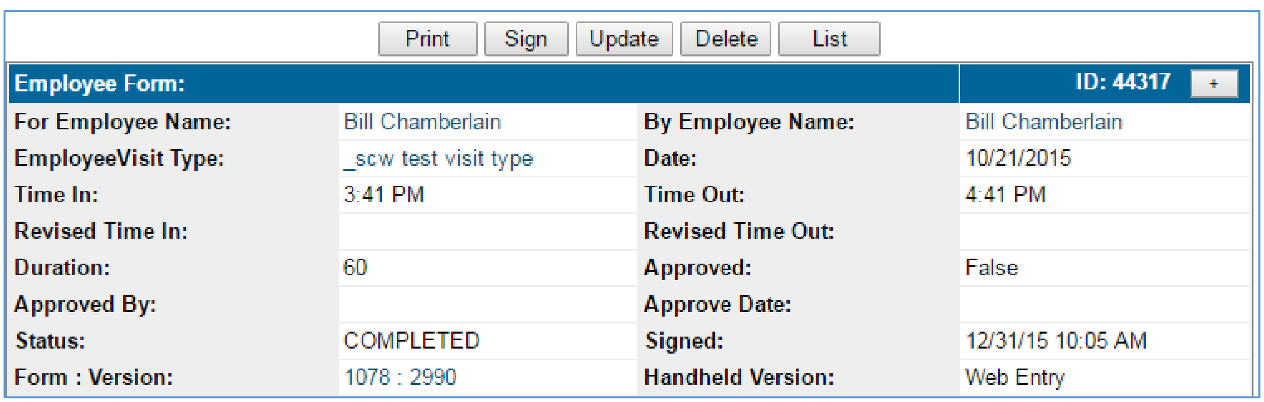
Screenshots:



Print | Sign | Update | Delete | List

Employee Form:			ID: 44317 +
For Employee Name:	Bill Chamberlain	By Employee Name:	Bill Chamberlain
EmployeeVisit Type:	_scw test visit type	Date:	10/21/2015
Time In:	3:41 PM	Time Out:	4:41 PM
Revised Time In:		Revised Time Out:	
Duration:	60	Approved:	False
Approved By:		Approve Date:	
Status:	COMPLETED	Signed:	12/31/15 10:05 AM
Form : Version:	1078 : 2990	Handheld Version:	Web Entry
Attachments:			Scan New Attach New
Test			delete

When EmployeeFormFileView is ENABLED



Print | Sign | Update | Delete | List

Employee Form:			ID: 44317 +
For Employee Name:	Bill Chamberlain	By Employee Name:	Bill Chamberlain
EmployeeVisit Type:	_scw test visit type	Date:	10/21/2015
Time In:	3:41 PM	Time Out:	4:41 PM
Revised Time In:		Revised Time Out:	
Duration:	60	Approved:	False
Approved By:		Approve Date:	
Status:	COMPLETED	Signed:	12/31/15 10:05 AM
Form : Version:	1078 : 2990	Handheld Version:	Web Entry

When EmployeeFormFileView is DISABLED

ViewClientFoldersTeamOnly

Function:

- If enabled, the user will only be able to view attachments on a Client that are either:
    - Contained in file folders that are assigned to teams that the user is also assigned to.
    - Contained in file folders that are not assigned to any teams.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Attachments Button

Screenshots:

ViewPrivateClientFolders

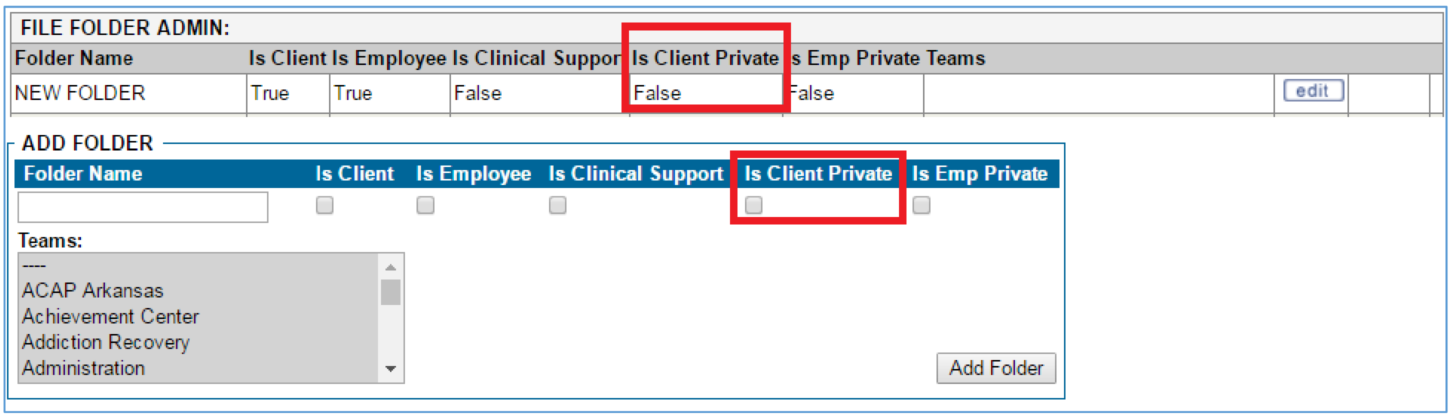
Function:

- If enabled, the user will be able to view any client file folders that are marked as Private.
  - File folders can be marked as Private from the “File Folders Admin” page, which is accessed from the Admin Tab.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Attachments Button

Screenshots:



ViewPrivateEmployeeFolders

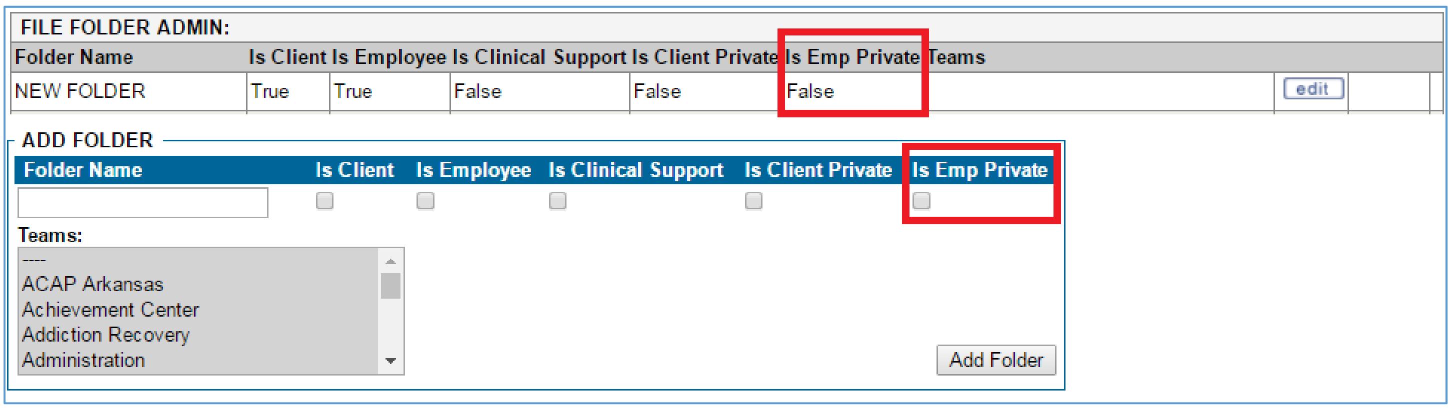
Function:

- If enabled, the user will be able to view any employee file folders that are marked as Private.
    - File folders can be marked as Private from the “File Folders Admin” page, which is accessed from the Admin Tab.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Attachments Button

Screenshots:



ARGLExport

Function:

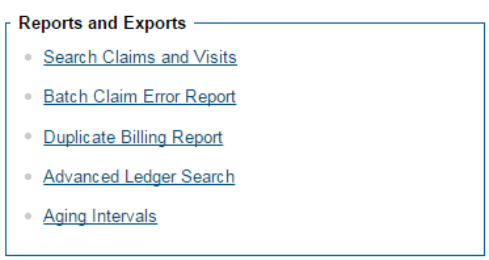
- Determines whether the user will see the “Revenue/AR Export” and the “Revenue/AR Export List” links that will display in the “Reports and Exports” section of the Billing Tab.

Location(s) this setting affects:

- Billing Tab -> Revenue/AR Export
- Billing Tab -> Revenue/AR Export List

Screenshots:

When ARGLExport is ENABLED



When ARGLExport is DISABLED

BedBoardBilling

Function:

- Determines whether the user will see the “Bed Board Billing” link that displays in the “Bed Board and Foster Home Billing” section of the Billing Tab.

Location(s) this setting affects:

- Billing Tab -> Bed Board Billing

Screenshots:

When BedBoardBilling is ENABLED

When BedBoardBilling is DISABLED

BillingAddAdjustment

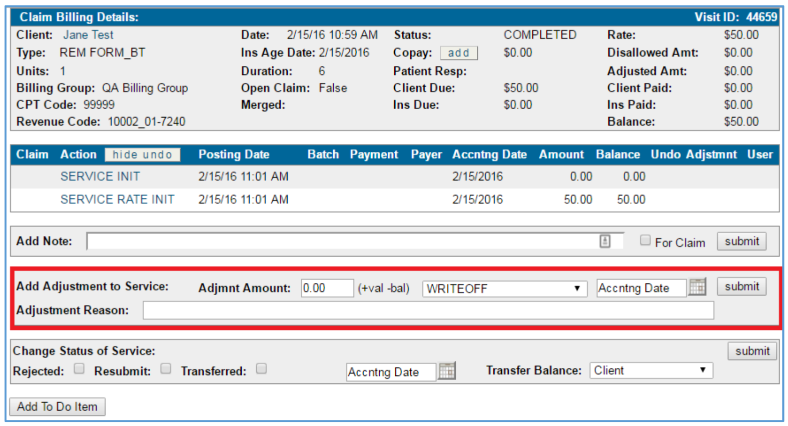
Function:

- Determines whether the user will see the “Add Adjustment to Service” module when viewing the Billing information on a Visit/Service.

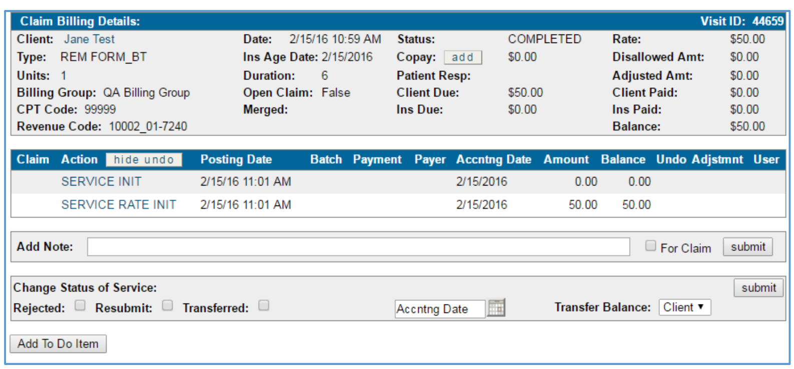
Location(s) this setting affects:

- Listed Service -> View -> Billing

Screenshots:



When BillingAddAdjustment is ENABLED



When BillingAddAdjustment is ENABLED

CREDIBLE

BillingAddAdjustmentMultiple

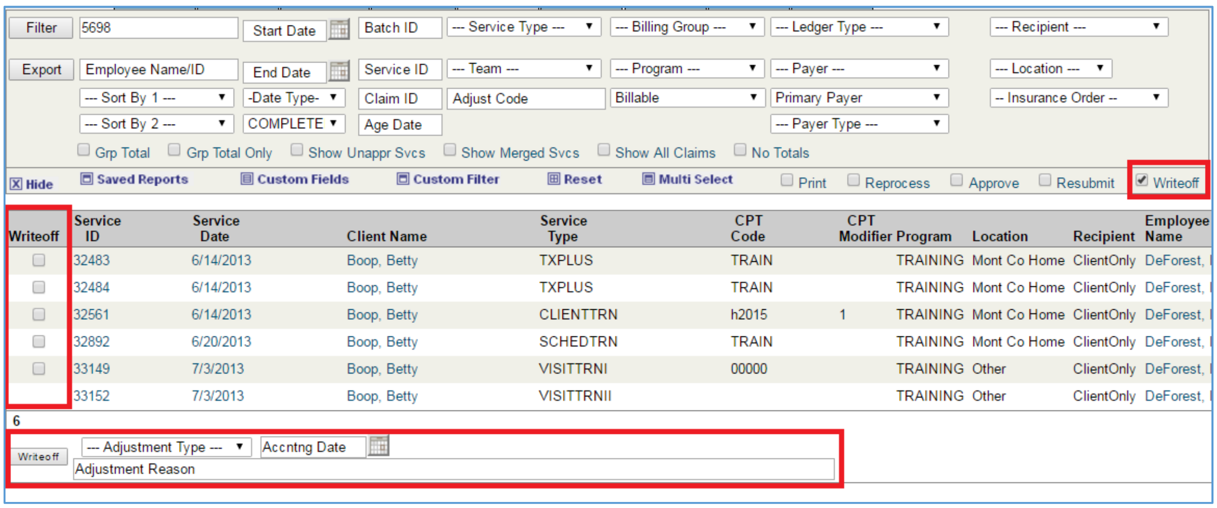
Function:

- Determines whether the "Writeoff" checkbox appears when performing an Advanced Visit/Service search. This checkbox will allow a Writeoff column to appear in the search results, and an Adjustment module to appear at the bottom, allowing the user to perform multiple adjustments at once.

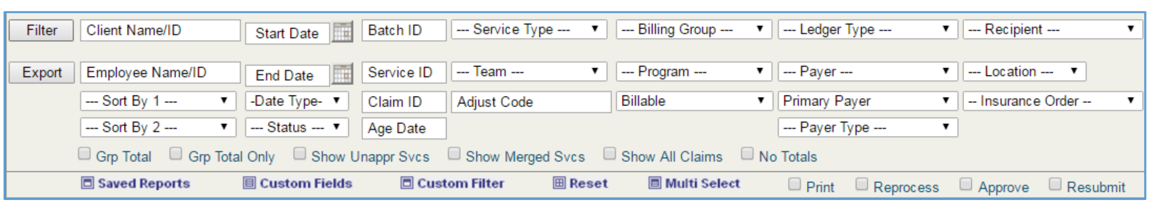
Location(s) this setting affects:

- Visit Tab -> Advanced Search

Screenshots:



When BillingAddAdjustmentMultiple is ENABLED



When BillingAddAdjustmentMultiple is DISABLED

BillingConfig

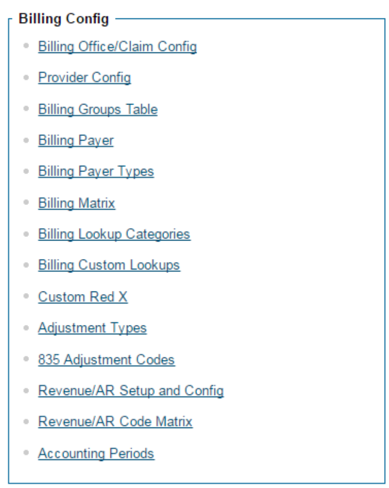
Function:

- Determines whether the “Billing Config” section on the Billing Tab will be accessible.
    - This section contains the following links: Billing Office/Claim Config, Provider Config, Billing Groups Table, Billing Payer, Billing Payer Types, Billing Matrix, Billing Lookup Categories, Billing Custom Lookups, Custom Red X, Adjustment Types, 835 Adjustment Codes, Revenue/AR Setup and Config, Revenue/AR Code Matrix, Accounting Periods

Location(s) this setting affects:

- Billing Tab -> Billing Config Section

Screenshots:



If BillingConfig is DISABLED, this section will not display.

BillingCPTCodes

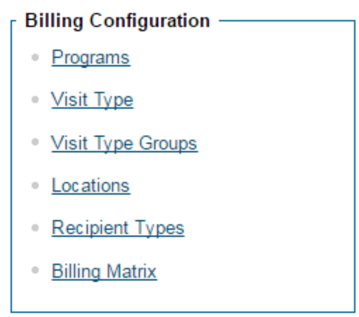
Function:

- Determines whether the “Billing Configuration” section on the Admin Tab will display normally.
    - Typically this section displays the following links: Programs, Visit Type, Visit Type Groups, Locations, Recipient Types, Billing Matrix
- NOTE: If disabled, the Billing Configuration section will remove those links and instead display the following links (assuming the user has access to them): Billing Payer, Billing Groups

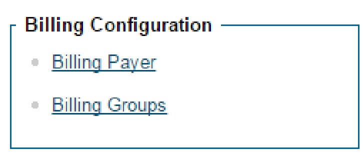
Location(s) this setting affects:

- Admin Tab -> Billing Configuration Section

Screenshots:



When BillingCPTCodes is ENABLED



When BillingCPTCodes is DISABLED

BillingModule

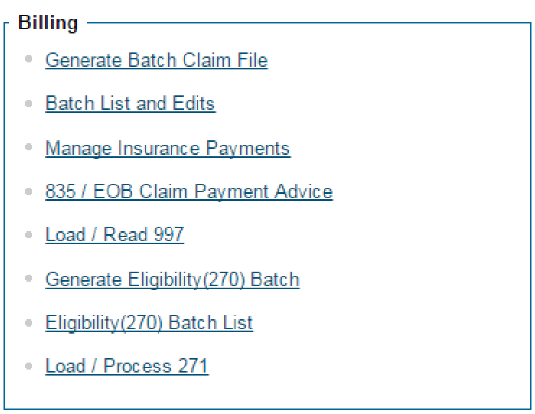
Function:

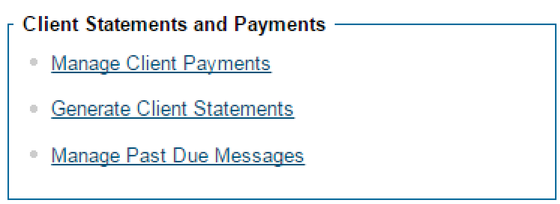
- Determines whether the “Billing” section on the Billing Tab will be accessible.
    - This section contains the following links: Generate Batch Claim File, Batch List and Edits, Manage Insurance Payments, 835 / EOB Claim Payment Advice, Load / Read 997, Generate Eligibility (270) Batch, Eligibility(270) Batch List, Load / Process 271
- Determines whether the “Client Statements and Payments” section on the Billing Tab will be accessible.
    - This section contains the following links: Manage Client Payments, Generate Client Statements, Manage Past Due Messages.
- Also affects whether the user will be able to access the “Ledger” button from the Client Nav Bar.
    - If disabled, an Insufficient Rights message will display.

Location(s) this setting affects:

- Billing Tab -> Billing Section
- Billing Tab -> Client Statements and Payments Section
- Client Nav Bar -> Ledger Button

Screenshots:





If BillingModule is DISABLED, these sections will not display.

BillingRefundClientPayment

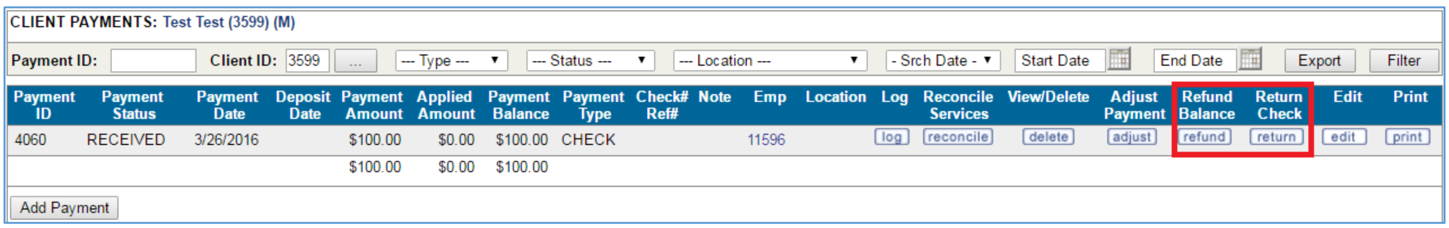
Function:

- Allows the “Refund” and “Return” buttons to display when viewing the “Payments” button from the Client Nav Bar, or the “Manage Client Payments” page from the Billing Tab.

Location(s) this setting affects:

- Billing Tab -> Manage Client Payments
- Client Nav Bar -> Payments

Screenshots:



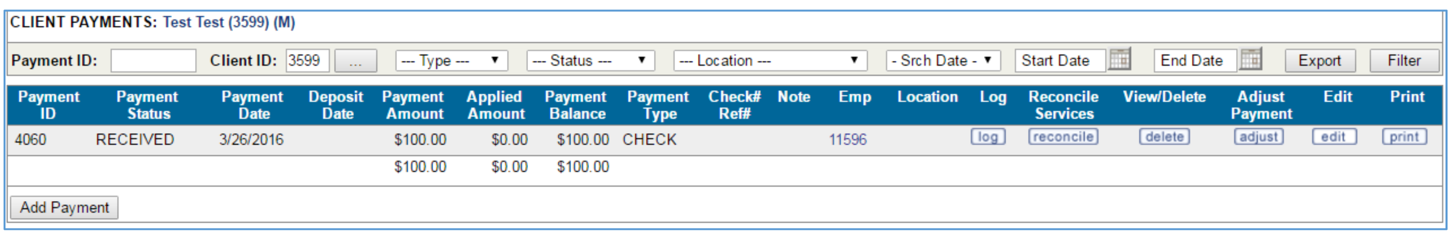
CLIENT PAYMENTS: Test Test (3599) (M)

Payment ID: Client ID: 3599 ... --- Type --- --- Status --- --- Location --- - Srch Date - Start Date End Date Export Filter

Payment ID	Payment Status	Payment Date	Deposit Date	Payment Amount	Applied Amount	Payment Balance	Payment Type	Check# Ref#	Note	Emp	Location	Log	Reconcile Services	View/Delete	Adjust Payment	Refund Balance	Return Check	Edit	Print
4060	RECEIVED	3/26/2016		$100.00	$0.00	$100.00	CHECK			11596		log	reconcile	delete	adjust	refund	return	edit	print
				$100.00	$0.00	$100.00													

Add Payment

When BillingRefundClientPayment is ENABLED



CLIENT PAYMENTS: Test Test (3599) (M)

Payment ID: Client ID: 3599 ... --- Type --- --- Status --- --- Location --- - Srch Date - Start Date End Date Export Filter

Payment ID	Payment Status	Payment Date	Deposit Date	Payment Amount	Applied Amount	Payment Balance	Payment Type	Check# Ref#	Note	Emp	Location	Log	Reconcile Services	View/Delete	Adjust Payment	Edit	Print
4060	RECEIVED	3/26/2016		$100.00	$0.00	$100.00	CHECK			11596		log	reconcile	delete	adjust	edit	print
				$100.00	$0.00	$100.00											

Add Payment

When BillingRefundClientPayment is DISABLED

BillingReports

Function:

- Determines whether the "Reports and Exports" section on the Billing Tab will be accessible.
  - This section contains the following links: Search Claims and Visits, Batch Claim Error Report, Duplicate Billing Report, Advanced Ledger Search, Revenue/AR Export, Revenue/AR Export List, Aging Intervals

Location(s) this setting affects:

- Billing Tab -> Reports and Exports Section

Screenshots:

If BillingReports is DISABLED, this section will not display.

BillingUndo

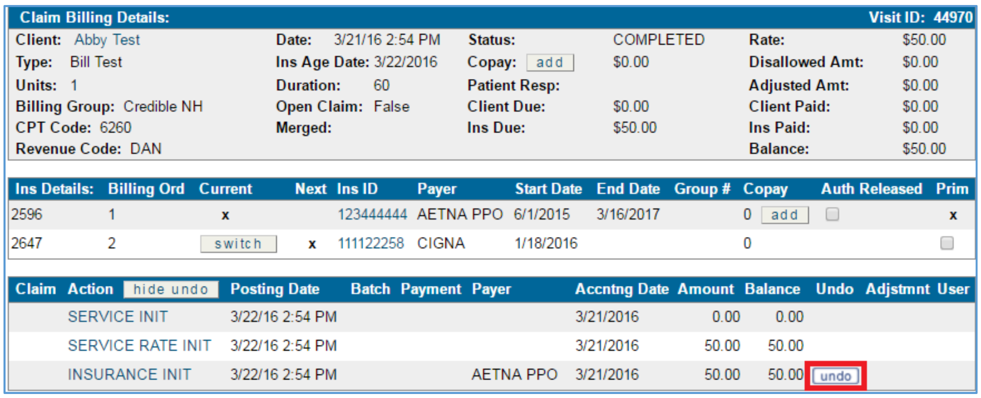
Function:

- Allows the “Undo” button to appear on ledger lines when viewing the Billing section of a Visit.

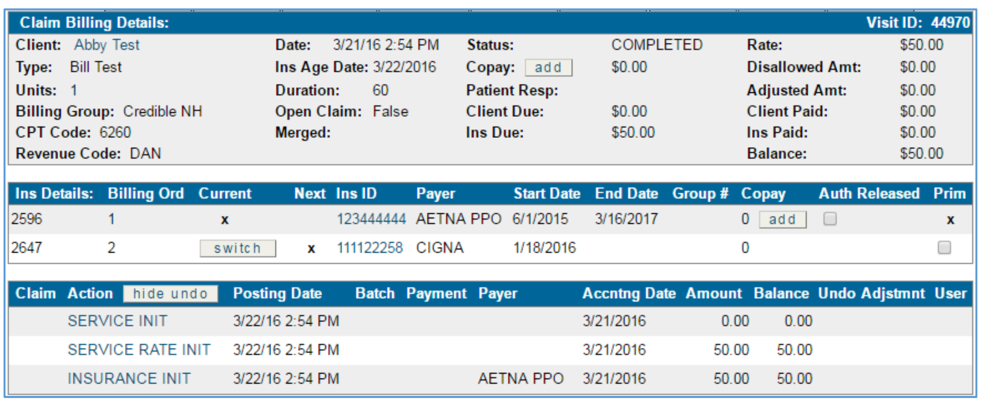
Location(s) this setting affects:

- Visit View -> Billing Button -> Ledger Section

Screenshots:



When BillingUndo is ENABLED



When BillingUndo is DISABLED

CREDIBLE

ClientPaymentAdjust

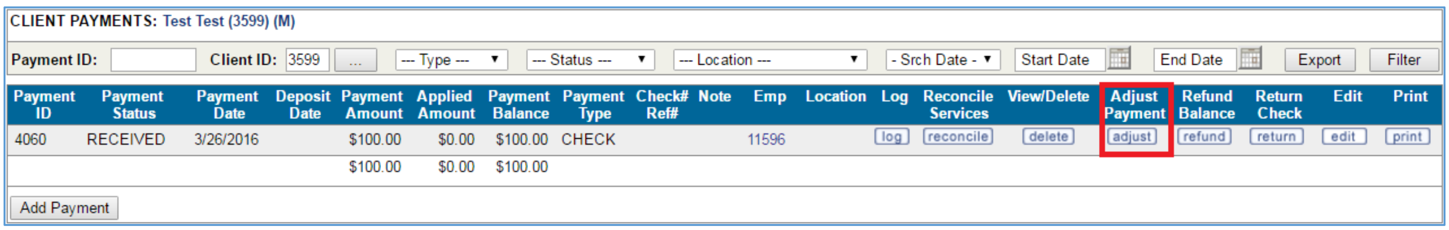
Function:

- Allows the "Adjust" button to appear when viewing the "Payments" button from the Client Nav Bar, or the "Manage Client Payments" page from the Billing Tab.

Location(s) this setting affects:

- Billing Tab -> Manage Client Payments
- Client Nav Bar -> Payments

Screenshots:



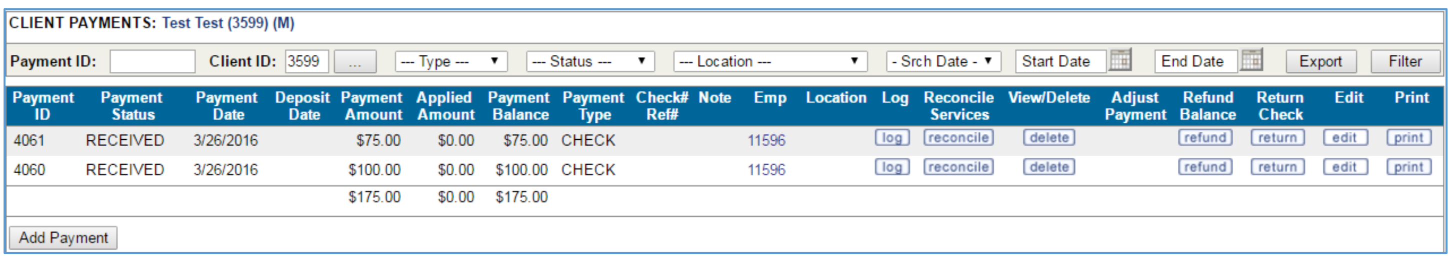
CLIENT PAYMENTS: Test Test (3599) (M)

Payment ID: Client ID: 3599 ... --- Type --- --- Status --- --- Location --- - Srch Date - Start Date End Date Export Filter

Payment ID	Payment Status	Payment Date	Deposit Date	Payment Amount	Applied Amount	Payment Balance	Payment Type	Check# Ref#	Note	Emp	Location	Log	Reconcile Services	View/Delete	Adjust Payment	Refund Balance	Return Check	Edit	Print
4060	RECEIVED	3/26/2016		$100.00	$0.00	$100.00	CHECK			11596		log	reconcile	delete	adjust	refund	return	edit	print
				$100.00	$0.00	$100.00													

Add Payment

When ClientPaymentAdjust is ENABLED



CLIENT PAYMENTS: Test Test (3599) (M)

Payment ID: Client ID: 3599 ... --- Type --- --- Status --- --- Location --- - Srch Date - Start Date End Date Export Filter

Payment ID	Payment Status	Payment Date	Deposit Date	Payment Amount	Applied Amount	Payment Balance	Payment Type	Check# Ref#	Note	Emp	Location	Log	Reconcile Services	View/Delete	Adjust Payment	Refund Balance	Return Check	Edit	Print
4061	RECEIVED	3/26/2016		$75.00	$0.00	$75.00	CHECK			11596		log	reconcile	delete		refund	return	edit	print
4060	RECEIVED	3/26/2016		$100.00	$0.00	$100.00	CHECK			11596		log	reconcile	delete		refund	return	edit	print
				$175.00	$0.00	$175.00													

Add Payment

When ClientPaymentAdjust is DISABLED

ClientPaymentDelete

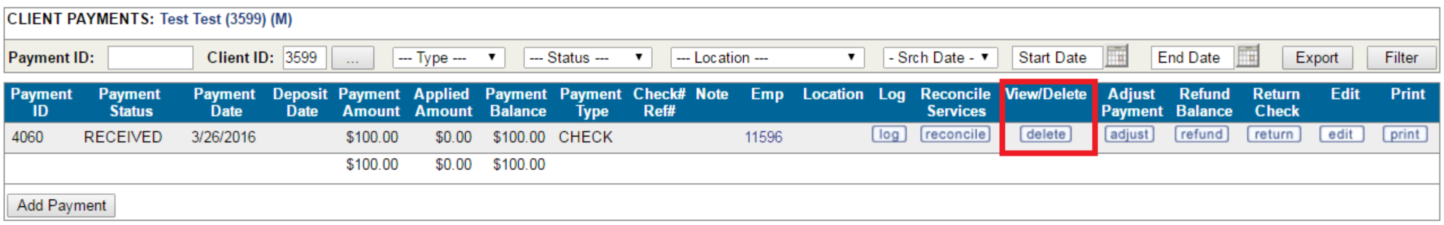
Function:

- Allows the “Delete” button to appear when viewing the “Payments” button from the Client Nav Bar, or the “Manage Client Payments” page from the Billing Tab.

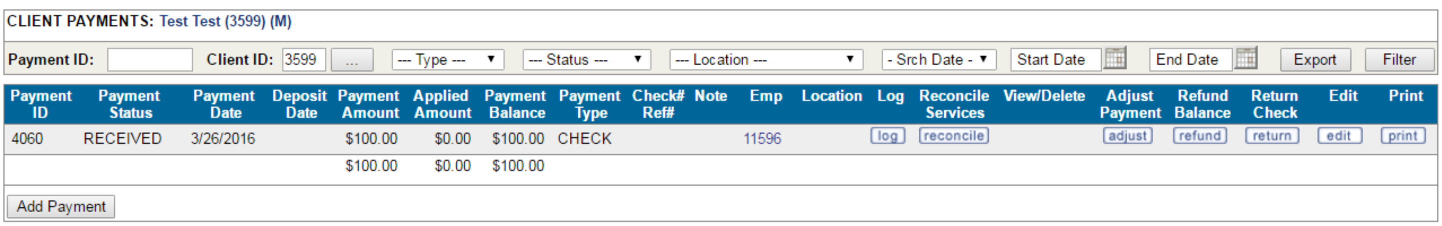
Location(s) this setting affects:

- Billing Tab -> Manage Client Payments
- Client Nav Bar -> Payments

Screenshots:



When ClientPaymentDelete is ENABLED



When ClientPaymentDelete is DISABLED

ClientPaymentUpdate

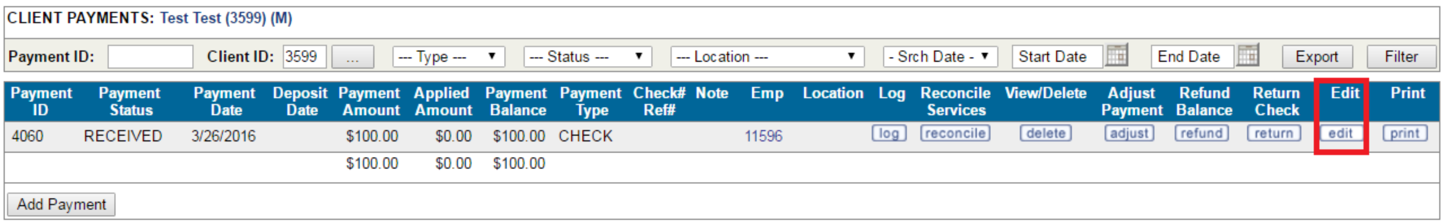
Function:

- Allows the "Edit" button to appear when viewing the "Payments" button from the Client Nav Bar, or the "Manage Client Payments" page from the Billing Tab.

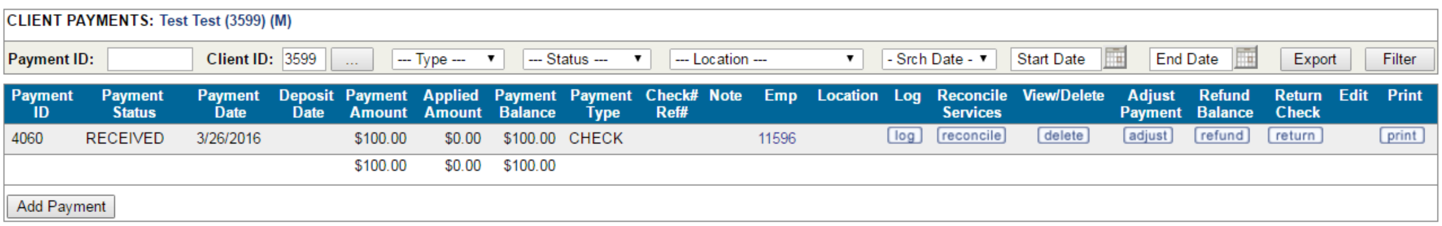
Location(s) this setting affects:

- Billing Tab -> Manage Client Payments
- Client Nav Bar -> Payments

Screenshots:



When ClientPaymentUpdate is ENABLED



When ClientPaymentUpdate is DISABLED

CREDIBLE

EnterCreditCardPayment

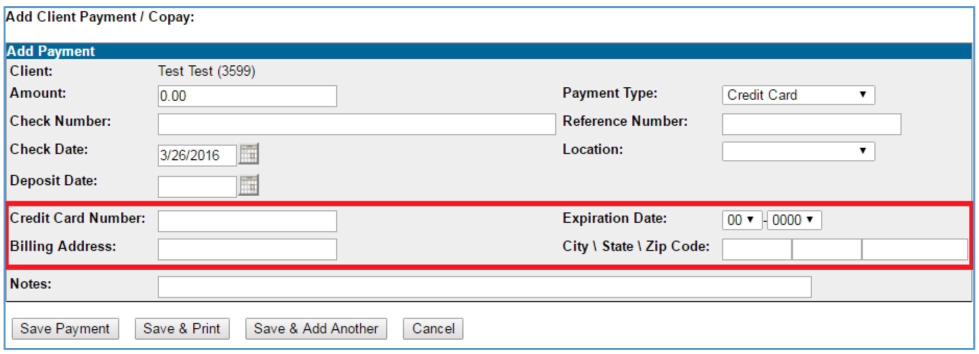
Function:

- The right to process Credit Card Info from the "Add Client Payment" screen.
- When Disabled, the Credit Card fields will not display, even after choosing a Payment Type that would normally cause these fields to appear.

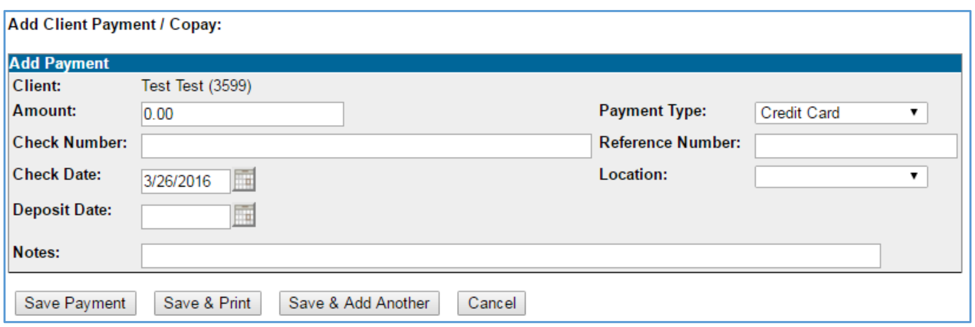
Location(s) this setting affects:

- Billing Tab -> Manage Client Payments -> Add Payment
- Client Nav Bar -> Payments -> Add Payment

Screenshots:



When EnterCreditCardPayment is ENABLED



When EnterCreditCardPayment is DISABLED

FinancialsView

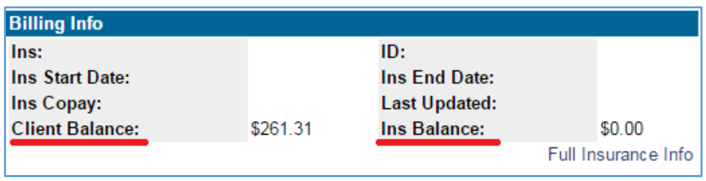
Function:

- Determines whether the “Client Balance” and “Insurance Balance” fields will appear in the “Billing Info” section that can display on the Client Overview and Client Profile pages.

Location(s) this setting affects:

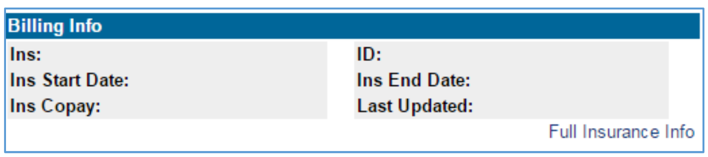
- Client Overview -> Billing Info
- Client Profile -> Billing Info

Screenshots:



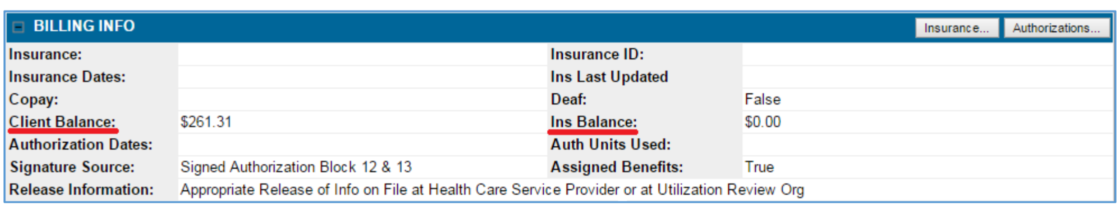
Billing Info			
Ins:		**ID:**	
Ins Start Date:		**Ins End Date:**	
Ins Copay:		**Last Updated:**	
Client Balance:	$261.31	**Ins Balance:**	$0.00
			Full Insurance Info

When FinancialsView is ENABLED



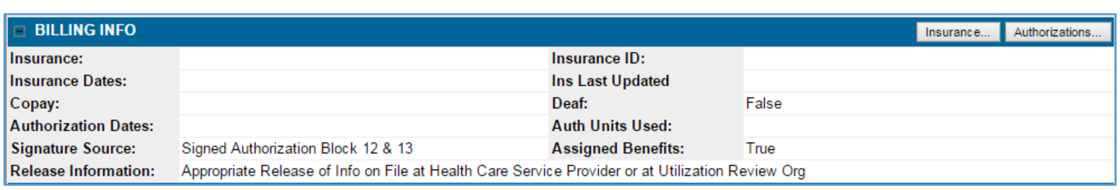
Billing Info	
Ins:	**ID:**
Ins Start Date:	**Ins End Date:**
Ins Copay:	**Last Updated:**
	Full Insurance Info

When FinancialsView is DISABLED



BILLING INFO		Insurance...	Authorizations...
Insurance:		**Insurance ID:**	
Insurance Dates:		**Ins Last Updated**	
Copay:		**Deaf:**	False
Client Balance:	$261.31	**Ins Balance:**	$0.00
Authorization Dates:		**Auth Units Used:**	
Signature Source:	Signed Authorization Block 12 & 13	**Assigned Benefits:**	True
Release Information:	Appropriate Release of Info on File at Health Care Service Provider or at Utilization Review Org		

When FinancialsView is ENABLED



BILLING INFO		Insurance...	Authorizations...
Insurance:		**Insurance ID:**	
Insurance Dates:		**Ins Last Updated**	
Copay:		**Deaf:**	False
Authorization Dates:		**Auth Units Used:**	
Signature Source:	Signed Authorization Block 12 & 13	**Assigned Benefits:**	True
Release Information:	Appropriate Release of Info on File at Health Care Service Provider or at Utilization Review Org		

When FinancialsView is DISABLED

FosterCareBilling

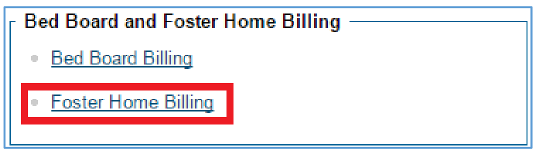
Function:

- Determines whether the “Foster Home Billing” link will display on the Billing Tab, in the “Bed Board and Foster Home Billing” section.

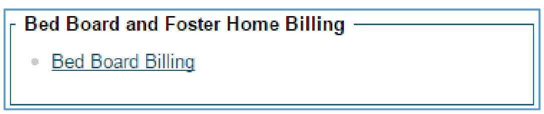
Location(s) this setting affects:

- Billing Tab -> Foster Home Billing

Screenshots:



When FosterCareBilling is ENABLED



When FosterCareBilling is DISABLED

GenerateStatements

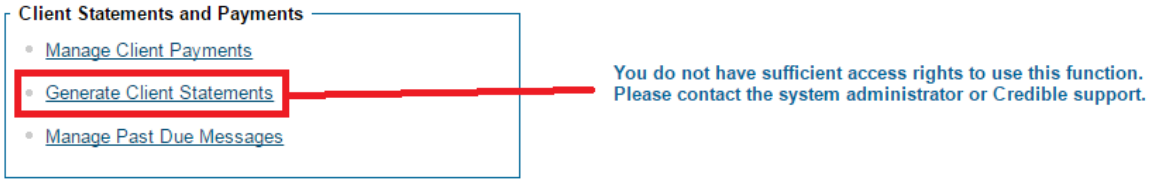
Function:

- Determines whether the "Generate Client Statements" link will be accessible on the Billing Tab, in the "Client Statements and Payments" section.
    - NOTE: If Disabled, clicking this link will lead to an Insufficient Rights notification.

Location(s) this setting affects:

- Billing Tab -> Generate Client Statements

Screenshots:



When GenerateStatements is DISABLED

InsPaymentAdjust

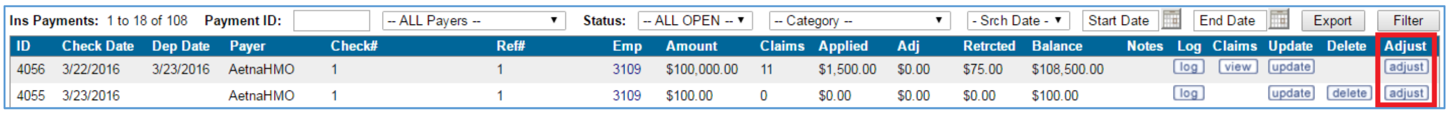
Function:

- Determines whether the “Adjust” button will appear on the “Manage Insurance Payments” page that is accessed from the Billing Tab.

Location(s) this setting affects:

- Billing Tab -> Manage Insurance Payments

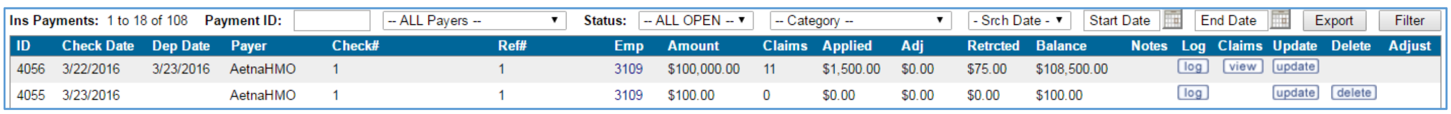
Screenshots:



Ins Payments: 1 to 18 of 108 Payment ID: -- ALL Payers -- Status: -- ALL OPEN -- -- Category -- - Srch Date - Start Date End Date Export Filter

ID	Check Date	Dep Date	Payer	Check#	Ref#	Emp	Amount	Claims	Applied	Adj	Retrcted	Balance	Notes	Log	Claims	Update	Delete	Adjust
4056	3/22/2016	3/23/2016	AetnaHMO	1	1	3109	$100,000.00	11	$1,500.00	$0.00	$75.00	$108,500.00		log	view	update		adjust
4055	3/23/2016		AetnaHMO	1	1	3109	$100.00	0	$0.00	$0.00	$0.00	$100.00		log		update	delete	adjust

When InsPaymentAdjust is ENABLED



Ins Payments: 1 to 18 of 108 Payment ID: -- ALL Payers -- Status: -- ALL OPEN -- -- Category -- - Srch Date - Start Date End Date Export Filter

ID	Check Date	Dep Date	Payer	Check#	Ref#	Emp	Amount	Claims	Applied	Adj	Retrcted	Balance	Notes	Log	Claims	Update	Delete	Adjust
4056	3/22/2016	3/23/2016	AetnaHMO	1	1	3109	$100,000.00	11	$1,500.00	$0.00	$75.00	$108,500.00		log	view	update		
4055	3/23/2016		AetnaHMO	1	1	3109	$100.00	0	$0.00	$0.00	$0.00	$100.00		log		update	delete	

When InsPaymentAdjust is DISABLED

InsPaymentDelete

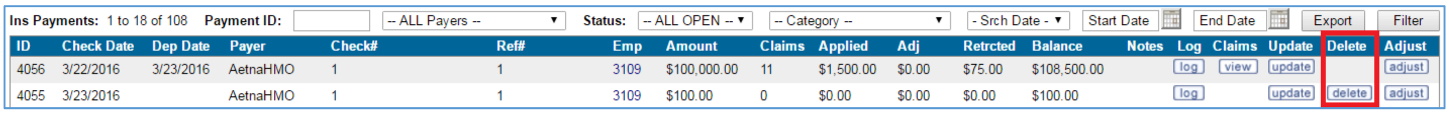
Function:

- Determines whether the “Delete” button will appear on the “Manage Insurance Payments” page that is accessed from the Billing Tab.

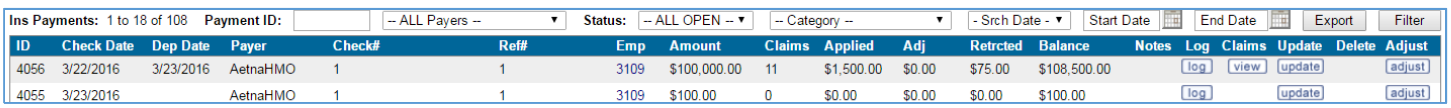
Location(s) this setting affects:

- Billing Tab -> Manage Insurance Payments

Screenshots:



When InsPaymentDelete is ENABLED



When InsPaymentDelete is DISABLED

InsPaymentUpdate

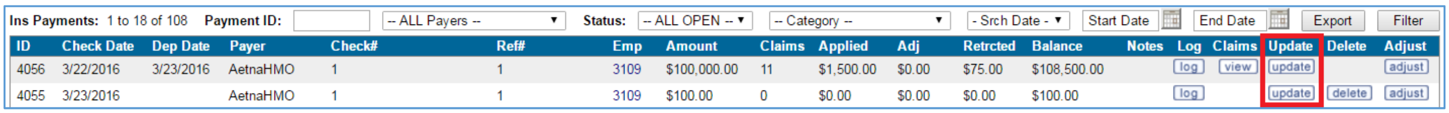
Function:

- Determines whether the "Update" button will appear on the "Manage Insurance Payments" page that is accessed from the Billing Tab.

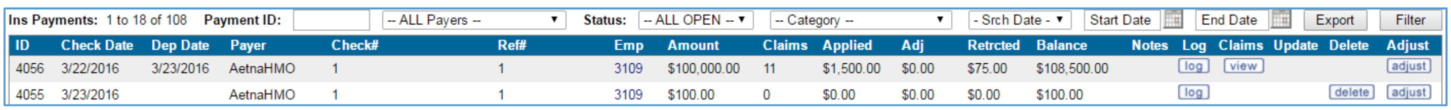
Location(s) this setting affects:

- Billing Tab -> Manage Insurance Payments

Screenshots:



When InsPaymentUpdate is ENABLED



When InsPaymentUpdate is DISABLED

ManagePastDueMessages

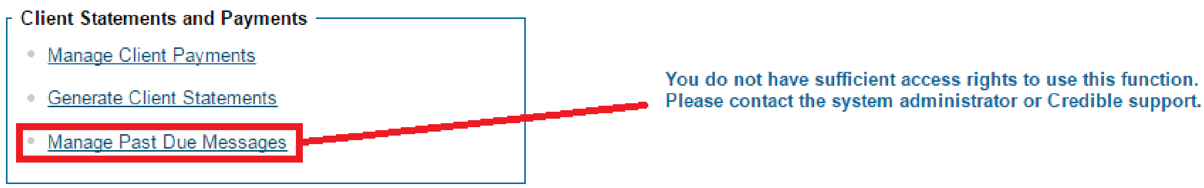
Function:

- Allows access to the "Manage Past Due Messages" link that appears on the Billing Tab.
  - NOTE: If disabled, the user will receive an Insufficient Rights message when trying to access this page.

Location(s) this setting affects:

- Billing Tab -> Manage Past Due Messages

Screenshots:



When ManagePastDueMessages is DISABLED

Matrix Section: Client Visit Admin

ClientVisitApprove

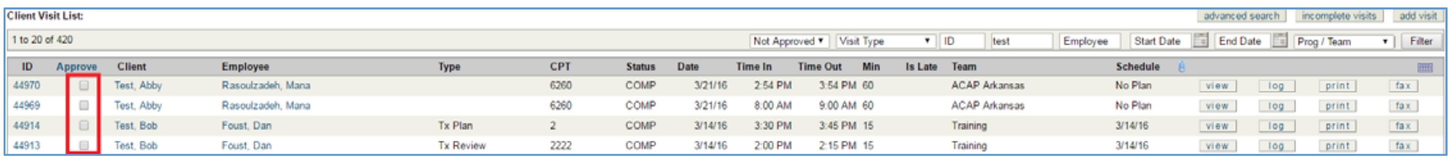
Function:

- Allows the user to approve any Client Visits that they have viewing rights for.

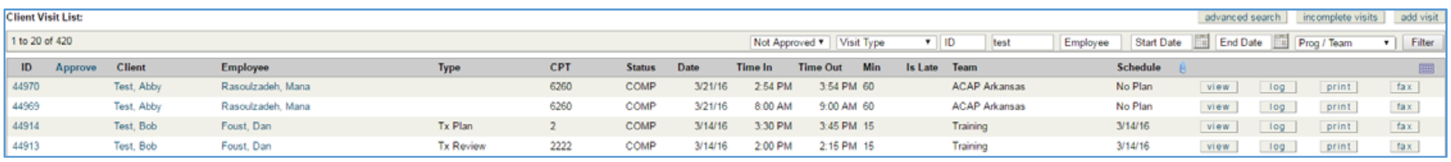
Location(s) this setting affects:

- Visit Tab -> Approve Checkboxes
- Visit Tab -> Advanced Search -> Approve Checkboxes
- Visit Tab -> Selected Visit -> Approve Button

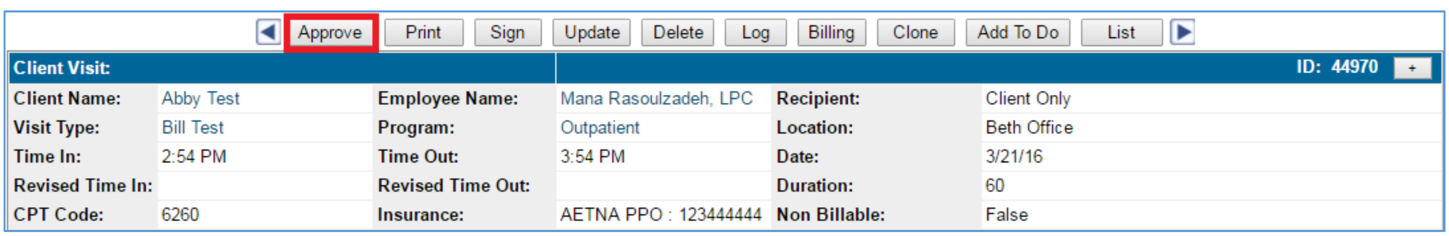
Screenshots:



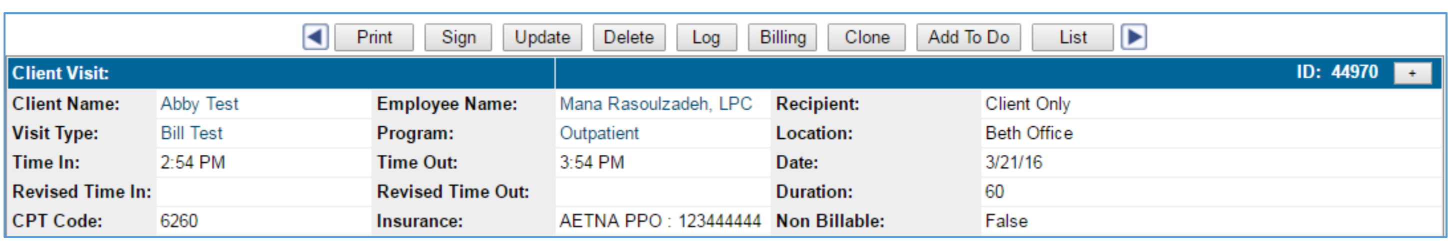
When ClientVisitApprove is ENABLED



When ClientVisitApprove is DISABLED



When ClientVisitApprove is ENABLED



When ClientVisitApprove is DISABLED

ClientVisitApproveColumn

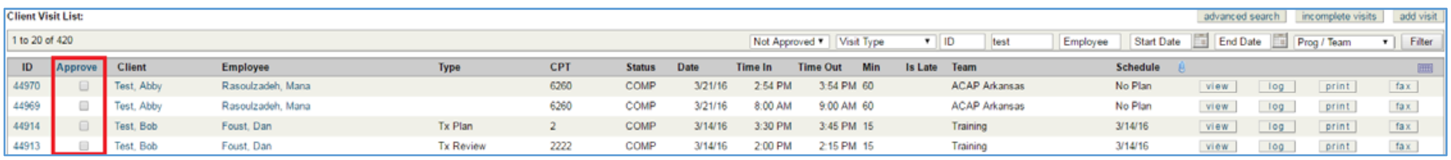
Function:

- Allows the user to approve any Client Visits that they have viewing rights for, utilizing the 'Approve' checkbox that displays on a Visit List, or an Advanced Visit search.
  - o If disabled, this column and checkbox will not display, requiring the user to approve each Visit individually from the Visit view.

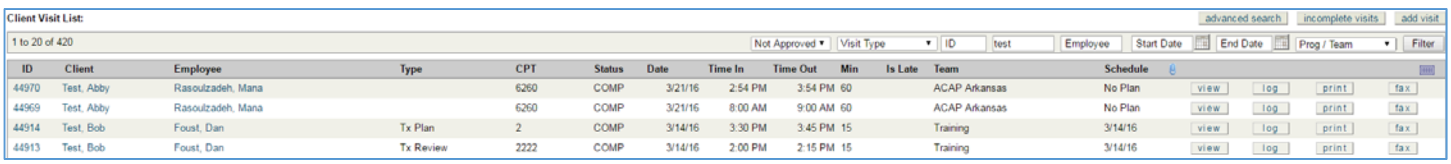
Location(s) this setting affects:

- Visit Tab -> Approve Checkboxes
- Visit Tab -> Advanced Search -> Approve Checkboxes

Screenshots:



When ClientVisitApproveColumn is ENABLED



When ClientVisitApproveColumn is DISABLED

ClientVisitApproveOwn

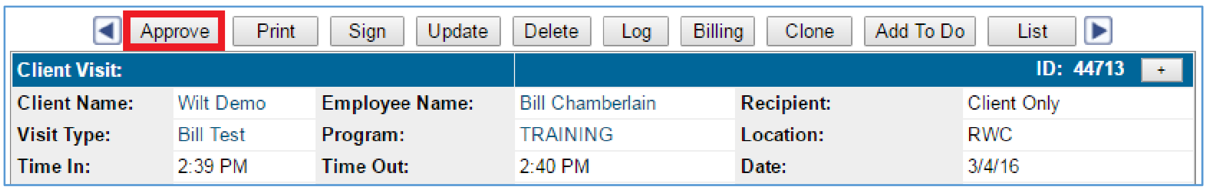
Function:

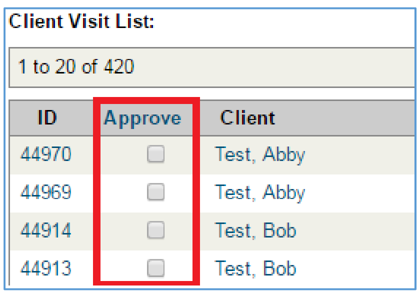
- Allows the user to approve ONLY their own Client Visits.
- NOTE: If ClientVisitApprove is enabled, this setting will have no effect.

Location(s) this setting affects:

- Visit Tab -> Approve Checkboxes
- Visit Tab -> Advanced Search -> Approve Checkboxes
- Visit Tab -> Selected Visit -> Approve Button

Screenshots:





ClientVisitDelete

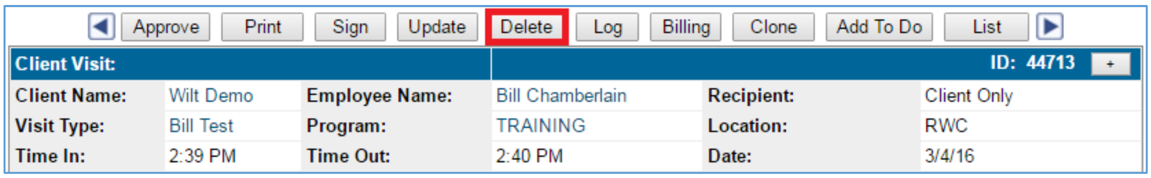
Function:

- Allows the “Delete” button to appear on the Visit view screen.

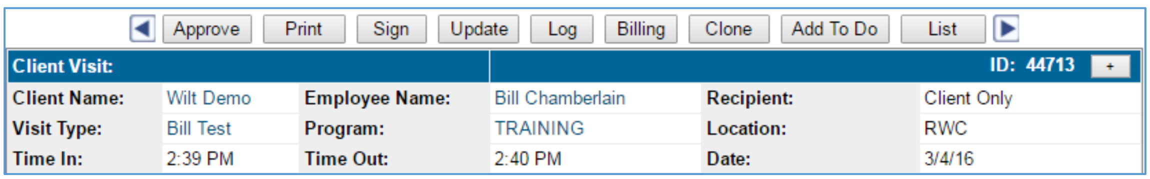
Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Delete Button

Screenshots:



When ClientVisitDelete is ENABLED



When ClientVisitDelete is DISABLED

ClientVisitManualRedX

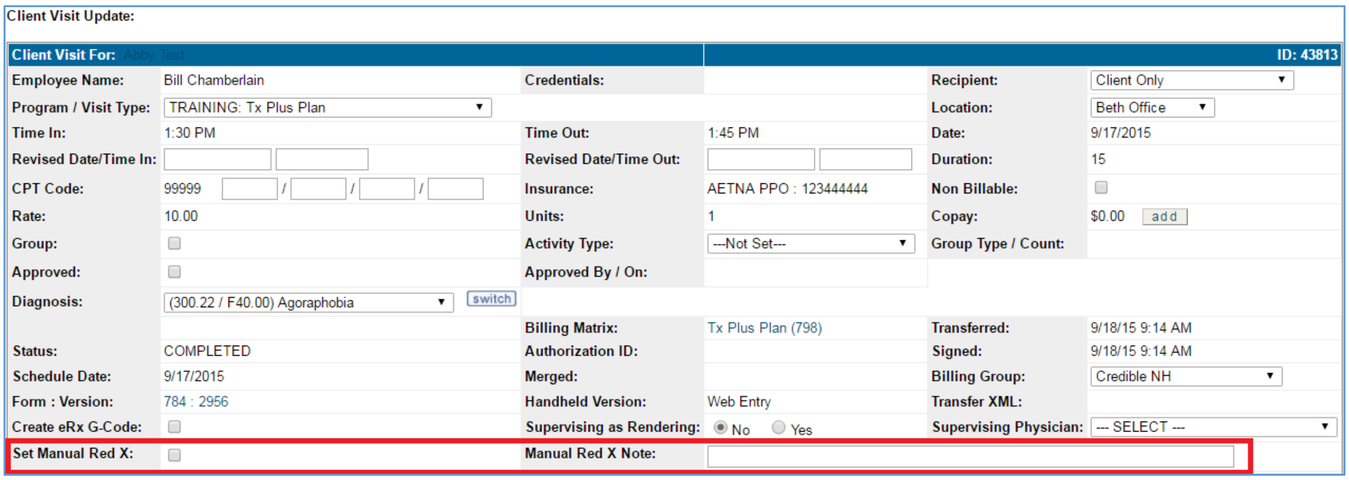
Function:

- Determines whether the “Set Manual Red X” and “Manual Red X Notes” fields will appear when selecting the “Update” button for a visit on the Visit view screen.

Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Update Button

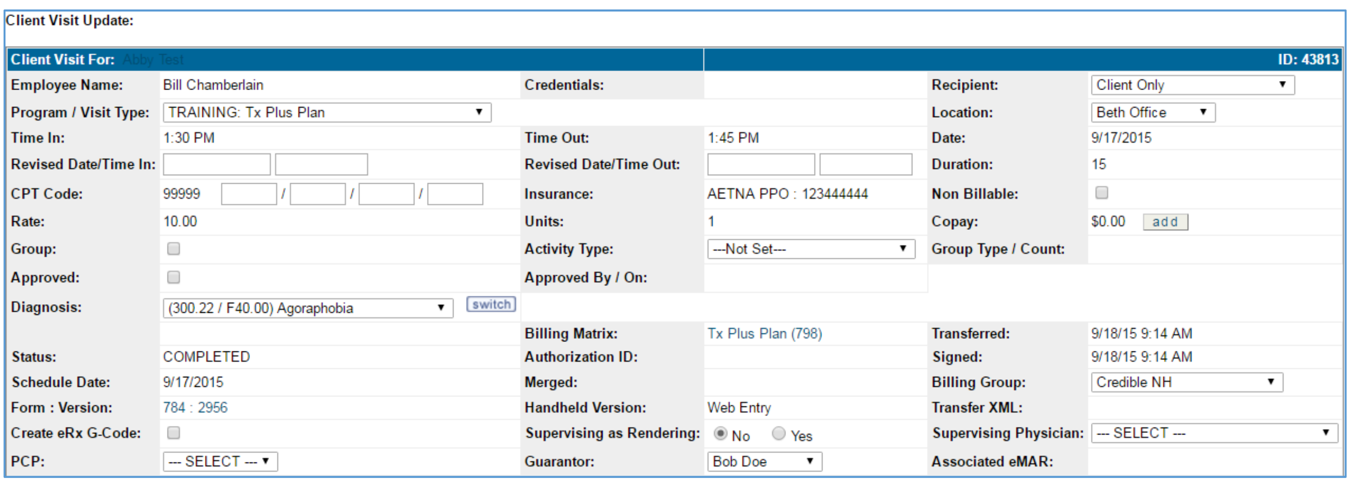
Screenshots:



Client Visit Update:

Client Visit For: Abby Test					ID: 43813
Employee Name:	Bill Chamberlain	Credentials:		Recipient:	Client Only
Program / Visit Type:	TRAINING: Tx Plus Plan			Location:	Beth Office
Time In:	1:30 PM	Time Out:	1:45 PM	Date:	9/17/2015
Revised Date/Time In:		Revised Date/Time Out:		Duration:	15
CPT Code:	99999 / / /	Insurance:	AETNA PPO : 123444444	Non Billable:	
Rate:	10.00	Units:	1	Copay:	$0.00 add
Group:		Activity Type:	---Not Set---	Group Type / Count:	
Approved:		Approved By / On:			
Diagnosis:	(300.22 / F40.00) Agoraphobia switch				
		Billing Matrix:	Tx Plus Plan (798)	Transferred:	9/18/15 9:14 AM
Status:	COMPLETED	Authorization ID:		Signed:	9/18/15 9:14 AM
Schedule Date:	9/17/2015	Merged:		Billing Group:	Credible NH
Form : Version:	784 : 2956	Handheld Version:	Web Entry	Transfer XML:	
Create eRx G-Code:		Supervising as Rendering:	No Yes	Supervising Physician:	--- SELECT ---
Set Manual Red X:		Manual Red X Note:			

When ClientVisitManualRedX is ENABLED



Client Visit Update:

Client Visit For: Abby Test					ID: 43813
Employee Name:	Bill Chamberlain	Credentials:		Recipient:	Client Only
Program / Visit Type:	TRAINING: Tx Plus Plan			Location:	Beth Office
Time In:	1:30 PM	Time Out:	1:45 PM	Date:	9/17/2015
Revised Date/Time In:		Revised Date/Time Out:		Duration:	15
CPT Code:	99999 / / /	Insurance:	AETNA PPO : 123444444	Non Billable:	
Rate:	10.00	Units:	1	Copay:	$0.00 add
Group:		Activity Type:	---Not Set---	Group Type / Count:	
Approved:		Approved By / On:			
Diagnosis:	(300.22 / F40.00) Agoraphobia switch				
		Billing Matrix:	Tx Plus Plan (798)	Transferred:	9/18/15 9:14 AM
Status:	COMPLETED	Authorization ID:		Signed:	9/18/15 9:14 AM
Schedule Date:	9/17/2015	Merged:		Billing Group:	Credible NH
Form : Version:	784 : 2956	Handheld Version:	Web Entry	Transfer XML:	
Create eRx G-Code:		Supervising as Rendering:	No Yes	Supervising Physician:	--- SELECT ---
PCP:	--- SELECT ---	Guarantor:	Bob Doe	Associated eMAR:	

When ClientVisitManualRedX is DISABLED

ClientVisitRelink

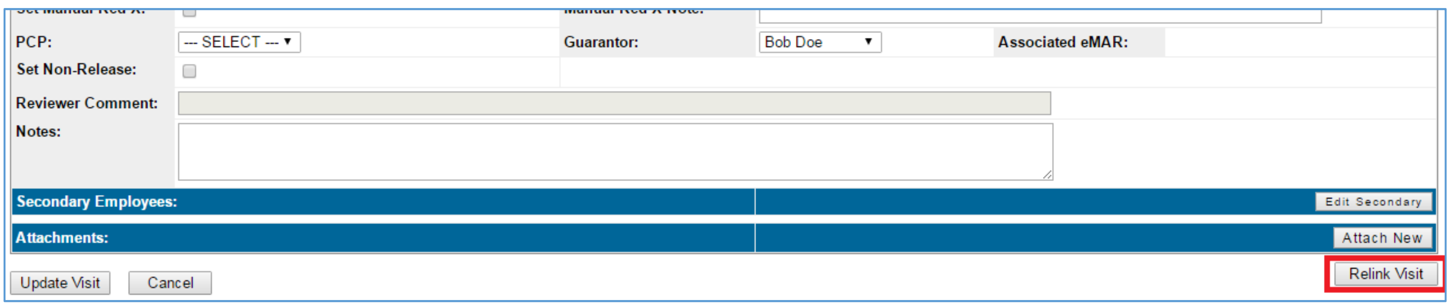
Function:

- Allows the “Relink Visit” button to appear when updating a Visit.
- Determines whether the “Relink Visits” link can be used on the Admin Tab.
    - If disabled, an Insufficient Rights message will display when choosing that link.

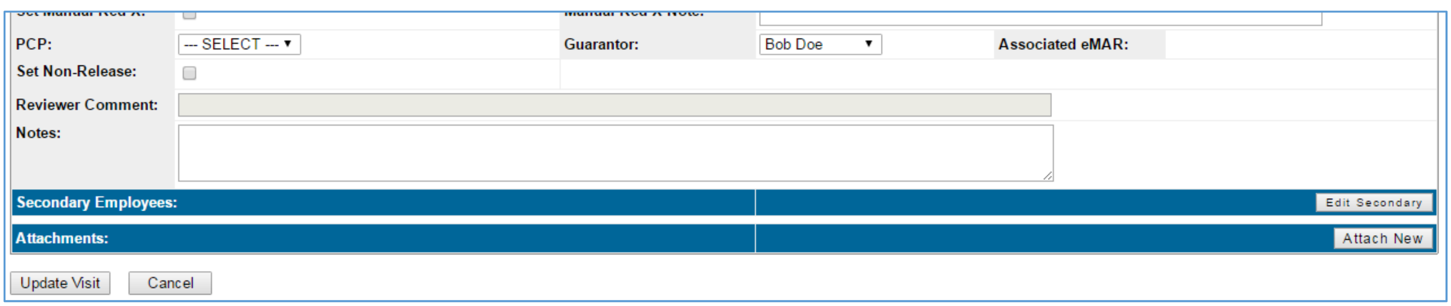
Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Update Button -> Relink Visit Button
- Admin Tab -> Relink Visits

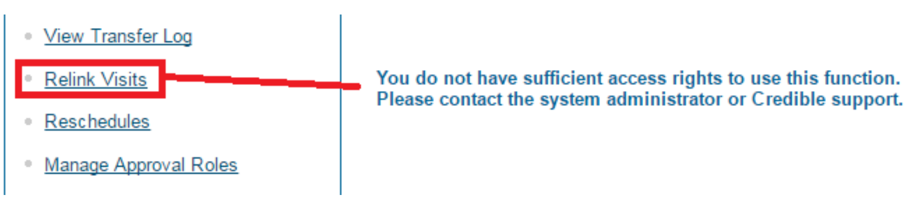
Screenshots:



When ClientVisitRelink is ENABLED



When ClientVisitRelink is DISABLED



When ClientVisitRelink is DISABLED

ClientVisitReprocess

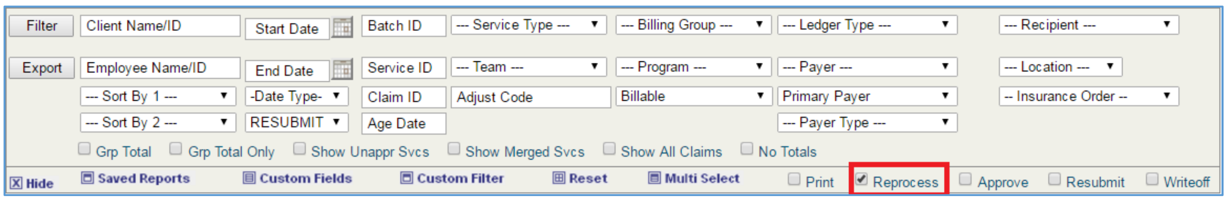
Function:

- Allows the “Reprocess” checkbox to display as an option when performing an Advanced Visit search.
- Determines whether the “Save and Reprocess” button will appear at the bottom of a Billing Matrix entry.

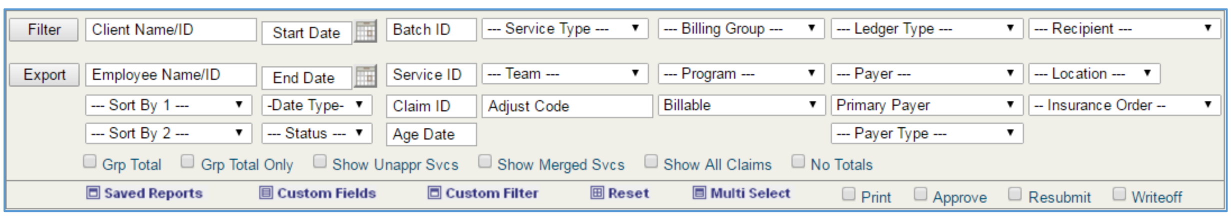
Location(s) this setting affects:

- Visit Tab -> Advanced Search -> Reprocess Checkbox
- Admin Tab -> Billing Matrix -> Edit Button -> Save and Reprocess
- Billing Tab -> Billing Matrix -> Edit Button -> Save and Reprocess

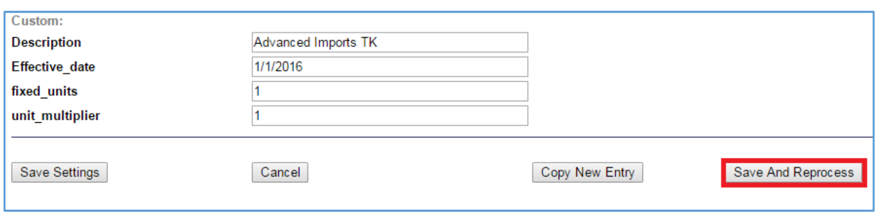
Screenshots:



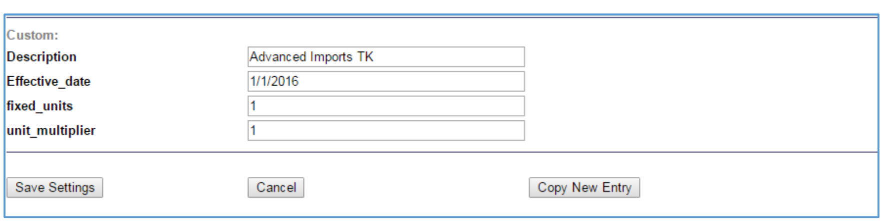
When ClientVisitReprocess is ENABLED



When ClientVisitReprocess is DISABLED



When ClientVisitReprocess is ENABLED



When ClientVisitReprocess is DISABLED

ClientVisitRestrictFinancial

Function:

- This is an anti-right that when enabled will prevent the user from seeing the Rate when viewing a Service, and financial information on a Service when viewing Services on the Advanced Search.

Location(s) this setting affects:

- Visit Tab -> View Button on a Visit -> Rate
- Visit Tab -> Advanced Search

Screenshots:

Client Visit: LATE ENTRY				ID: 45472	+
Client Name:	Blue Tura	Employee Name:	John Forma, BS, CAC, Doctor, CAC	Recipient:	Client Only
Visit Type:	Bed Board Day	Program:	Intake	Location:	12345
Time In:	12:00 AM	Time Out:	11:59 PM	Date:	5/29/16
Revised Time In:		Revised Time Out:		Duration:	1439 (23:59)
CPT Code:	12345	Insurance:	AetnaHMO : 123547896512	Non Billable:	False
Rate :		Units :	1	Copay:	$0.00 add

When ClientVisitRestrictFinancial is ENABLED

Client Visit: LATE ENTRY				ID: 45472	+
Client Name:	Blue Tura	Employee Name:	John Forma, BS, CAC, Doctor, CAC	Recipient:	Client Only
Visit Type:	Bed Board Day	Program:	Intake	Location:	12345
Time In:	12:00 AM	Time Out:	11:59 PM	Date:	5/29/16
Revised Time In:		Revised Time Out:		Duration:	1439 (23:59)
CPT Code:	12345	Insurance:	AetnaHMO : 123547896512	Non Billable:	False
Rate :	150.00	Units :	1	Copay:	$0.00 add

When ClientVisitRestrictFinancial is DISABLED

Service ID	Service Date	Client Name	CPT Code	CPT Modifier	Status	Base Rate	Billing Rate	Ins Paid	Client Paid	Balance Due	Client Due	Insur Due
32465	6/13/2013	Fakerson Junior,	h2015	1	COMPLETED							
32467	6/13/2013	Morgan, Samantha	h2015	1	COMPLETED							
32468	6/13/2013	Thing, Wild	h2015	1	COMPLETED							
32469	6/9/2013	Davis, Al	h2015	1	COMPLETED							
32470	6/10/2013	Doe, John	h2015	1	COMPLETED							
32471	6/10/2013	Gonzalez, marley	h2015	1	COMPLETED							

When ClientVisitRestrictFinancial is ENABLED

Service ID	Service Date	Client Name	CPT Code	CPT Modifier	Status	Base Rate	Billing Rate	Ins Paid	Client Paid	Balance Due	Client Due	Insur Due
32465	6/13/2013	Fakerson Junior,	h2015	1	COMPLETED	$100	$100	$0	$0	$100	$100	$0
32467	6/13/2013	Morgan, Samantha	h2015	1	COMPLETED	$100	$100	$0	$0	$100	$100	$0
32468	6/13/2013	Thing, Wild	h2015	1	COMPLETED	$100	$100	$0	$0	$100	$100	$0
32469	6/9/2013	Davis, Al	h2015	1	COMPLETED	$100	$100	$0	$0	$100	$100	$0
32470	6/10/2013	Doe, John	h2015	1	COMPLETED	$600	$600	$0	$0	$600	$600	$0
32471	6/10/2013	Gonzalez, marley	h2015	1	COMPLETED	$100	$100	$0	$0	$100	$100	$0

When ClientVisitRestrictFinancial is DISABLED

ClientVisitSignAny

Function:

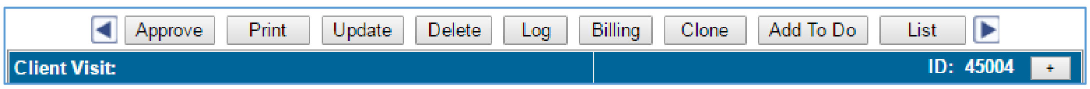
- Determines whether the user can view the “Sign” button on any Client Visit, regardless of who completed it.
    - If disabled, the Sign button will only appear on Visits that the user has completed.

Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Sign Button

Screenshots:

When ClientVisitSignAny is ENABLED



When ClientVisitSignAny is DISABLED, and the Visit one that someone else has completed.

ClientVisitSuperView

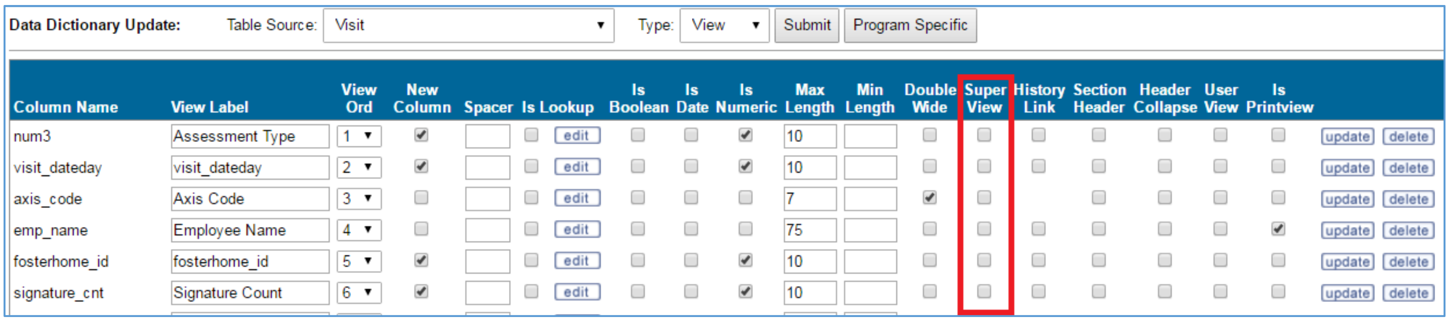
Function:

- Allows the user to view Visit fields that are marked as “Super View” in the Visit section of the Data Dictionary.

Location(s) this setting affects:

- Admin Tab -> Data Dictionary -> Visit Table Source -> Super View checkboxes

Screenshots:



ClientVisitUnApprove

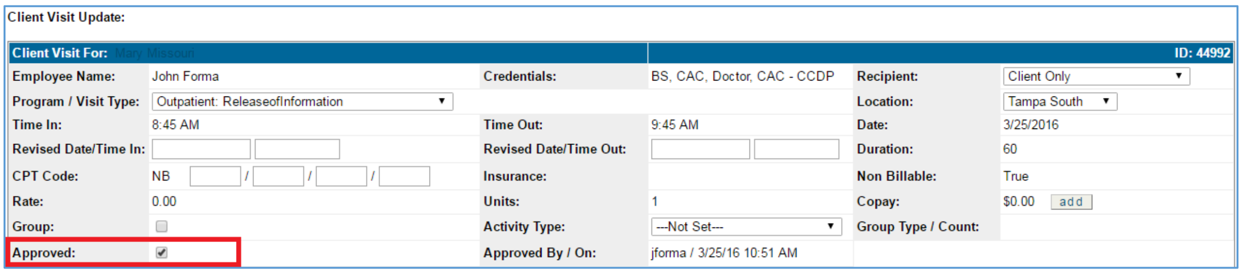
Function:

- Allows the user to unapprove locked Visits that have been previously approved.
    - If disabled, the checkbox allowing to unapprove will instead show as the word "True".

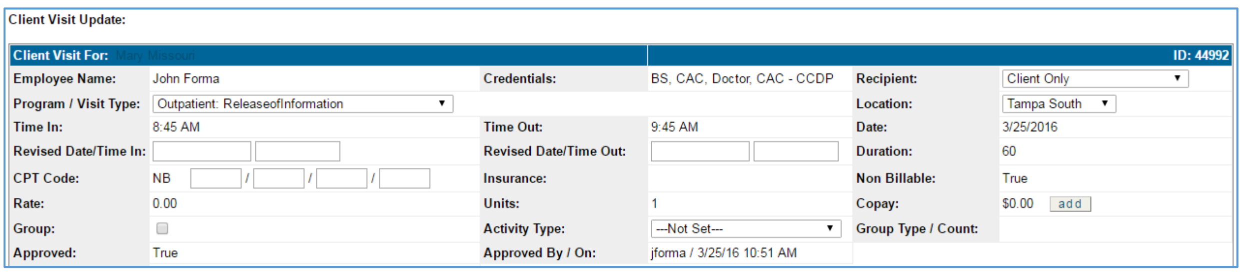
Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Update Button -> Approved

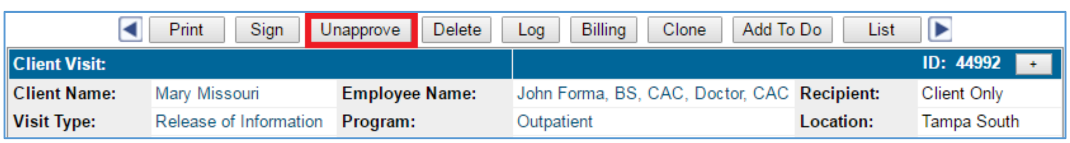
Screenshots:



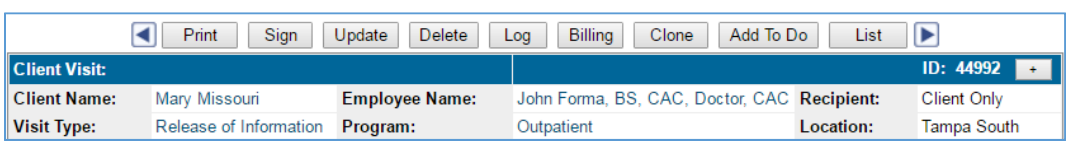
When ClientVisitUnApprove is ENABLED



When ClientVisitUnApprove is DISABLED



When ClientVisitUnApprove is ENABLED



When ClientVisitUnApprove is DISABLED

ClientVisitUpdateLocked

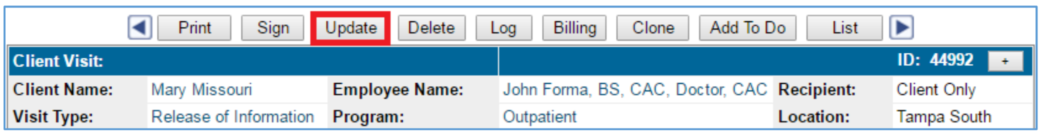
Function:

- Allows the user to “Update” Visits that are locked, or were previously locked.

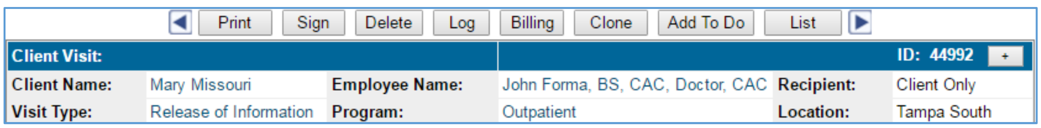
Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Update Button
- Visit Tab -> Selected Visit -> Edit Full Visit Button

Screenshots:



When ClientVisitUpdateLocked is ENABLED



When ClientVisitUpdateLocked is DISABLED

Matrix Section: Client Visits

ClientVisitClone

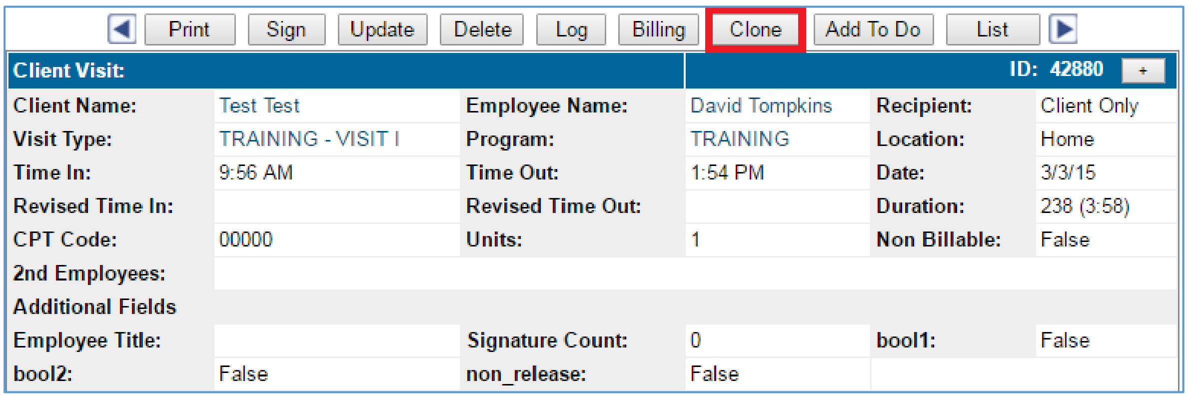
Function:

- Determines whether the user will be able to use the “Clone” button to clone an existing Visit.

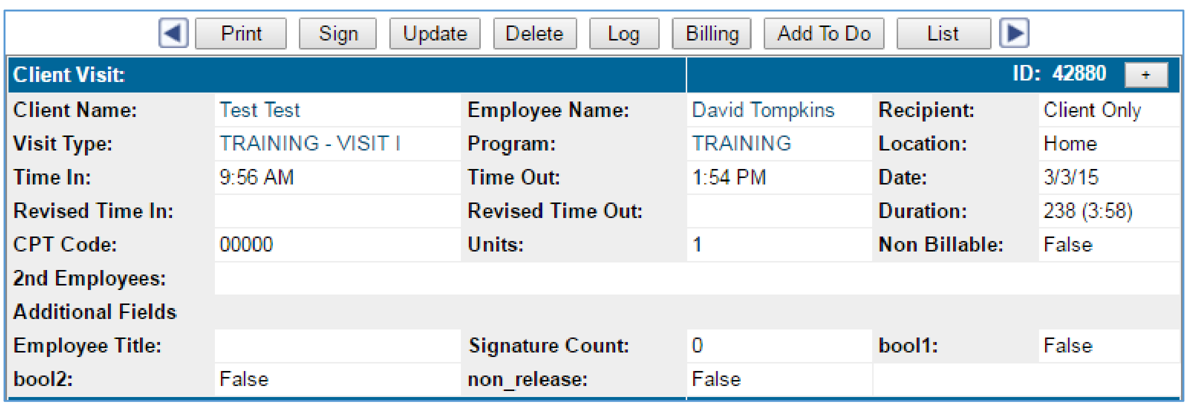
Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Visit List -> Selected Visit

Screenshots:



When ClientVisitClone is ENABLED



When ClientVisitClone is DISABLED

ClientVisitCreateGCode

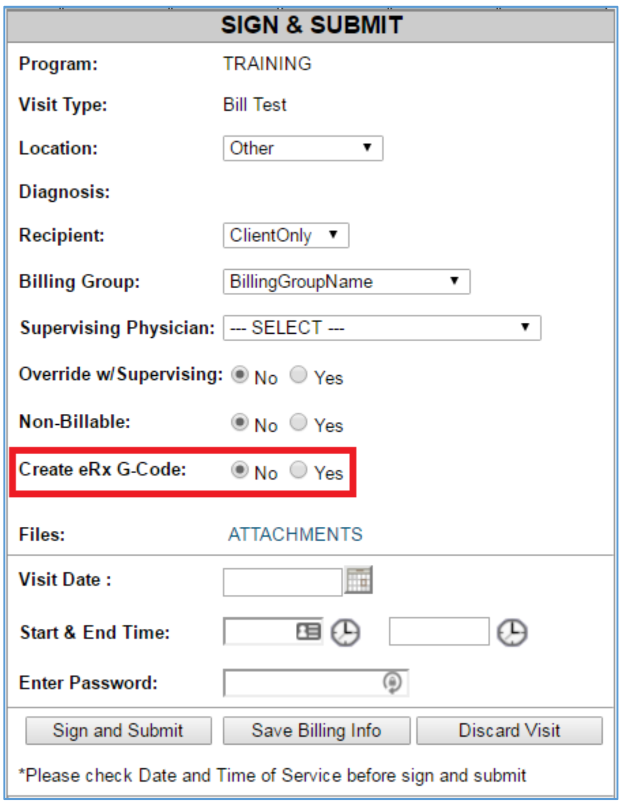
Function:

- Controls whether the user will be able to view the “Create eRx G-Code” option on the Sign & Submit page.
  - NOTE: This setting only applies to those that have the “Flag for G-Code” option checked in the Partner Config.

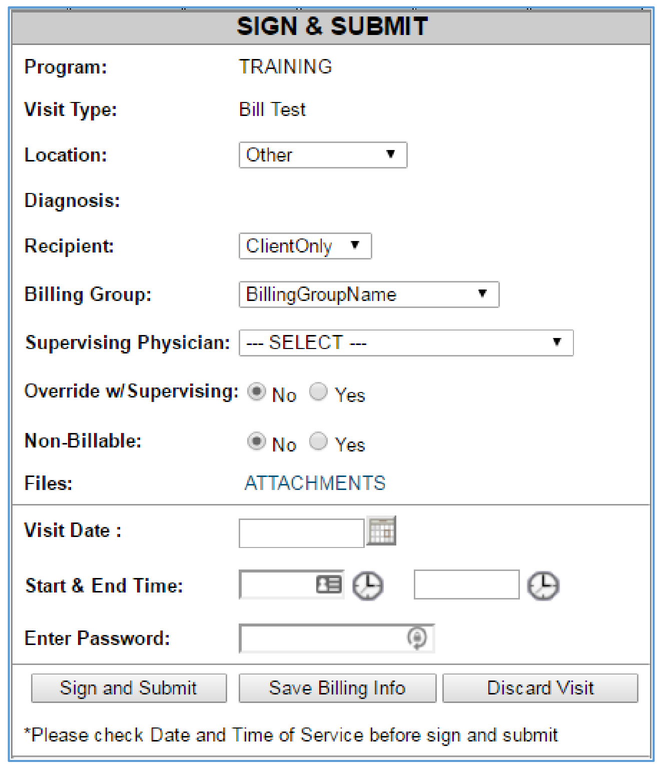
Location(s) this setting affects:

- Sign & Submit Page

Screenshots:



When ClientVisitCreateGCode is ENABLED



When ClientVisitCreateGCode is DISABLED

ClientVisitDisplayAll

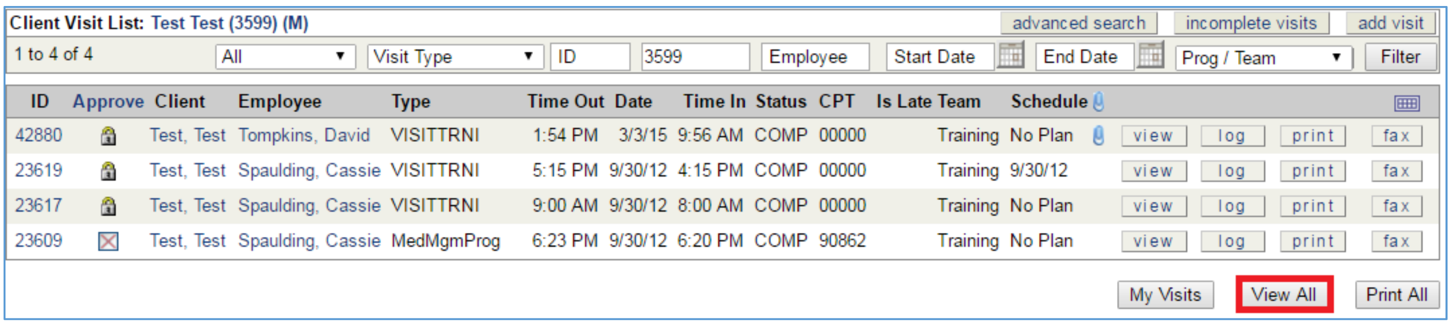
Function:

- Controls whether the “View All” button will display when viewing a Client or Employee Visit List.

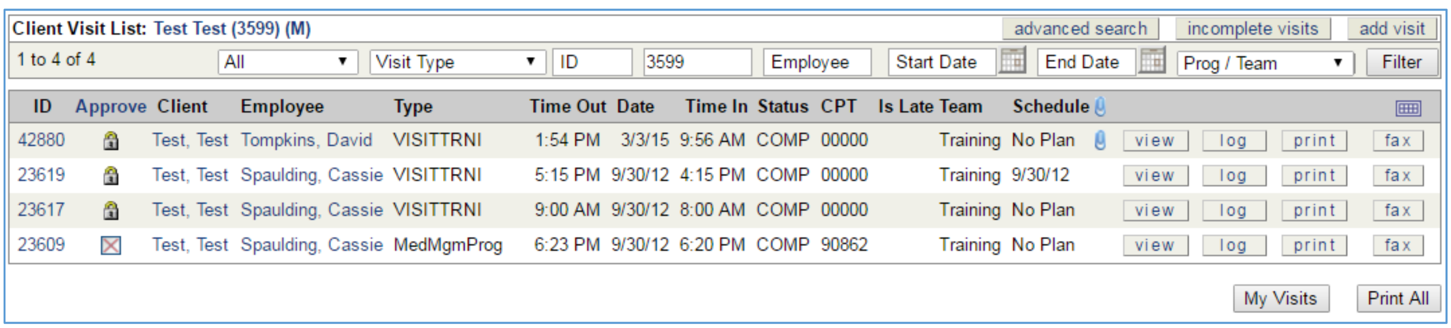
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Visit List -> View All
- Employee Page -> Employee Nav Bar -> Visit List -> View All
- Visit Tab -> View All

Screenshots:



When ClientVisitDisplayAll is ENABLED



When ClientVisitDisplayAll is DISABLED

ClientVisitEditAllIncomplete

Function:

- Determines whether the “Edit” button will display when viewing an Employee’s Incomplete Visit list.

Location(s) this setting affects:

- Visit Tab -> Incomplete Services Button
- Employee Page -> Employee Nav Bar -> Visit List -> Incomplete Services Button

Screenshots:

Incomplete Client Visit List:

ID	Client	Employee	Type	Program	Group Plan Date	Visit Start Time	Delete	Edit	View
71106	Test Test	Bill Chamberlain		TRAINING	False	4/10/2016 2:07 PM	delete	edit	view
70398	Wilt Demo	Bill Chamberlain	CertVisit2	TRAINING	False	1/28/2016 9:06 AM	delete	edit	view
70397	Wilt Demo	Bill Chamberlain	CertVisit1	TRAINING	False	1/28/2016 9:06 AM	delete	edit	view
70396	Wilt Demo	Bill Chamberlain	CertSchedu	TRAINING	False	1/28/2016 9:06 AM	delete	edit	view
70395	Wilt Demo	Bill Chamberlain	CertiEmpl	TRAINING	False	1/28/2016 9:06 AM	delete	edit	view
70394	Wilt Demo	Bill Chamberlain	CertClient	TRAINING	False	1/28/2016 9:06 AM	delete	edit	view

When ClientVisitEditAllIncomplete is ENABLED

Incomplete Client Visit List:

ID	Client	Employee	Type	Program	Group Plan Date	Visit Start Time	Delete	View
71106	Test Test	Bill Chamberlain		TRAINING	False	4/10/2016 2:07 PM	delete	view
70398	Wilt Demo	Bill Chamberlain	CertVisit2	TRAINING	False	1/28/2016 9:06 AM	delete	view
70397	Wilt Demo	Bill Chamberlain	CertVisit1	TRAINING	False	1/28/2016 9:06 AM	delete	view
70396	Wilt Demo	Bill Chamberlain	CertSchedu	TRAINING	False	1/28/2016 9:06 AM	delete	view
70395	Wilt Demo	Bill Chamberlain	CertiEmpl	TRAINING	False	1/28/2016 9:06 AM	delete	view
70394	Wilt Demo	Bill Chamberlain	CertClient	TRAINING	False	1/28/2016 9:06 AM	delete	view

When ClientVisitEditAllIncomplete is DISABLED

ClientVisitFax

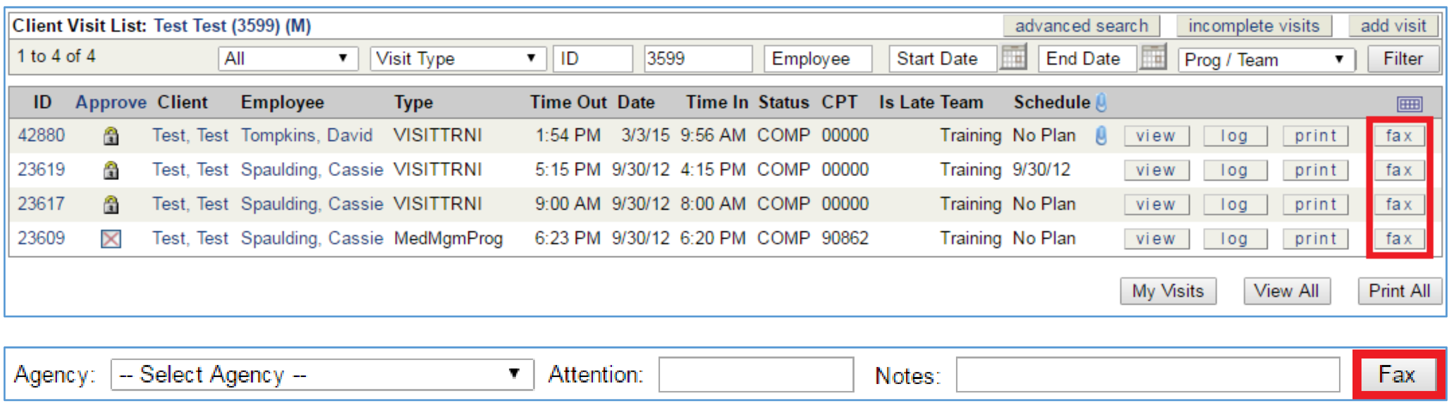
Function:

- Controls whether the "Fax" button will display when viewing a Visit or Template.
  - NOTE: This setting only affects those that have the "Fax Visits" setting enabled in the Partner Config.

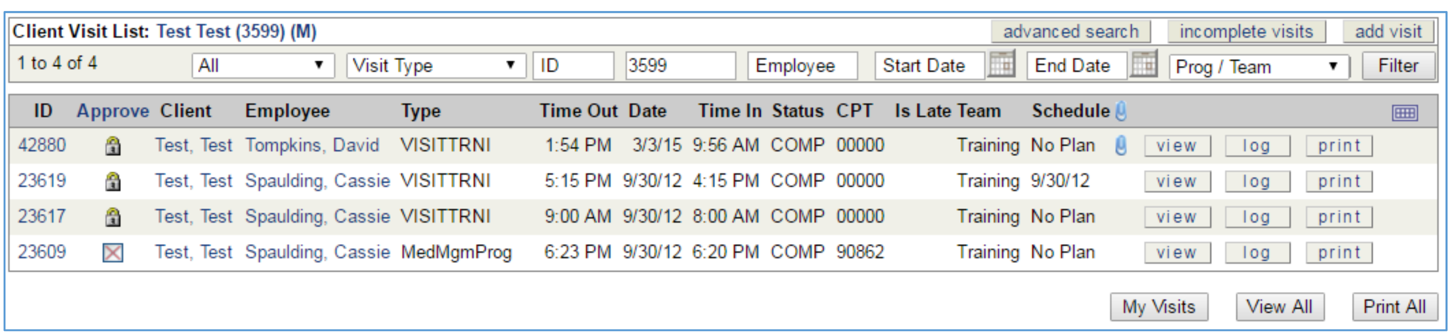
Location(s) this setting affects:

- Visit Tab -> Fax Button
- Visit Tab -> Selected Visit -> Template Button -> Fax Button
- Client Page -> Client Nav Bar -> Visit List Button -> Fax Button
- Employee Page -> Employee Nav Bar -> Visit List Button -> Fax Button

Screenshots:



When ClientVisitFax is ENABLED



When ClientVisitFax is DISABLED

ClientVisitFlagLate

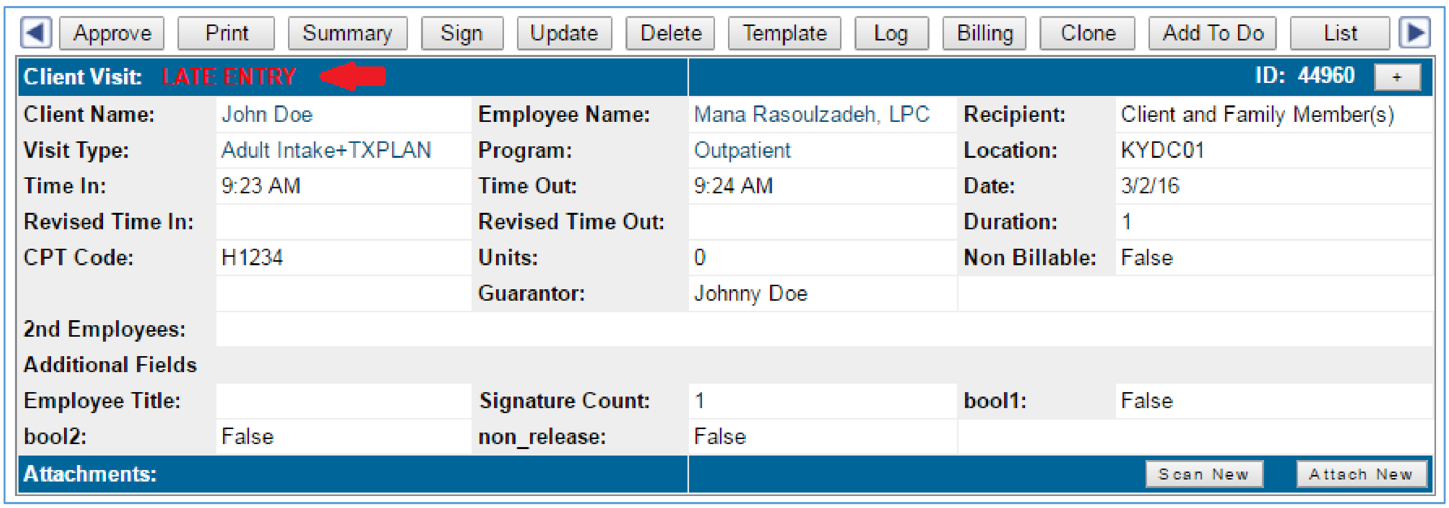
Function:

- Determines whether the user will be able to flag Client Visits as late.
    - NOTE: This setting only affects those that have the “Mark Late Entries” setting enabled in Partner Config.

Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit

Screenshots:



ClientVisitList

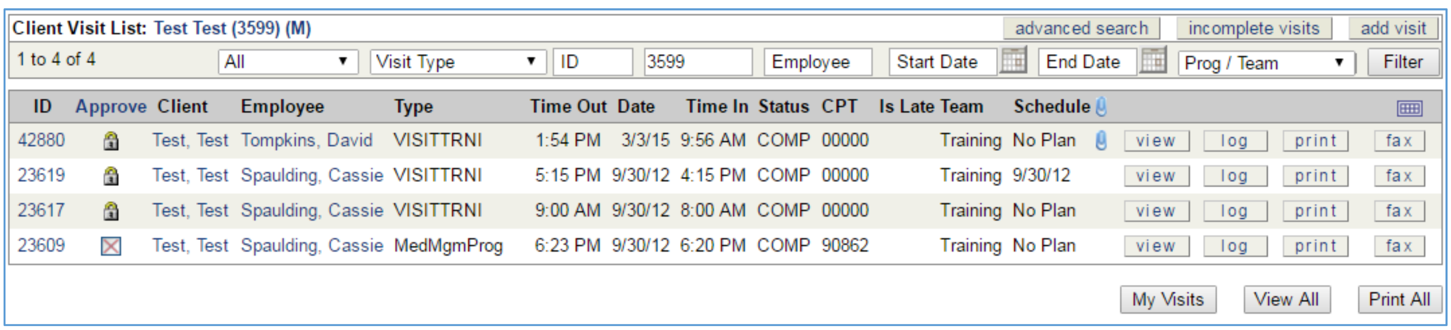
Function:

- Allows the user to view a list of their own visits, visits done by Employees they supervise, visits done by Employees that are on teams they supervise, and visits done by Employees on Teams that the user is listed as a Team Leader on.
    - NOTE: This setting is recommended for all Staff.
    - NOTE: If disabled, the user will be unable to access the Visit Tab, or any Visit Lists. They will be kicked to the Client Tab.
    - NOTE: This setting also will affect the user's ability to view their own Forms, even if they are Employee Forms. An insufficient rights message will display when clicking 'Incomplete Forms'.

Location(s) this setting affects:

- Visit Tab
- Client Page -> Client Nav Bar -> Visit List Button
- Employee Page -> Employee Nav Bar -> Visit List Button
- Employee Page -> Employee Nav Bar -> Forms Button -> Incomplete Forms Button

Screenshots:



ClientVisitListAll

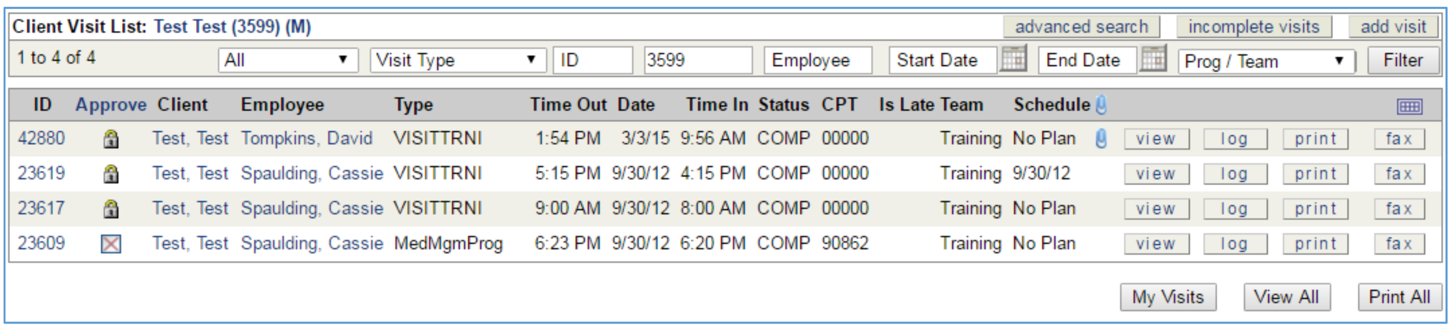
Function:

- Allows the user to view a list of every Client Visit in the system.
  - NOTE: This setting is a high-level role.
  - NOTE: ClientVisitList must be enabled to utilize this setting.

Location(s) this setting affects:

- Visit Tab
- Client Page -> Client Nav Bar -> Visit List Button
- Employee Page -> Employee Nav Bar -> Visit List Button

Screenshots:



Client Visit List: Test Test (3599) (M) advanced search incomplete visits add visit

1 to 4 of 4 All Visit Type ID 3599 Employee Start Date End Date Prog / Team Filter

ID	Approve	Client	Employee	Type	Time Out	Date	Time In	Status	CPT	Is Late	Team	Schedule				
42880		Test, Test	Tompkins, David	VISITTRNI	1:54 PM	3/3/15	9:56 AM	COMP	00000		Training	No Plan	view	log	print	fax
23619		Test, Test	Spaulding, Cassie	VISITTRNI	5:15 PM	9/30/12	4:15 PM	COMP	00000		Training	9/30/12	view	log	print	fax
23617		Test, Test	Spaulding, Cassie	VISITTRNI	9:00 AM	9/30/12	8:00 AM	COMP	00000		Training	No Plan	view	log	print	fax
23609		Test, Test	Spaulding, Cassie	MedMgmProg	6:23 PM	9/30/12	6:20 PM	COMP	90862		Training	No Plan	view	log	print	fax

My Visits View All Print All

ClientVisitListTeam

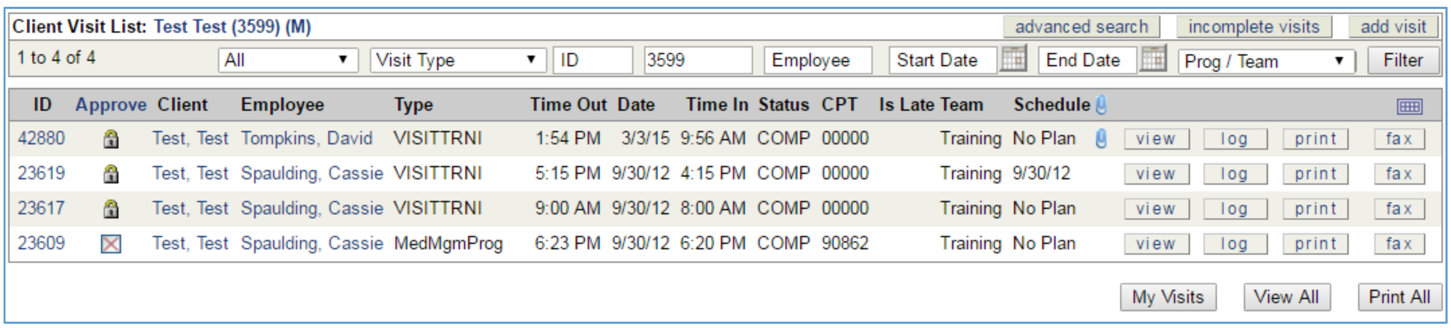
Function:

- In addition to the Visits that are listed from the ClientVisitList setting, this setting will also list Visits that are done for Clients directly assigned to the user or assigned through a Team.
  - NOTE: ClientVisitList must be enabled to utilize this setting.
  - NOTE: This setting supercedes the ClientVisitListTeamOnly setting.

Location(s) this setting affects:

- Visit Tab
- Client Page -> Client Nav Bar -> Visit List Button
- Employee Page -> Employee Nav Bar -> Visit List Button

Screenshots:



Client Visit List: Test Test (3599) (M) — advanced search | incomplete visits | add visit

1 to 4 of 4 — All | Visit Type | ID | 3599 | Employee | Start Date | End Date | Prog / Team | Filter

ID	Approve	Client	Employee	Type	Time Out	Date	Time In	Status	CPT	Is Late	Team	Schedule				
42880		Test, Test	Tompkins, David	VISITTRNI	1:54 PM	3/3/15	9:56 AM	COMP	00000		Training	No Plan	view	log	print	fax
23619		Test, Test	Spaulding, Cassie	VISITTRNI	5:15 PM	9/30/12	4:15 PM	COMP	00000		Training	9/30/12	view	log	print	fax
23617		Test, Test	Spaulding, Cassie	VISITTRNI	9:00 AM	9/30/12	8:00 AM	COMP	00000		Training	No Plan	view	log	print	fax
23609		Test, Test	Spaulding, Cassie	MedMgmProg	6:23 PM	9/30/12	6:20 PM	COMP	90862		Training	No Plan	view	log	print	fax

My Visits | View All | Print All

ClientVisitListTeamOnly

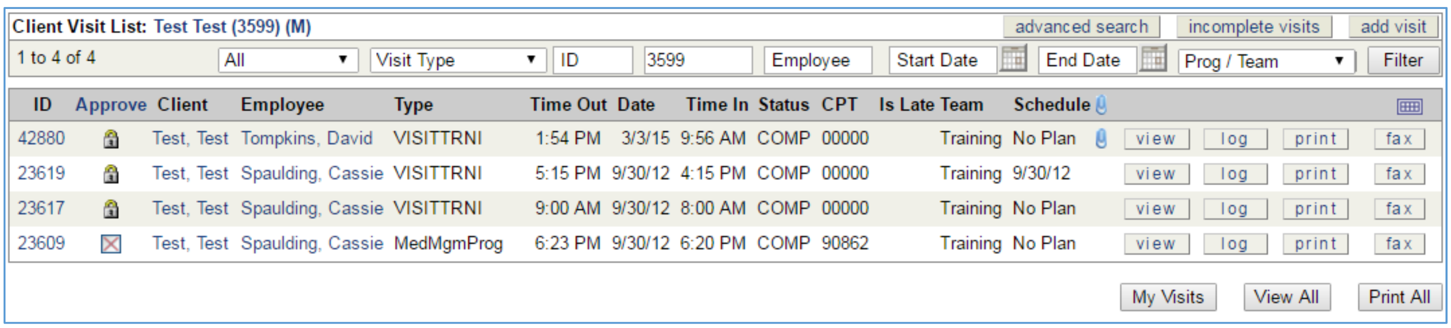
Function:

- In addition to the Visits that are listed from the ClientVisitList setting, this setting will also list Visits that are done for Clients directly assigned to the user, but ONLY visits that are done on Teams that the user is also assigned to. If the Client has Visits done on other Teams that the user is not a part of, those Visits will not be listed.
    - NOTE: ClientVisitList must be enabled to utilize this setting.
    - NOTE: This setting is superceded the ClientVisitListTeamOnly setting.

Location(s) this setting affects:

- Visit Tab
- Client Page -> Client Nav Bar -> Visit List Button
- Employee Page -> Employee Nav Bar -> Visit List Button

Screenshots:



ClientVisitPrintAll

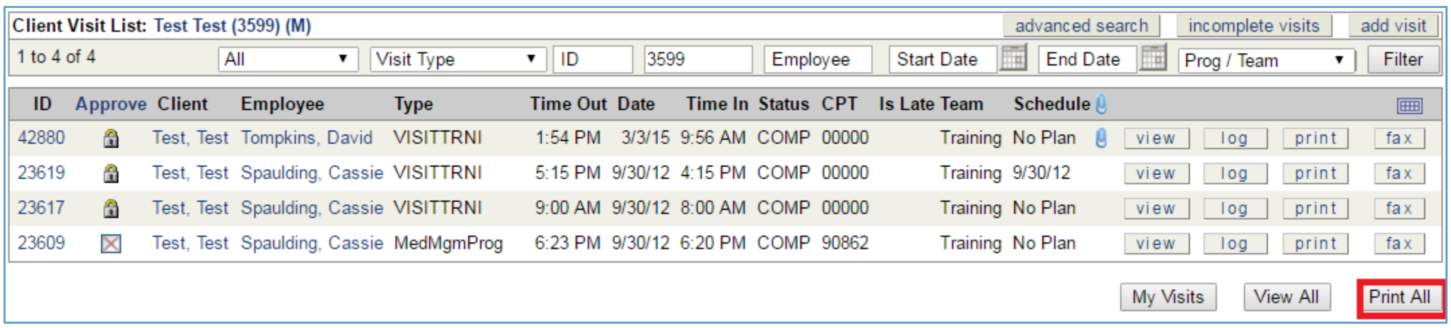
Function:

- Determines whether the user will see the “Print All” button when viewing a Visit List.

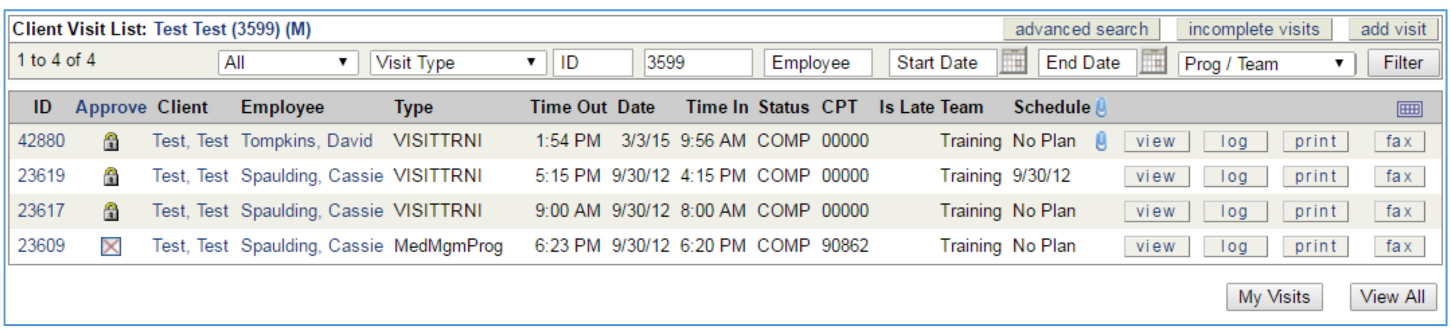
Location(s) this setting affects:

- Visit Tab
- Client Page -> Client Nav Bar -> Visit List Button
- Employee Page -> Employee Nav Bar -> Visit List Button

Screenshots:



When ClientVisitPrintAll is ENABLED



When ClientVisitPrintAll is DISABLED

ClientVisitSetNonbillable

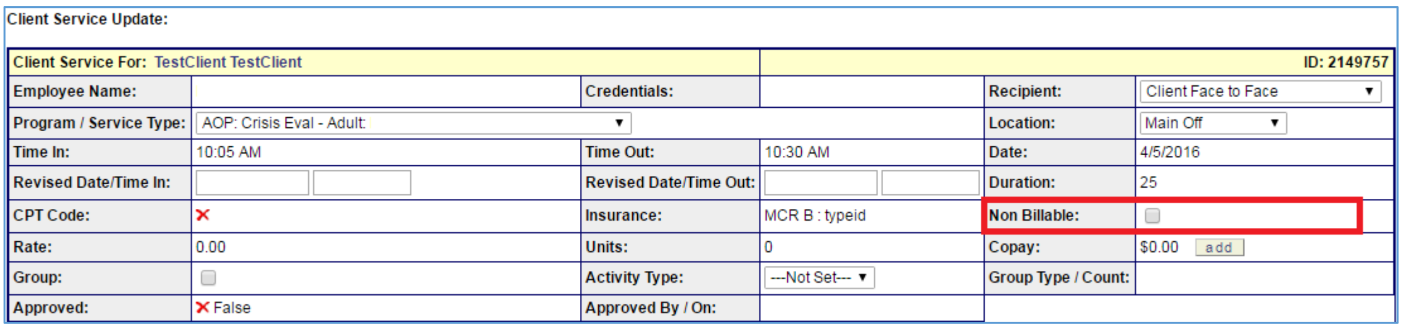
Function:

- Determines whether the user will be able to manually set a Visit as Non Billable, when updating the Visit.
    - When disabled, the Non Billable field will instead display “True” or “False”, and cannot be edited.

Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Update Button
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit -> Update Button
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit -> Update Button

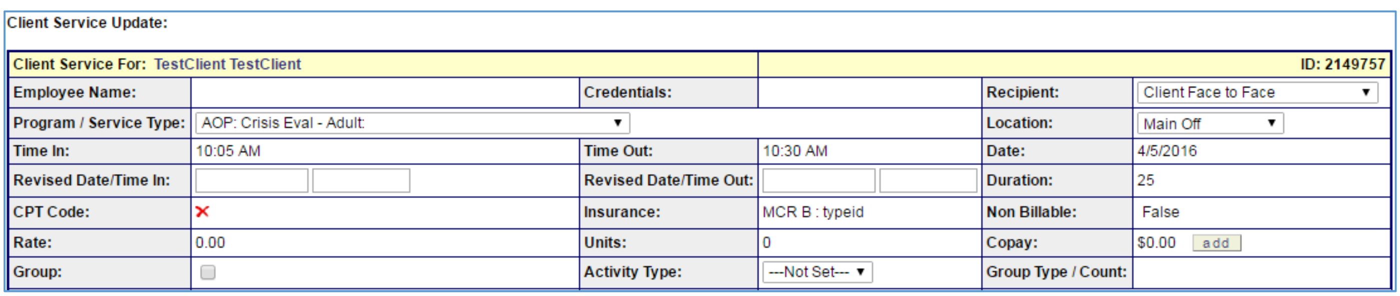
Screenshots:



Client Service Update:

Client Service For: TestClient TestClient					ID: 2149757
Employee Name:		Credentials:		Recipient:	Client Face to Face
Program / Service Type:	AOP: Crisis Eval - Adult			Location:	Main Off
Time In:	10:05 AM	Time Out:	10:30 AM	Date:	4/5/2016
Revised Date/Time In:		Revised Date/Time Out:		Duration:	25
CPT Code:		Insurance:	MCR B : typeid	Non Billable:	
Rate:	0.00	Units:	0	Copay:	$0.00 add
Group:		Activity Type:	---Not Set---	Group Type / Count:	
Approved:	False	Approved By / On:			

When ClientVisitSetNonbillable is ENABLED



Client Service Update:

Client Service For: TestClient TestClient					ID: 2149757
Employee Name:		Credentials:		Recipient:	Client Face to Face
Program / Service Type:	AOP: Crisis Eval - Adult			Location:	Main Off
Time In:	10:05 AM	Time Out:	10:30 AM	Date:	4/5/2016
Revised Date/Time In:		Revised Date/Time Out:		Duration:	25
CPT Code:		Insurance:	MCR B : typeid	Non Billable:	False
Rate:	0.00	Units:	0	Copay:	$0.00 add
Group:		Activity Type:	---Not Set---	Group Type / Count:	

When ClientVisitSetNonbillable is DISABLED

ClientVisitSummaryView

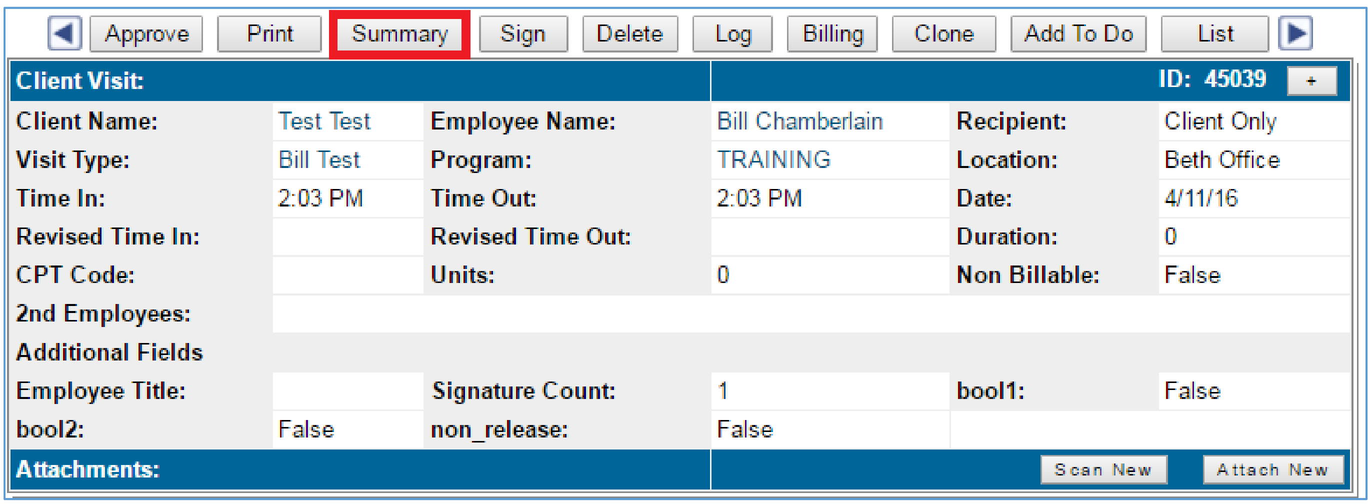
Function:

- Determines whether the “Summary” button will display when viewing a completed Visit, allowing you to view a Summary printout.
    - A Summary printout will display any answers to questions that were set up in the Form with the “Include in Summary” identifier. The Visit Type must also have the “Include Summary” checkbox enabled.

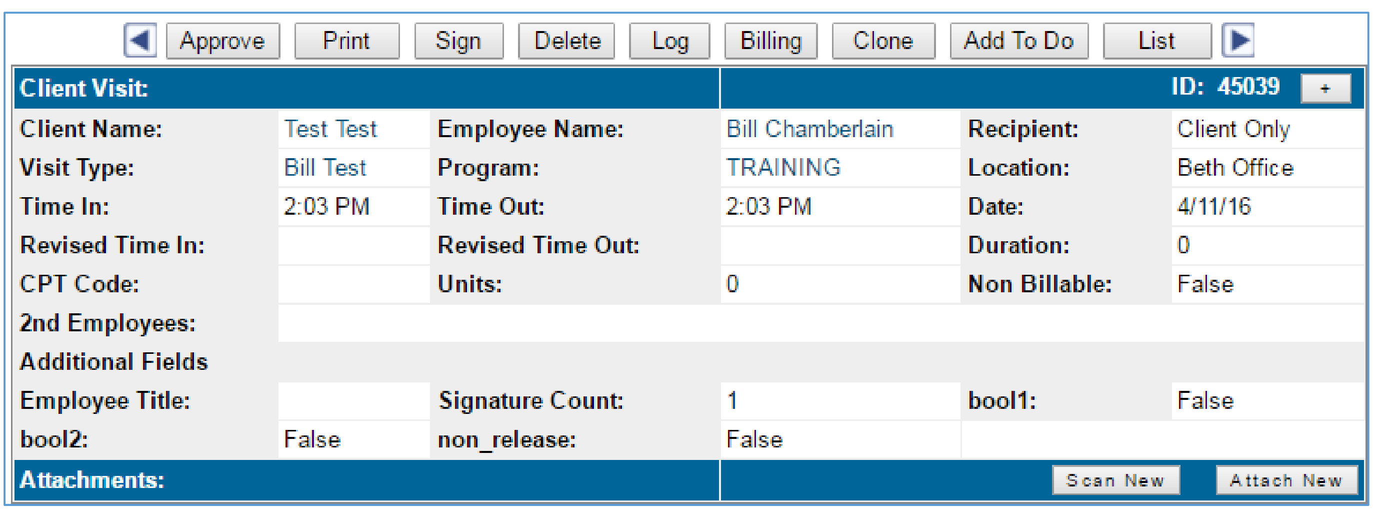
Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Update Button
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit -> Update Button
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit -> Update Button

Screenshots:



When ClientVisitSummaryView is ENABLED



When ClientVisitSummaryView is ENABLED

ClientVisitUpdate

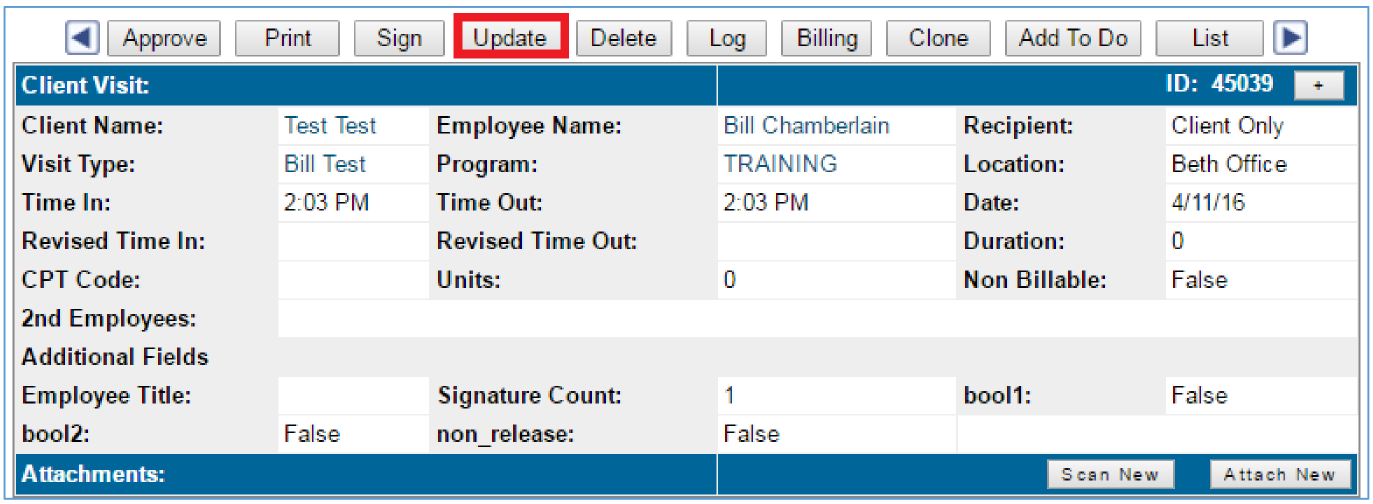
Function:

- Determines whether the “Update” button will display when viewing a Visit.

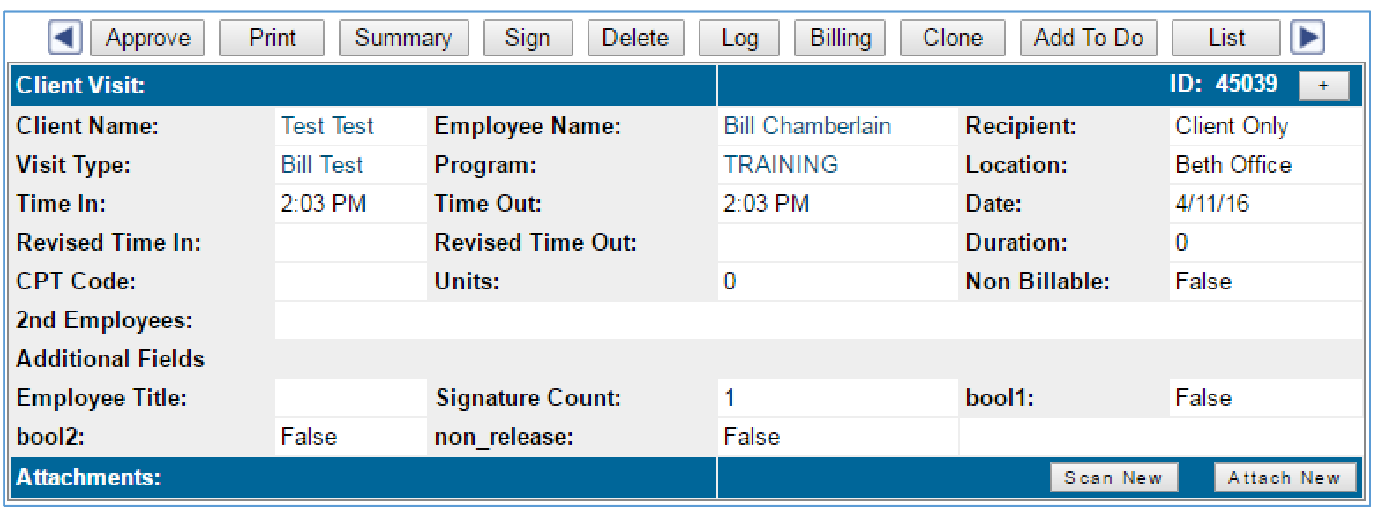
Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit

Screenshots:



When ClientVisitUpdate is ENABLED



When ClientVisitUpdate is DISABLED

ClientVisitUpdateForm

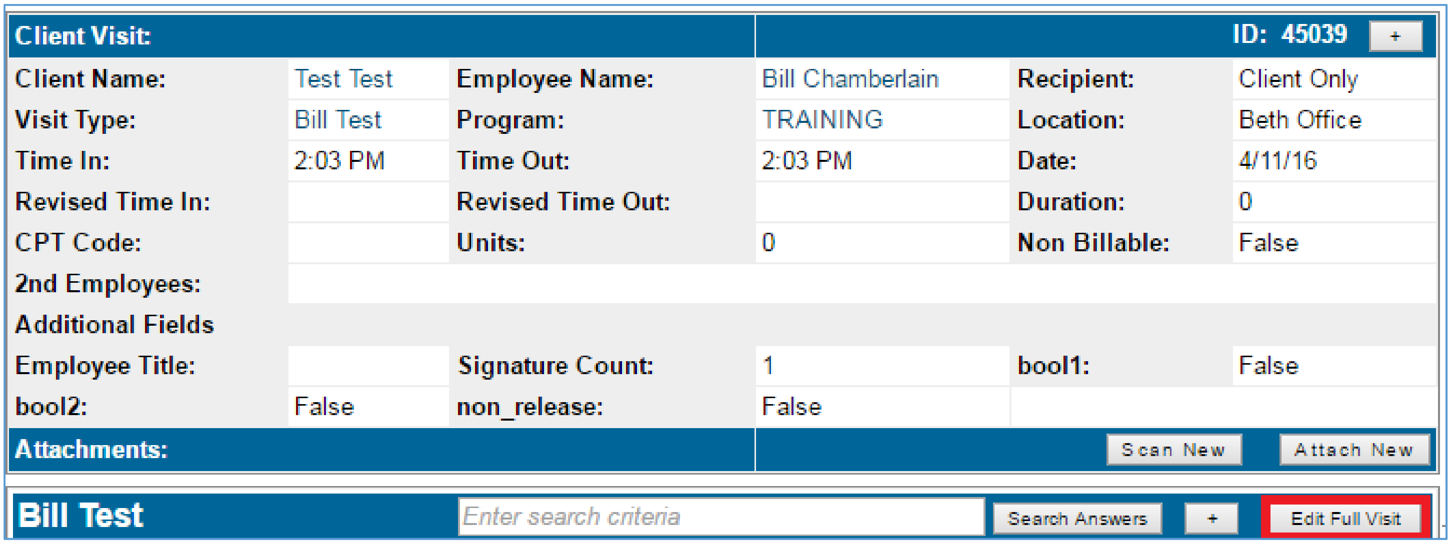
Function:

- Determines whether the “Edit Full Visit” button will display when viewing a Visit.

Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit

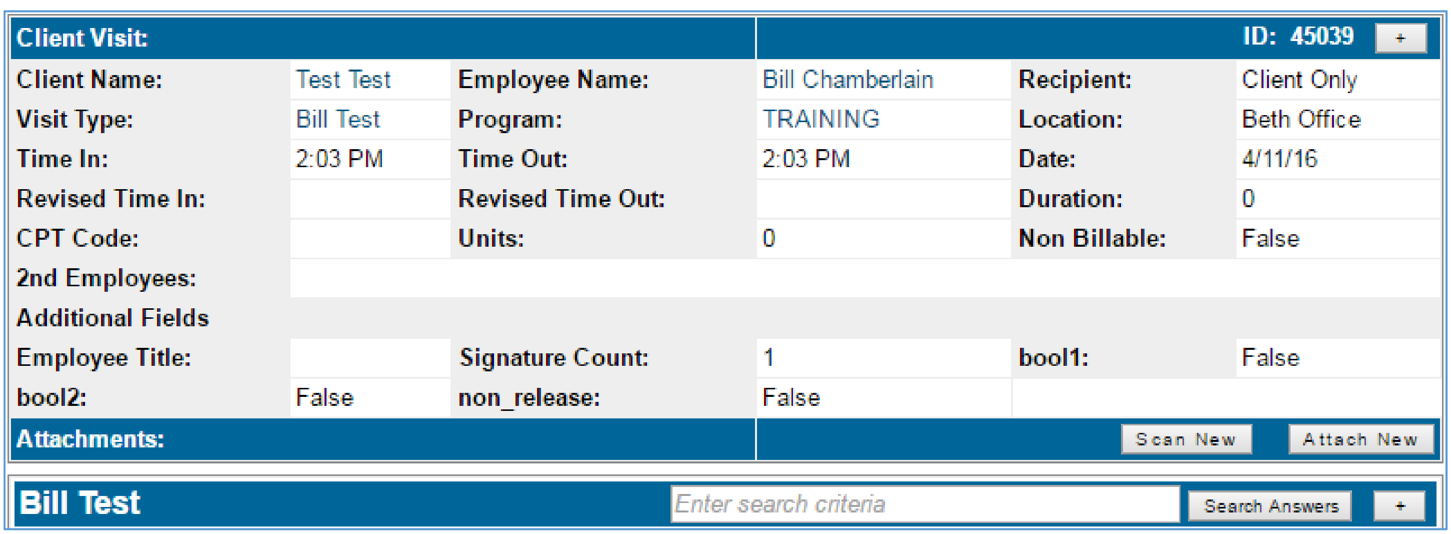
Screenshots:



Client Visit:				ID: 45039	+
Client Name:	Test Test	Employee Name:	Bill Chamberlain	Recipient:	Client Only
Visit Type:	Bill Test	Program:	TRAINING	Location:	Beth Office
Time In:	2:03 PM	Time Out:	2:03 PM	Date:	4/11/16
Revised Time In:		Revised Time Out:		Duration:	0
CPT Code:		Units:	0	Non Billable:	False
2nd Employees:					
Additional Fields					
Employee Title:		Signature Count:	1	bool1:	False
bool2:	False	non_release:	False		
Attachments:				Scan New	Attach New

Bill Test	Enter search criteria	Search Answers	+	Edit Full Visit

When ClientVisitUpdateForm is ENABLED



Client Visit:				ID: 45039	+
Client Name:	Test Test	Employee Name:	Bill Chamberlain	Recipient:	Client Only
Visit Type:	Bill Test	Program:	TRAINING	Location:	Beth Office
Time In:	2:03 PM	Time Out:	2:03 PM	Date:	4/11/16
Revised Time In:		Revised Time Out:		Duration:	0
CPT Code:		Units:	0	Non Billable:	False
2nd Employees:					
Additional Fields					
Employee Title:		Signature Count:	1	bool1:	False
bool2:	False	non_release:	False		
Attachments:				Scan New	Attach New

Bill Test	Enter search criteria	Search Answers	+

When ClientVisitUpdateForm is DISABLED

Credible

ClientVisitUpdateModifier

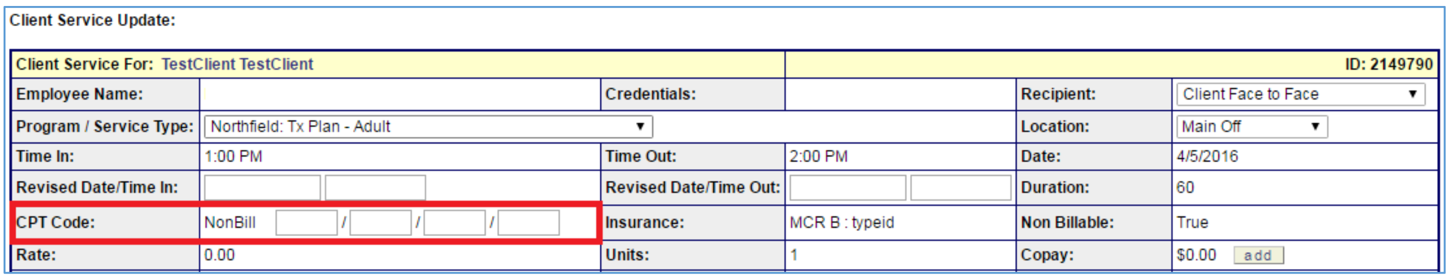
Function:

- Allows the user to update the CPT modifiers when updating a Visit.

Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Update Button
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit -> Update Button
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit -> Update Button

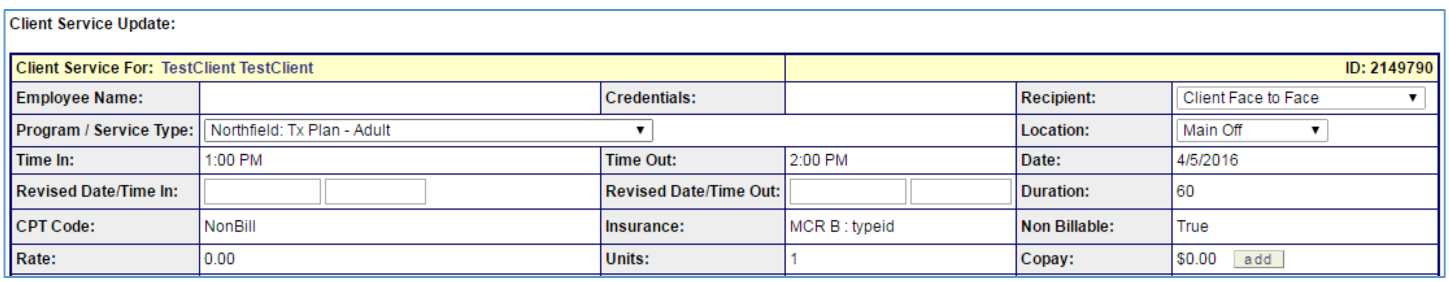
Screenshots:



Client Service Update:

Client Service For: TestClient TestClient					ID: 2149790
Employee Name:		Credentials:		Recipient:	Client Face to Face
Program / Service Type:	Northfield: Tx Plan - Adult			Location:	Main Off
Time In:	1:00 PM	Time Out:	2:00 PM	Date:	4/5/2016
Revised Date/Time In:		Revised Date/Time Out:		Duration:	60
CPT Code:	NonBill / / /	Insurance:	MCR B : typeid	Non Billable:	True
Rate:	0.00	Units:	1	Copay:	$0.00 add

When ClientVisitUpdateModifier is ENABLED



Client Service Update:

Client Service For: TestClient TestClient					ID: 2149790
Employee Name:		Credentials:		Recipient:	Client Face to Face
Program / Service Type:	Northfield: Tx Plan - Adult			Location:	Main Off
Time In:	1:00 PM	Time Out:	2:00 PM	Date:	4/5/2016
Revised Date/Time In:		Revised Date/Time Out:		Duration:	60
CPT Code:	NonBill	Insurance:	MCR B : typeid	Non Billable:	True
Rate:	0.00	Units:	1	Copay:	$0.00 add

When ClientVisitUpdateModifier is DISABLED

ClientVisitUpdateName

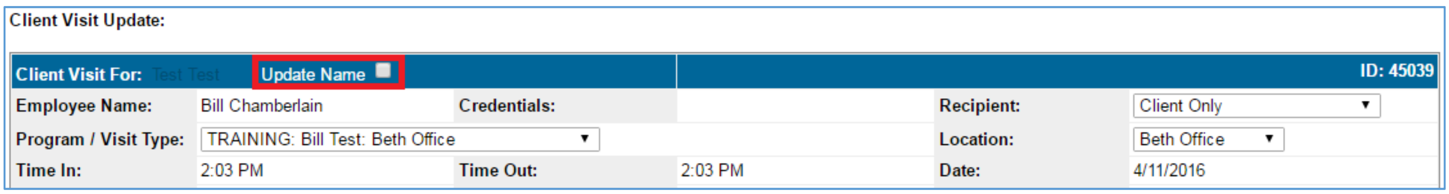
Function:

- Allows the user to utilize the “Update Name” checkbox when updating a completed Visit.
    - This checkbox only displays if the Name of the Client has changed since the Visit was completed.

Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Update Button
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit -> Update Button
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit -> Update Button

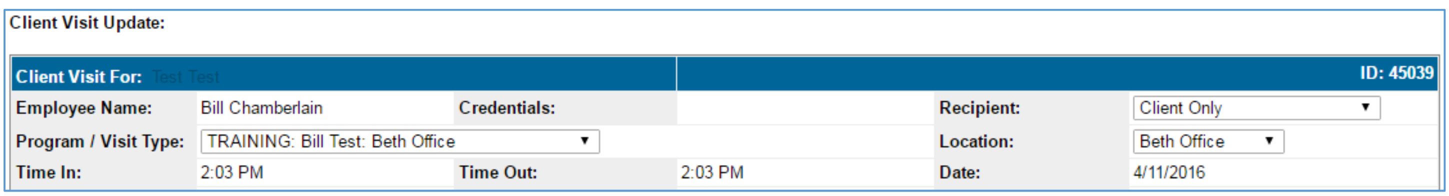
Screenshots:



Client Visit Update:

Client Visit For: Test Test Update Name					ID: 45039
Employee Name:	Bill Chamberlain	Credentials:		Recipient:	Client Only
Program / Visit Type:	TRAINING: Bill Test: Beth Office			Location:	Beth Office
Time In:	2:03 PM	Time Out:	2:03 PM	Date:	4/11/2016

When ClientVisitUpdateName is ENABLED



Client Visit Update:

Client Visit For: Test Test					ID: 45039
Employee Name:	Bill Chamberlain	Credentials:		Recipient:	Client Only
Program / Visit Type:	TRAINING: Bill Test: Beth Office			Location:	Beth Office
Time In:	2:03 PM	Time Out:	2:03 PM	Date:	4/11/2016

When ClientVisitUpdateName is DISABLED

ClientVisitUpdateOwn

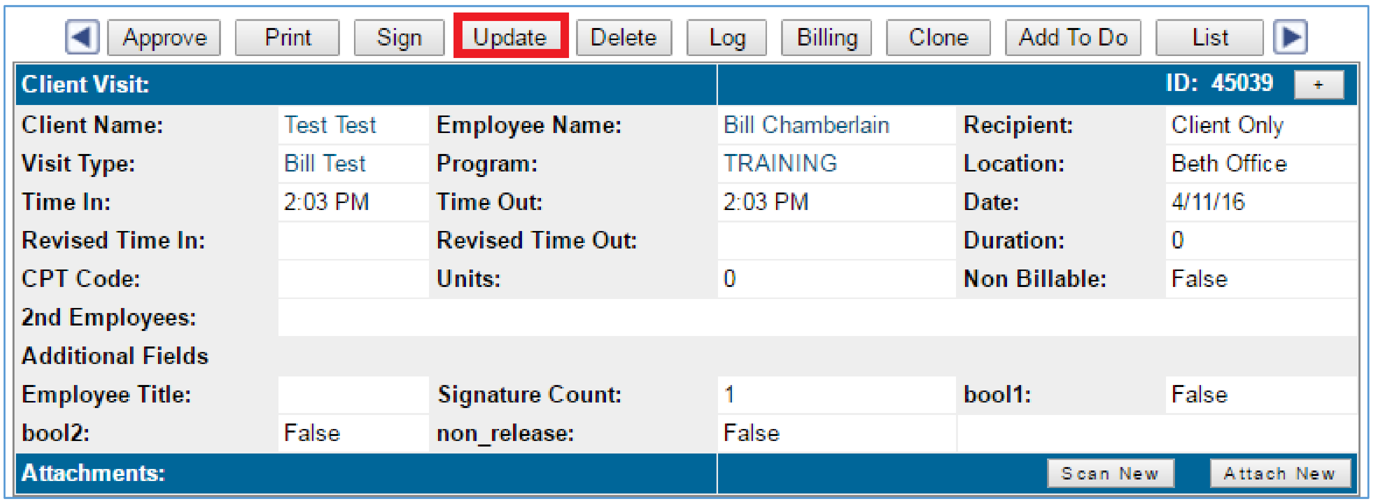
Function:

- Allows the user to utilize the "Update" button on only their own Client Visits.
  - NOTE: If ClientVisitUpdate is enabled, this setting will have no effect.

Location(s) this setting affects:

- Visit Tab -> Selected Visit -> Update Button
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit -> Update Button
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit -> Update Button

Screenshots:



ClientVisitView

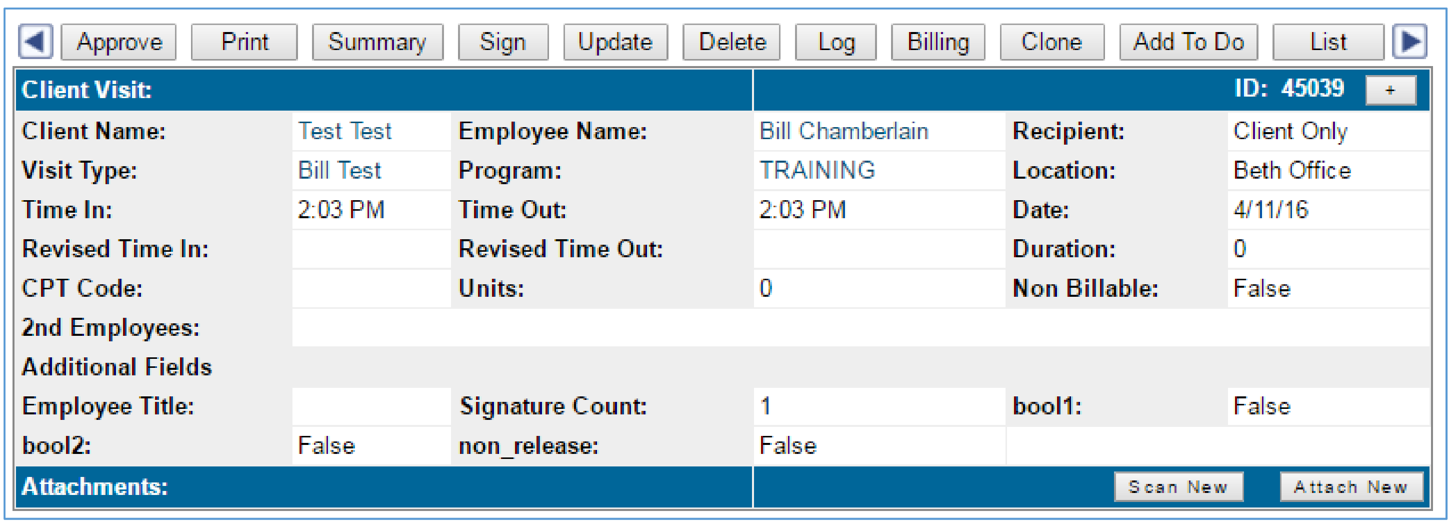
Function:

- Allows the user to right to view the summary of their own Client visits, visits done by Employees they supervise, and visits done on teams where the user is a team leader.
  - If disabled, the user will receive an Insufficient Rights message.
  - In addition to not being able to view the summary, the user will also be unable to generate a printout.
  - NOTE: This setting is recommended for all staff.
  - NOTE: This setting is superceded by ClientVisitViewAll

Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit

Screenshots:



ClientVisitViewAll

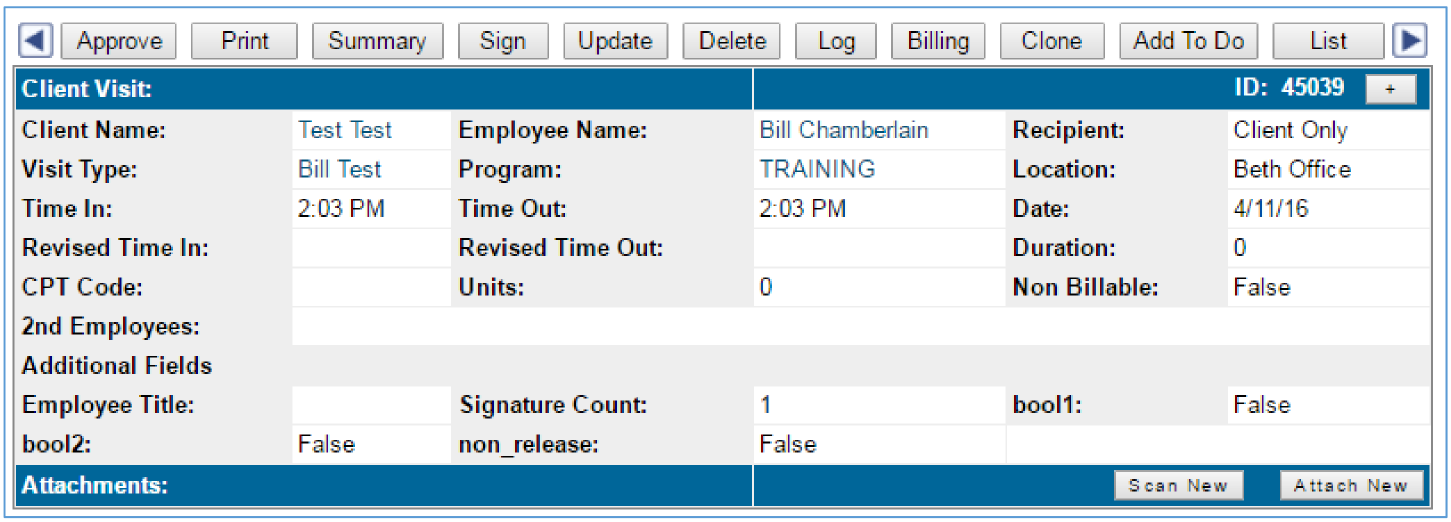
Function:

- Allows the user to right to view the summary of all Client Visits.
    - NOTE: This setting is recommended for only high-level staff.
    - NOTE: This setting supercedes the ClientVisitView setting.

Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit

Screenshots:



ClientVisitViewAllIncomplete

Function:

- Allows the user to right to view all Incomplete Visits, including ones started by other users.
  - If disabled, the user will be taken to their own Incomplete Visits when they click the “Incomplete Visits” button while on another Employee’s Service List.

Location(s) this setting affects:

- Visit Tab -> Incomplete Services Button
- Employee Page -> Employee Nav Bar -> Visit List Button -> Incomplete Services Button

Screenshots:

Incomplete Client Visit List:

ID	Client	Employee	Type	Program	Group Plan Date	Visit Start Time	Delete	Edit	View
71106	Test Test	Bill Chamberlain		TRAINING	False	4/10/2016 2:07 PM	delete	edit	view
70398	Wilt Demo	Bill Chamberlain	CertVisit2	TRAINING	False	1/28/2016 9:06 AM	delete	edit	view
70397	Wilt Demo	Bill Chamberlain	CertVisit1	TRAINING	False	1/28/2016 9:06 AM	delete	edit	view
70396	Wilt Demo	Bill Chamberlain	CertSchedu	TRAINING	False	1/28/2016 9:06 AM	delete	edit	view
70395	Wilt Demo	Bill Chamberlain	CertiEmpl	TRAINING	False	1/28/2016 9:06 AM	delete	edit	view
70394	Wilt Demo	Bill Chamberlain	CertClient	TRAINING	False	1/28/2016 9:06 AM	delete	edit	view
70393	Wilt Demo	Bill Chamberlain	CertSetup	TRAINING	False	1/28/2016 9:06 AM	delete	edit	view
70392	Wilt Demo	Bill Chamberlain	VISITTRNII	TRAINING	False	1/28/2016 9:06 AM	delete	edit	view

ClientVisitViewForm

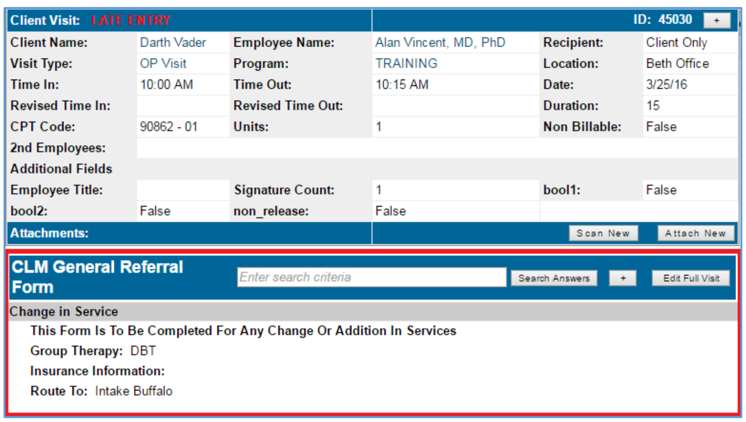
Function:

- Determines whether the Form information, and the “Edit Full Visit” button will display when viewing a Visit summary.
- Determines whether the “Print” and “Fax” buttons will display when viewing a Visit list.

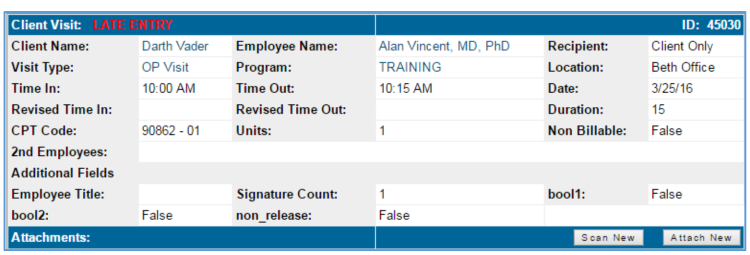
Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit
- Print Button on the top row of buttons when viewing a selected Visit.

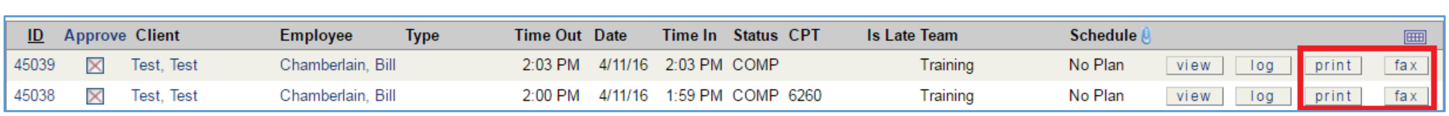
Screenshots:



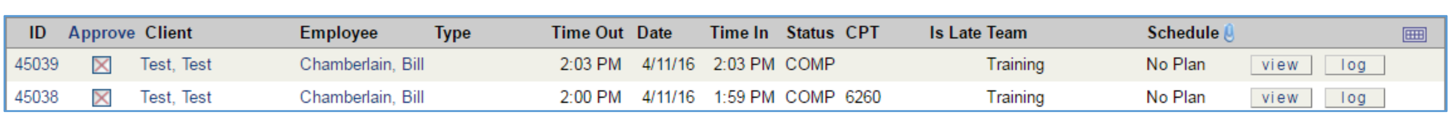
When ClientVisitViewForm is ENABLED



When ClientVisitViewForm is DISABLED



When ClientVisitViewForm is ENABLED



When ClientVisitViewForm is DISABLED

ClientVisitViewLog

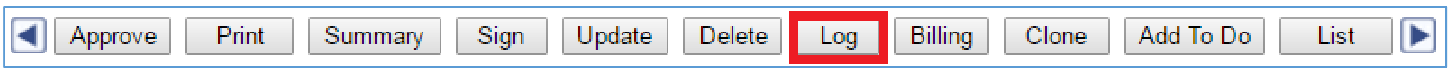
Function:

- Determines whether the Form information, and the “Edit Full Visit” button will display when viewing a Visit summary.
- Determines whether the “Print” and “Fax” buttons will display when viewing a Visit list.

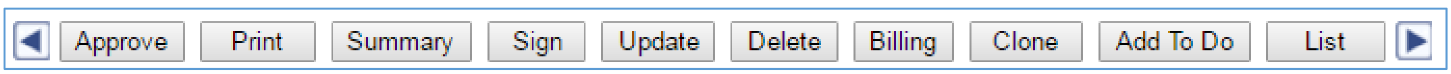
Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit

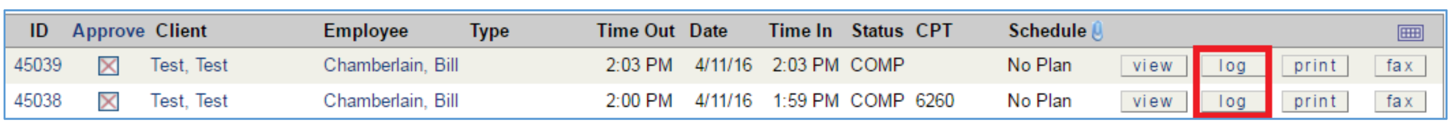
Screenshots:



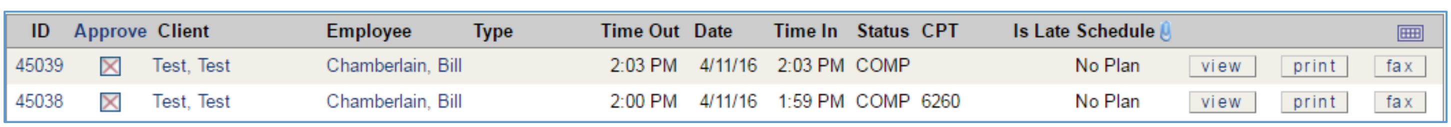
When ClientVisitViewLog is ENABLED



When ClientVisitViewLog is DISABLED



When ClientVisitViewLog is ENABLED



When ClientVisitViewLog is DISABLED

ClientVisitViewTeam

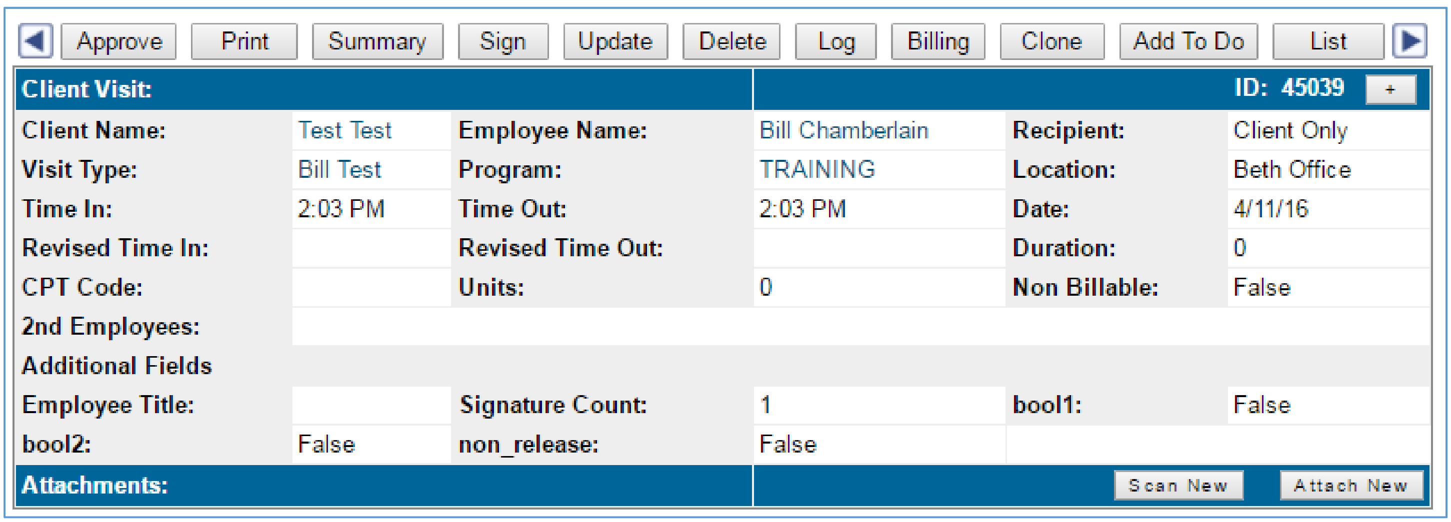
Function:

- Determines whether the user can view Visit summaries for Clients that are either directly assigned to the user, or Visits that are assigned to the same Team as the user.
    - NOTE: If utilizing this setting, it is recommended to also have the ClientVisitView setting enabled as well.
    - NOTE: This setting supercedes the ClientVisitViewTeamOnly setting.

Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit

Screenshots:



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ClientVisitViewTeamOnly

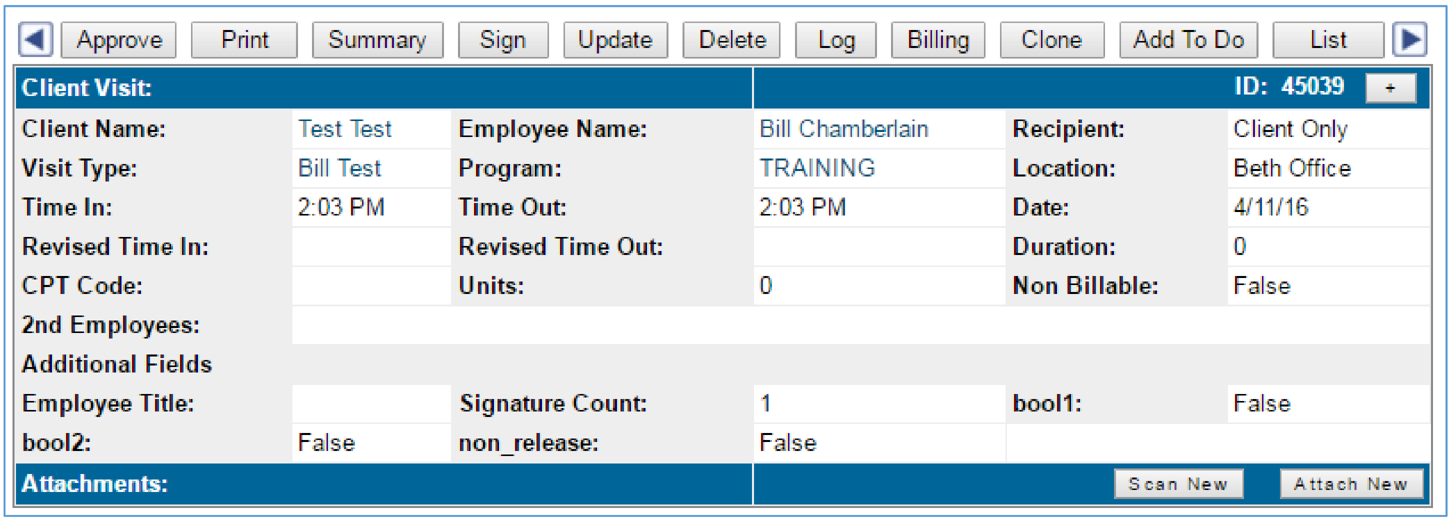
Function:

- Determines whether the user can view Visit summaries that are assigned to the same Team as the user.
  - NOTE: This setting is superceded by the ClientVisitViewTeam setting.

Location(s) this setting affects:

- Visit Tab -> Selected Visit
- Client Page -> Client Nav Bar -> Visit List Button -> Selected Visit
- Employee Page -> Employee Nav Bar -> Visit List Button -> Selected Visit

Screenshots:



SubmitAllVisits

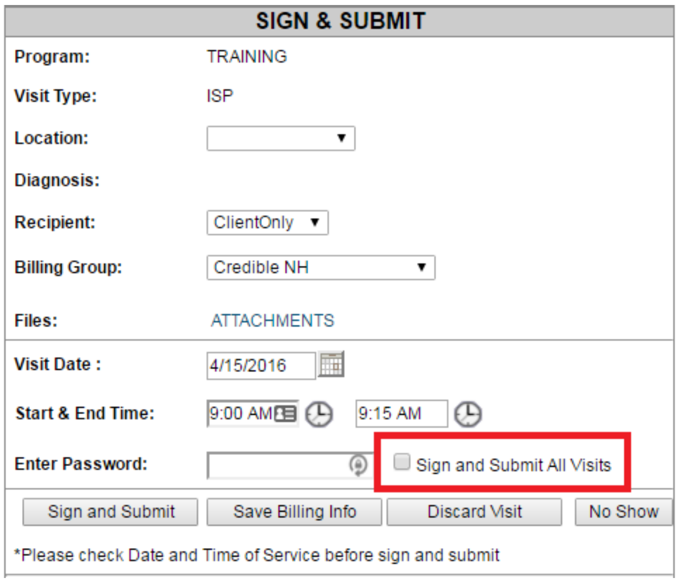
Function:

- Determines whether the user will see the "Sign and Submit All Visits" checkbox. This displays on the Sign & Submit page, when signing for multiple/group Visits.

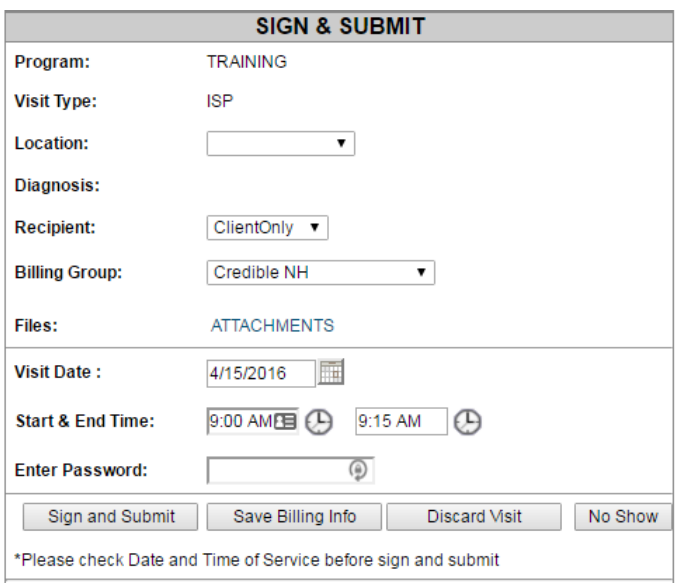
Location(s) this setting affects:

- Sign & Submit Page when signing multiple/group Visits

Screenshots:



When SubmitAllVisits is ENABLED



When SubmitAllVisits is DISABLED

TxSwitch

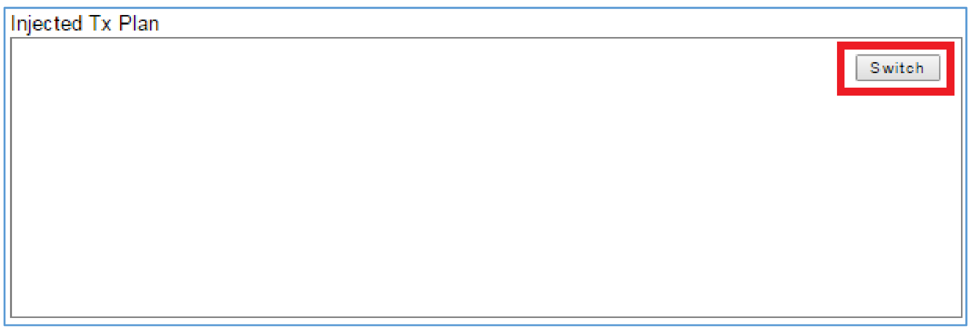
Function:

- If a user is performing a Visit with Web Forms that contain an "Injected Tx Plan" question, this setting determines whether the user will be able to utilize the "Switch" button on that field, which switches the Treatment Plan that is injected.

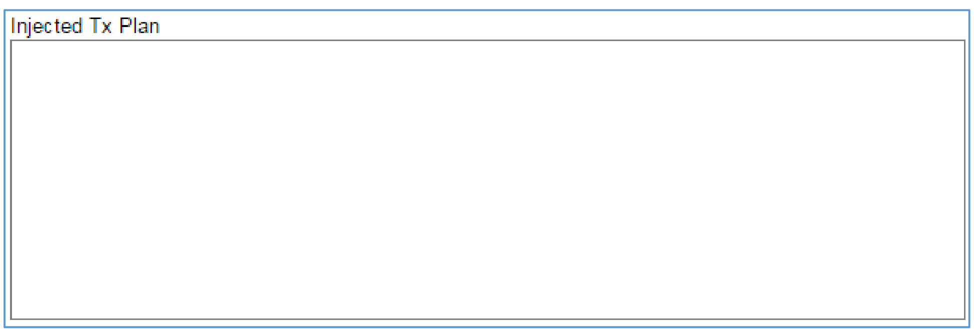
Location(s) this setting affects:

- Web Forms -> Injected Tx Plan Question -> Switch Button

Screenshots:



When TxSwitch is ENABLED



When TxSwitch is DISABLED

ViewIncidentForm

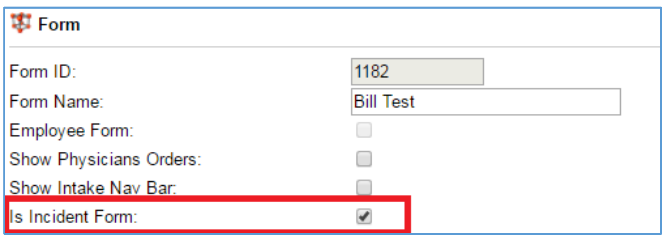
Function:

- Determines whether the user can view Visits that are done utilizing forms that are marked as “Incident Forms”.
    - Forms are marked as Incident Forms directly from the Forms tab. When editing a Form, on the first page, there is a checkbox called “Is Incident Form”.
    - If disabled, the user will not be able to see these Visits on a Visit List.

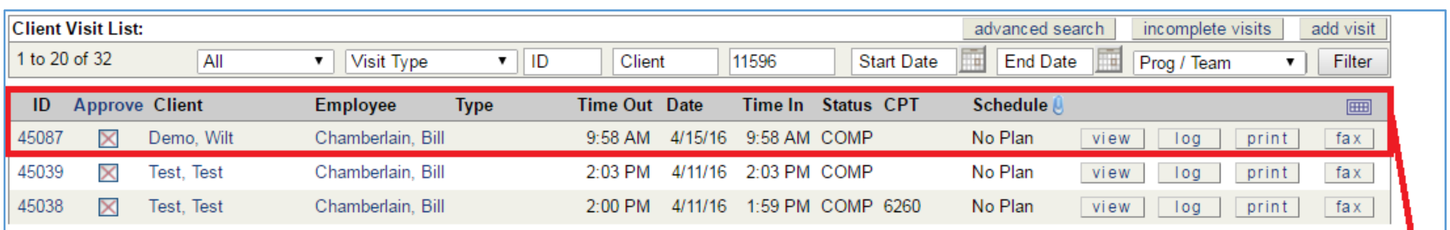
Location(s) this setting affects:

- Visit Tab -> Visit List
- Client Page -> Client Nav Bar -> Visit List Button
- Employee Page -> Employee Nav Bar -> Visit List Button

Screenshots:



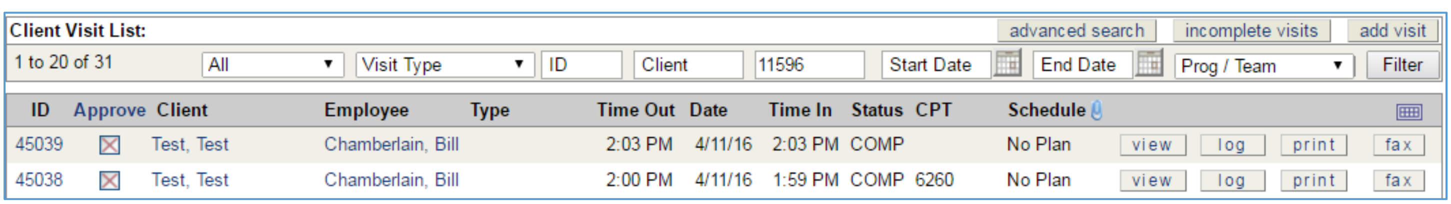
Where a Form can be marked as “Is Incident Form”



ID	Approve	Client	Employee	Type	Time Out	Date	Time In	Status	CPT	Schedule				
45087		Demo, Wilt	Chamberlain, Bill		9:58 AM	4/15/16	9:58 AM	COMP		No Plan	view	log	print	fax
45039		Test, Test	Chamberlain, Bill		2:03 PM	4/11/16	2:03 PM	COMP		No Plan	view	log	print	fax
45038		Test, Test	Chamberlain, Bill		2:00 PM	4/11/16	1:59 PM	COMP	6260	No Plan	view	log	print	fax

This Visit has a Form connected to it that is marked as an Incident Form.

When ViewIncidentForm is ENABLED



ID	Approve	Client	Employee	Type	Time Out	Date	Time In	Status	CPT	Schedule				
45039		Test, Test	Chamberlain, Bill		2:03 PM	4/11/16	2:03 PM	COMP		No Plan	view	log	print	fax
45038		Test, Test	Chamberlain, Bill		2:00 PM	4/11/16	1:59 PM	COMP	6260	No Plan	view	log	print	fax

When ViewIncidentForm is DISABLED

VisitDataEntry

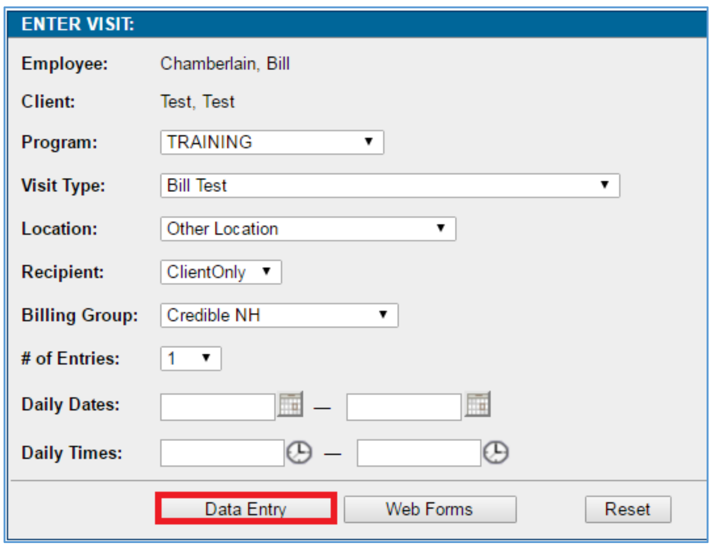
Function:

- Determines whether the “Data Entry” button will appear when adding a new Visit from the “Add Visit” button on an Employee or Client Nav Bar.

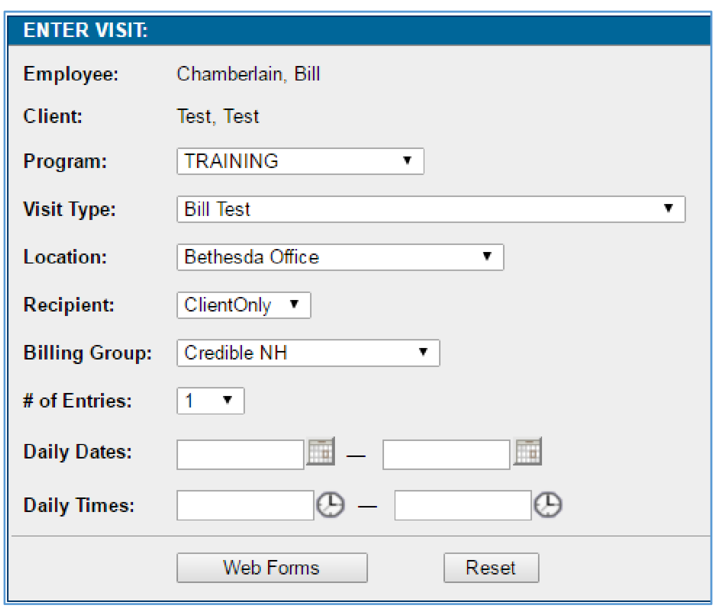
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Add Visit Button
- Employee Page -> Employee Nav Bar -> Add Visit Button

Screenshots:



When VisitDataEntry is ENABLED



When VisitDataEntry is DISABLED

VisitEntryMultiPerClient

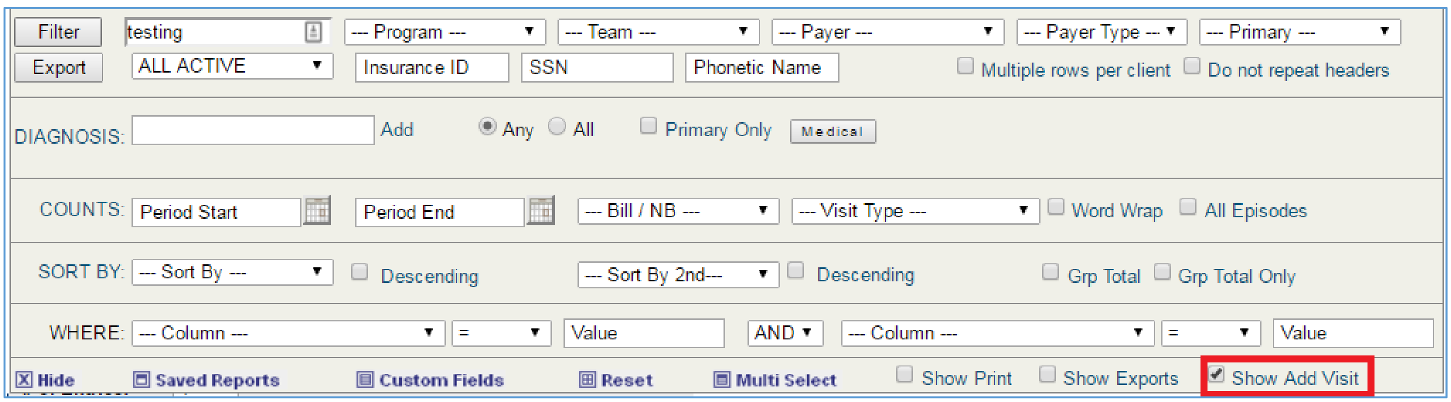
Function:

- Allows the user the right to create multiple Visits for multiple Clients through the Advanced Client Search. If enabled, a “Show Add Visit” checkbox will display in the Advanced Client search that allows you to add a Visit to the Clients that are pulled in the search results.
    - If disabled, this checkbox will not appear as an option.

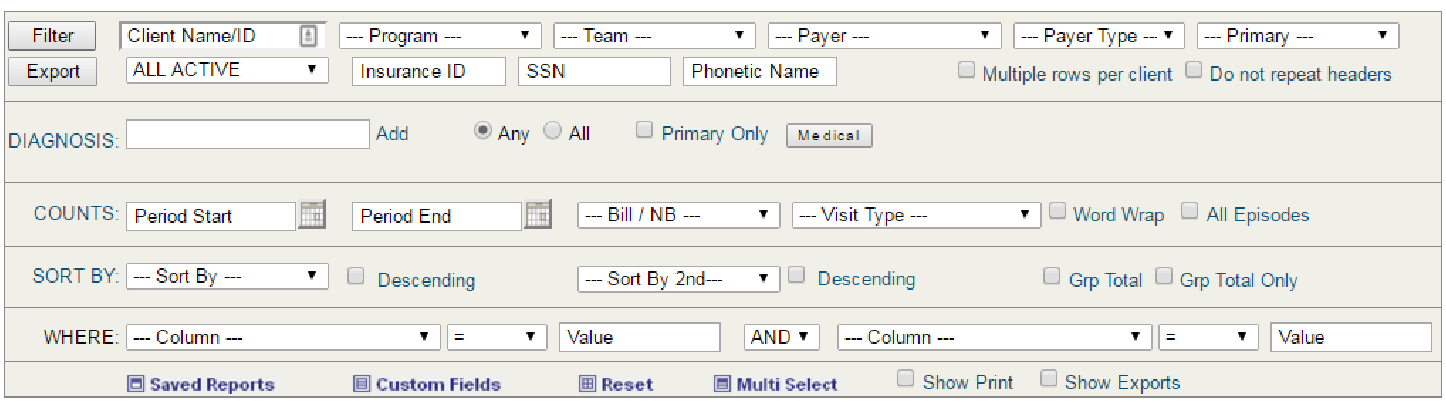
Location(s) this setting affects:

- Client Tab -> Advanced Search Button -> Show Add Visit Checkbox

Screenshots:



When VisitEntryMultiPerClient is ENABLED



When VisitEntryMultiPerClient is DISABLED

VisitEntryOtherEmp

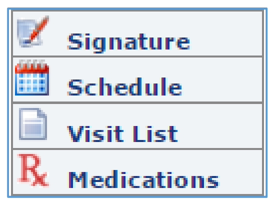
Function:

- Determines whether the “Add Visit” button shows on other Employee Nav Bars, letting the user add and complete Visits under that Employee’s name.
- If enabled, when choosing “Add Visit” on a Client Nav Bar, you will be prompted to choose an Employee name, rather than the user’s name automatically being entered as the Employee.
- NOTE: VisitEntryOtherEmp and VisitEntryOtherEmpAsSelf cannot be utilized at the same time. If one is checked, the other setting will be unchecked.

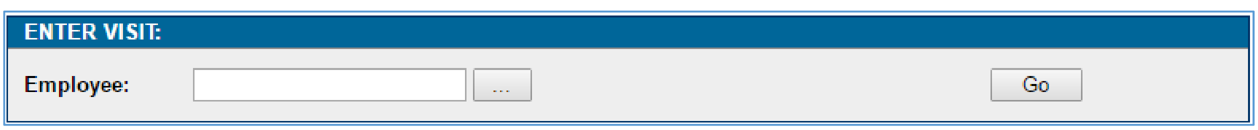
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Add Visit Button
- Employee Tab -> Employee Nav Bar -> Add Visit Button

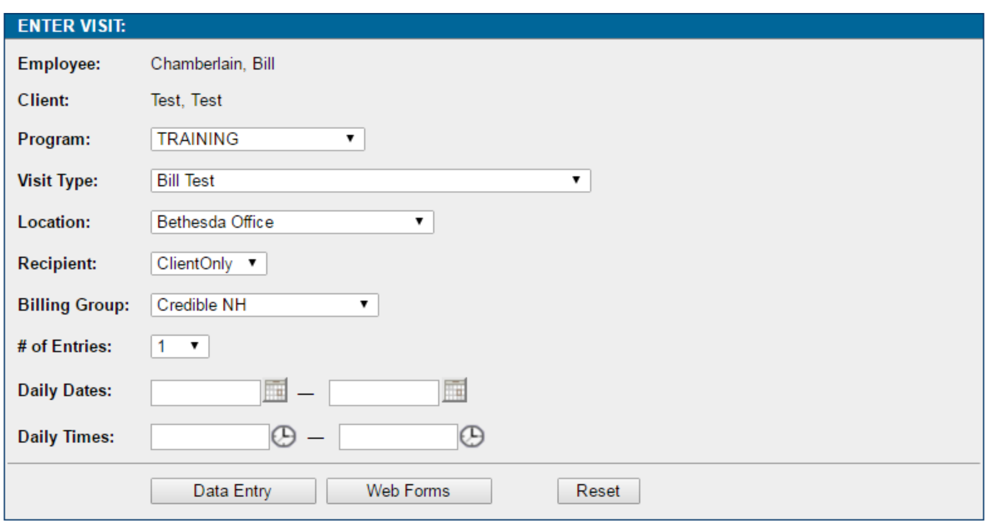
Screenshots:



The nav bar of another Employee with VisitEntryOtherEmp ENABLED vs DISABLED



When VisitEntryOtherEmp is ENABLED, choosing “Add Visit” from the Client Nav Bar allows Employee selection.



When VisitEntryOtherEmp is DISABLED, choosing “Add Visit” from the Client Nav Bar only allows your Employee Name.

VisitEntryWeb

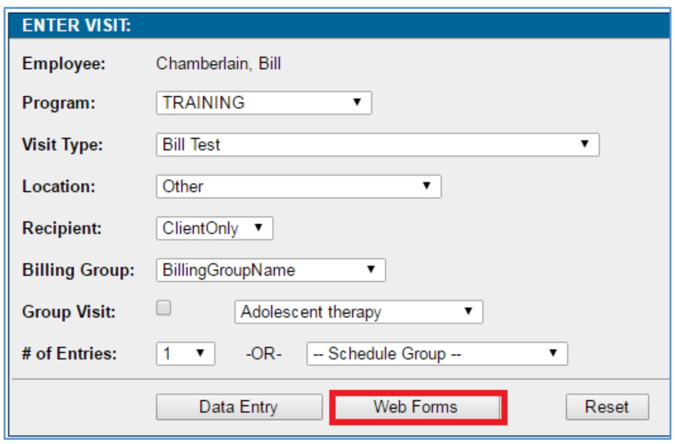
Function:

- Determines whether the Web Forms on a Visit are accessible.
  - This affects whether the “Web Forms” button displays when using the “Add Visit” button, either on the Client Nav Bar, or when viewing a list of Visits.
  - Also affects whether the “Begin Visit” button will display when viewing a Scheduled Entry.

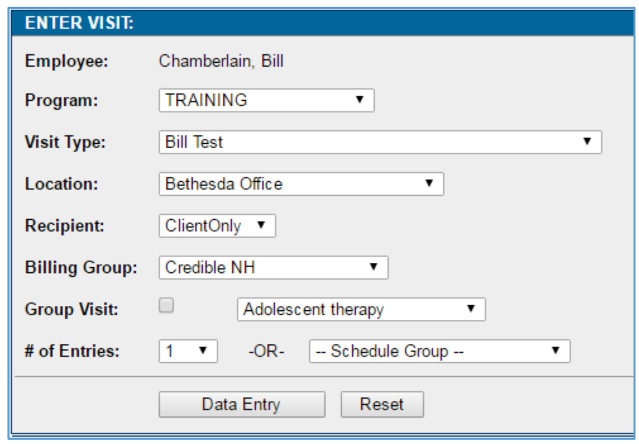
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Add Visit Button -> Web Forms Button
- Employee Tab -> Employee Nav Bar -> Add Visit Button -> Web Forms Button
- Schedule -> Chosen Scheduled Entry -> Begin Visit Button

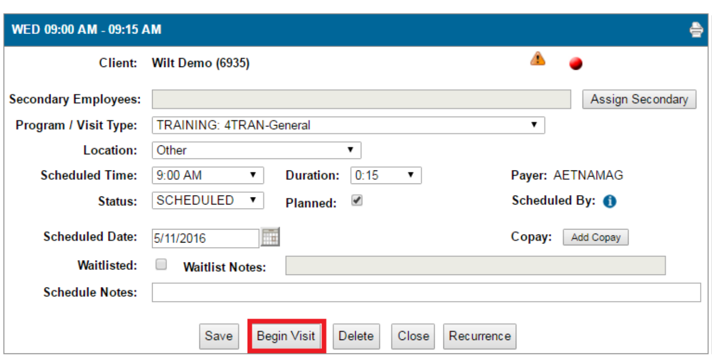
Screenshots:



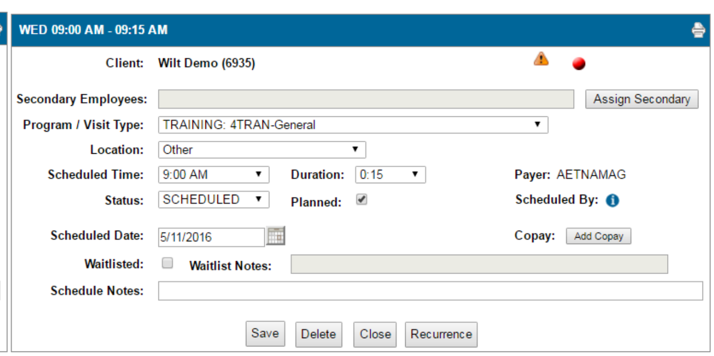
When VisitEntryWeb is ENABLED



When VisitEntryWeb is DISABLED



When VisitEntryWeb is ENABLED



When VisitEntryWeb is DISABLED

ClientAdd

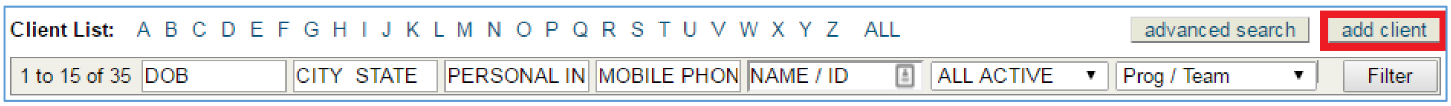
Function:

- Determines whether the user can add new Clients to the Domain.
    - If disabled, the “add client” button will not display when viewing the Client List.

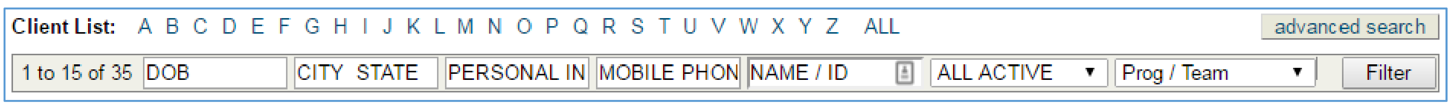
Location(s) this setting affects:

- Client Tab -> Add Client Button

Screenshots:



When ClientAdd is ENABLED



When ClientAdd is DISABLED

ClientAmendmentAdd

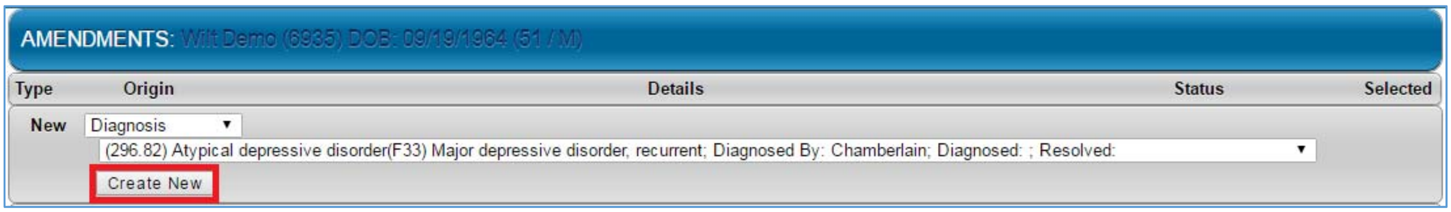
Function:

- Determines whether the user can add an Amendment to a Client record.
  - If disabled, the "Create New" button will not display when viewing the Client's Amendment page.

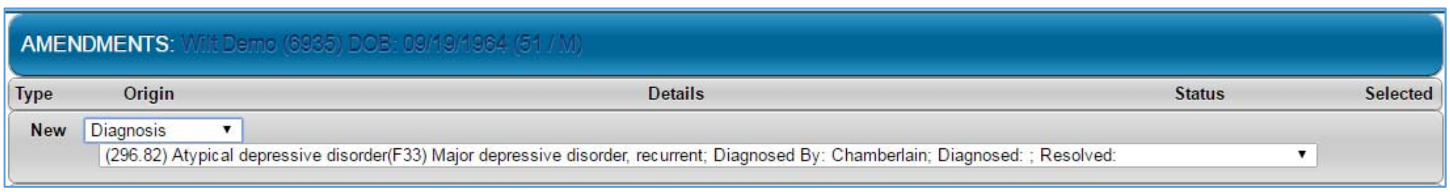
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Amendment Button -> Create New Button

Screenshots:



When ClientAmendmentAdd is ENABLED



When ClientAmendmentAdd is DISABLED

ClientAmendmentDelete

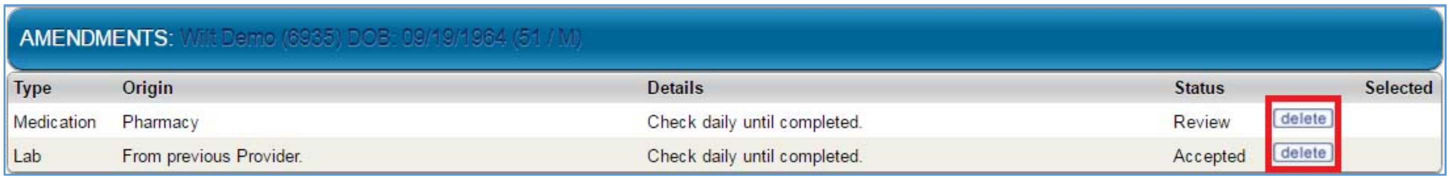
Function:

- Determines whether the user can delete an attached Amendment from a Client record.
    - If disabled, the "delete" button will not display when viewing the Client's Amendment page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Amendment Button -> Delete Button

Screenshots:



ClientAmendmentView

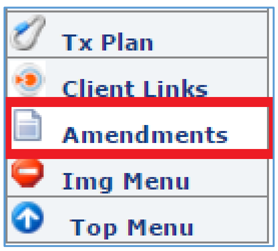
Function:

- Determines whether the user can view attached Amendments on a Client record.
  - If disabled, the "Amendments" button will not display on the Client Nav Bar.
  - If disabled, the "Amendments" module will not display on the Client page (only affects those who set the Amendments module to display).

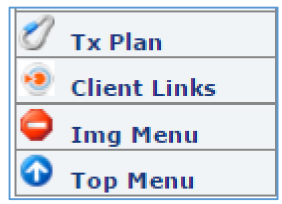
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Amendment Button
- Client Page -> Amendments Module

Screenshots:



When ClientAmendmentView is ENABLED



When ClientAmendmentView is DISABLED

ClientDelete

Function:

- Determines whether the user can delete a Client record.
    - If Disabled, the “Delete” button will not display when viewing the Client’s Profile.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Profile Button -> Delete Button

Screenshots:

ClientEmergencyAccess

Function:

- Determines whether the user can utilize the "Emergency" button on the Employee Nav Bar of their own Employee Page. This would allow them to gain access in an Emergency scenario to Clients that they typically would not be able to view.
    - If Disabled, the "Emergency" button will not display on the Employee Nav Bar.

Location(s) this setting affects:

- Employee Page (your own) -> Employee Nav Bar -> Emergency Button

Screenshots:

When ClientEmergencyAccess is ENABLED

When ClientEmergencyAccess is DISABLED

ClientEpisodeDelete

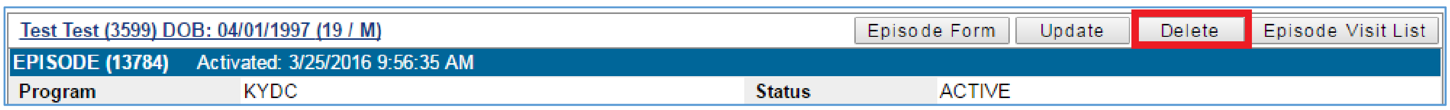
Function:

- Determines whether the user can delete Episodes that appear on a Client.
    - If Disabled, the “Delete” button will not display when viewing an Episode.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Episodes Button -> View Button -> Delete Button
- Client Page -> Episodes Module -> Selected Episode ID -> Delete Button

Screenshots:



When ClientEpisodeDelete is ENABLED

When ClientEpisodeDelete is DISABLED

ClientEpisodeFormsUpdate

Function:

- Determines whether the user will be able to make updates to Episode fields through Web Forms. If an answer on a Web Form is set to map to an Episode field, this setting will determine whether the Form answer will map to that field or not.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Episodes Button -> View Button
- Client Page -> Episodes Module -> Selected Episode ID

ClientEpisodeUpdate

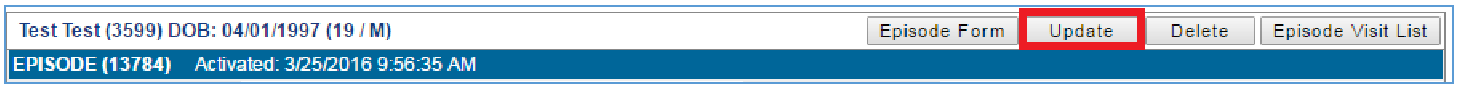
Function:

- Determines whether the user will able to make updates to an Episode using the ‘Update’ button.
    - If disabled, the ‘Update’ button will not display.

Location(s) this setting affects:

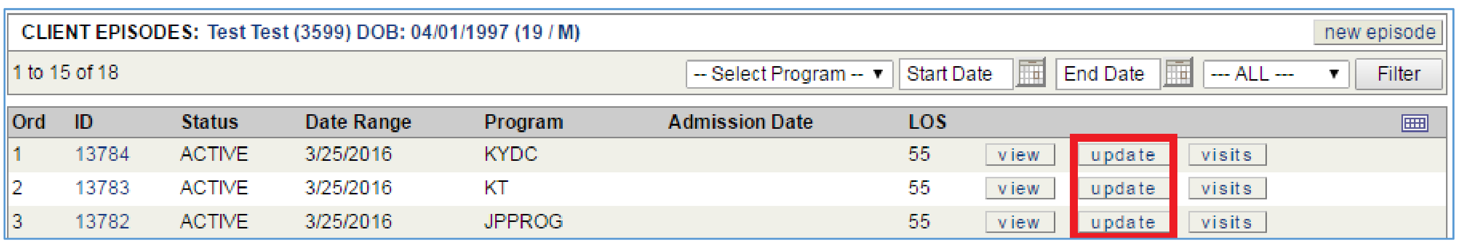
- Client Page -> Client Nav Bar -> Episodes Button -> Update Button
- Client Page -> Episodes Module -> Selected Episode ID -> Update Button

Screenshots:

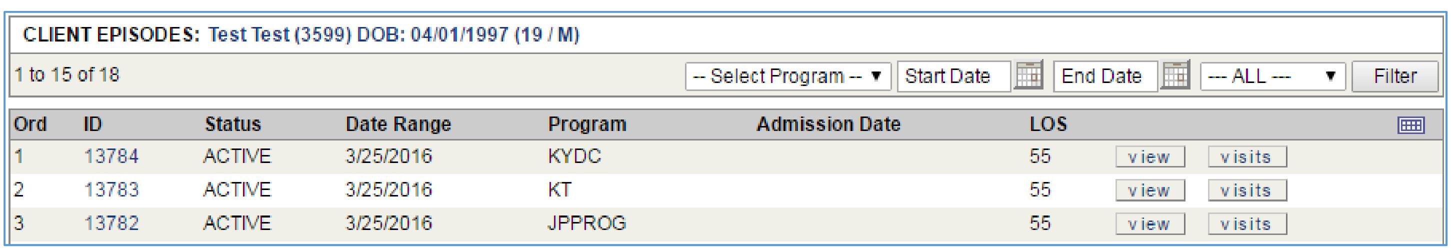


When ClientEpisodeUpdate is ENABLED

When ClientEpisodeUpdate is DISABLED



When ClientEpisodeUpdate is ENABLED



When ClientEpisodeUpdate is DISABLED

ClientFormsUpdate

Function:

- Determines whether the user will be able to make updates to Client fields through Web Forms. If an answer on a Web Form is set to map to a Client field, this setting will determine whether the Form answer will map to that field or not.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Profile Button

ClientLinksAdmin

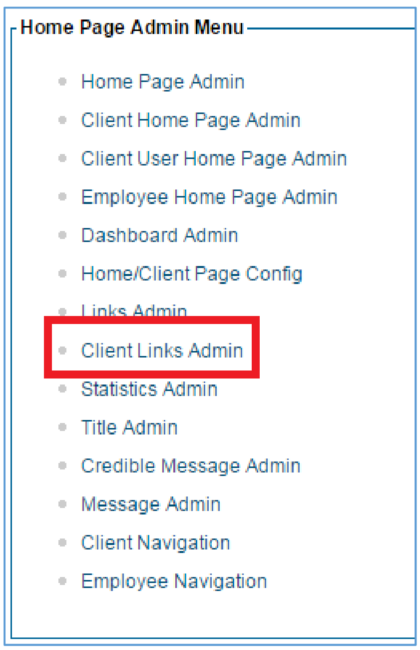
Function:

- Determines whether the user will able to manage Client Links on the Home Page Admin Menu.
    - If disabled, the 'Client Links Admin' link will not appear.

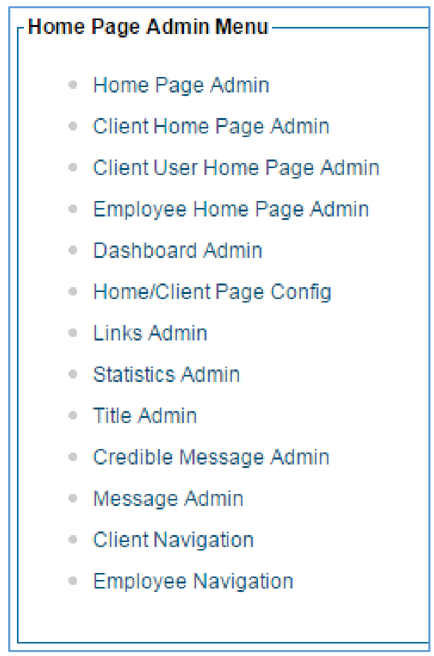
Location(s) this setting affects:

- Admin Tab -> Home Page Config -> Client Links Admin

Screenshots:



When ClientLinksAdmin is ENABLED



When ClientLinksAdmin is DISABLED

ClientList

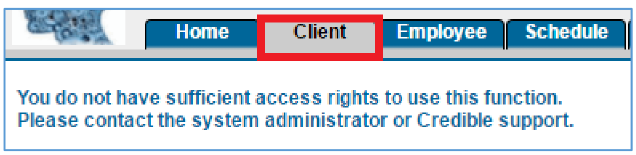
Function:

- Determines whether the user will able to access the Client Tab.
  - If Disabled, an “Insufficient Rights” message will appear when clicking the Client Tab.
- If enabled, the user will be able to search listed Clients that are directly assigned to them, indirectly assigned through Teams or Teams they supervise, or assigned to Employees they supervise.
- NOTE: This setting is recommended for all Staff.
- NOTE: This setting does not affect the ability to click on a listed Client and view their page. That setting is controlled by the ClientView right. This setting only affects what Clients can be searched.
- NOTE: Even if the user is utilizing the ClientListAll right, this setting must also be enabled in order to access the Client Tab.

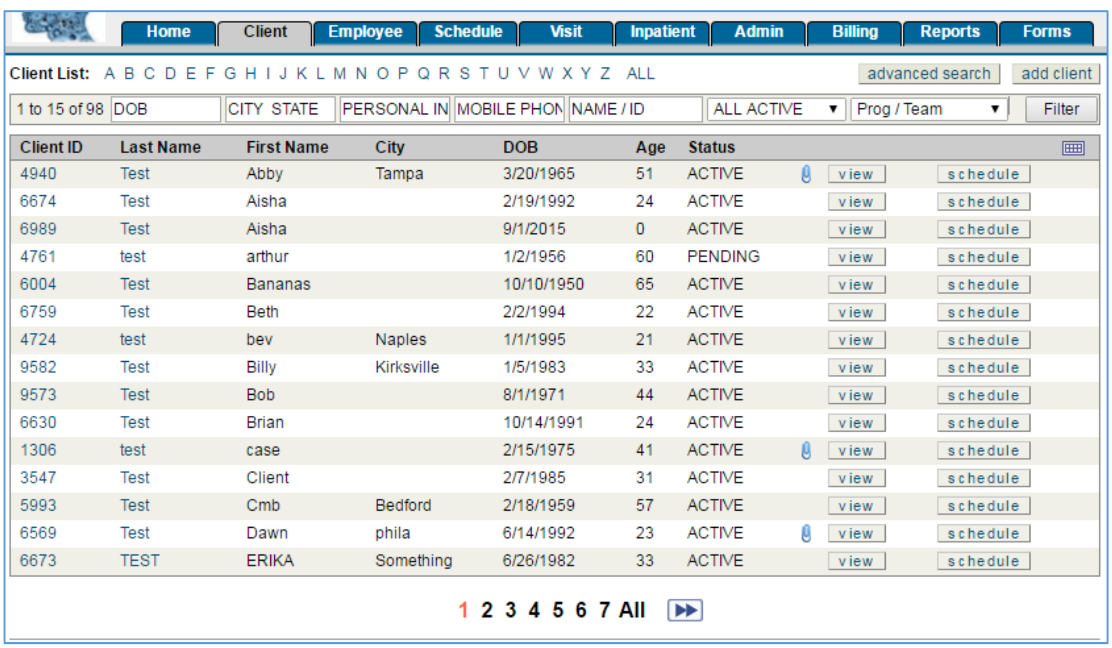
Location(s) this setting affects:

- Client Tab -> Listed Clients

Screenshots:



If ClientList is DISABLED



Client ID	Last Name	First Name	City	DOB	Age	Status		
4940	Test	Abby	Tampa	3/20/1965	51	ACTIVE	view	schedule
6674	Test	Aisha		2/19/1992	24	ACTIVE	view	schedule
6989	Test	Aisha		9/1/2015	0	ACTIVE	view	schedule
4761	test	arthur		1/2/1956	60	PENDING	view	schedule
6004	Test	Bananas		10/10/1950	65	ACTIVE	view	schedule
6759	Test	Beth		2/2/1994	22	ACTIVE	view	schedule
4724	test	bev	Naples	1/1/1995	21	ACTIVE	view	schedule
9582	Test	Billy	Kirksville	1/5/1983	33	ACTIVE	view	schedule
9573	Test	Bob		8/1/1971	44	ACTIVE	view	schedule
6630	Test	Brian		10/14/1991	24	ACTIVE	view	schedule
1306	test	case		2/15/1975	41	ACTIVE	view	schedule
3547	Test	Client		2/7/1985	31	ACTIVE	view	schedule
5993	Test	Cmb	Bedford	2/18/1959	57	ACTIVE	view	schedule
6569	Test	Dawn	phila	6/14/1992	23	ACTIVE	view	schedule
6673	TEST	ERIKA	Something	6/26/1982	33	ACTIVE	view	schedule

ClientListAll

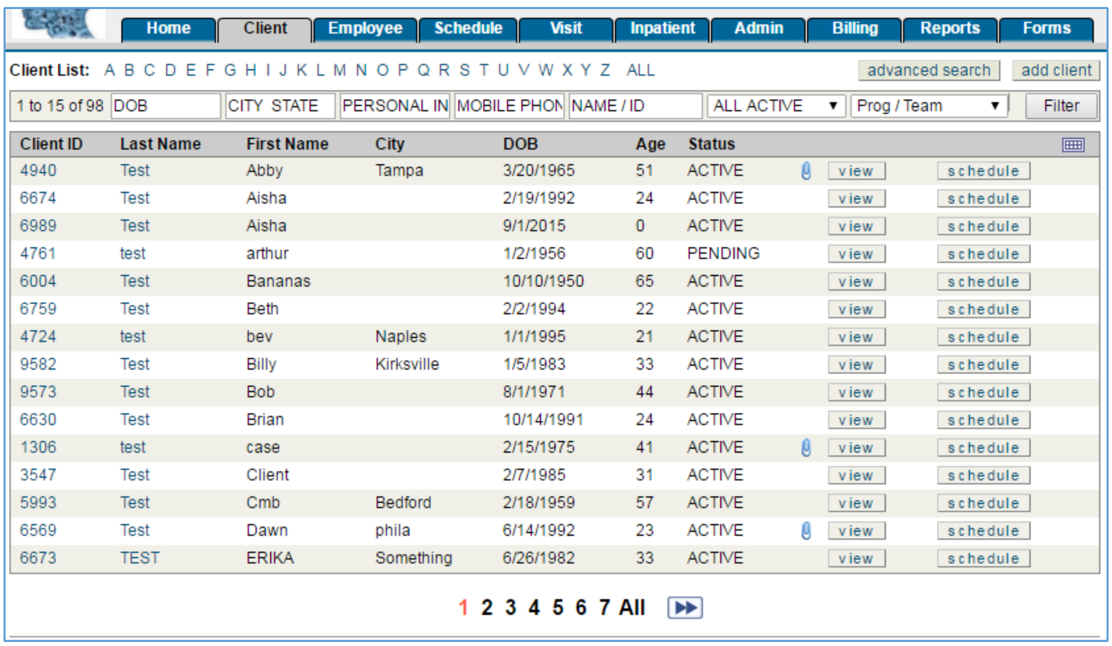
Function:

- Allows the user to list ALL Clients in the system.
- Allows the user to view any client on the Scheduler when performing a Client search, bypassing Team Assignments.
- NOTE: This setting is typically a supervisory right.
- NOTE: ClientList will need to be enabled as well, in order to access the Client Tab.

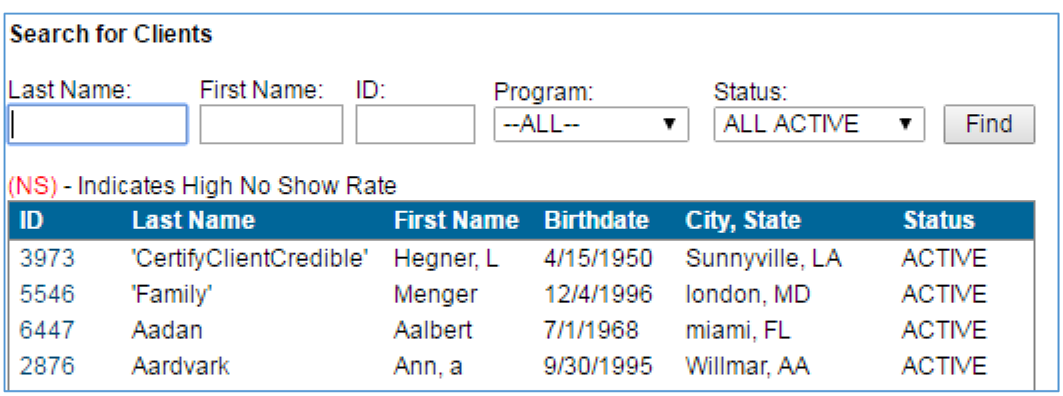
Location(s) this setting affects:

- Client Tab -> Listed Clients
- Schedule Tab -> Add Schedule Entry -> Client Search

Screenshots:



Client ID	Last Name	First Name	City	DOB	Age	Status		
4940	Test	Abby	Tampa	3/20/1965	51	ACTIVE	view	schedule
6674	Test	Aisha		2/19/1992	24	ACTIVE	view	schedule
6989	Test	Aisha		9/1/2015	0	ACTIVE	view	schedule
4761	test	arthur		1/2/1956	60	PENDING	view	schedule
6004	Test	Bananas		10/10/1950	65	ACTIVE	view	schedule
6759	Test	Beth		2/2/1994	22	ACTIVE	view	schedule
4724	test	bev	Naples	1/1/1995	21	ACTIVE	view	schedule
9582	Test	Billy	Kirksville	1/5/1983	33	ACTIVE	view	schedule
9573	Test	Bob		8/1/1971	44	ACTIVE	view	schedule
6630	Test	Brian		10/14/1991	24	ACTIVE	view	schedule
1306	test	case		2/15/1975	41	ACTIVE	view	schedule
3547	Test	Client		2/7/1985	31	ACTIVE	view	schedule
5993	Test	Cmb	Bedford	2/18/1959	57	ACTIVE	view	schedule
6569	Test	Dawn	phila	6/14/1992	23	ACTIVE	view	schedule
6673	TEST	ERIKA	Something	6/26/1982	33	ACTIVE	view	schedule



ID	Last Name	First Name	Birthdate	City, State	Status
3973	'CertifyClientCredible'	Hegner, L	4/15/1950	Sunnyville, LA	ACTIVE
5546	'Family'	Menger	12/4/1996	london, MD	ACTIVE
6447	Aadan	Aalbert	7/1/1968	miami, FL	ACTIVE
2876	Aardvark	Ann, a	9/30/1995	Willmar, AA	ACTIVE

ClientSuperEdit

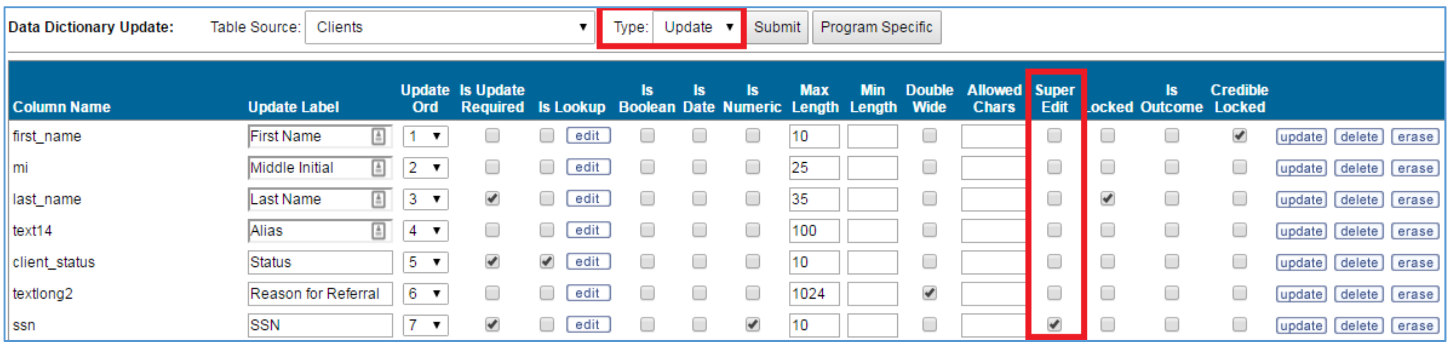
Function:

- Determines whether the user will able to make edits to any Client fields that are marked as “Super Edit”.
- Client fields are marked as “Super Edit” through the Data Dictionary, when viewing the “Update” Type of the “Clients” Table Source.
    - If disabled, any fields marked as “Super Edit” will not display when updating the Client Profile.

Location(s) this setting affects:

- Client Tab -> Selected Client -> Client Nav Bar -> Profile Button -> Update Button -> Client Field
- Client Tab -> Selected Client -> Client Info Module -> Edit Button

Screenshots:


Data Dictionary Update: Table Source: Clients Type: Update Submit Program Specific

Column Name	Update Label	Update Ord	Is Update Required	Is Lookup	Is Boolean	Is Date	Is Numeric	Max Length	Min Length	Double Wide	Allowed Chars	Super Edit	Locked	Is Outcome	Credible Locked			
first_name	First Name	1		edit				10							✓	update	delete	erase
mi	Middle Initial	2		edit				25								update	delete	erase
last_name	Last Name	3	✓	edit				35					✓			update	delete	erase
text14	Alias	4		edit				100								update	delete	erase
client_status	Status	5	✓	✓ edit				10								update	delete	erase
textlong2	Reason for Referral	6		edit				1024		✓						update	delete	erase
ssn	SSN	7	✓	edit			✓	10				✓				update	delete	erase

Where fields can be marked as “Super Edit”

ClientSuperView

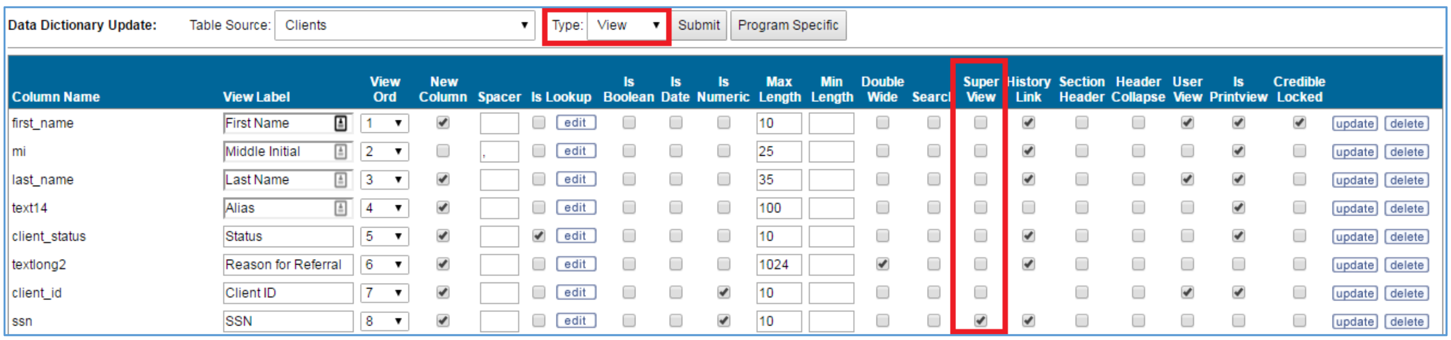
Function:

- Determines whether the user will able to view any Client fields that are marked as “Super View”.
- Client fields are marked as “Super View” through the Data Dictionary, when viewing the “View” Type of the “Clients” Table Source.
    - If disabled, any fields marked as “Super View” will not display when viewing the Client Profile.

Location(s) this setting affects:

- Client Tab -> Selected Client -> Client Nav Bar -> Profile Button -> Client Field
- Client Tab -> Selected Client -> Client Info Module

Screenshots:



Where fields can be marked as “Super View”

ClientUpdate

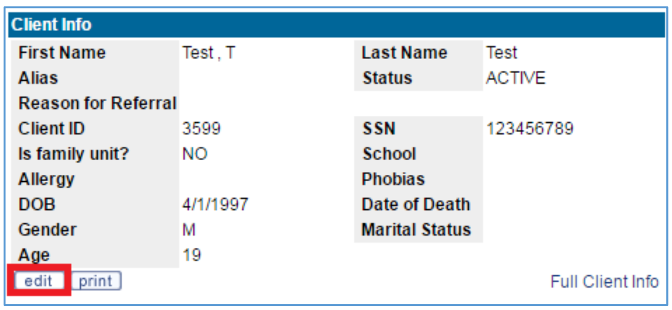
Function:

- Determines whether the user will able to make updates to a Client by clicking the “Update” button when viewing the Client Profile.
- Determines whether the user will able to make updates to a Client by clicking the “Edit” button when viewing the Client Info module.

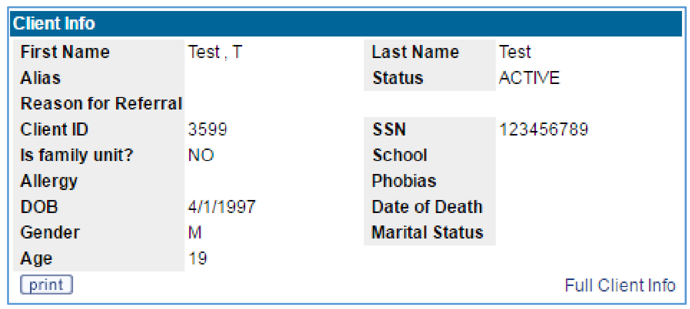
Location(s) this setting affects:

- Client Tab -> Selected Client -> Client Nav Bar -> Profile Button -> Update Button
- Client Tab -> Selected Client -> Client Info Module -> Edit Button

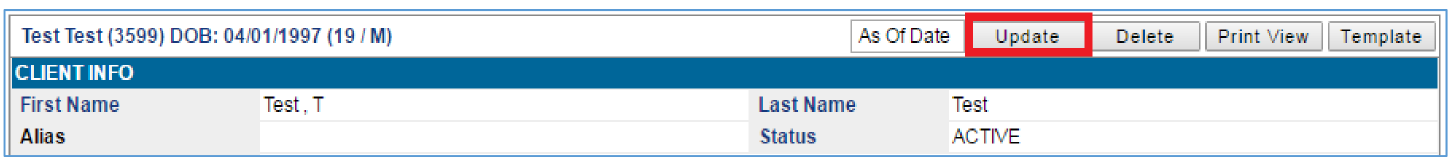
Screenshots:



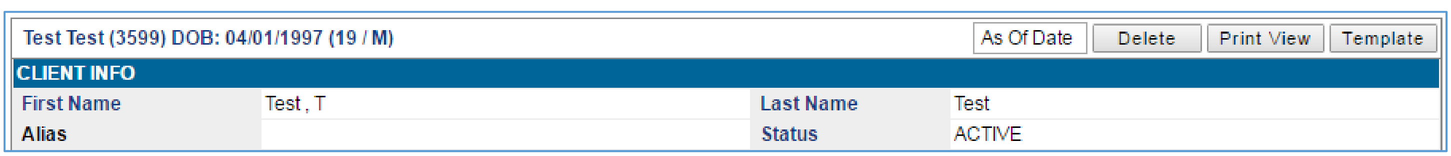
When ClientUpdate is ENABLED



When ClientUpdate is DISABLED



When ClientUpdate is ENABLED



When ClientUpdate is DISABLED

ClientUpdateContactsFamily

Function:

- Determines whether the user will able to Add or Select Client Family Members when viewing the “Family” page on the Client Nav Bar.
- Determines whether the user will able to Add, Delete, or Update Client Contacts when viewing the “Contacts” page on the Client Nav Bar.

Location(s) this setting affects:

- Client Tab -> Selected Client -> Client Nav Bar -> Family Button
- Client Tab -> Selected Client -> Client Nav Bar -> Contacts Button

Screenshots:

Family Members: Test Test (3599) DOB: 04/01/1997 (19 / M)

Filter | Active | Export | Add Family Members

	Name	Relation	Dependent	Guarantor	ROI Obtained	Pri Care Giver	Lives at Home	Notes	Diagnosis	
select	Mom Test	Birth Mother	False	False	True	False	False		DX	delete

When ClientUpdateContactsFamily is ENABLED

Family Members: Test Test (3599) DOB: 04/01/1997 (19 / M)

Filter | Active | Export

Name	Relation	Dependent	Guarantor	ROI Obtained	Pri Care Giver	Lives at Home	
Mom Test	Birth Mother	False	False	True	False	False	delete

When ClientUpdateContactsFamily is DISABLED

Contacts: Test Test (3599) DOB: 04/01/1997 (19 / M)

Filter | CURRENT | ALL | Export | Add Contact

	Type	Name	City	State	Phone	ROI Obtained	ROI Start Date	ROI Expires Date	ROI Status	Notes	
select	Attorney	Jake Mathis	Rockville	MD	212-555-4847	False			ROI NOT OBTAINED		delete

When ClientUpdateContactsFamily is ENABLED

Contacts: Test Test (3599) DOB: 04/01/1997 (19 / M)

Filter | CURRENT | ALL | Export

	Type	Name	City	State	Phone	ROI Obtained	ROI Start Date	ROI Expires Date	ROI Status	Notes
select	Attorney	Jake Mathis	Rockville	MD	212-555-4847	False			ROI NOT OBTAINED	

When ClientUpdateContactsFamily is DISABLED

ClientView

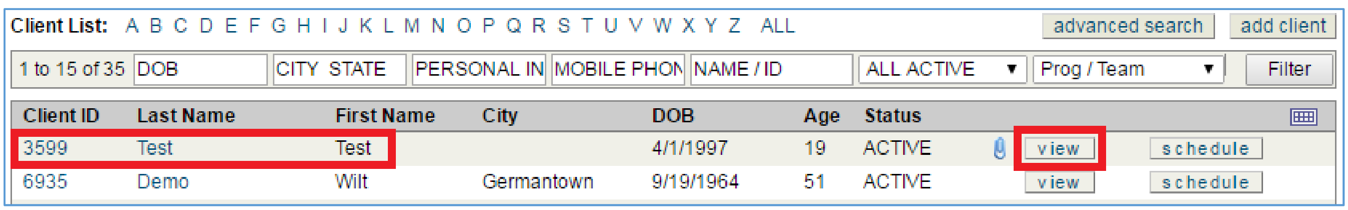
Function:

- Determines whether the user will able to access a Client page.
    - If disabled, an "Insufficient Rights" message will appear when clicking the Client Name, ID, or View button.
- If enabled, the user will be able to view the pages for Clients that are directly assigned to them, indirectly assigned through Teams or Teams they supervise, or assigned to Employees they supervise.
- NOTE: This setting is recommended for all Staff.
- NOTE: This setting does not affect the ability to see listed Clients on the Client Tab. ClientView affects the ability to select a Client and view their page and nav bar.
- NOTE: Even if the user is utilizing the ClientViewAll right, this setting must also be enabled in order to access the Client Tab.

Location(s) this setting affects:

- Client Tab -> Listed Clients -> Clicking the Client Name, ID, or View button

Screenshots:



ClientViewAll

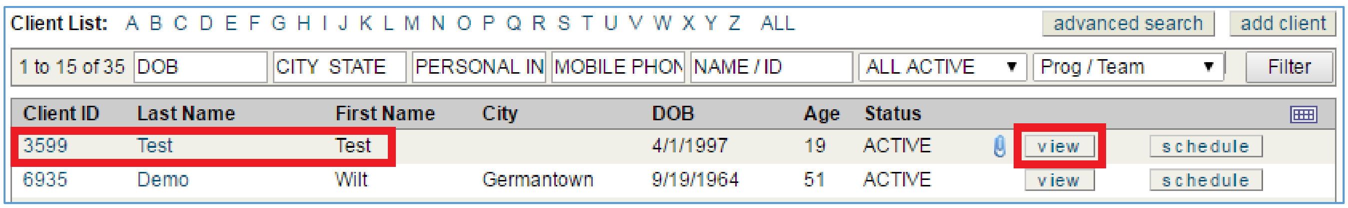
Function:

- Allows the user to view ALL Clients in the system.
- NOTE: This setting is typically a supervisory right.
- NOTE: ClientView will need to be enabled as well in order to view Clients.

Location(s) this setting affects:

- Client Tab -> Listed Clients -> Clicking the Client Name, ID, or View button

Screenshots:



ClientViewLog

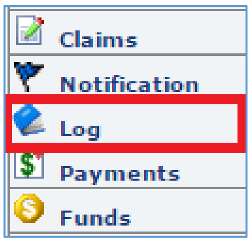
Function:

- Determines whether the “Log” button will display on the Client Nav Bar.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Log Button

Screenshots:



When ClientViewLog is ENABLED

When ClientViewLog is DISABLED

ClinicalSupportView

Function:

- Determines whether the “Clinical Support” button will display on the Client Nav Bar.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Clinical Support Button

Screenshots:

When ClinicalSupportView is ENABLED

When ClinicalSupportView is DISABLED

PatientSummaryGenerator

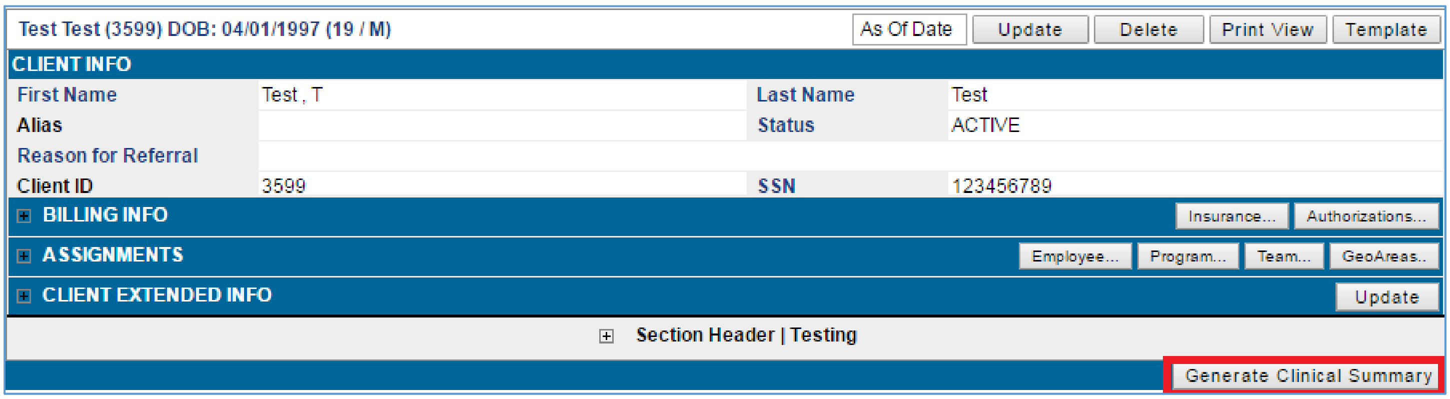
Function:

- Determines whether the user will be able to generate a CCR (Continuity of Care Record) by using the "Generate Clinical Summary" button which displays at the bottom right corner of the Client Profile.

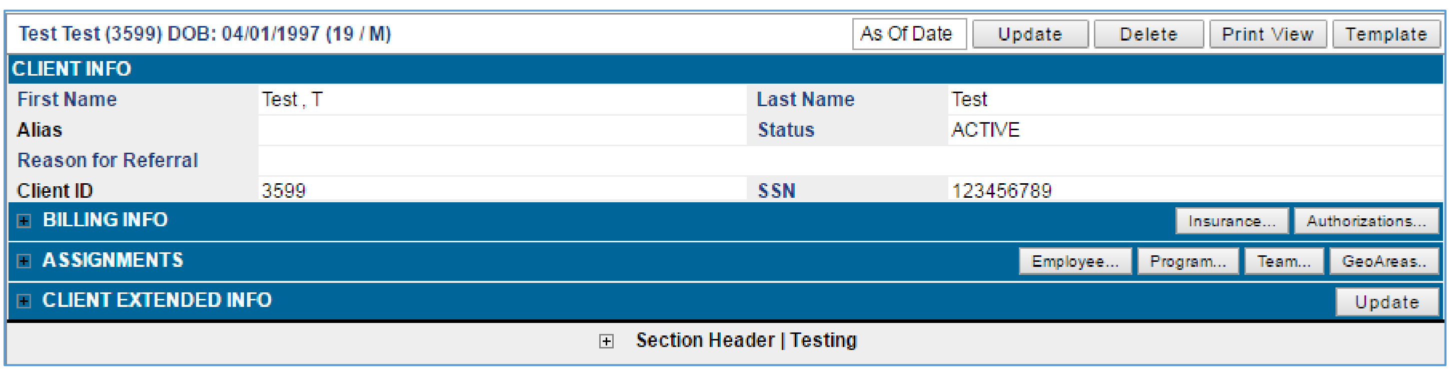
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Profile Button -> Generate Clinical Summary Button

Screenshots:



When PatientSummaryGenerator is ENABLED



When PatientSummaryGenerator is DISABLED

ViewClientLinks

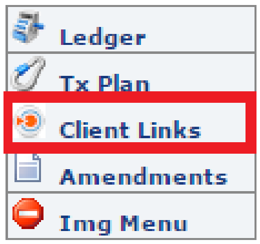
Function:

- Determines whether the "Client Links" button will be viewable on the Client Nav Bar.
    - NOTE: This feature is only applicable to some Partners in AR and UT.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Client Links Button

Screenshots:



When ViewClientLinks is ENABLED

When ViewClientLinks is DISABLED

Matrix Section: Clients Subsidiary

AddExternalProvider

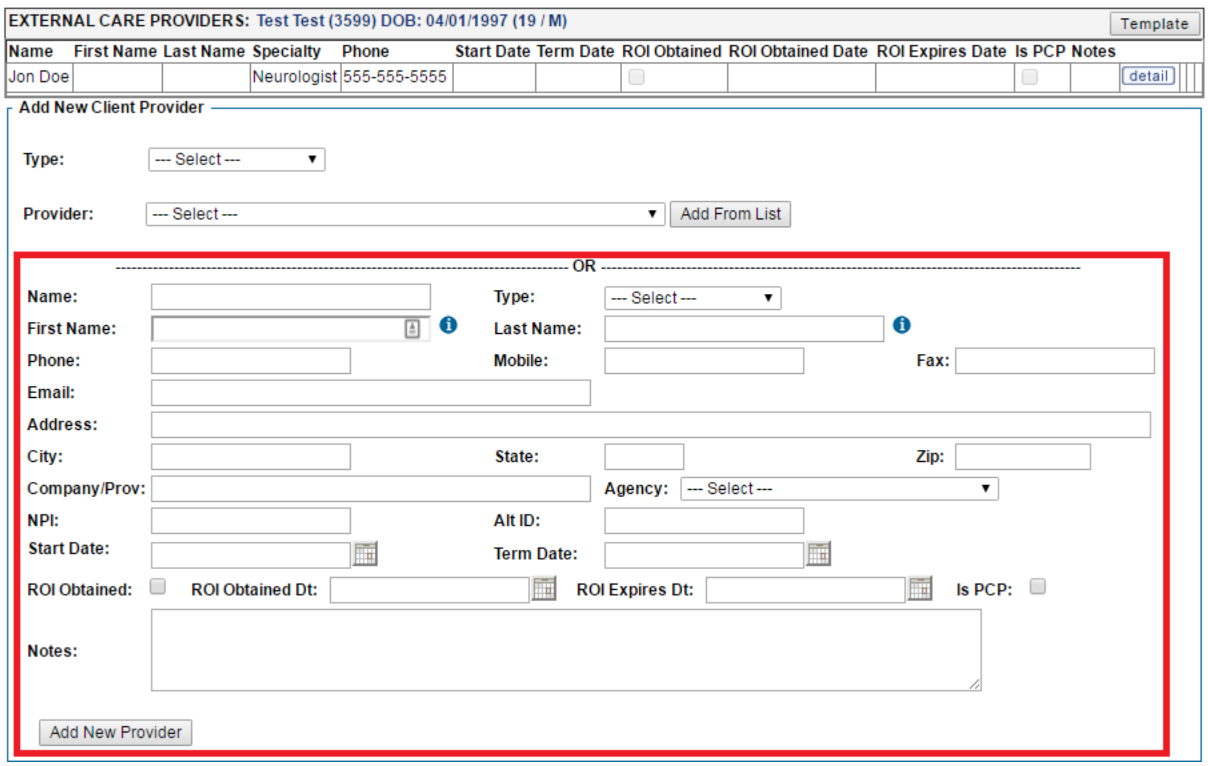
Function:

- Determines whether the user will be able to create a new External Provider when viewing the External Provider button on a Client Nav Bar.
    - If disabled, the only option will be to add existing External Provider entries using the dropdowns.

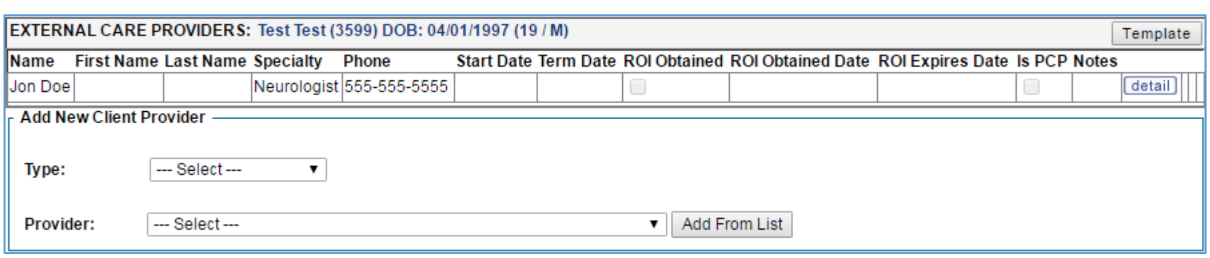
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Ext Provider Button

Screenshots:



When AddExternal Provider is ENABLED



When AddExternal Provider is DISABLED

AllergyAdd

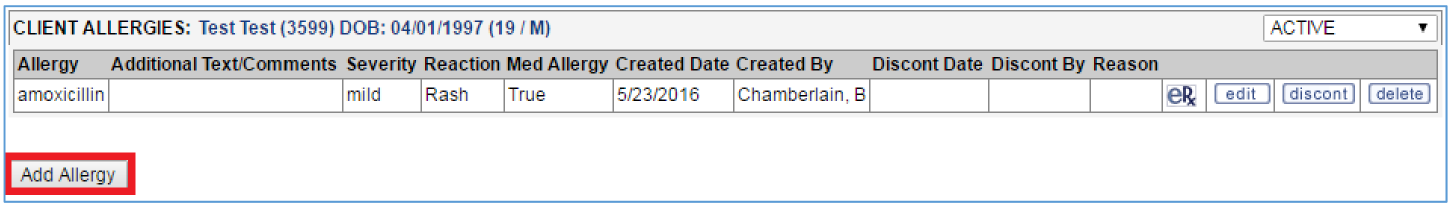
Function:

- Determines whether the user will be able to add new Allergy entries to a Client, using the "Add Allergy" button on the Client's Allergy page.

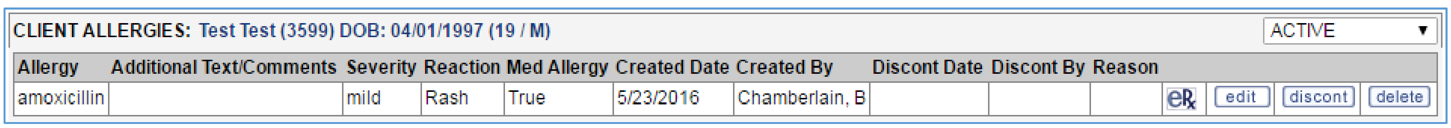
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Allergy Button -> Add Allergy Button

Screenshots:



When AllergyAdd is ENABLED



When AllergyAdd is DISABLED

AllergyDelete

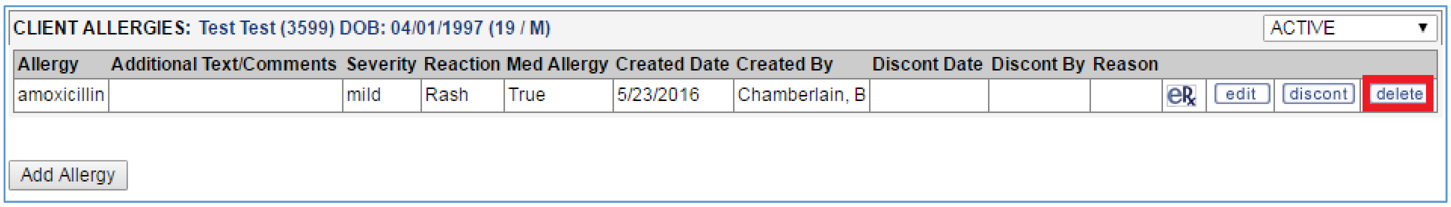
Function:

- Determines whether the user will be able to delete Allergy entries on a Client, using the “Delete” button on the Client’s Allergy page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Allergy Button -> Delete Button

Screenshots:

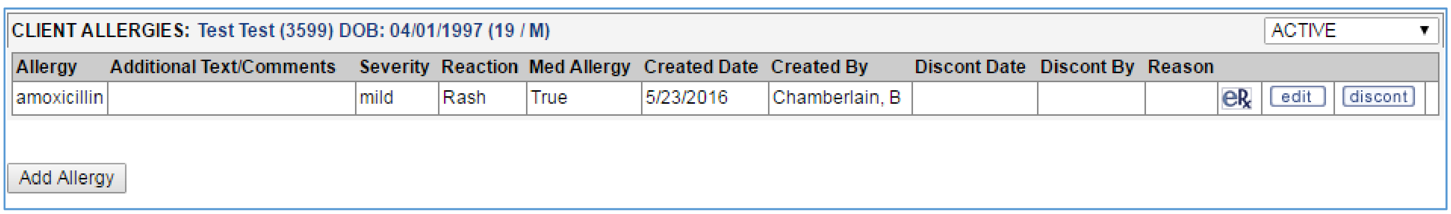


CLIENT ALLERGIES: Test Test (3599) DOB: 04/01/1997 (19 / M) ACTIVE

Allergy	Additional Text/Comments	Severity	Reaction	Med Allergy	Created Date	Created By	Discont Date	Discont By	Reason				
amoxicillin		mild	Rash	True	5/23/2016	Chamberlain, B				eRx	edit	discont	delete

Add Allergy

When AllergyDelete is ENABLED



CLIENT ALLERGIES: Test Test (3599) DOB: 04/01/1997 (19 / M) ACTIVE

Allergy	Additional Text/Comments	Severity	Reaction	Med Allergy	Created Date	Created By	Discont Date	Discont By	Reason			
amoxicillin		mild	Rash	True	5/23/2016	Chamberlain, B				eRx	edit	discont

Add Allergy

When AllergyDelete is ENABLED

AllergyUpdate

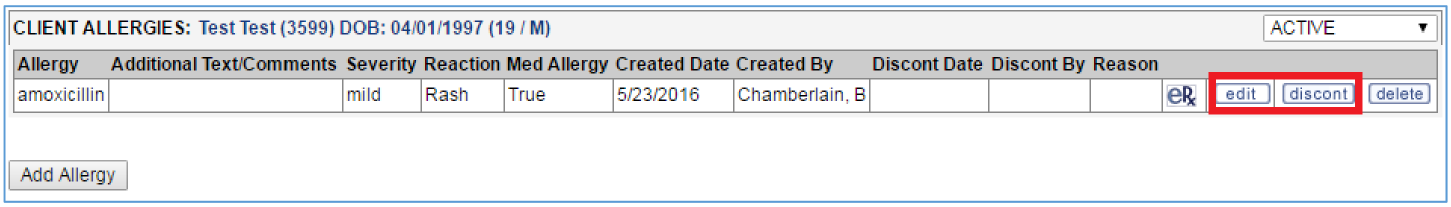
Function:

- Determines whether the user will be able to update Allergy entries on a Client, using either the “Edit” or “Discontinue” button on the Client’s Allergy page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Allergy Button -> Edit or Discont Button

Screenshots:

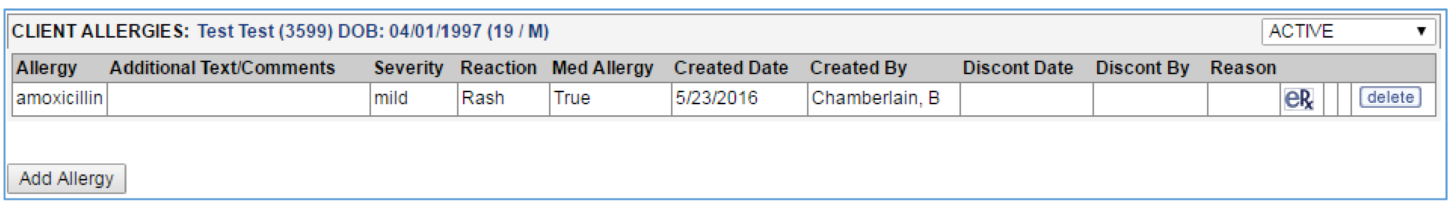


CLIENT ALLERGIES: Test Test (3599) DOB: 04/01/1997 (19 / M) ACTIVE

Allergy	Additional Text/Comments	Severity	Reaction	Med Allergy	Created Date	Created By	Discont Date	Discont By	Reason				
amoxicillin		mild	Rash	True	5/23/2016	Chamberlain, B				eRx	edit	discont	delete

Add Allergy

When AllergyUpdate is ENABLED



CLIENT ALLERGIES: Test Test (3599) DOB: 04/01/1997 (19 / M) ACTIVE

Allergy	Additional Text/Comments	Severity	Reaction	Med Allergy	Created Date	Created By	Discont Date	Discont By	Reason		
amoxicillin		mild	Rash	True	5/23/2016	Chamberlain, B				eRx	delete

Add Allergy

When AllergyUpdate is DISABLED

AllergyView

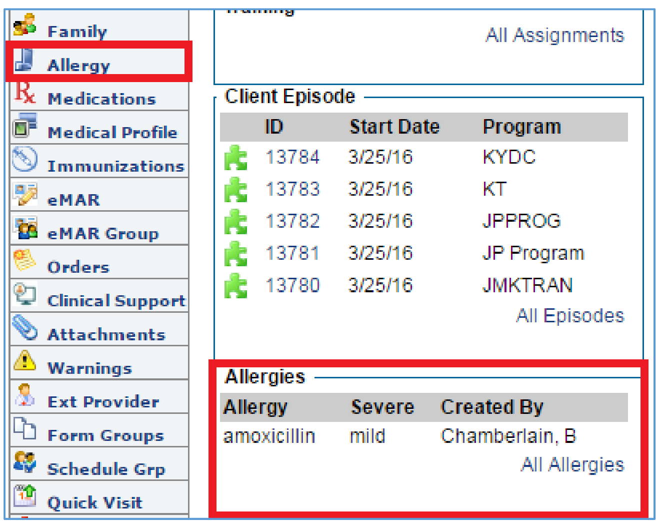
Function:

- Determines whether the “Allergy” button will display on the Client Nav Bar, allowing the user access to the Client’s Allergy page.
- Determines whether the “Allergies” module will display on the Client Overview page.
    - Only applicable if the Allergies module is set to display.

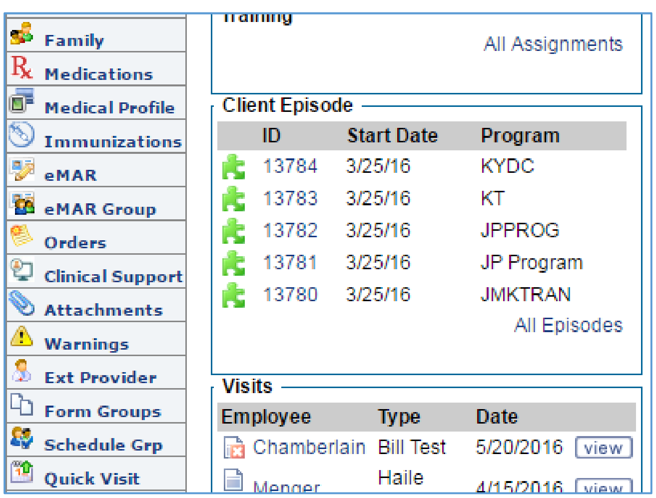
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Allergy Button
- Client Page -> Allergies Module

Screenshots:



When AllergyView is ENABLED



When AllergyView is DISABLED

AuthorizationAdd

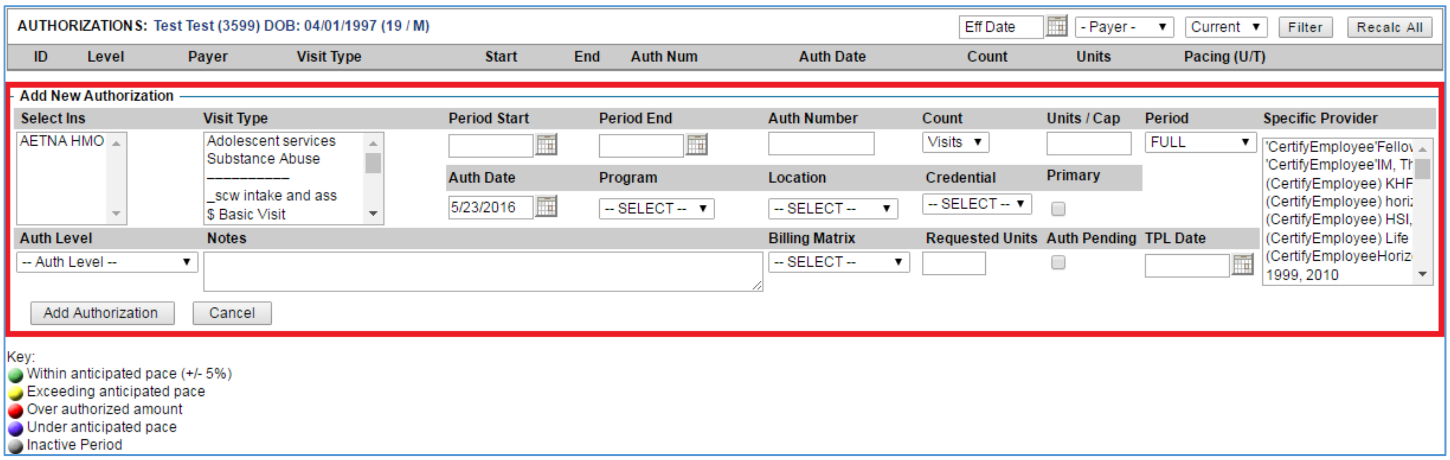
Function:

- Determines whether the “Add New Authorization” section will display when viewing a Client’s Authorizations page.

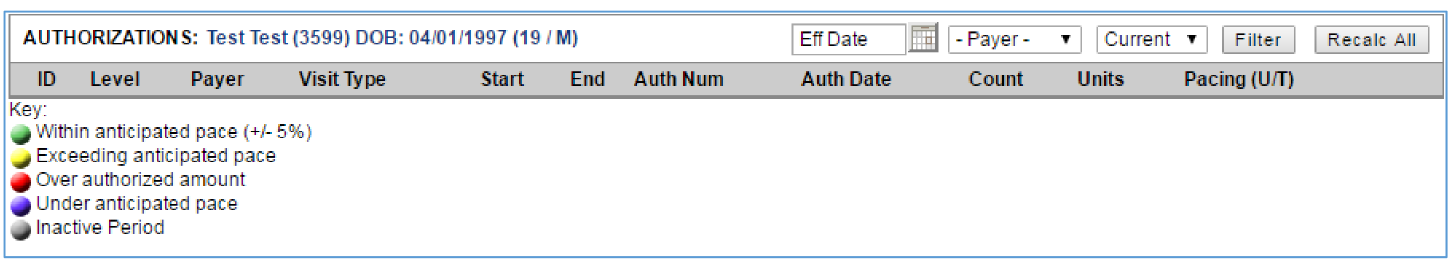
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Authorizations Button -> Add New Authorization

Screenshots:



When AuthorizationAdd is ENABLED



When AuthorizationAdd is DISABLED

AuthorizationDelete

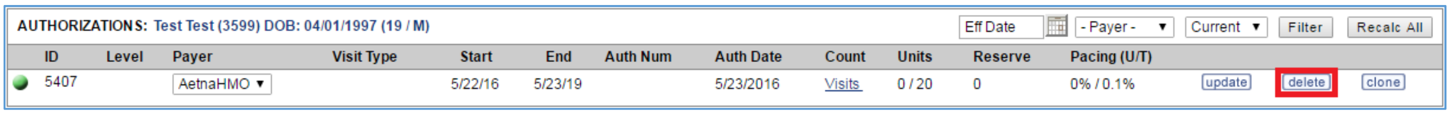
Function:

- Determines whether the "Delete" button will display when viewing a Client's Authorizations.

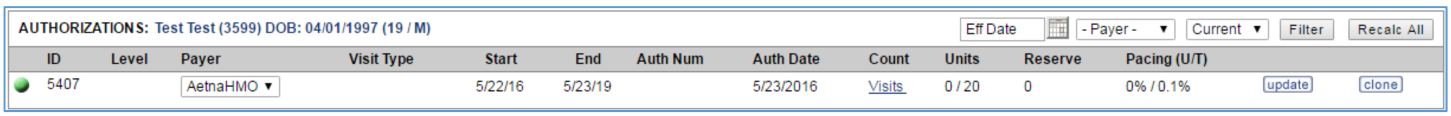
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Authorizations Button -> Delete Button

Screenshots:



When AuthorizationDelete is ENABLED



When AuthorizationDelete is DISABLED

AuthorizationView

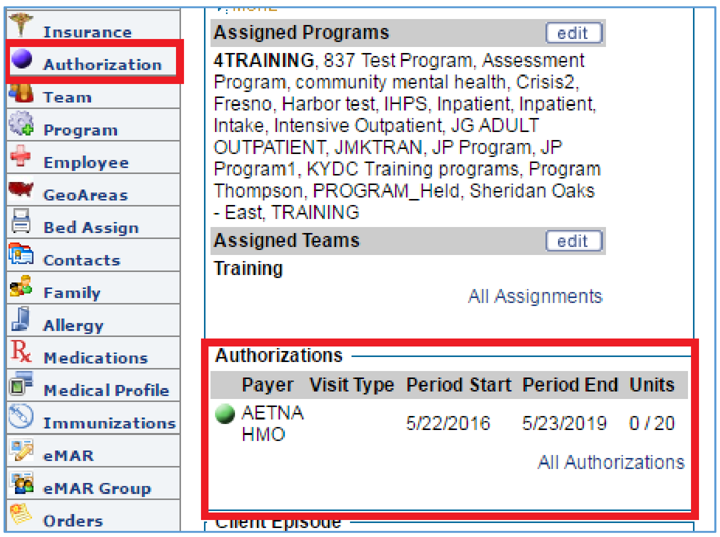
Function:

- Determines whether the "Authorizations" button will display on the Client Nav Bar, allowing the user access to the Client's Authorizations page.
- Determines whether the "Authorizations" module will display on the Client Overview page.
    - Only applicable if the Authorizations module is set to display.

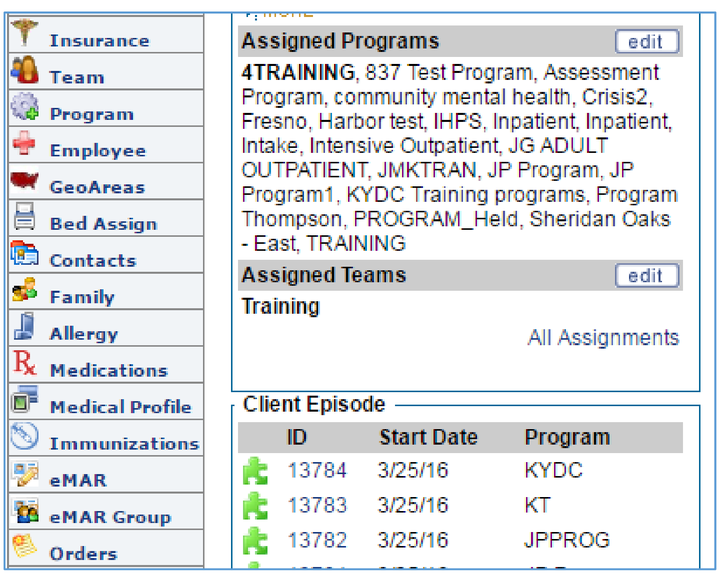
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Authorizations Button
- Client Page -> Authorizations Module

Screenshots:



When AuthorizationView is ENABLED



When AuthorizationView is DISABLED

ClientBedBoardAssign

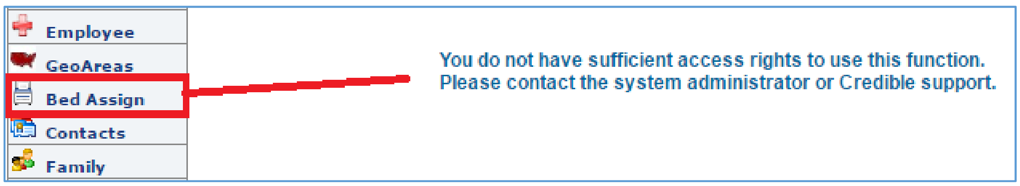
Function:

- Determines whether the user will be able to assign a Client to a bed, and whether the “Bed Assign” button is accessible.
    - If disabled, an “Insufficient Rights” message will display when clicking “Bed Assign”.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Bed Assign

Screenshots:



When ClientBedBoardAssign is DISABLED

ClientBedBoardIntervalDelete

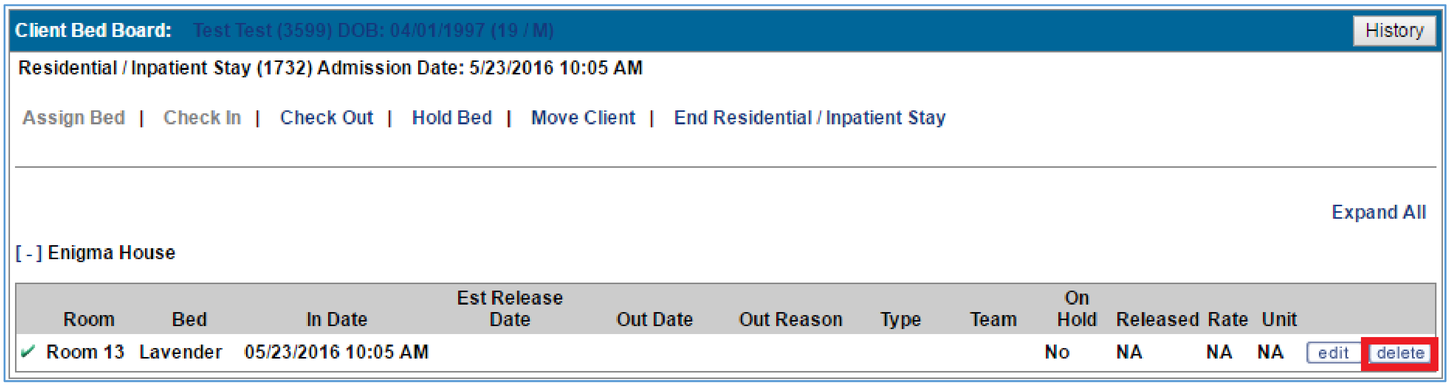
Function:

- Determines whether the user will be able to delete an existing Bed Board entry, when viewing the Client's Bed Assign page.

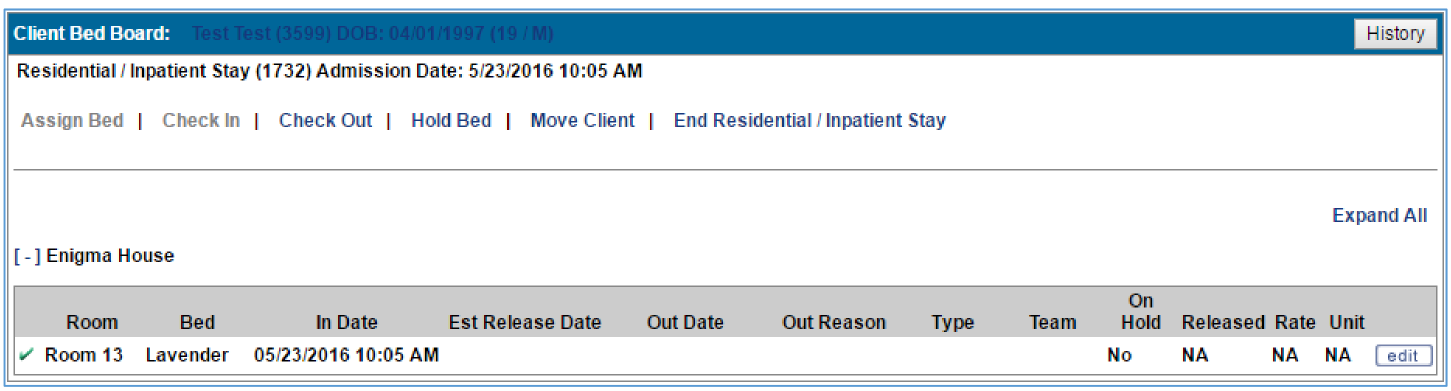
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Bed Assign -> Delete Button

Screenshots:



When ClientBedBoardIntervalDelete is ENABLED



When ClientBedBoardIntervalDelete is DISABLED

ClientBedBoardIntervalEdit

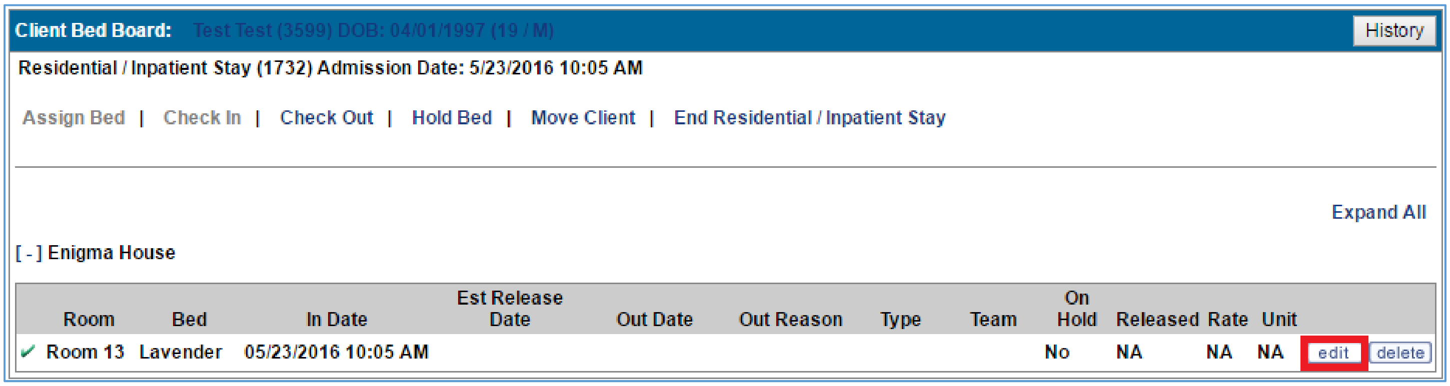
Function:

- Determines whether the user will be able to edit an existing Bed Board entry, when viewing the Client's Bed Assign page.

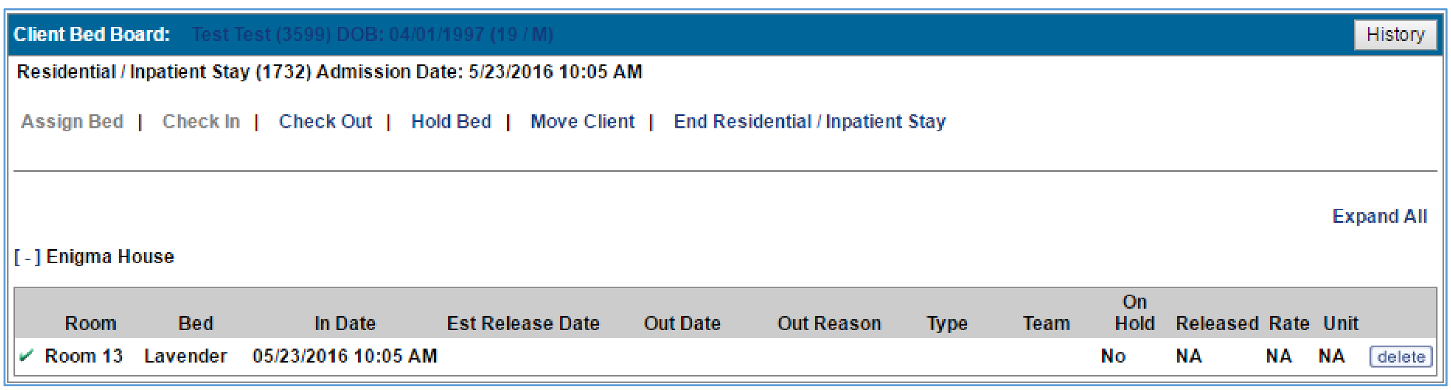
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Bed Assign -> Edit Button

Screenshots:



When ClientBedBoardIntervalEdit is ENABLED



When ClientBedBoardIntervalEdit is DISABLED

ClientInsuranceAdd

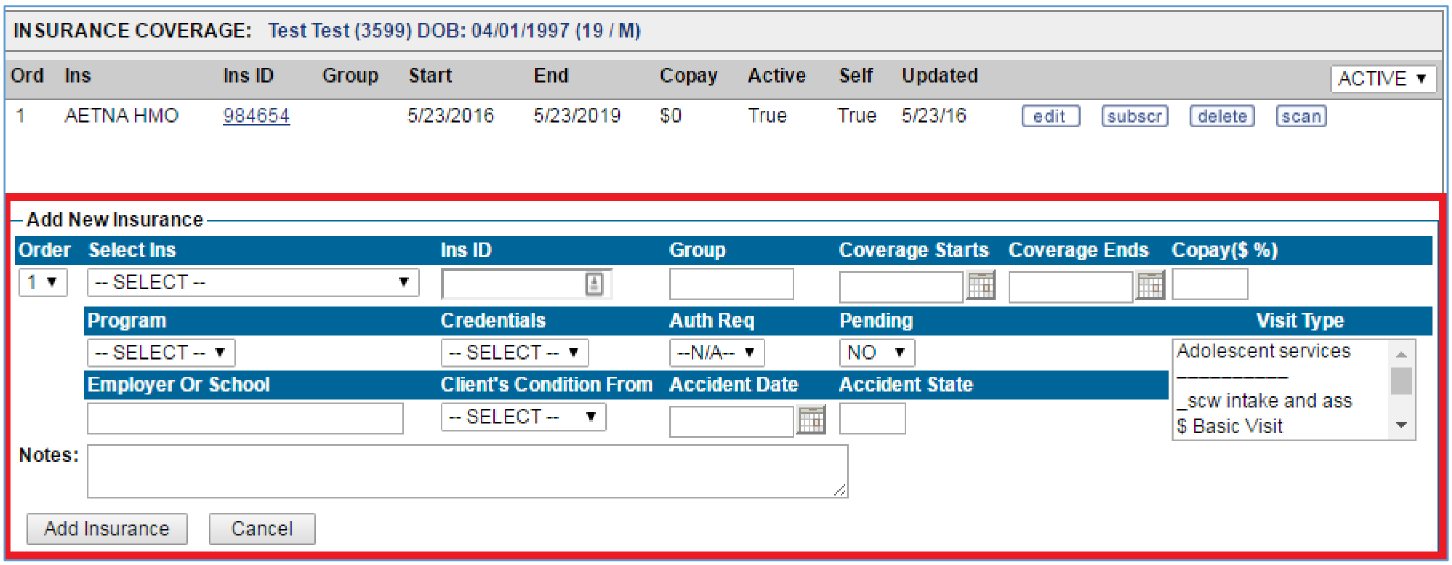
Function:

- Determines whether the user will be able to add a new Insurance entry to the Client, using the “Add New Insurance” section on the Client’s Insurance page.

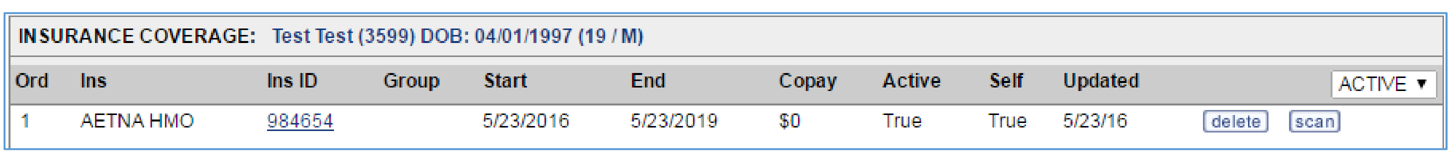
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Insurance Button -> Add New Insurance Section

Screenshots:



When ClientInsuranceAdd is ENABLED



When ClientInsuranceAdd is DISABLED

ClientInsuranceDelete

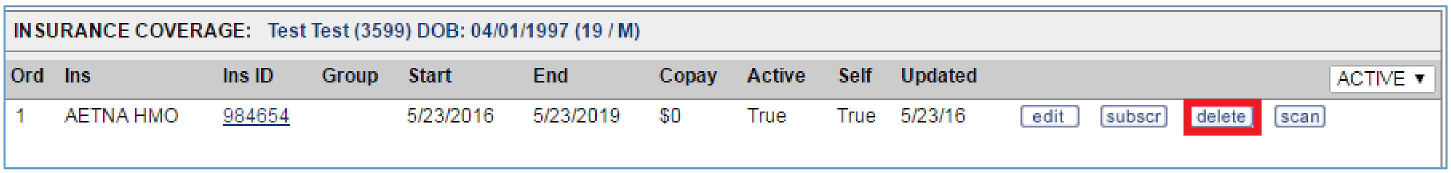
Function:

- Determines whether the user will be able to delete an existing Insurance entry on the Client, using the “Delete” button on the Client’s Insurance page.

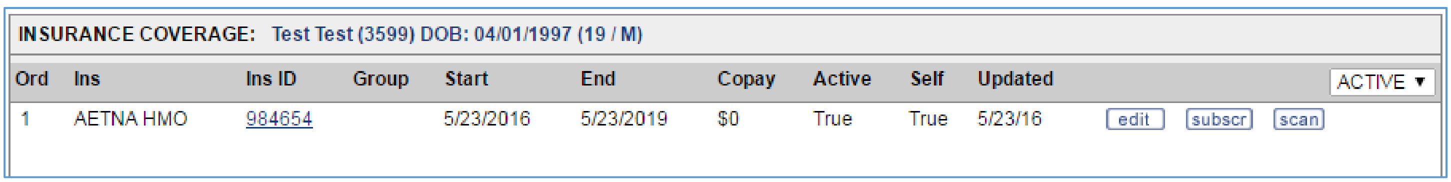
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Insurance Button -> Delete Button

Screenshots:



When ClientInsuranceDelete is ENABLED



When ClientInsuranceDelete is DISABLED

ClientInsuranceView

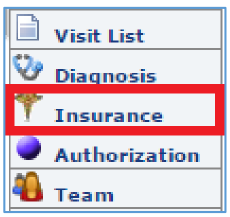
Function:

- Allows the user to view and click the “Insurance” option on the Client Nav Bar.
    - If disabled, the Insurance option will not display.
- If the Client has the “Billing Info” module showing on their overview page, this setting controls whether the user can click the “Full Insurance Info” link to be taken to the Client’s Insurance page.
    - If disabled, an “Insufficient Rights” message will display when clicking the “Full Insurance Info” link.

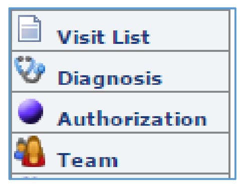
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Insurance Button
- Client Page -> Billing Info Module -> Full Insurance Info Button

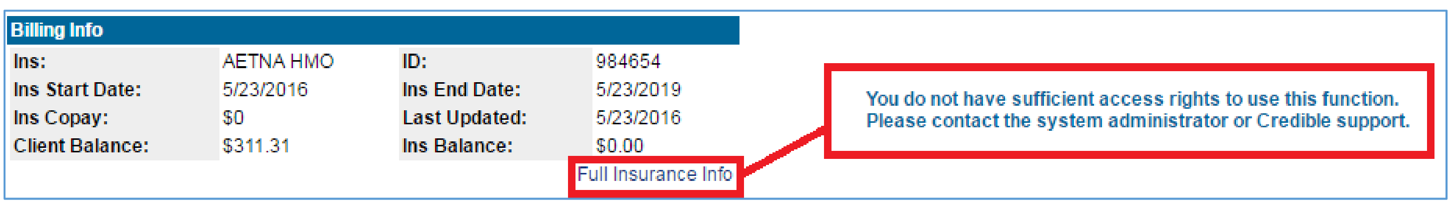
Screenshots:



When ClientInsuranceView is ENABLED



When ClientInsuranceView is DISABLED



When ClientInsuranceView is DISABLED

ClientLiabilityUpdate

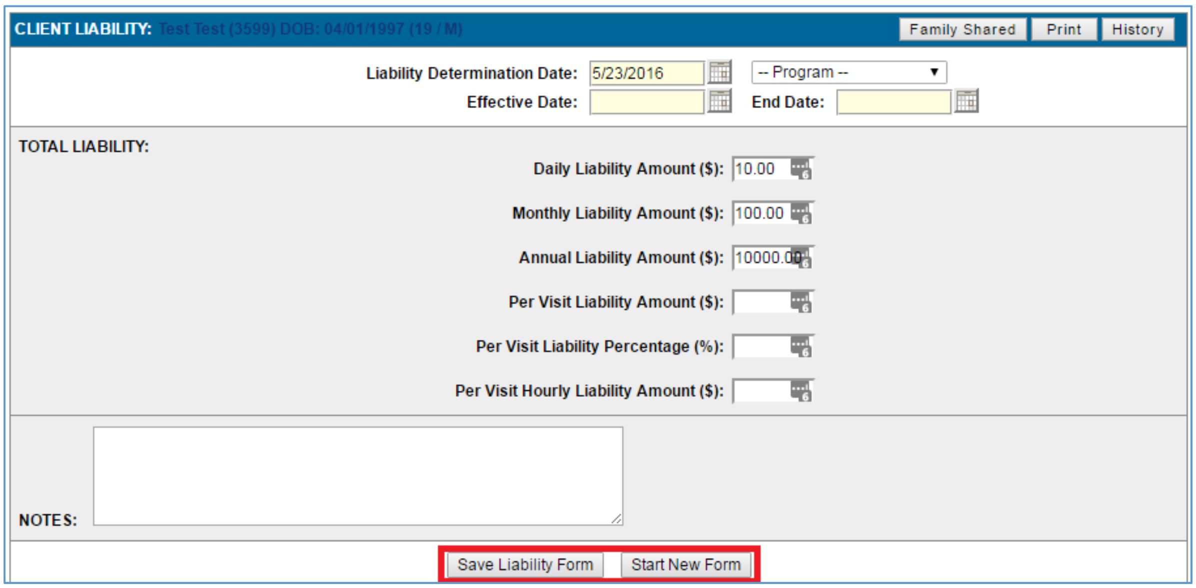
Function:

- Determines whether the user will be able to make an update to the Client's Liability. Affects whether the "Save Liability Form" and "Start New Form" buttons will display on the Client's Liability page.

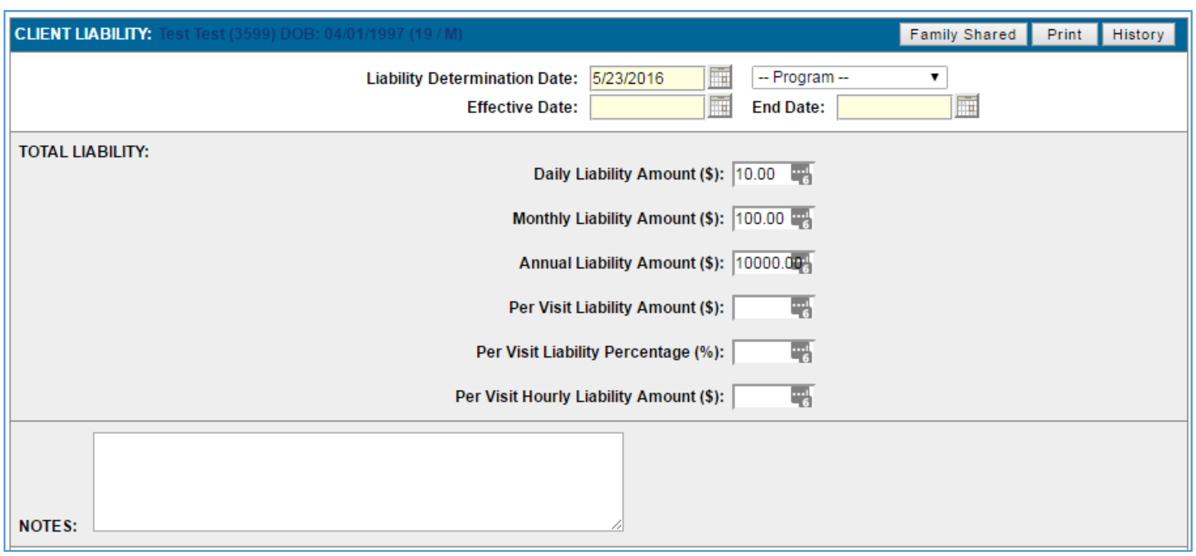
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Liability Button -> Save Liability Form and Start New Form Buttons

Screenshots:



When ClientLiabilityUpdate is ENABLED



When ClientLiabilityUpdate is DISABLED

ClientLiabilityView

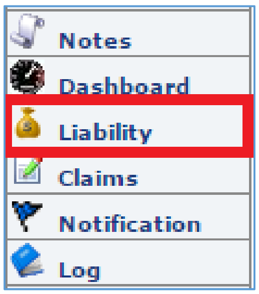
Function:

- Determines whether the user will be able to view the Client's Liability page. Controls whether the Liability button displays on the Client Nav Bar.

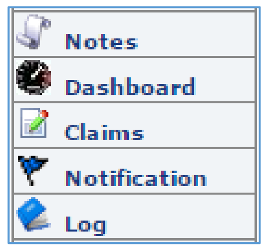
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Liability Button

Screenshots:



When ClientLiabilityView is ENABLED



When ClientLiabilityView is DISABLED

ClientNoteAdd

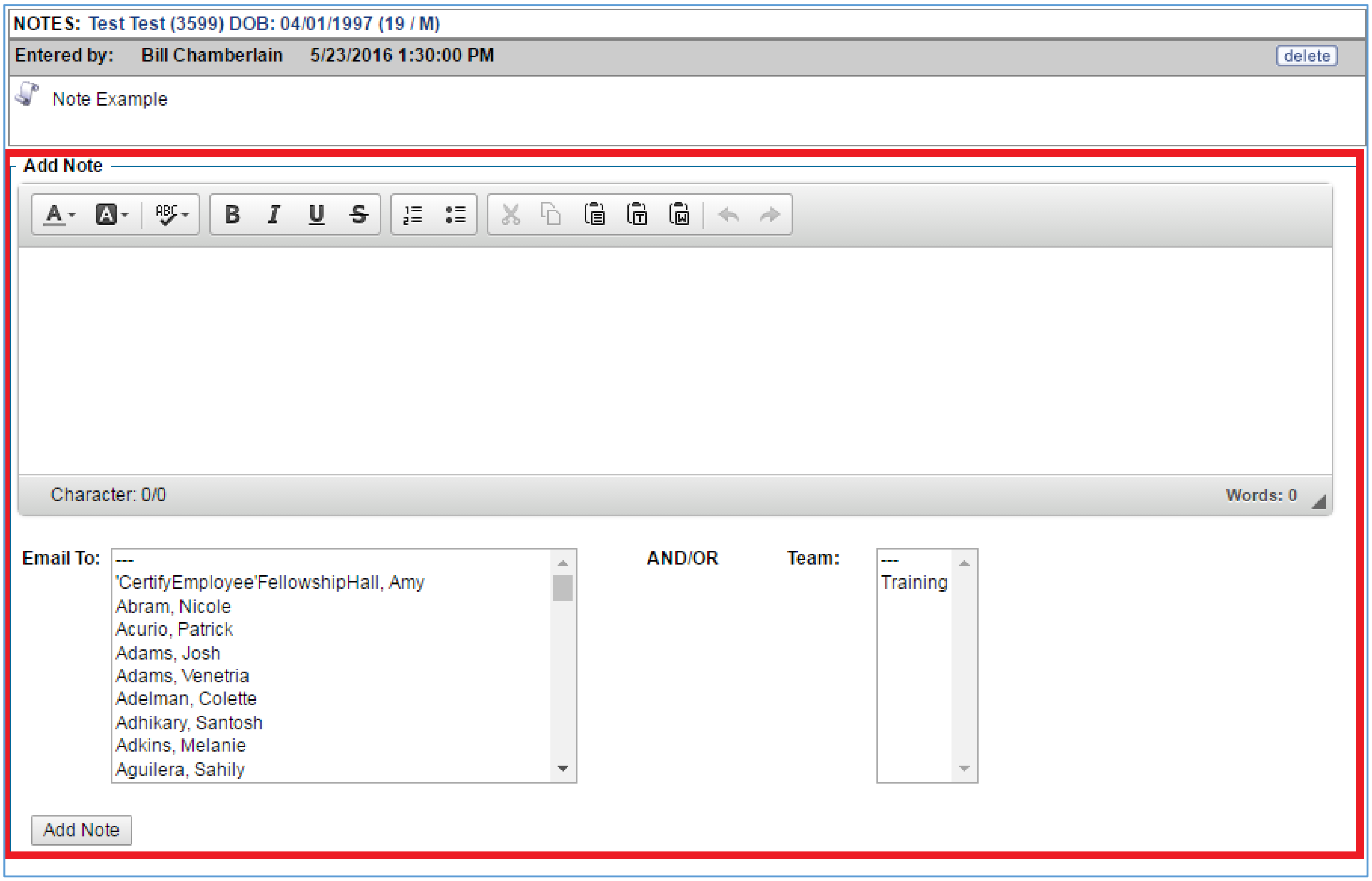
Function:

- Determines whether the user will be able to add a new Note to a Client. Controls whether the “Add Note” section will display when viewing the Client’s Notes page.

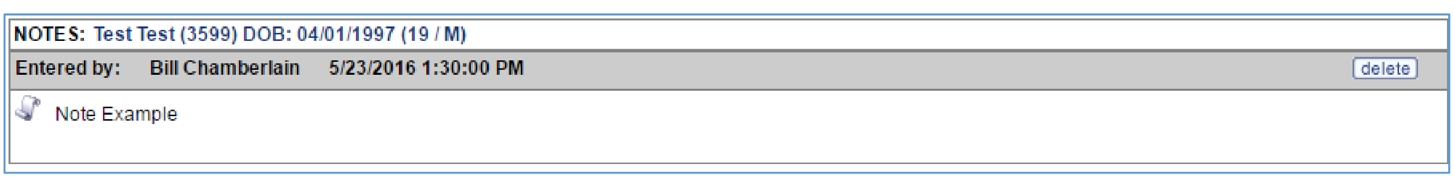
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Notes Button -> Add Note Section

Screenshots:



When ClientNoteAdd is ENABLED



When ClientNoteAdd is DISABLED

ClientNoteDelete

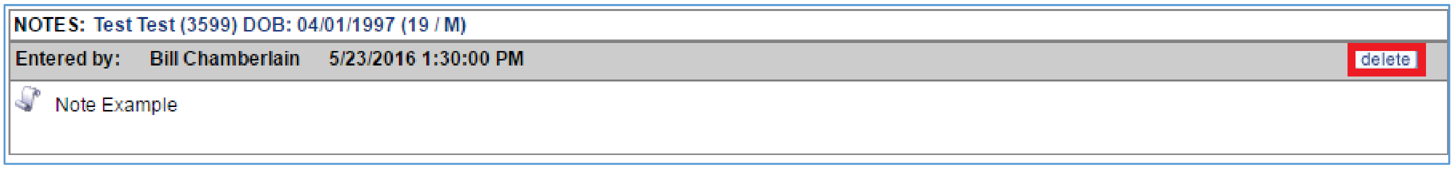
Function:

- Determines whether the user will be able to Delete an existing Note entry on a Client.

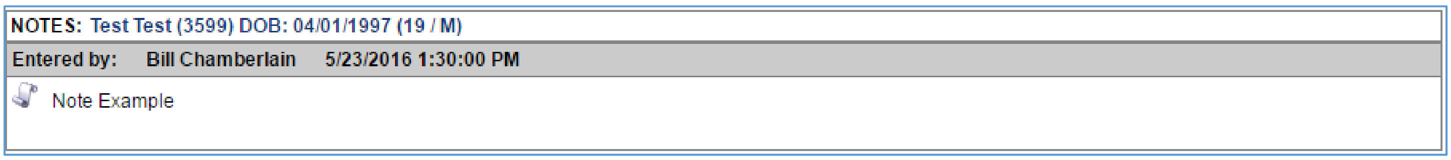
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Notes Button -> Delete Button

Screenshots:



When ClientNoteDelete is ENABLED



When ClientNoteDelete is DISABLED

ClientPictureAdd

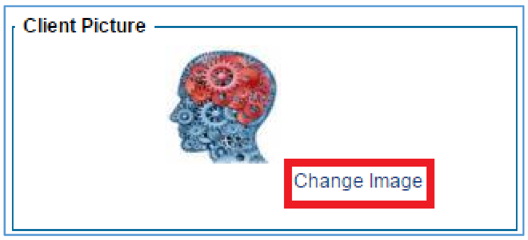
Function:

- Determines whether the user will be able to add, update, or delete a Client Picture.
  - The “Client Picture” section must be added to the Client Overview for this setting to be applicable.

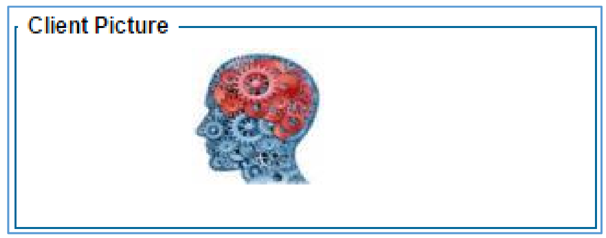
Location(s) this setting affects:

- Client Page -> Client Picture Section

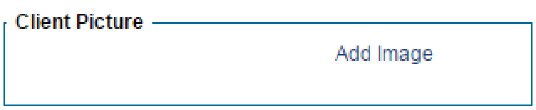
Screenshots:



When ClientPictureAdd is ENABLED



When ClientPictureAdd is DISABLED



When ClientPictureAdd is ENABLED

When ClientPictureAdd is DISABLED

ClientUserView

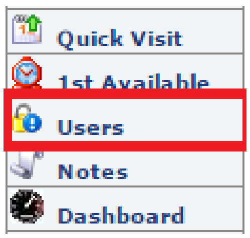
Function:

- Determines whether the user will be able to view, add, or update Client Portal Usernames.
    - If disabled, the "Users" button will not display on the Client Nav Bar.

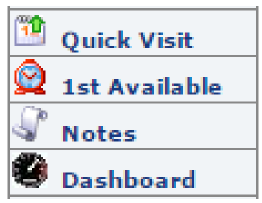
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Users Button
- Admin Tab -> Client User List -> Update Button

Screenshots:



When ClientUserView is ENABLED



When ClientUserView is DISABLED

CREDIBLE

ClientWarningAdd

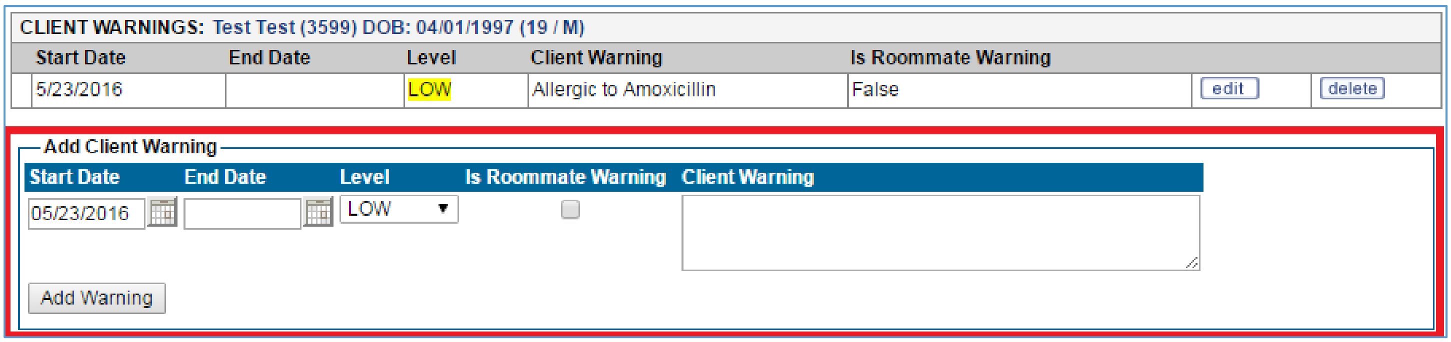
Function:

- Determines whether the user will be able to add new warnings to a Client on the Client's Warnings page.

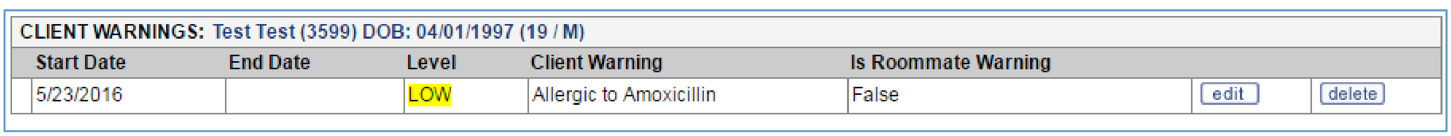
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Warnings Button

Screenshots:



When ClientWarningAdd is ENABLED



When ClientWarningAdd is DISABLED

ClientWarningDelete

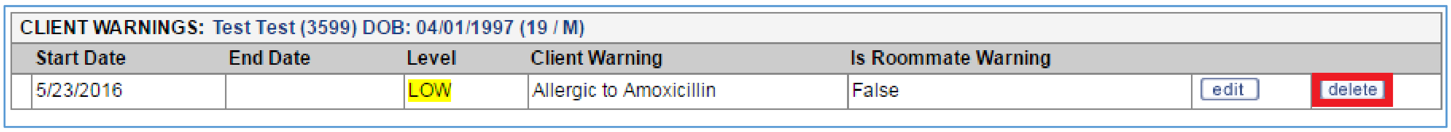
Function:

- Determines whether the user will be able to delete existing warnings on the Client's Warnings page.

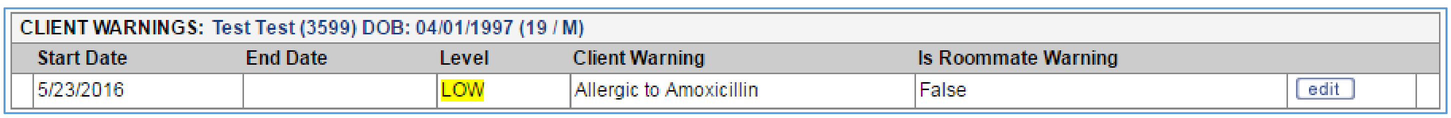
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Warnings Button -> Delete Button

Screenshots:



When ClientWarningDelete is ENABLED



When ClientWarningDelete is DISABLED

ClientWarningUpdate

Function:

- Determines whether the user will be able to edit existing warnings on the Client's Warnings page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Warnings Button -> Edit Button

Screenshots:

CLIENT WARNINGS: Test Test (3599) DOB: 04/01/1997 (19 / M)

Start Date	End Date	Level	Client Warning	Is Roommate Warning		
5/23/2016		LOW	Allergic to Amoxicillin	False	edit	delete

CLIENT WARNINGS: Test Test (3599) DOB: 04/01/1997 (19 / M)

Start Date	End Date	Level	Client Warning	Is Roommate Warning	
5/23/2016		LOW	Allergic to Amoxicillin	False	delete

ClientWarningView

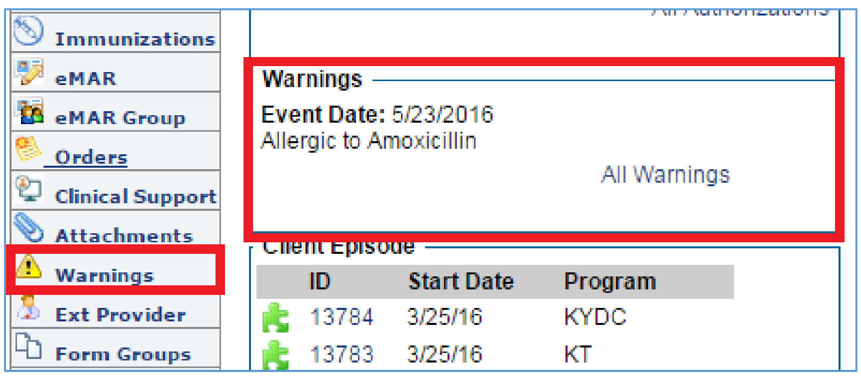
Function:

- Determines whether the user will be able to view the Warnings page on the Client Nav Bar.
  - o If disabled, the "Warnings" button will not appear.
- Determines whether the user will be able to view the Warnings module on the Client Overview Page.
  - o Only applicable if the Warnings module is set to appear.
- Also controls whether a Warning icon will display on the Client Info module.

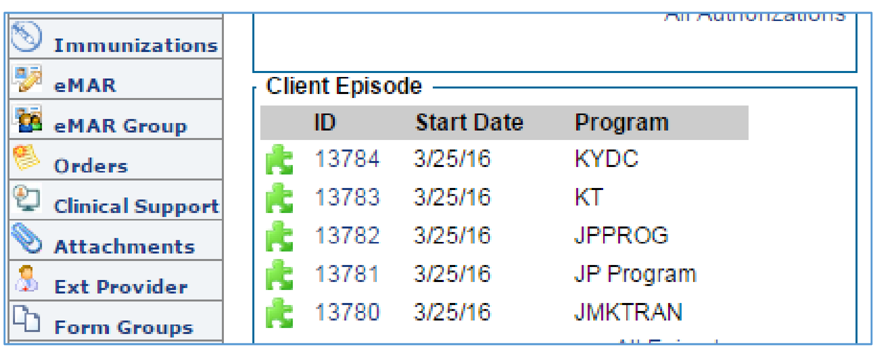
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Warnings Button -> Edit Button

Screenshots:

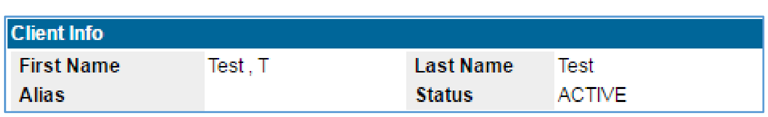


When ClientWarningView is ENABLED



When ClientWarningView is DISABLED

When ClientWarningView is ENABLED



When ClientWarningView is DISABLED

DxAdd

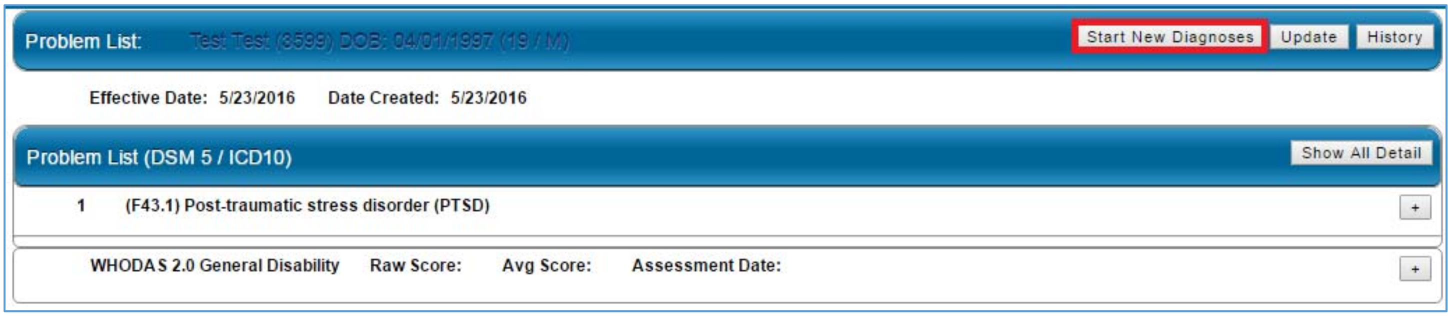
Function:

- Determines whether the user will be able to add Diagnoses to a Client, using the "Start New Diagnoses" button on the Client's Diagnosis page.

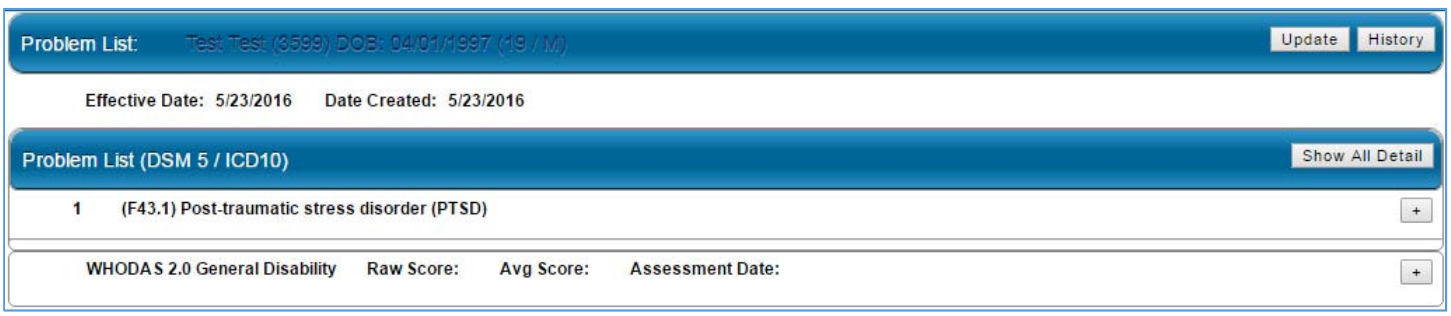
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Diagnosis Button -> Start New Diagnoses Button

Screenshots:



With DxAdd ENABLED



With DxAdd DISABLED

DxAxisDelete

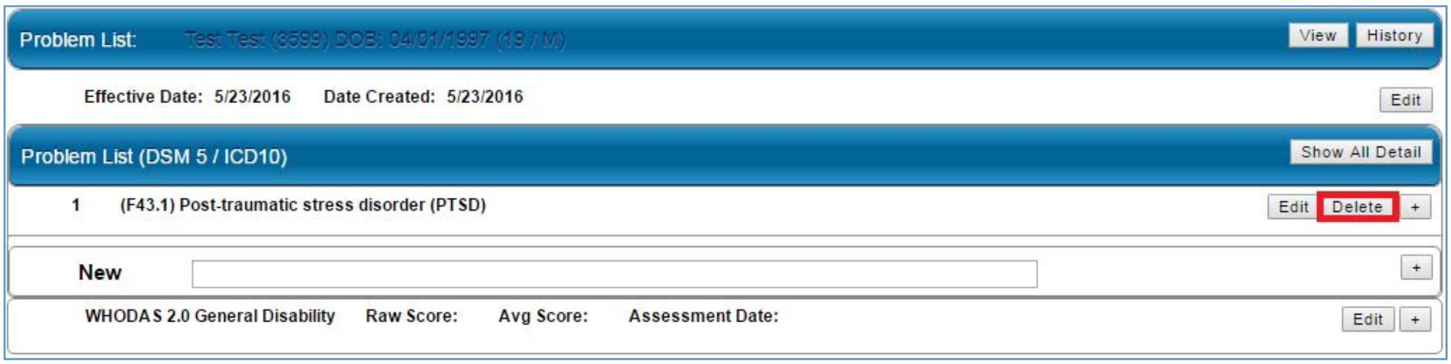
Function:

- Determines whether the user will be able to delete an existing Client Diagnosis, using the “Delete” button on the Client’s Diagnosis page.

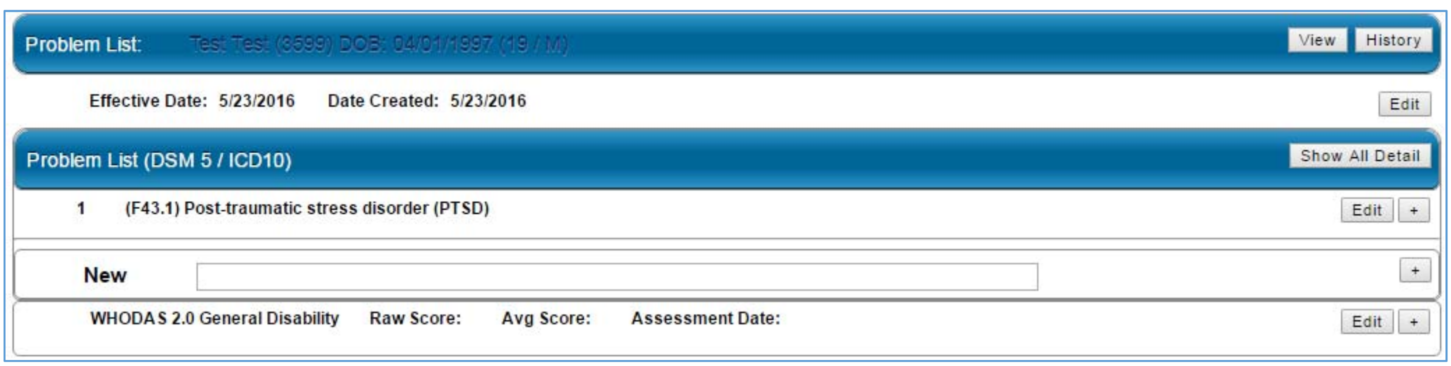
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Diagnosis Button -> Edit Button -> Delete Button

Screenshots:



When DxAxisDelete is ENABLED



When DxAxisDelete is DISABLED

DxFormsAdd

Function:

- Determines whether the user will be able to make updates to Diagnosis fields through Web Forms. If an answer on a Web Form is set to map to a Diagnosis field, this setting will determine whether the Form answer will map to that field or not.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Diagnosis Button

Screenshots:

DxUpdate

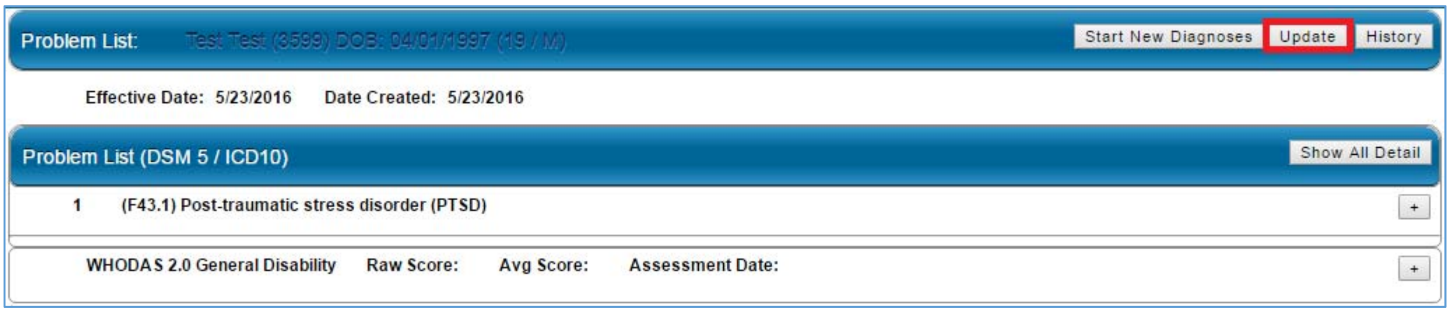
Function:

- Determines whether the user will be able to use the “Update” button in the Client’s Diagnosis section to either Delete or Edit an existing Diagnosis entry.

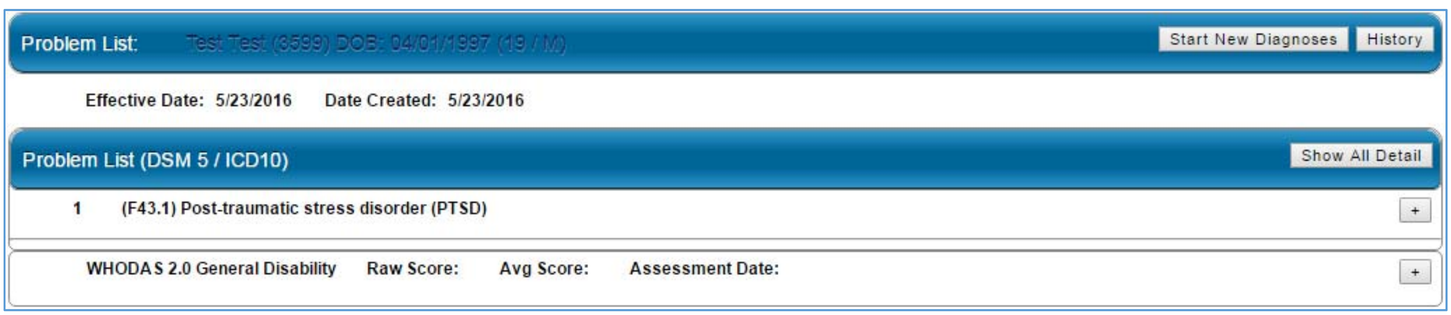
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Diagnosis Button -> Update Button

Screenshots:



When DxUpdate is ENABLED



When DxUpdate is DISABLED

DxView

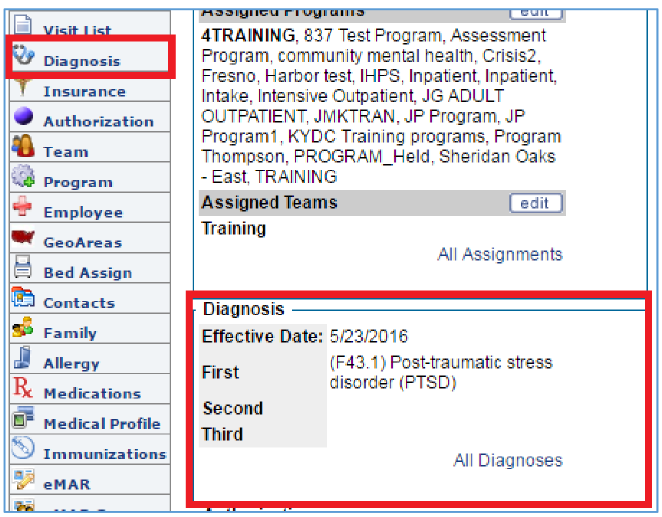
Function:

- Determines whether the user will be able to view the Client's Diagnosis page from the Client Nav Bar.
  - If Disabled, the Diagnosis button will not display on the Client Nav Bar.
- Determines whether the Diagnosis module will display on the Client Overview.
  - Only applicable if the Diagnosis module is set to display.

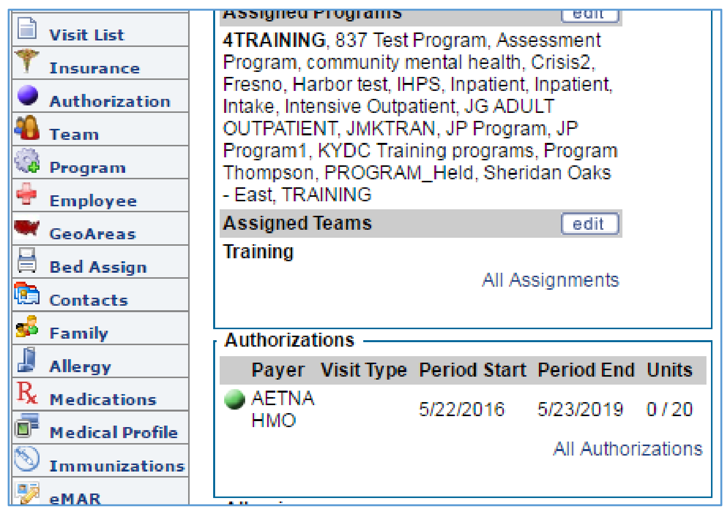
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Diagnosis Button
- Client Page -> Diagnosis Module

Screenshots:



When DxView is ENABLED



When DxView is DISABLED

ExternalProviderUpdate

Function:

- Determines whether the user will be able to make updates to existing External Provider entries on a Client.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Ext Provider Button -> Edit Button

Screenshots:

EXTERNAL CARE PROVIDERS: Test Test (3599) DOB: 04/01/1997 (19 / M) Template

Name	First Name	Last Name	Specialty	Phone	Start Date	Term Date	ROI Obtained	ROI Obtained Date	ROI Expires Date	Is PCP	Notes			
Jane Doe			Endocrinologist				☐			☐		detail	edit	delete

When ExternalProviderUpdate is ENABLED

EXTERNAL CARE PROVIDERS: Test Test (3599) DOB: 04/01/1997 (19 / M) Template

Name	First Name	Last Name	Specialty	Phone	Start Date	Term Date	ROI Obtained	ROI Obtained Date	ROI Expires Date	Is PCP	Notes		
Jane Doe			Endocrinologist				☐			☐		detail	delete

When ExternalProviderUpdate is DISABLED

ExternalProviderView

Function:

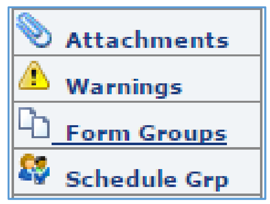
- Determines whether the user will be able to view the External Providers on a Client.
  - If disabled, the "Ext Provider" button will not display on the Client Nav Bar.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Ext Provider Button

Screenshots:

When ExternalProviderView is ENABLED



When ExternalProviderView is DISABLED

FosterHomeIntervalEdit

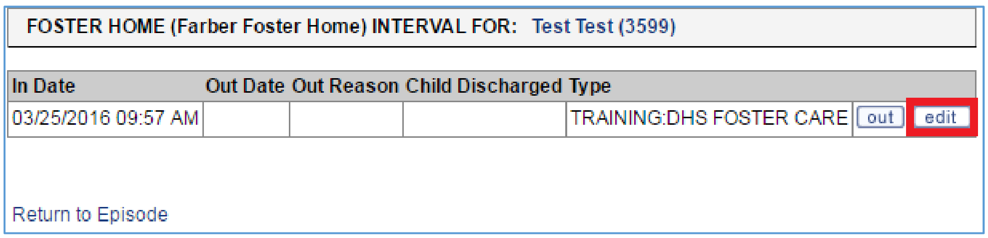
Function:

- Determines whether the user will be able to edit an existing Foster Home Interval on a Client Episode.

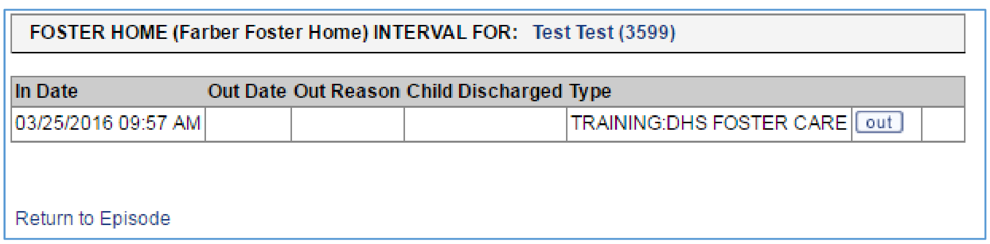
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Episodes Button -> View Button -> Foster Home Intervals Button -> Edit Button
- Client Page -> Episodes Module -> Selected Episode -> Foster Home Intervals Button -> Edit Button

Screenshots:



When FosterHomeIntervalEdit is ENABLED



When FosterHomeIntervalEdit is DISABLED

ImmunizationAdd

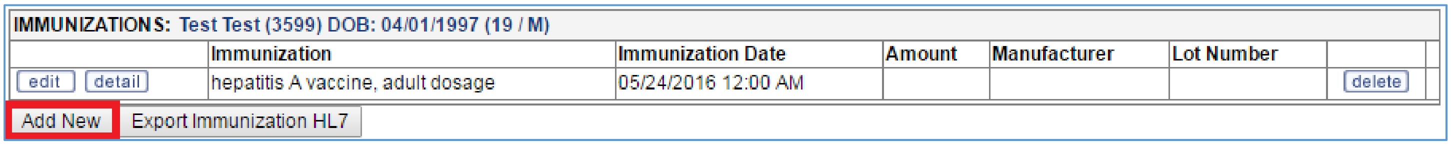
Function:

- Determines whether the user will be able to add a new Immunization to a Client.
    - If disabled, the “Add New” button will not display when viewing a Client’s Immunizations page.

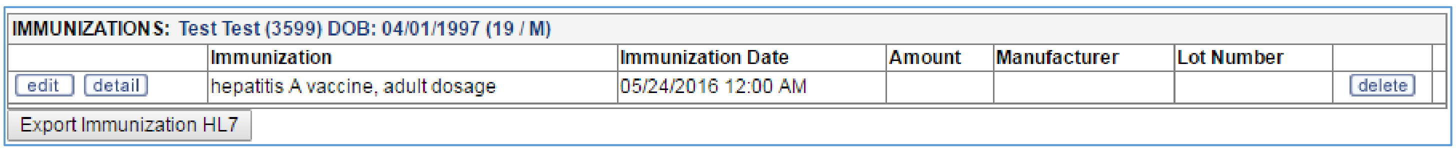
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Immunizations Button -> Add New Button

Screenshots:



When ImmunizationAdd is ENABLED



When ImmunizationAdd is DISABLED

ImmunizationDelete

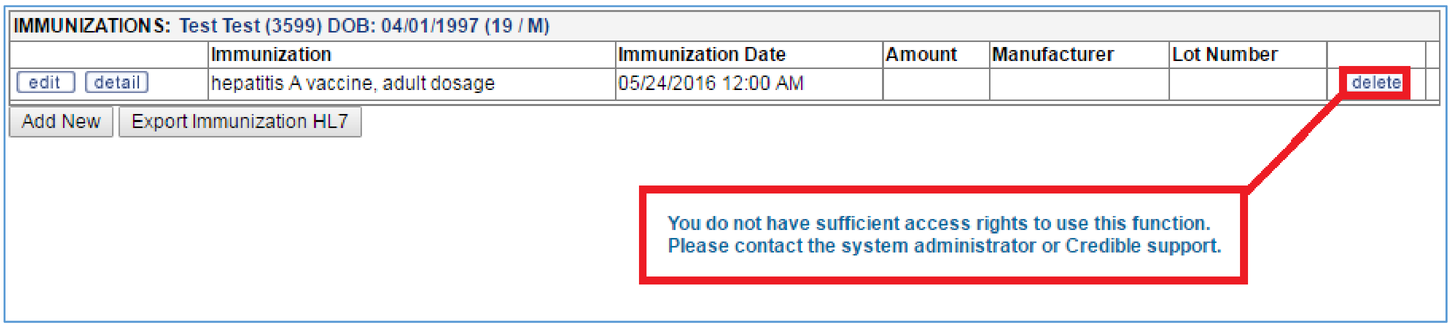
Function:

- Determines whether the user will be able to delete a Client Immunization entry.
  - If disabled, an "Insufficient Rights" message will display when trying to delete an Immunization.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Immunizations Button -> Delete Button

Screenshots:



When ImmunizationDelete is DISABLED

ImmunizationEdit

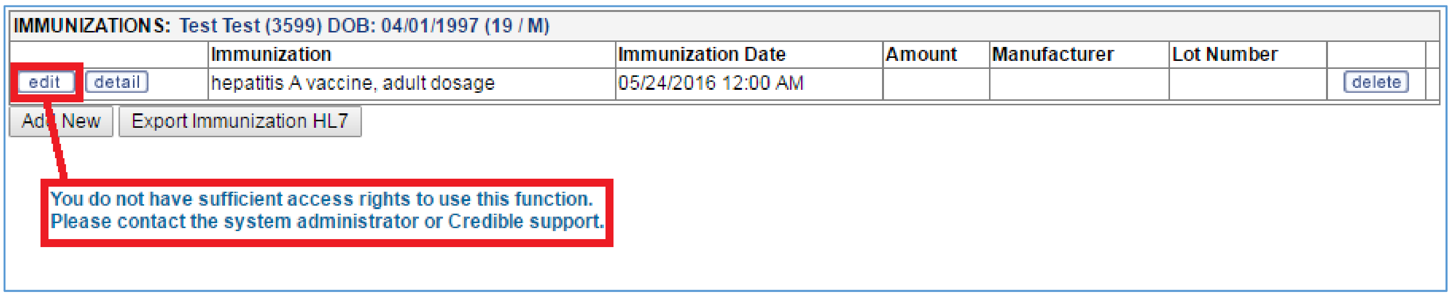
Function:

- Determines whether the user will be able to edit a Client Immunization entry.
    - If disabled, an “Insufficient Rights” message will display when trying to edit an Immunization.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Immunizations Button -> Edit Button

Screenshots:



ImmunizationView

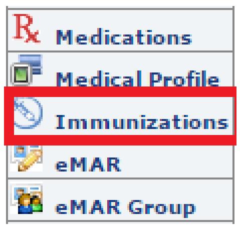
Function:

- Determines whether the user will be able to edit a Client Immunization entry.
    - If disabled, an "Insufficient Rights" message will display when trying to edit an Immunization.

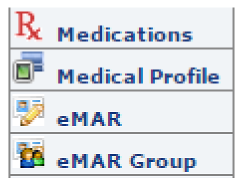
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Immunizations Button

Screenshots:



When ImmunizationView is ENABLED



When ImmunizationView is DISABLED

MedicalProfileAdd

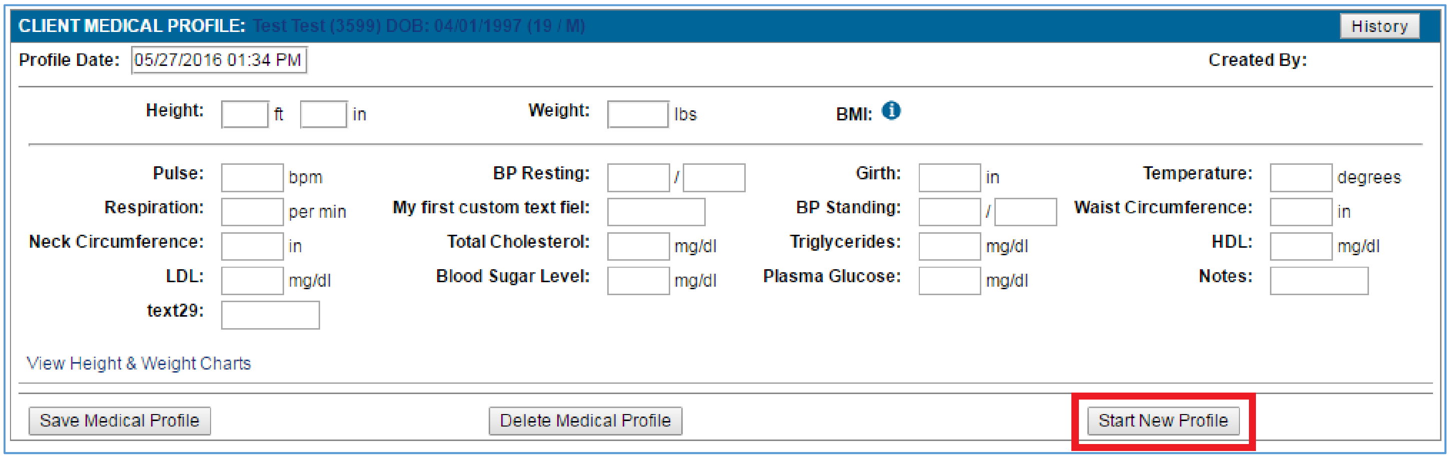
Function:

- Determines whether the user will be able to start a new Medical Profile on a Client.
  - If Disabled, the “Start New Profile” button will not display.

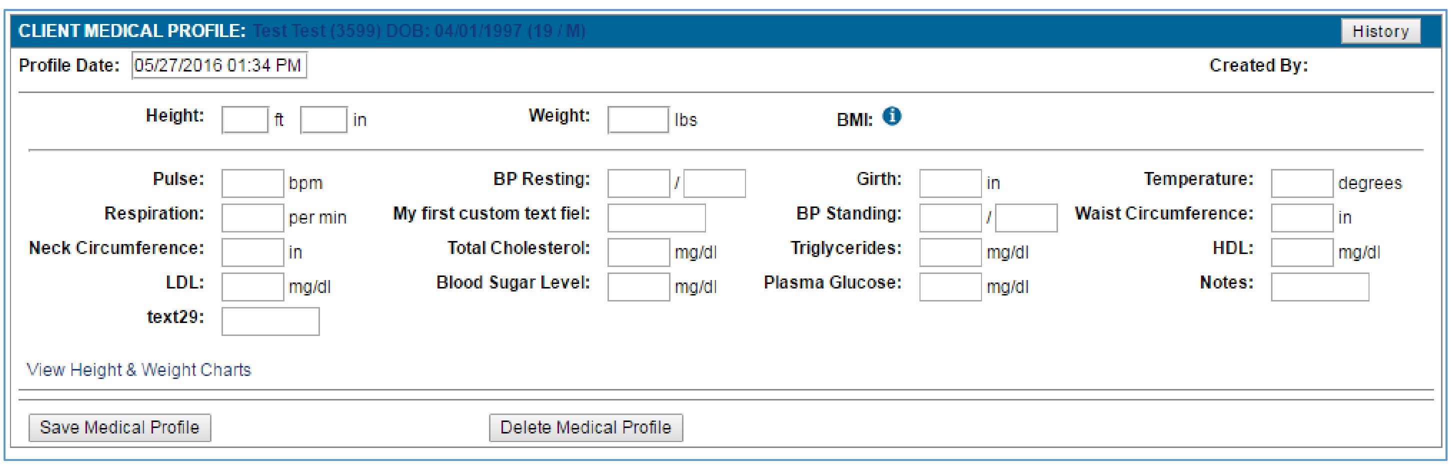
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medical Profile Button -> Start New Profile Button

Screenshots:



When MedicalProfileAdd is ENABLED



When MedicalProfileAdd is DISABLED

MedicalProfileDelete

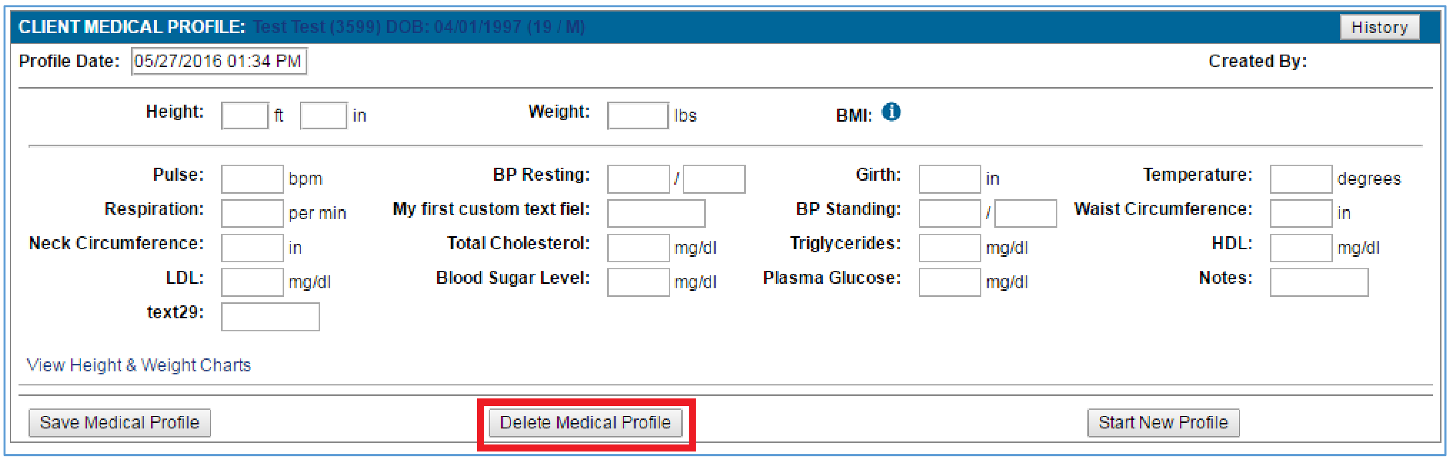
Function:

- Determines whether the user will be able to delete the Medical Profile on a Client.
    - If Disabled, the “Delete Medical Profile” button will not display.

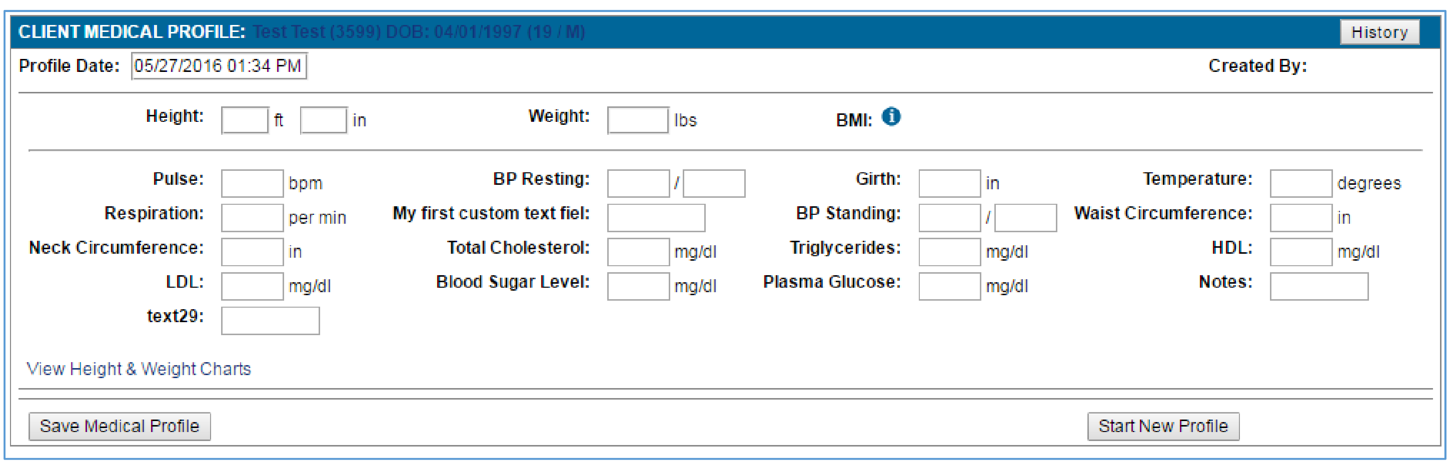
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medical Profile Button -> Delete Medical Profile Button

Screenshots:



When MedicalProfileDelete is ENABLED



When MedicalProfileDelete is DISABLED

MedicalProfileUpdate

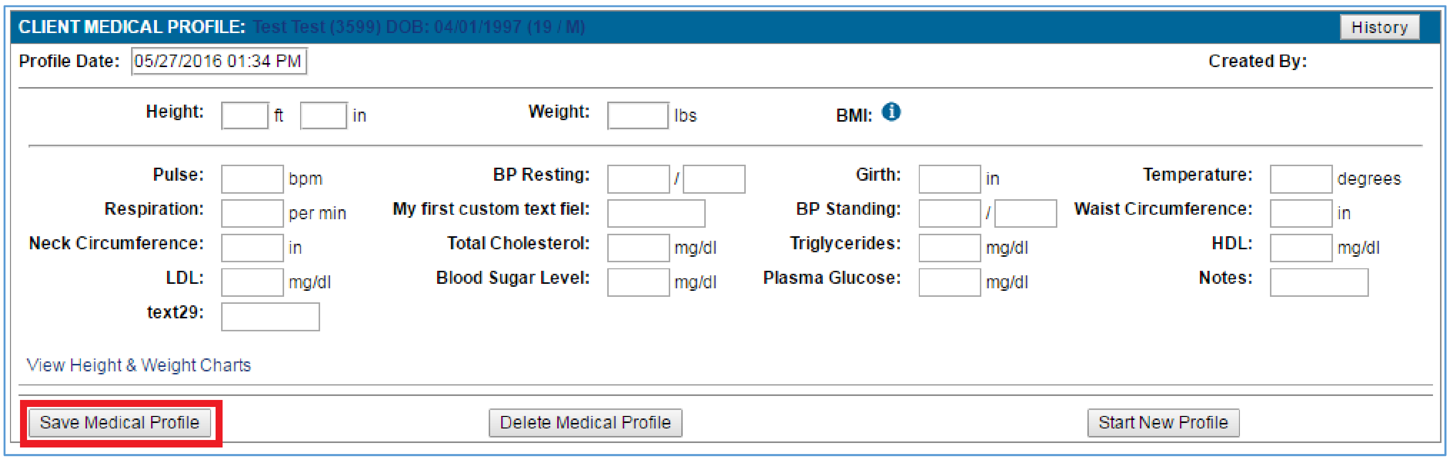
Function:

- Determines whether the user will be able to save or update the Medical Profile on a Client.
    - If Disabled, the “Save Medical Profile” button will not display.

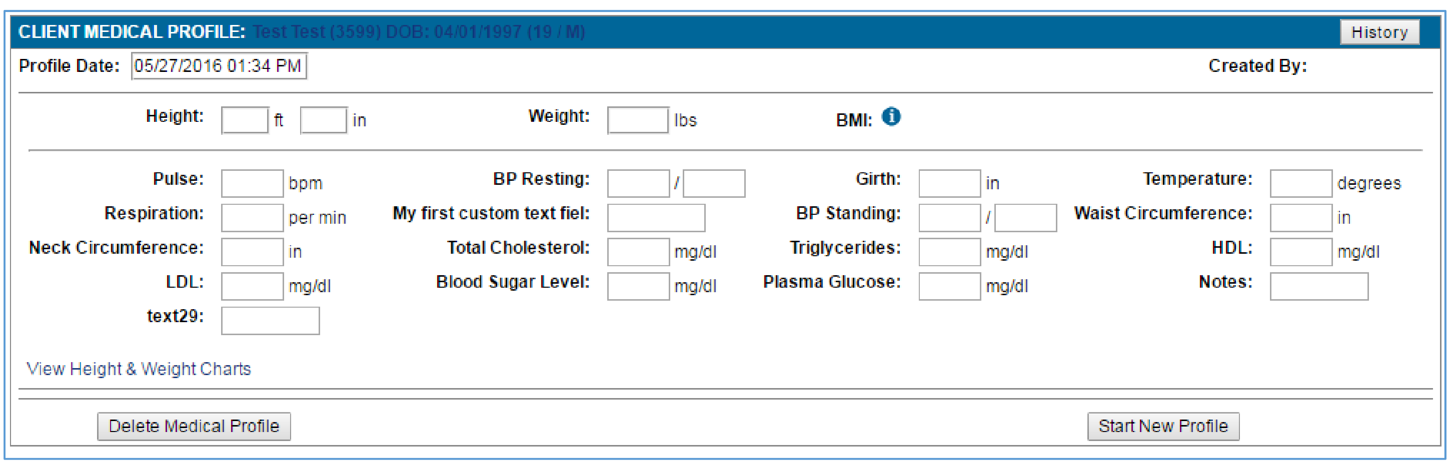
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medical Profile Button -> Save Medical Profile Button

Screenshots:



When MedicalProfileUpdate is ENABLED



When MedicalProfileUpdate is DISABLED

MedicalProfileUpdateInactive

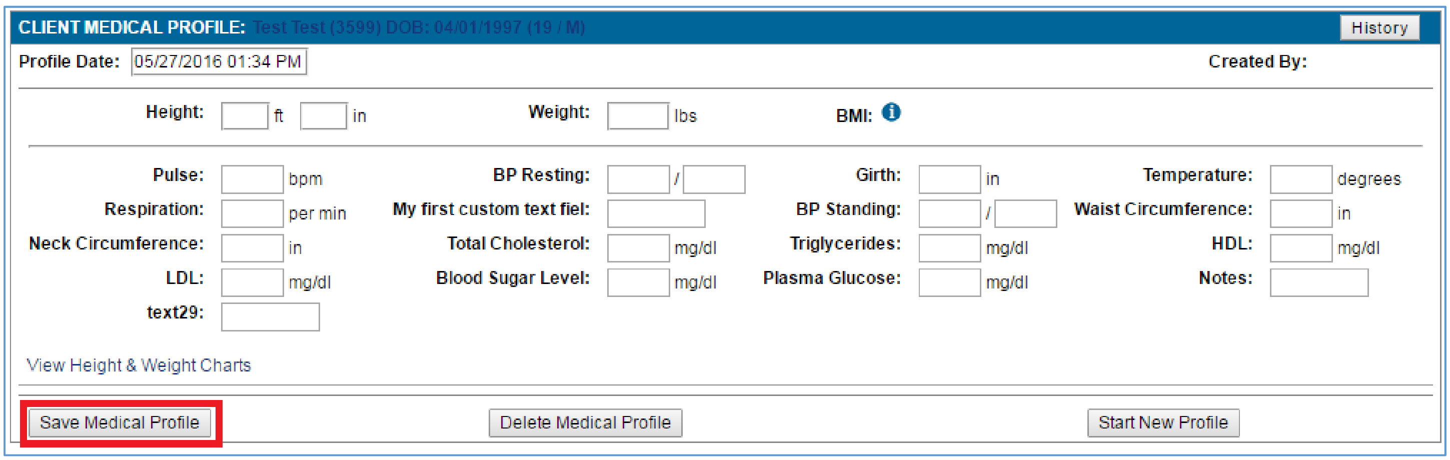
Function:

- Determines whether the user will be able to save or update an Inactive Medical Profile on a Client. The Inactive Medical Profiles are accessed through the "History" button.
    - If Disabled, the "Save Medical Profile" button will not display.

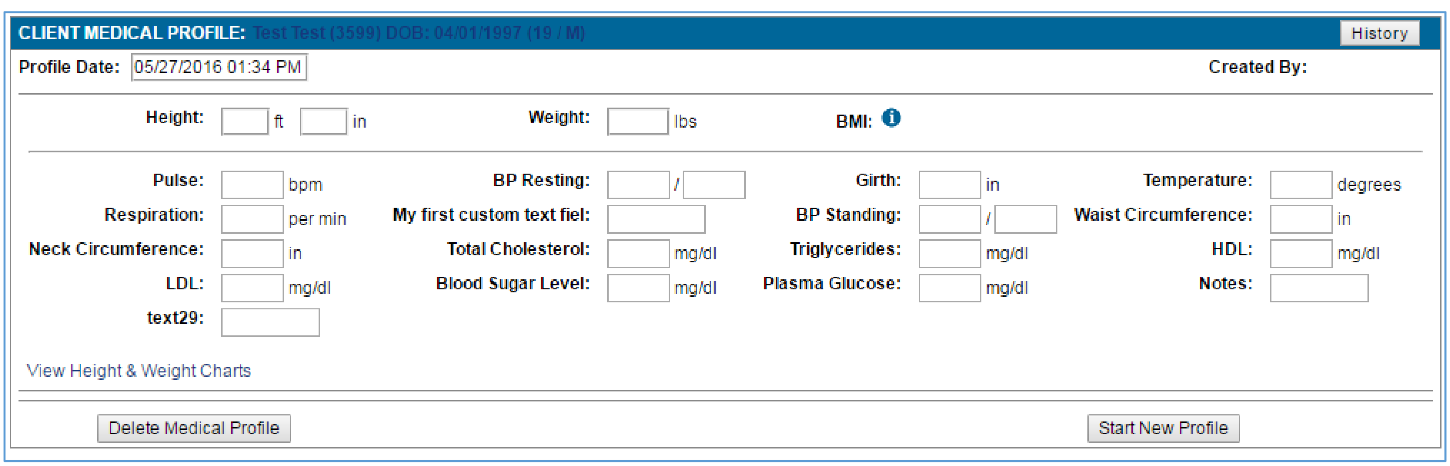
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medical Profile Button -> History -> View Button -> Save Medical Profile Button

Screenshots:



When MedicalProfileUpdateInactive is ENABLED



When MedicalProfileUpdateInactive is DISABLED

MedicalProfileView

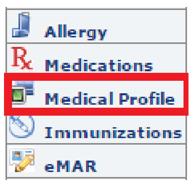
Function:

- Determines whether the user will be able to save or update an Inactive Medical Profile on a Client. The Inactive Medical Profiles are accessed through the “History” button.
    - If Disabled, the “Save Medical Profile” button will not display.

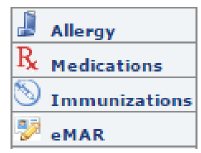
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medical Profile Button

Screenshots:



When MedicalProfileView is ENABLED



When MedicalProfileView is DISABLED

RISarchive

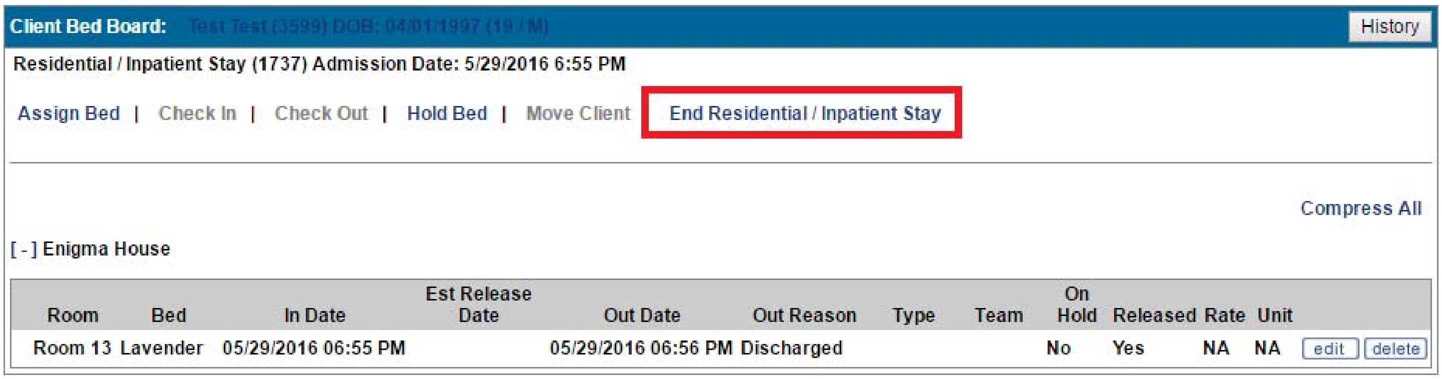
Function:

- Determines whether the user will be able to close / archive Residential / Inpatient stays.
  - If Disabled, the “End Residential / Inpatient Stay” link will be greyed out, and will not be able to be clicked.

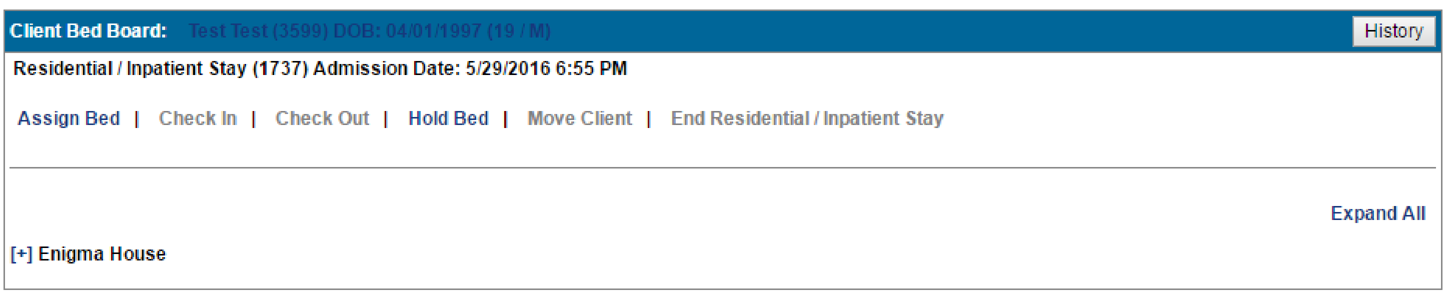
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Bed Assign Button -> End Residential / Inpatient Stay

Screenshots:



When RISarchive is ENABLED



When RISarchive is DISABLED

RISReactivate

Function:

- Determines whether the user will be able to reactivate closed Residential / Inpatient stays.
    - If Disabled, the "Reactivate" link will not display.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Bed Assign Button -> History -> Reactivate

Screenshots:

When RISReactivate is ENABLED

When RISReactivate is DISABLED

RxDelete

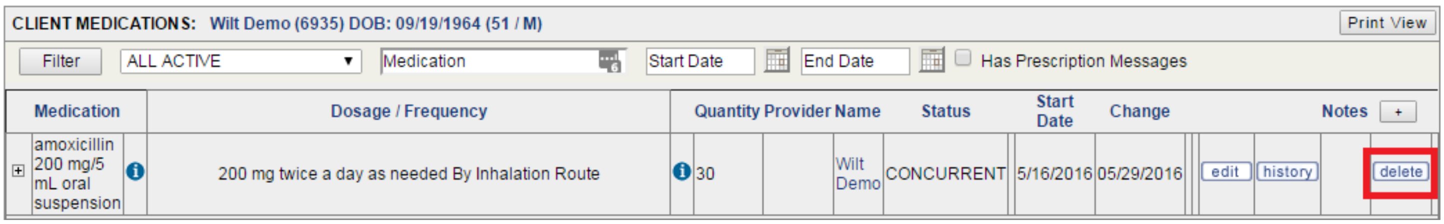
Function:

- Determines whether the user will be able to delete Medication entries.

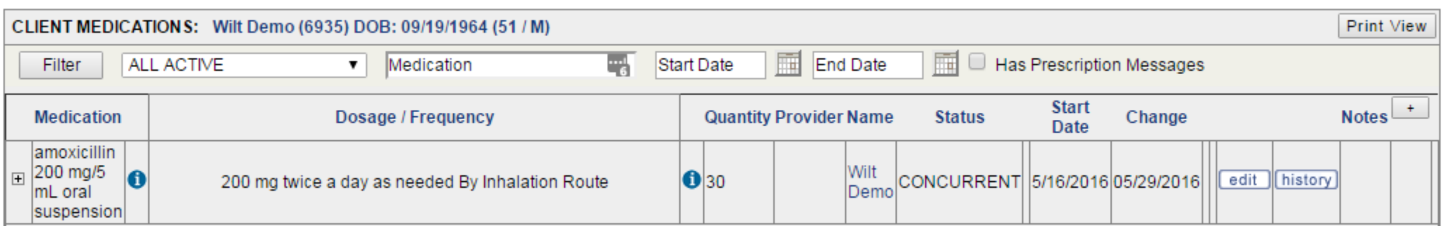
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications -> Delete

Screenshots:



When RxDelete is ENABLED



When RxDelete is DISABLED

RxFormsAdd

Function:

- Determines whether the user will be able to map back details to the Medications section from a Form.
    - If Disabled, the Medication details will not map back, even if the Form is set up to do so.

RxUpdate

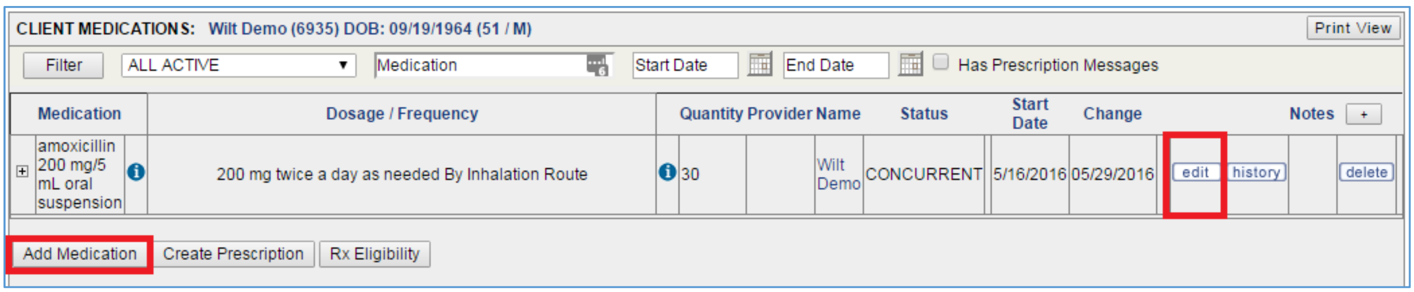
Function:

- Determines whether the user will be able to add or update a Medication entry.

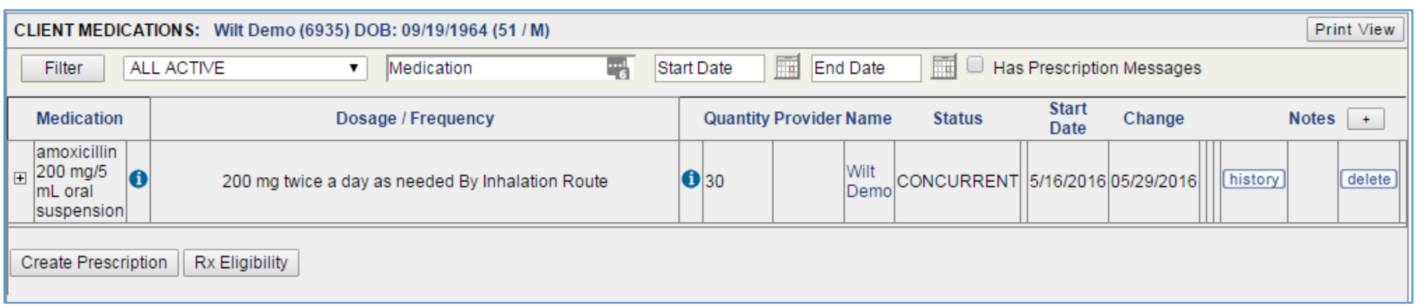
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications -> Edit Button
- Client Page -> Client Nav Bar -> Medications -> Add Medication Button
- Client Page -> Client Nav Bar -> Orders-> Add Medication Button

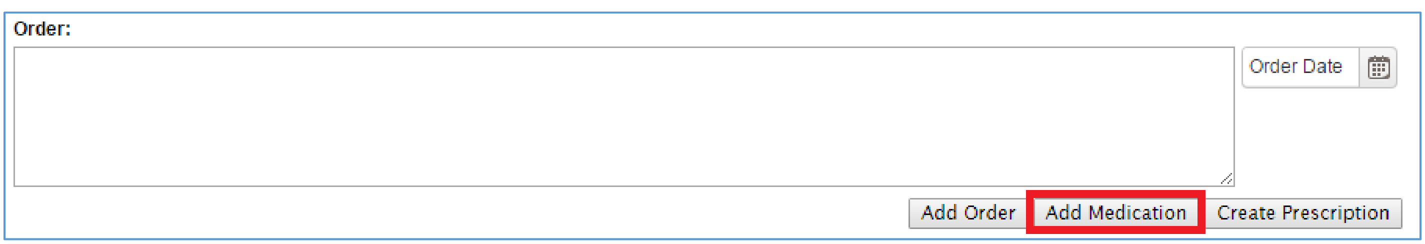
Screenshots:



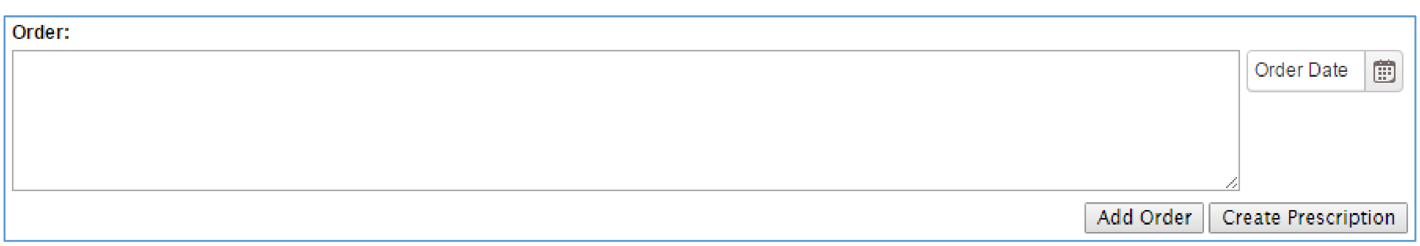
When RxUpdate is ENABLED



When RxUpdate is DISABLED



When RxUpdate is ENABLED



When RxUpdate is DISABLED

RxView

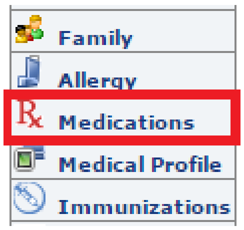
Function:

- Determines whether the user will be able to add or update a Medication entry.

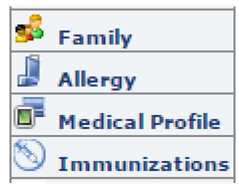
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications

Screenshots:



When RxView is ENABLED



When RxView is DISABLED

TxAdd

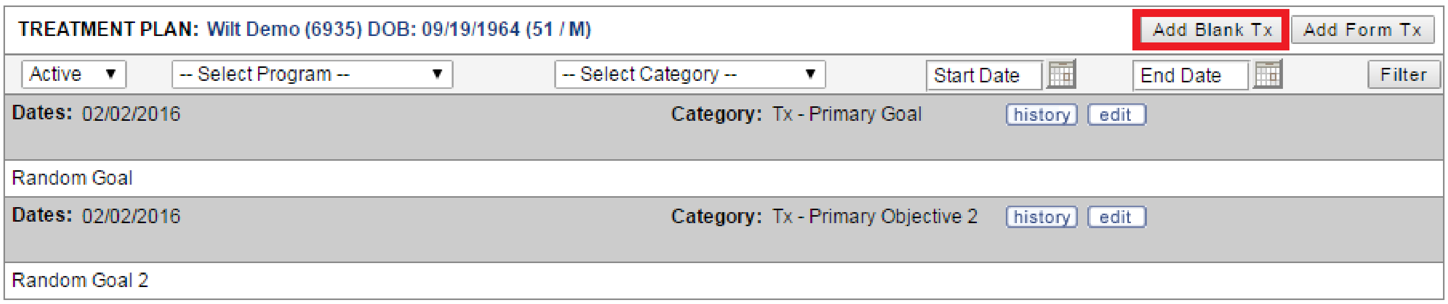
Function:

- Determines whether the user will be able to view and use the “Add Blank Tx” button when viewing a Client’s Tx Plan.

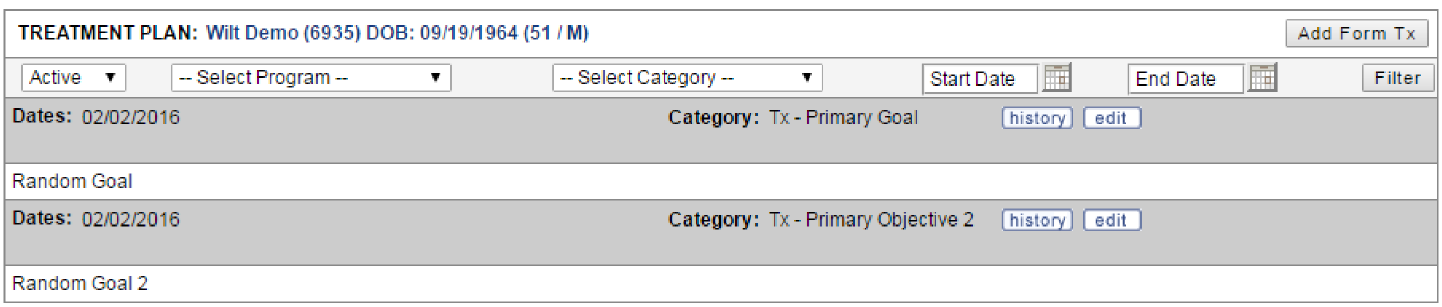
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Tx Plan -> Add Blank Tx Button

Screenshots:



When TxAdd is ENABLED



When TxAdd is DISABLED

TxDelete

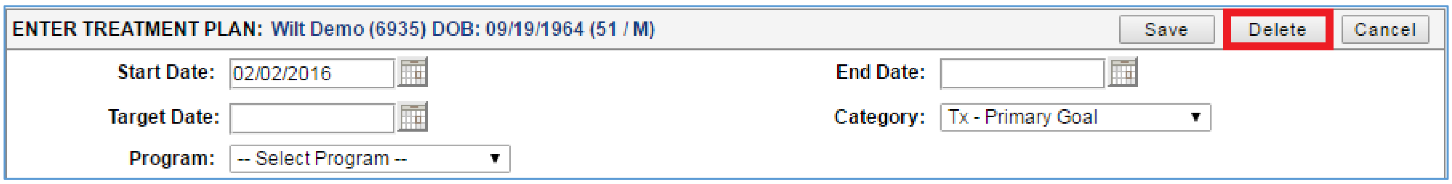
Function:

- Determines whether the user will be able to delete TxPlan entries. If disabled, the “Delete” button will not display when editing a TxPlan entry.

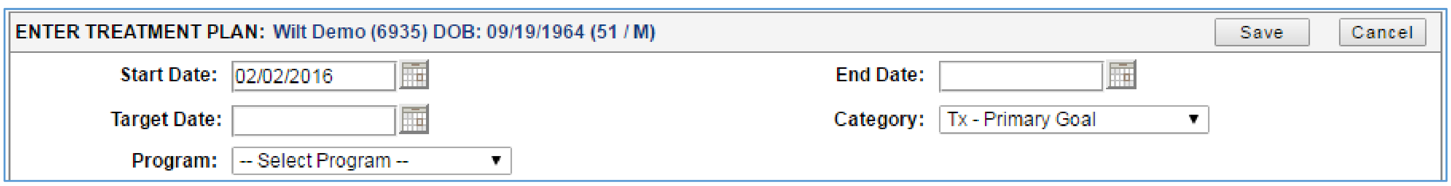
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Tx Plan -> Edit Button -> Delete Button

Screenshots:



When TxDelete is ENABLED



When TxDelete is DISABLED

TxFormsAdd

Function:

- Determines whether the user will be able to map back details to the TxPlan section from a Form.
    - If Disabled, the TxPlan details will not map back, even if the Form is set up to do so.

TxPlusBuild

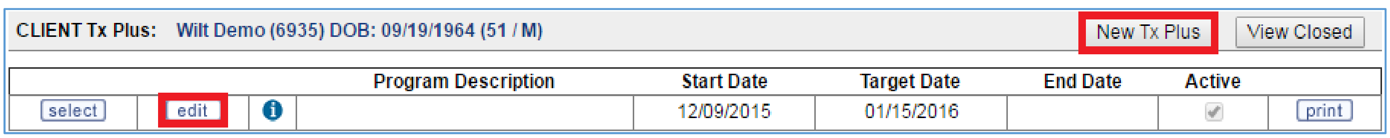
Function:

- Determines whether the user will be able to add new TxPlus plans through the Client Nav Bar or Web Forms.
    - NOTE: If disabled, and TxPlusView is also disabled, “TxPlus” will not appear on the Client Nav Bar.
- Determines if the user will be able to edit or add TxPlus segment Titles, Dates, or Descriptions when TxPlus is accessed from the Client Nav Bar.
    - If disabled, the edit button will not display.
- Determines if the user will be able to edit or add TxPlus segment Titles, Dates, or Descriptions when TxPlus is accessed on a Visit Form.
    - NOTE: This setting does not affect the ability to Document against existing TxPlus segments.

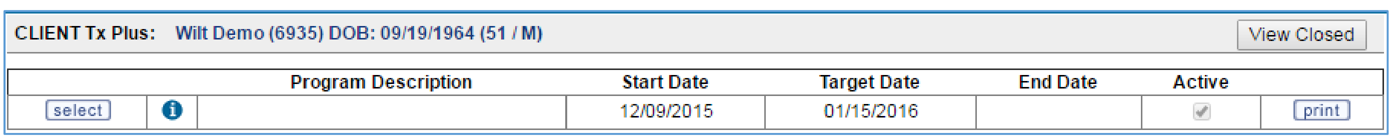
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> TxPlus -> New Tx Plus Button
- Client Page -> Client Nav Bar -> TxPlus -> Edit Button
- Visit Web Form -> TxPlus Section (If Applicable)

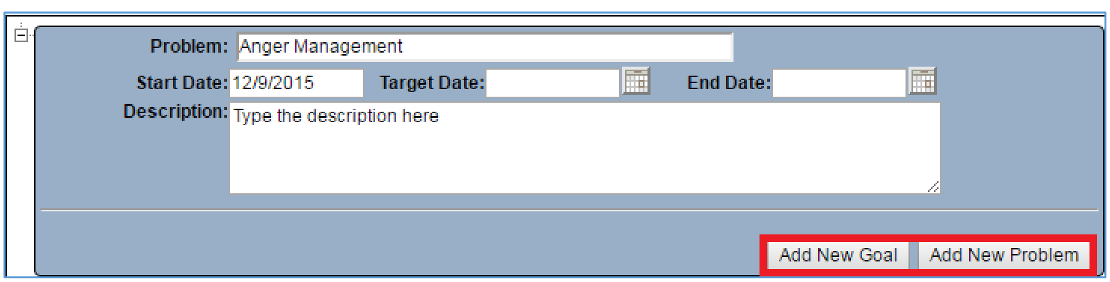
Screenshots:



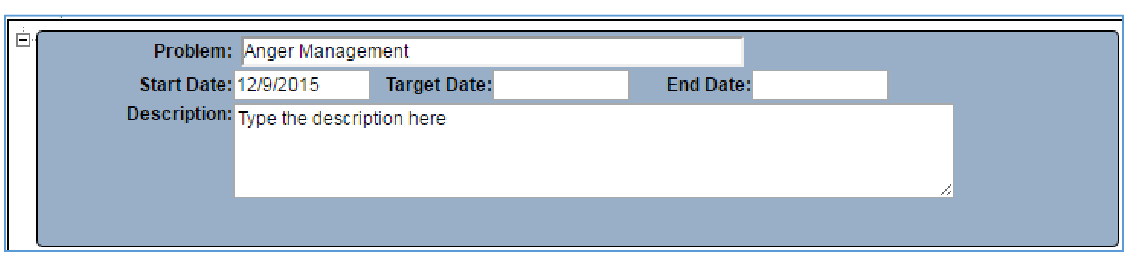
When TxPlusBuild is ENABLED



When TxPlusBuild is DISABLED



When TxPlusBuild is ENABLED



When TxPlusBuild is DISABLED

TxPlusBuildFromForm

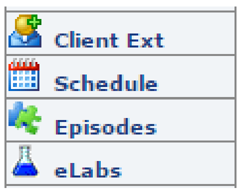
Function:

- This is an anti-right, that will only allow the user to build/edit TxPlus plans from forms.
    - NOTE: If enabled, this will remove the TxPlus button from the Client Nav Bar.

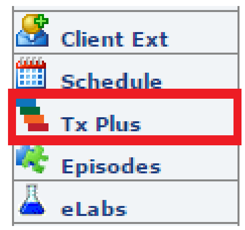
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> TxPlus

Screenshots:



When TxPlusBuildFromForm is ENABLED



When TxPlusBuildFromForm is DISABLED

TxPlusDelete

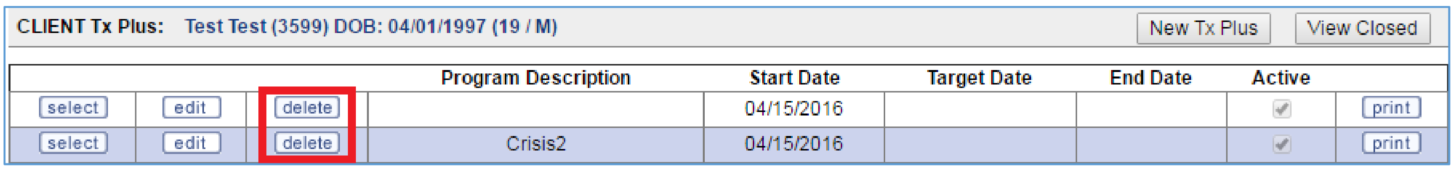
Function:

- Determines whether the user will be allowed to delete an existing TxPlus entry on a Client.
    - NOTE: Even with this setting enabled, a user will not be able to delete a TxPlus entry that has been documented against, or one that is linked to an Incomplete Visit. Those entries show with a blue 'i' next to the edit button where the delete button would normally appear.

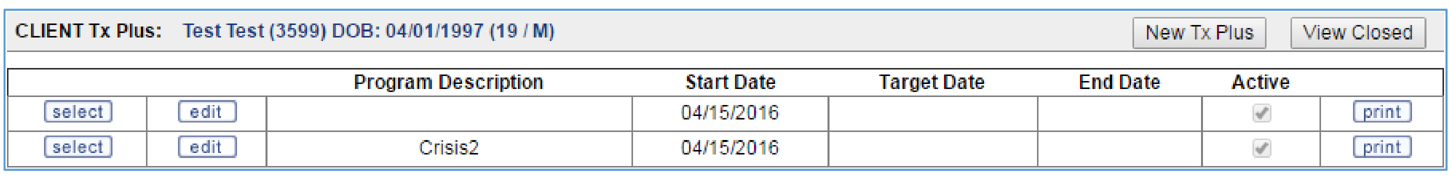
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> TxPlus -> Delete Button

Screenshots:



When TxPlusDelete is ENABLED



When TxPlusDelete is DISABLED

TxPlusInactive

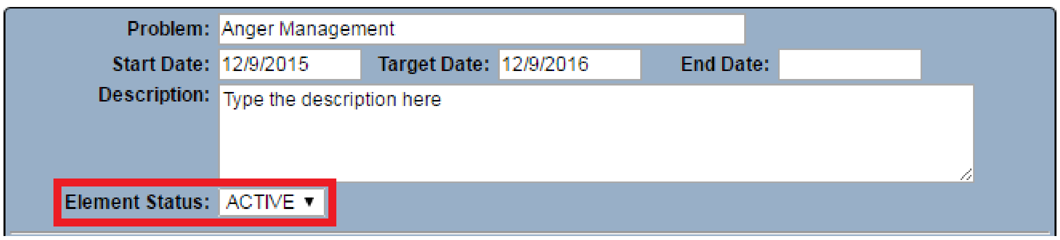
Function:

- Determines whether the user will be allowed to mark TxPlus elements as Inactive.
  - If disabled, the “Element Status” dropdown will still appear, however the dropdown will not activate when clicked.
  - NOTE: This setting is only applicable if the domain has the following Partner Config setting enabled: “Inactivate Individual Tx Plus Elements”

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> TxPlus -> Edit Button -> Element Status Dropdown

Screenshots:



When TxPlusInactive is DISABLED, this dropdown cannot be altered.

TxPlusView

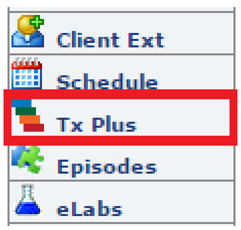
Function:

- If TxPlusBuild is disabled, this will still allow the user to view the TxPlus option on the Client Nav Bar, and will allow the TxPlus plans to be read-only.
    - NOTE: If TxPlusBuild is enabled, this setting will have no effect.

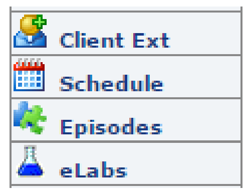
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> TxPlus -> Select Button

Screenshots:



When TxPlusView is ENABLED



When TxPlusView is DISABLED

TxUpdate

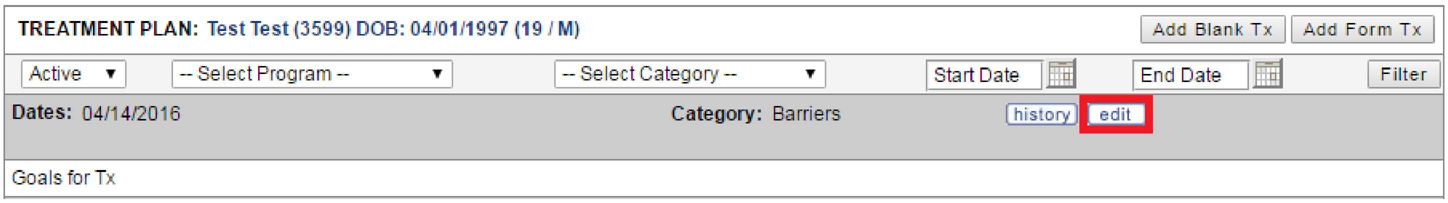
Function:

- Determines whether the user will be allowed to edit free text Tx Plan entries.

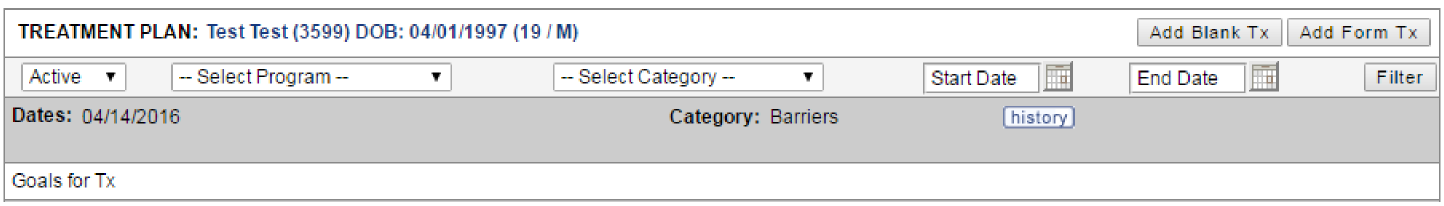
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Tx Plan -> Edit Button

Screenshots:



When TxUpdate is ENABLED



When TxUpdate is DISABLED

TxView

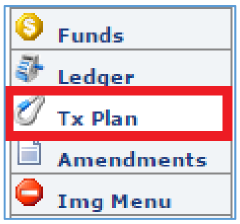
Function:

- Determines whether the user will be allowed to access the Tx Plan button on the Client Nav Bar.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Tx Plan

Screenshots:



When TxView is ENABLED

When TxView is DISABLED

eLabs

Function:

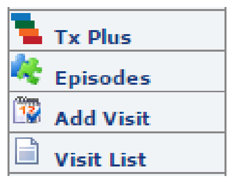
- Determines whether the user will be able to access the eLabs functionality from the Client Nav Bar.
  - NOTE: Only applies to Partners that have eLabs enabled from the Partner Config.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> eLabs

Screenshots:

When eLabs is ENABLED



When eLabs is DISABLED

eLabsSign

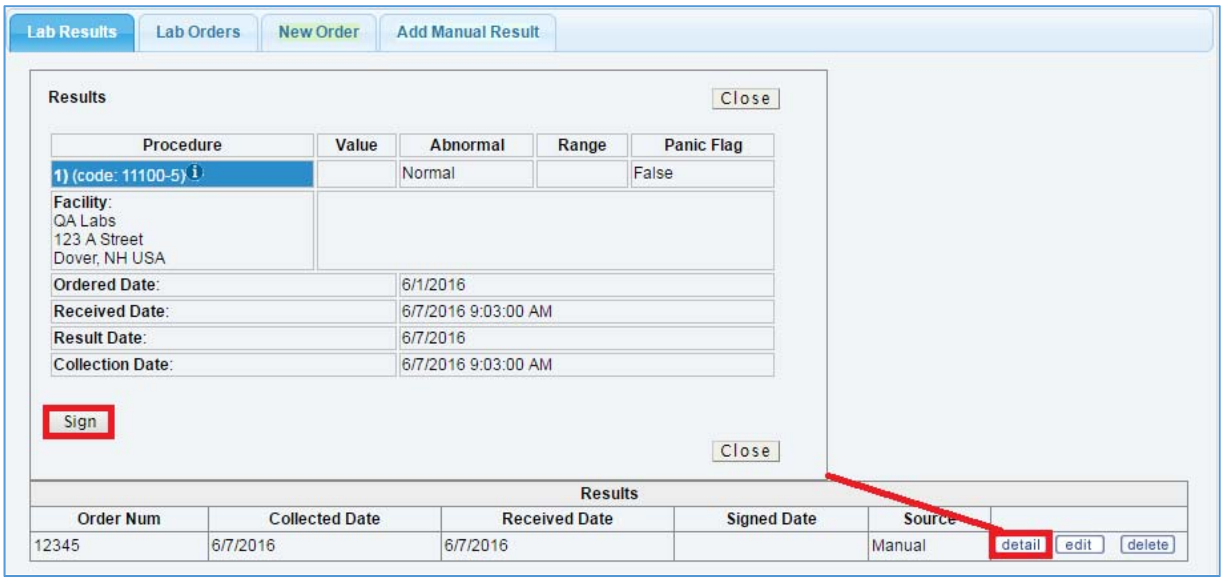
Function:

- Determines whether the user will be able to utilize a "Sign" button when viewing the details of a lab result. This button allows the user to enter their signature password to sign off on the entry.

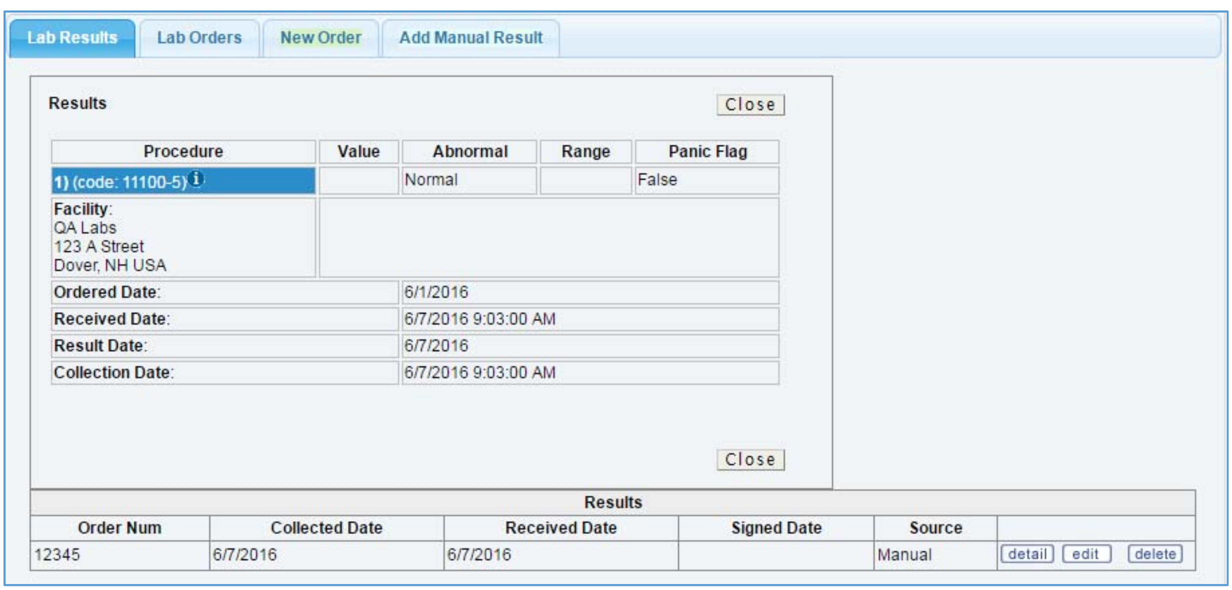
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> eLabs -> Detail Button -> Sign Button

Screenshots:



When eLabsSign is ENABLED



When eLabsSign is DISABLED

eRxViewAllMessages

Function:

- Affects what displays on the “Prescription Messages” module that can appear on the Credible Home Page. If enabled, you will see messages for all Clients you can view. If disabled, you will only see messages where you are the prescriber.
    - NOTE: If the “Prescription Messages” module does not appear in the Home Page, this setting will have no effect.

Location(s) this setting affects:

- Home Page -> Prescription Messages Module

Screenshots:

Prescription Messages

Client	Medication	Status
Peter Pan	aripiprazole 10 mg tablet	ELECTRONIC - FAILED
Debbie Diagnosis	aripiprazole 2 mg tablet	ELECTRONIC - FAILED
Ronald MacDonald	hydroxyzine pamoate 25 mg capsule	ELECTRONIC - FAILED
Honey Bee	fluoxetine 10 mg capsule	ELECTRONIC - FAILED

All Prescriptions w/ Messages

When eRxViewAllMessages is DISABLED, this module will only show messages prescribed by you

PrescriptionCreate

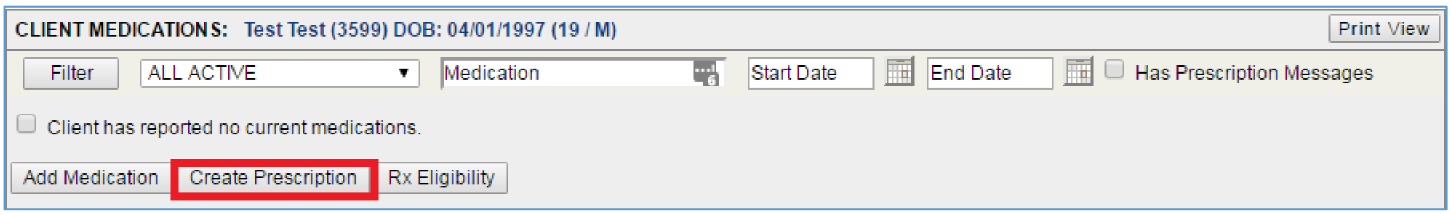
Function:

- Allows the “Create Prescription” button to appear on the Medications or Orders page.

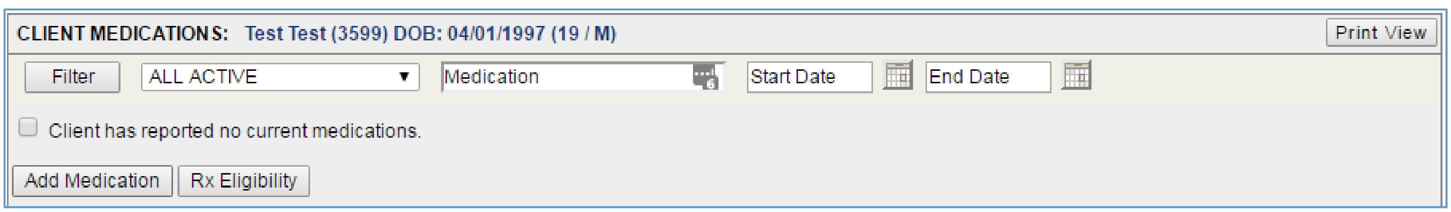
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications -> Create Prescription Button
- Client Page -> Client Nav Bar -> Orders -> Create Prescription Button

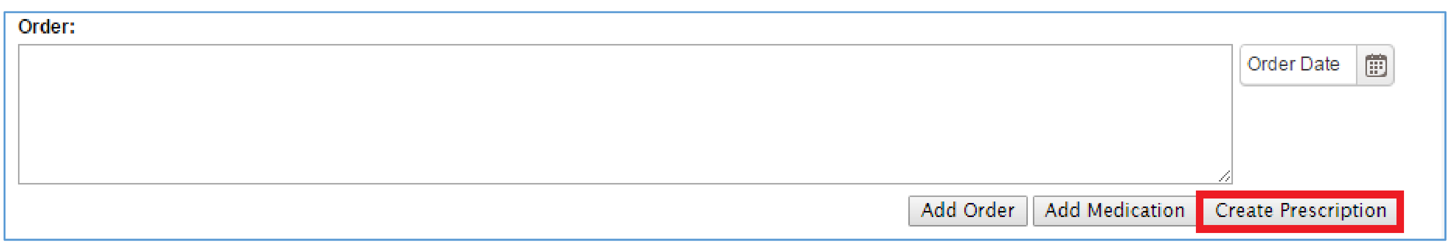
Screenshots:



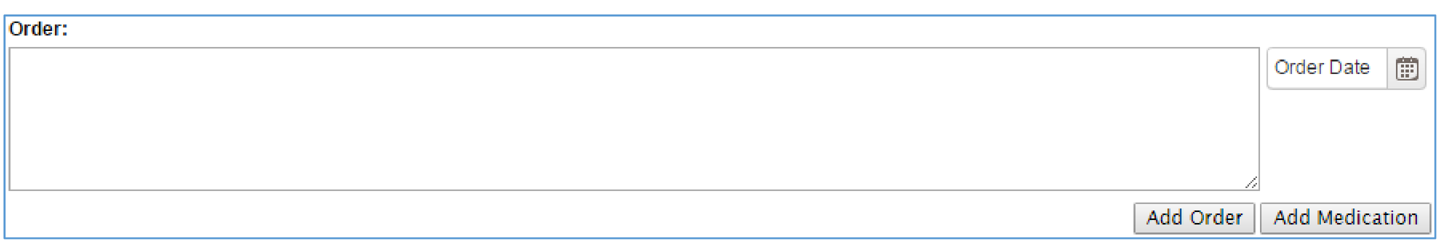
When PrescriptionCreate is ENABLED



When PrescriptionCreate is DISABLED



When PrescriptionCreate is ENABLED



When PrescriptionCreate is DISABLED

PrescriptionCreateNonSPI

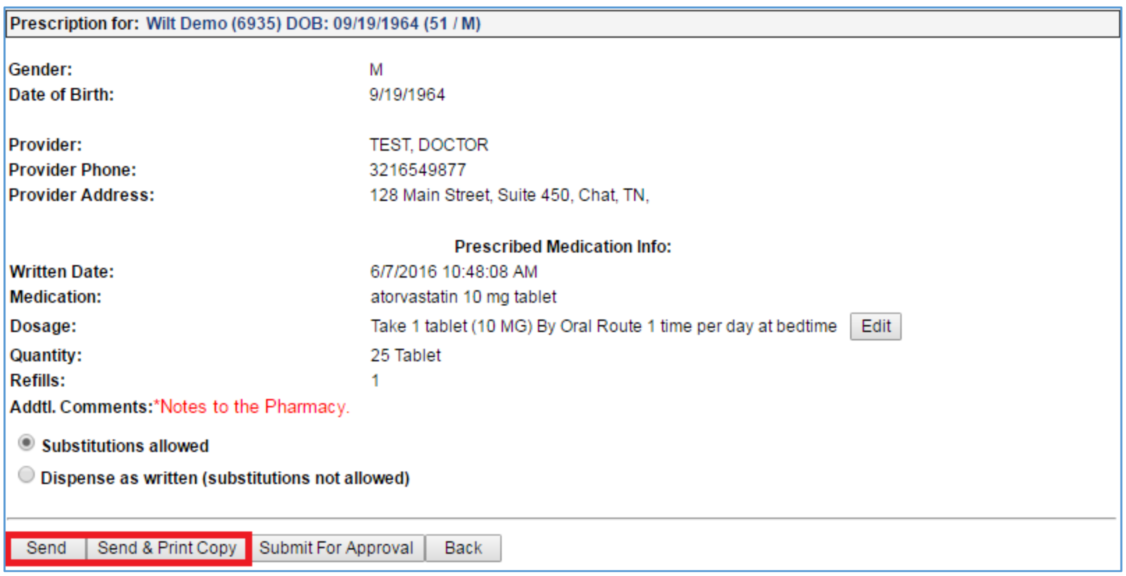
Function:

- Allows an employee without a SureScripts Provider Identifier (SPI) to create a prescription for a noncontrolled substance and then print it or send it to a pharmacy prior to prescriber approval.
    - NOTE: The PrescriptionCreate setting must also be enabled to utilize this setting.

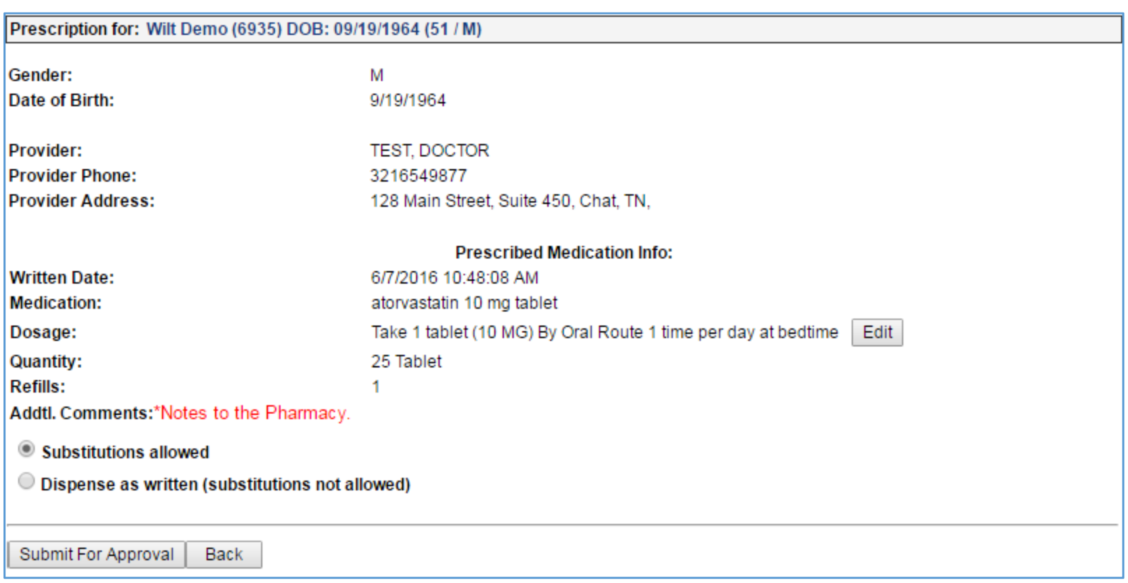
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications -> Create Prescription Button -> Send / Send and Print Button
- Client Page -> Client Nav Bar -> Orders -> Create Prescription Button -> Send / Send and Print Button

Screenshots:



When PrescriptionCreateNonSPI is ENABLED



When PrescriptionCreateNonSPI is DISABLED

PrintOriginalRx

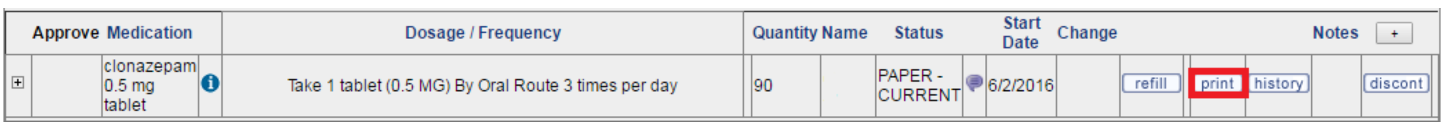
Function:

- Allows an employee to print the original prescription (no Duplicate watermark) when using the print button for an existing prescription.
    - NOTE: If disabled, a Duplicate watermark will appear on the printout when the "Print" button is clicked.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications -> Print Button

Screenshots:



RequireSupervisingProvidereRx

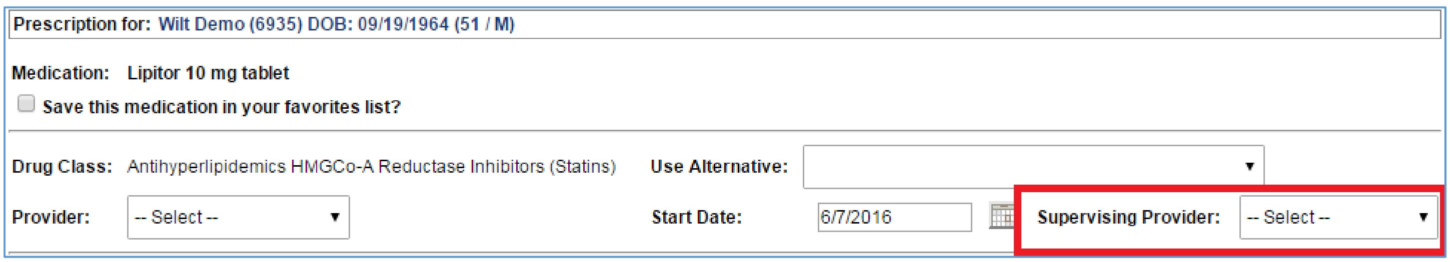
Function:

- Determines whether the Supervising Provider dropdown will appear on the SigBuilder page for any Rx created for prescribers with this Security Matrix right.

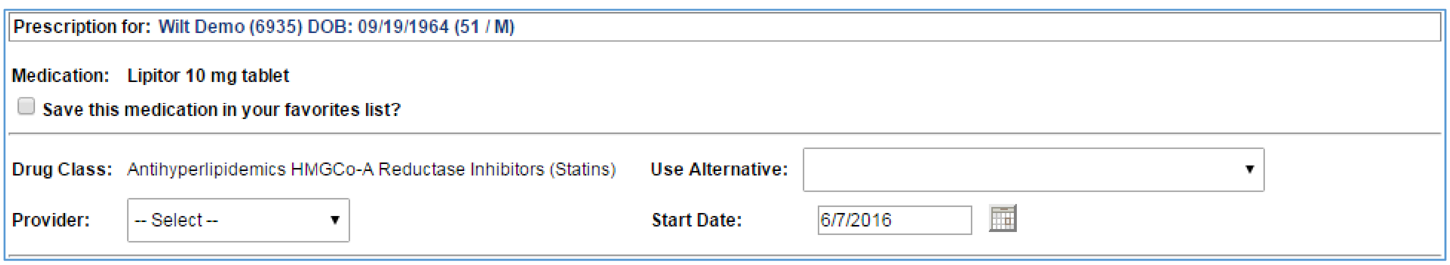
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications -> Create Prescription -> Supervising Provider
- Client Page -> Client Nav Bar -> Orders -> Create Prescription -> Supervising Provider

Screenshots:



When RequireSupervisingProvidereRx is ENABLED



When RequireSupervisingProvidereRx is DISABLED

RxDiscontinue

Function:

- Determines whether a non-prescriber can discontinue a Medication.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications -> Discont Button

Screenshots:

Medication	Dosage / Frequency	Quantity	Provider Name	Status	Start Date	Change	Notes	+
Anafranil 50 mg capsule	take tree tabs by mouth at QHS	90		ELECTRONIC - CURRENT	4/12/2016		history	discont
benztropine 0.5 mg tablet	take one tablet by mouth twice a day	60		ELECTRONIC - CURRENT	4/12/2016		history	discont

When RxDiscontinue is ENABLED

Medication	Dosage / Frequency	Quantity	Provider Name	Status	Start Date	Change	Notes	+
Anafranil 50 mg capsule	take tree tabs by mouth at QHS	90		ELECTRONIC - CURRENT	4/12/2016		history	
benztropine 0.5 mg tablet	take one tablet by mouth twice a day	60		ELECTRONIC - CURRENT	4/12/2016		history	

When RxDiscontinue is DISABLED

RxRefill

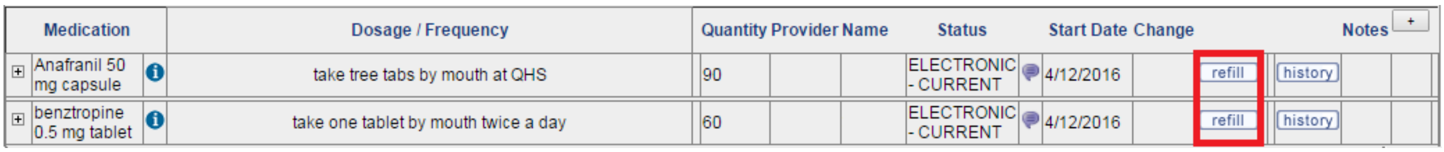
Function:

- Determines whether a non-prescriber can refill a prescription without prescriber approval.

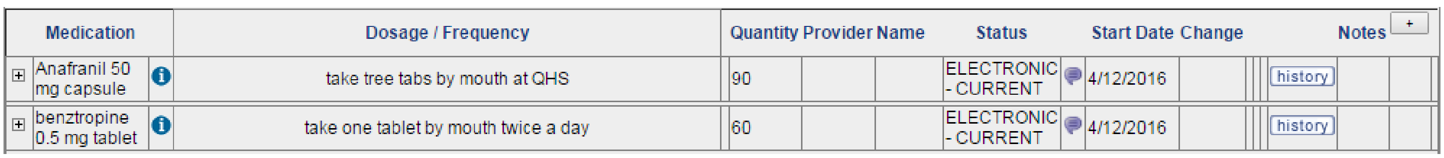
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications -> Refill Button

Screenshots:



When RxRefill is ENABLED



When RxRefill is DISABLED

RxRefillNeedsApproval

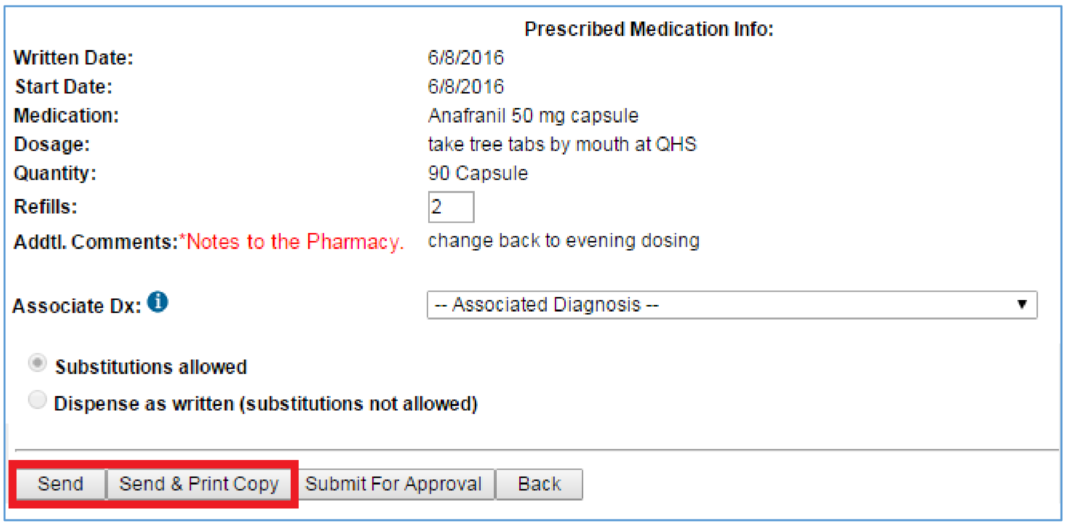
Function:

- Determines whether a non-prescriber can refill a prescription, however the refill will need approval.
    - NOTE: RxRefill must be enabled to utilize this setting.

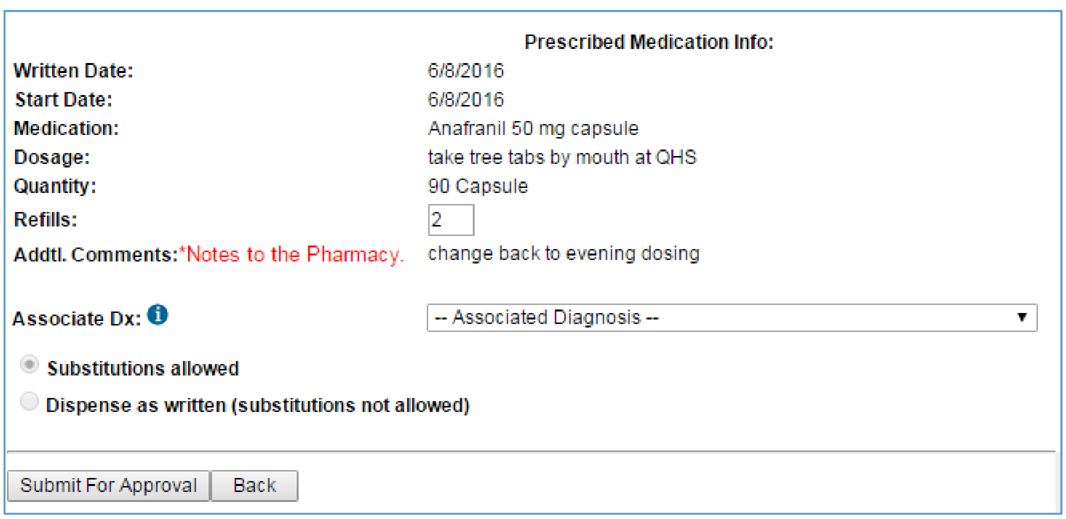
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Medications -> Refill Button -> Send / Send & Print Copy Button

Screenshots:



When RxRefillNeedsApproval is DISABLED



When RxRefillNeedsApproval is ENABLED

RxReprint

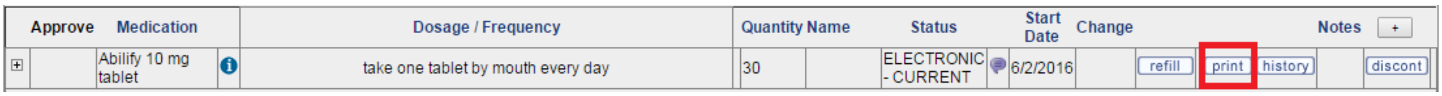
Function:

- Determines whether an Employee can print a copy of a prescription after it has been created.

Location(s) this setting affects:

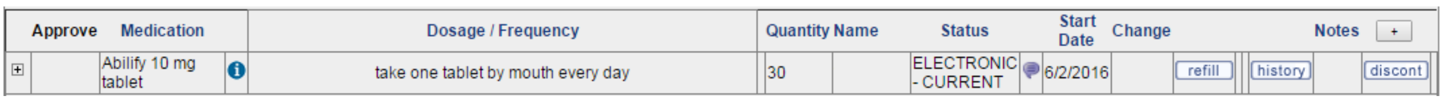
- Client Page -> Client Nav Bar -> Medications -> Print Button

Screenshots:



Approve	Medication	Dosage / Frequency	Quantity	Name	Status	Start Date	Change	Notes +
	Abilify 10 mg tablet	take one tablet by mouth every day	30		ELECTRONIC - CURRENT	6/2/2016	refill print history	discont

When RxReprint is ENABLED



Approve	Medication	Dosage / Frequency	Quantity	Name	Status	Start Date	Change	Notes +
	Abilify 10 mg tablet	take one tablet by mouth every day	30		ELECTRONIC - CURRENT	6/2/2016	refill history	discont

When RxReprint is DISABLED

SeverityLevelAdmin

Function:

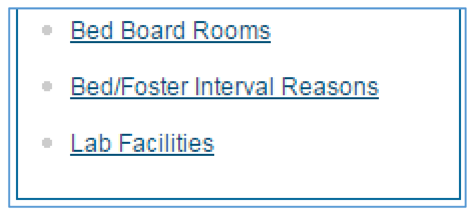
- Determines whether Med Severity Levels can be created or edited, using the “Med Severity Levels” link on the Admin Tab.
    - If disabled, the “Med Severity Levels” link will not appear.

Location(s) this setting affects:

- Admin Tab -> Lookup and Code Tables Section -> Med Severity Levels

Screenshots:

When SeverityLevelAdmin is ENABLED



When SeverityLevelAdmin is DISABLED

CREDIBLE

Matrix Section: EMAR

eMar

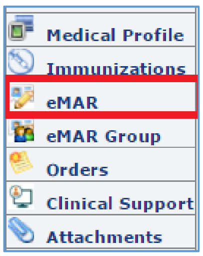
Function:

- Determines whether the “eMAR” functionality can be utilized.
    - NOTE: This setting will need to be enabled to utilize any of the other eMar Security Matrix settings.

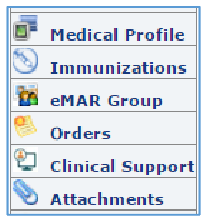
Location(s) this setting affects:

- Client Nav Bar -> eMAR

Screenshots:



When eMar is ENABLED



When eMar is DISABLED

eMarAdministerMeds

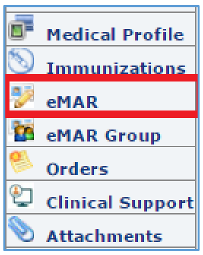
Function:

- Determines whether the “eMAR” button will display on the Client Nav Bar.

Location(s) this setting affects:

- Client Nav Bar -> eMAR

Screenshots:



When eMar is ENABLED

When eMar is DISABLED

eMarAdminMissed

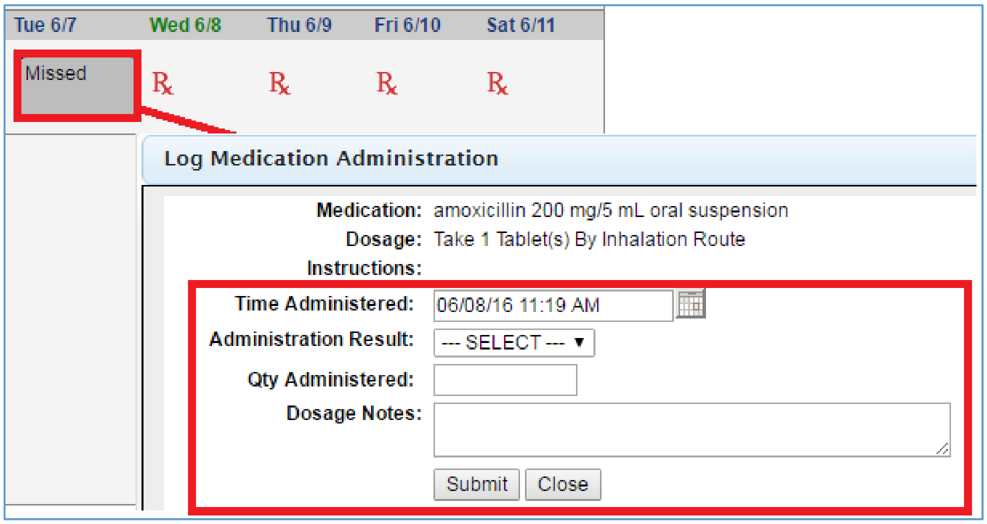
Function:

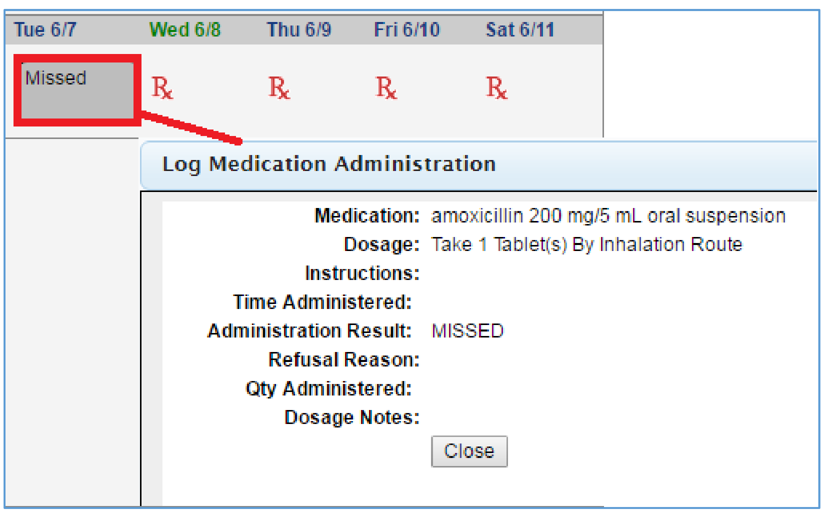
- Determines whether the user will be able to make edits to a missed eMar Medication entry.
    - If disabled, the pop-up that appears when clicking the missed entry will be read-only.

Location(s) this setting affects:

- Client Nav Bar -> eMAR -> Missed Entry

Screenshots:





eMarAdminRecordEdit

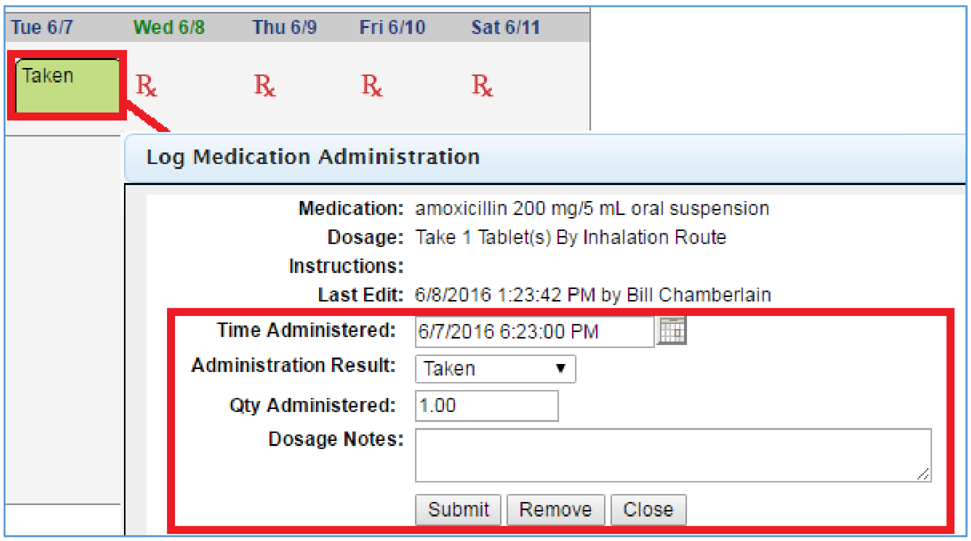
Function:

- Determines whether the user will be able to make edits to a taken eMar Medication entry.
  - If disabled, the pop-up that appears when clicking the taken entry will be read-only.

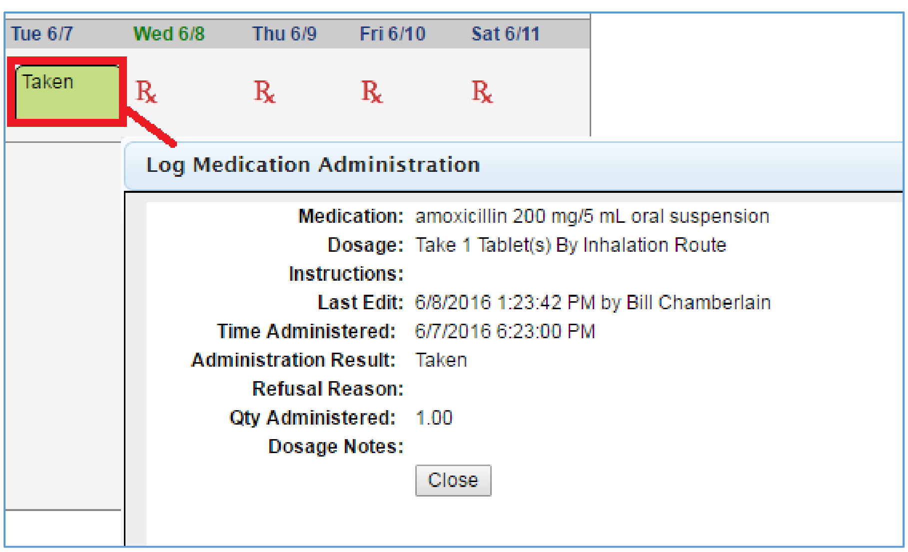
Location(s) this setting affects:

- Client Nav Bar -> eMAR -> Taken Entry

Screenshots:



When eMarAdminRecordEdit is ENABLED



When eMarAdminRecordEdit is DISABLED

eMarClientGroup

Function:

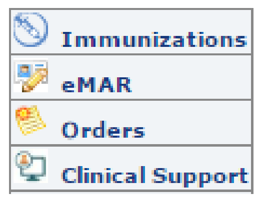
- Determines whether the user will be able to add and remove Clients from eMar Groups.
  - If disabled, the “eMar Groups” button will not appear on the Client Nav Bar.

Location(s) this setting affects:

- Client Nav Bar -> eMAR Group Button

Screenshots:

When eMarClientGroup is ENABLED



When eMarClientGroup is DISABLED

eMarCreateMedSchedule

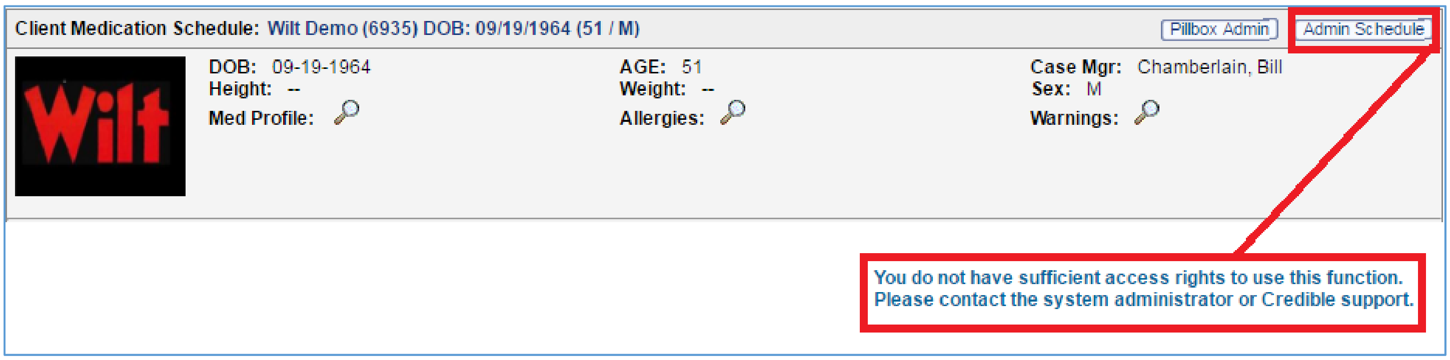
Function:

- Allows the user to create Med Schedules for Clients using the “Admin Schedule” button within eMAR.
    - If disabled, an “Insufficient Rights” message will appear when clicking the “Admin Schedule” button.

Location(s) this setting affects:

- Client Nav Bar -> eMAR Group Button -> Admin Schedule Button

Screenshots:



When eMarCreateMedSchedule is DISABLED

eMarEmployeeGroup

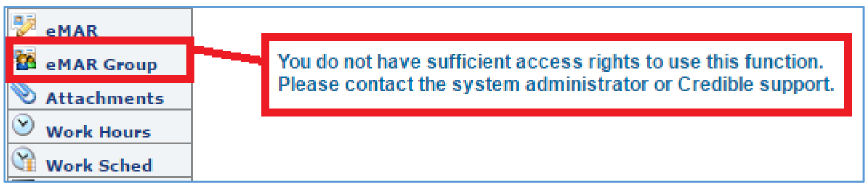
Function:

- Allows the user to add and remove Employees from eMAR Groups using the “eMAR Group” button on an Employee Nav Bar.
    - If disabled, an “Insufficient Rights” message will appear when clicking the “eMAR Group” button on an Employee Nav Bar.

Location(s) this setting affects:

- Employee Nav Bar -> eMAR Group Button

Screenshots:



When eMarEmployeeGroup is DISABLED

eMarManageGroups

Function:

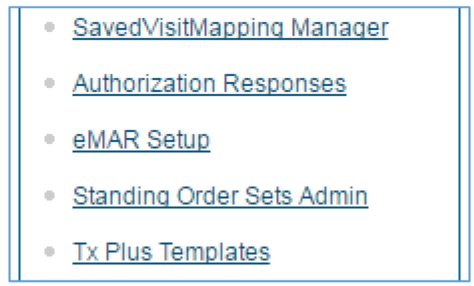
- Determines whether the user will be able to access the "Manage eMAR Groups" link on the Admin Tab.
    - If disabled, the link will not appear.

Location(s) this setting affects:

- Admin Tab -> Daily Activities Section -> Manage eMAR Groups

Screenshots:

When eMarManageGroups is ENABLED



When eMarManageGroups is DISABLED

eMarPillBoxAdmin

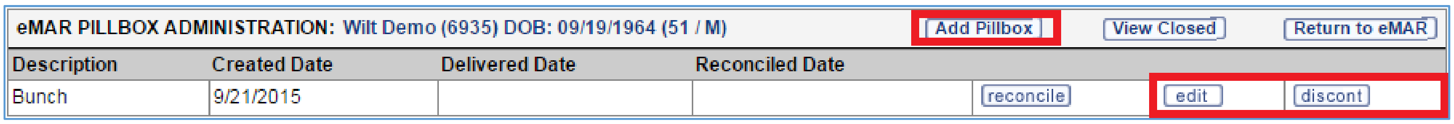
Function:

- Determines whether the user will be able to add, edit, or discontinue a Pillbox on a Client's eMAR page.

Location(s) this setting affects:

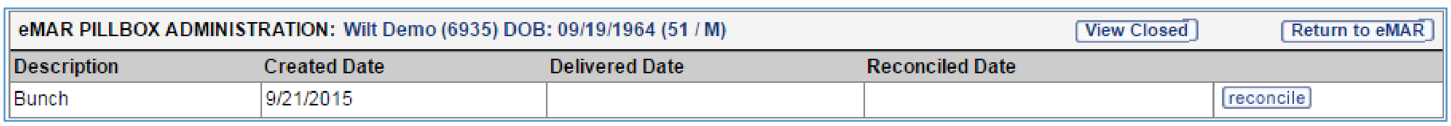
- Client Page -> Client Nav Bar -> eMAR -> Pillbox Admin -> "Add Pillbox", "Edit", and "Discont" Buttons

Screenshots:


eMAR PILLBOX ADMINISTRATION: Wilt Demo (6935) DOB: 09/19/1964 (51 / M) Add Pillbox View Closed Return to eMAR

Description	Created Date	Delivered Date	Reconciled Date			
Bunch	9/21/2015			reconcile	edit	discont

When eMarPillBoxAdmin is ENABLED


eMAR PILLBOX ADMINISTRATION: Wilt Demo (6935) DOB: 09/19/1964 (51 / M) View Closed Return to eMAR

Description	Created Date	Delivered Date	Reconciled Date	
Bunch	9/21/2015			reconcile

When eMarPillBoxAdmin is DISABLED

eMarPillBoxReconcile

Function:

- Determines whether the user will be able to reconcile a Pillbox on a Client's eMAR page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> eMAR -> Pillbox Admin -> Reconcile Button

Screenshots:

eMAR PILLBOX ADMINISTRATION: Wilt Demo (6935) DOB: 09/19/1964 (51 / M) [Add Pillbox] [View Closed] [Return to eMAR]

Description	Created Date	Delivered Date	Reconciled Date			
Bunch	9/21/2015			reconcile	edit	discont

When eMarPillBoxReconcile is ENABLED

eMAR PILLBOX ADMINISTRATION: Wilt Demo (6935) DOB: 09/19/1964 (51 / M) [Add Pillbox] [View Closed] [Return to eMAR]

Description	Created Date	Delivered Date	Reconciled Date		
Bunch	9/21/2015			edit	discont

When eMarPillBoxReconcile is DISABLED

Matrix Section: Employee Forms

EmployeeFormAdd

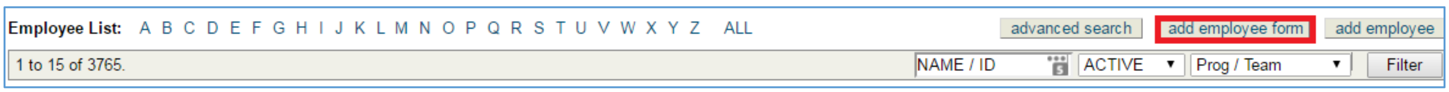
Function:

- Determines whether the user will be able to add Forms for Employees using the “add employee form” button.
  - If Disabled, this button will not display.

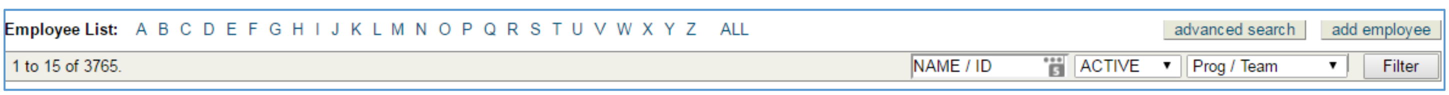
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms
- Employee Tab -> Add Employee Form Button
- Admin Tab -> Employee Form Queue

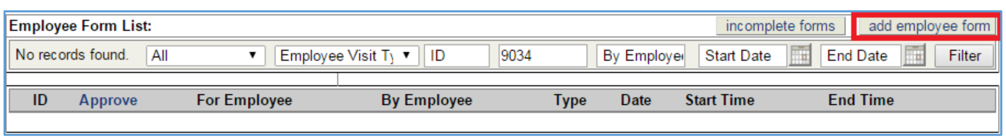
Screenshots:



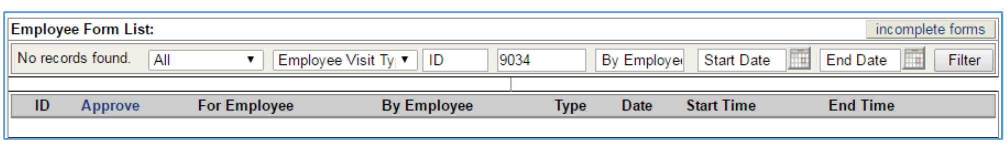
When EmployeeFormAdd is ENABLED



When EmployeeFormAdd is DISABLED



When EmployeeFormAdd is ENABLED



When EmployeeFormAdd is DISABLED

EmployeeFormApprove

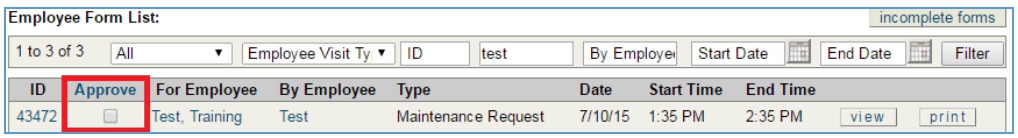
Function:

- Determines whether the user will be able to Approve Forms for those Employees the user has supervisory rights to.
    - NOTE: If the EmployeeFormApproveAll setting is checked, this setting will have no effect.

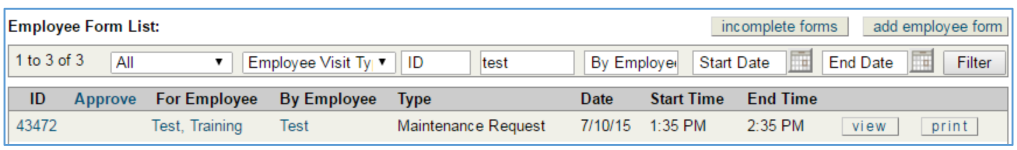
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms
- Admin Tab -> Employee Form Queue

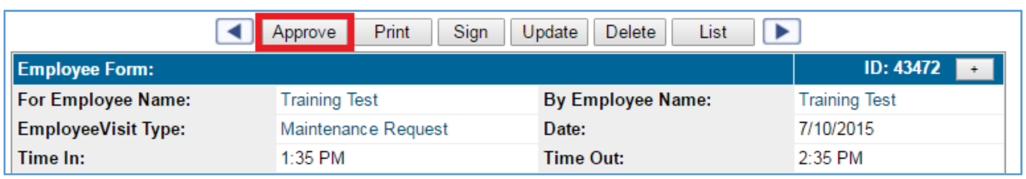
Screenshots:



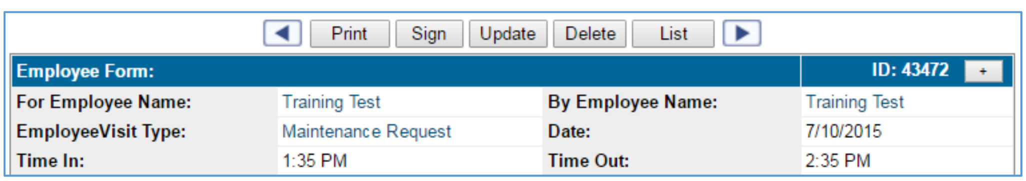
When EmployeeFormApprove is ENABLED



When EmployeeFormApprove is DISABLED



When EmployeeFormApprove is ENABLED



When EmployeeFormApprove is DISABLED

EmployeeFormApproveAll

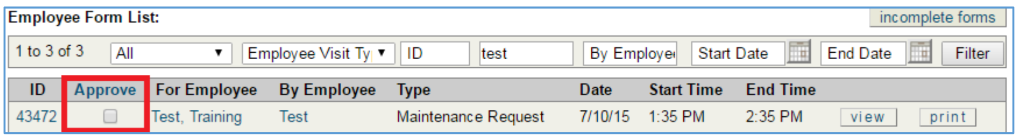
Function:

- Determines whether the user will be able to Approve Forms for all Employees. Typically reserved for Supervisors that manage all Staff.
    - NOTE: This setting supercedes the EmployeeFormApprove setting.

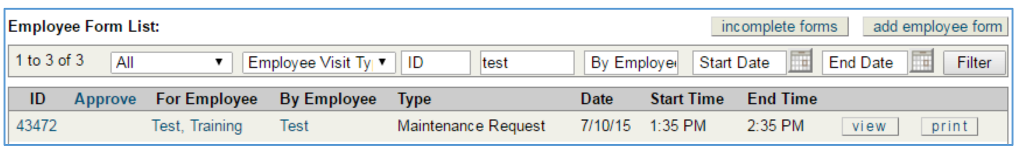
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms
- Admin Tab -> Employee Form Queue

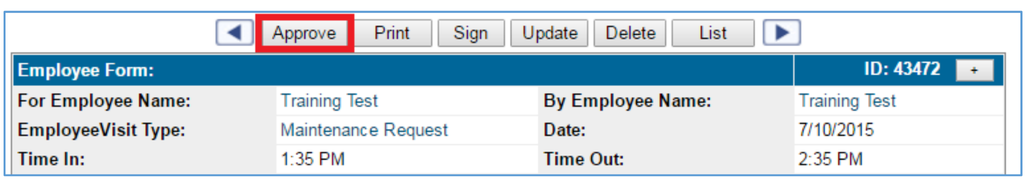
Screenshots:



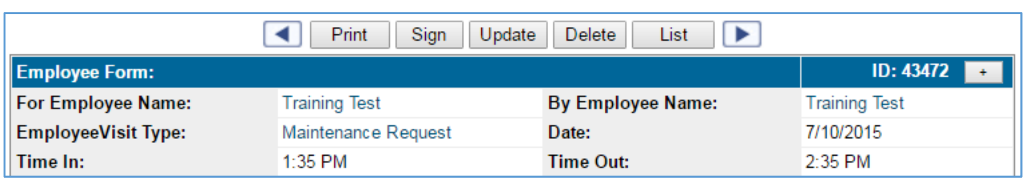
When EmployeeFormApproveAll is ENABLED



When EmployeeFormApproveAll is DISABLED



When EmployeeFormApproveAll is ENABLED



When EmployeeFormApproveAll is DISABLED

EmployeeFormApproveOwn

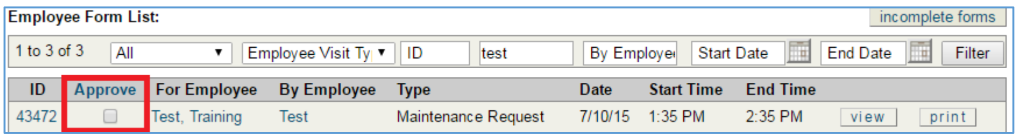
Function:

- Determines whether the user will be able to Approve their own Employee Forms.
    - NOTE: If the EmployeeFormApproveAll setting is checked, this setting will have no effect.

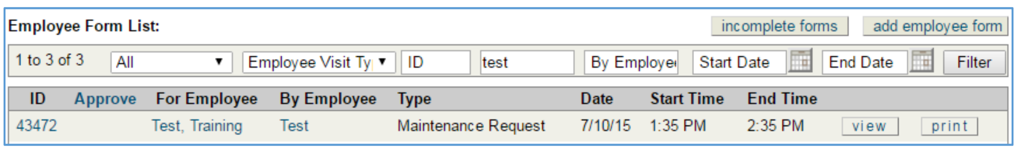
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms
- Admin Tab -> Employee Form Queue

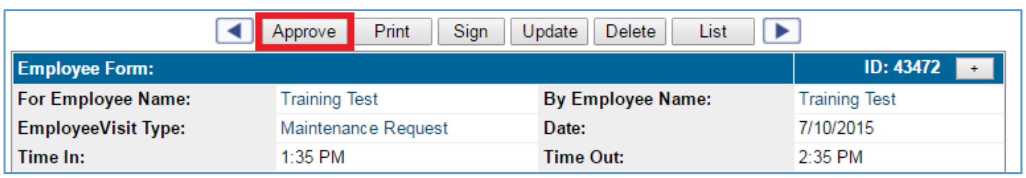
Screenshots:



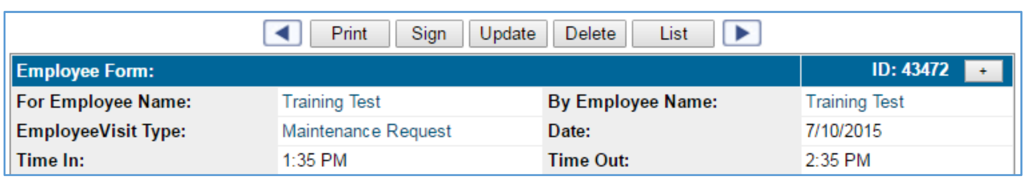
When EmployeeFormApproveOwn is ENABLED



When EmployeeFormApproveOwn is DISABLED



When EmployeeFormApproveOwn is ENABLED



When EmployeeFormApproveOwn is DISABLED

EmployeeFormDelete

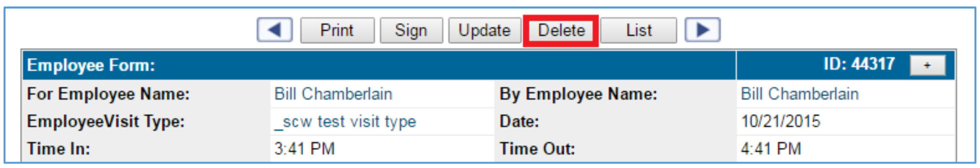
Function:

- Determines whether the user will be able to delete any completed Employee Form they can view. This is done with a Delete button that shows when viewing the summary of a Form.
  - NOTE: This setting does not affect a user's ability to delete Incomplete Forms.

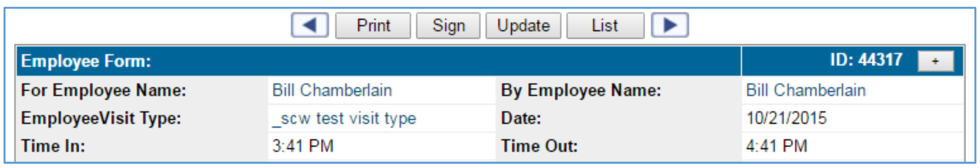
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms
- Admin Tab -> Employee Form Queue

Screenshots:



When EmployeeFormDelete is ENABLED



When EmployeeFormDelete is DISABLED

EmployeeFormList

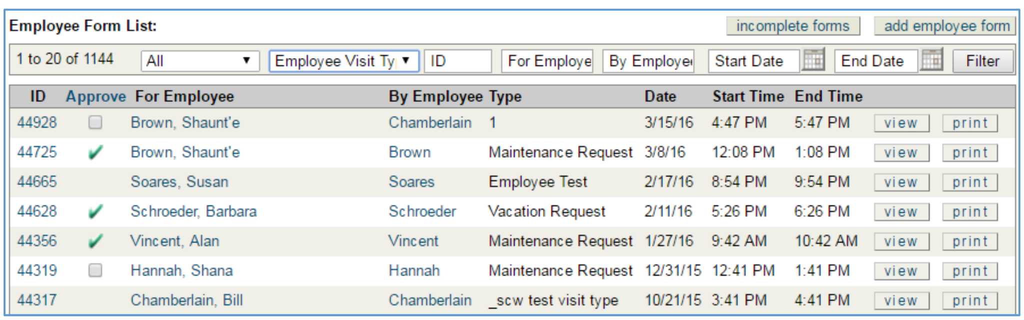
Function:

- Gives the Profile the right to view a list of their own employee forms, the forms of employees they supervise, the forms of employees on teams they supervise and the forms of employees on teams for which they are a team leader.
- Determines whether the user will see the “Forms” button that appears on the Employee Nav Bar.
    - NOTE: If this setting is disabled, the “Forms” button will not appear, <u>even if EmployeeFormListAll is enabled.</u>

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms
- Admin Tab -> Employee Form Queue

Screenshots:



Employee Form List: incomplete forms | add employee form

1 to 20 of 1144 | All | Employee Visit Ty | ID | For Employe | By Employe | Start Date | End Date | Filter

ID	Approve	For Employee	By Employee	Type	Date	Start Time	End Time		
44928	☐	Brown, Shaunt'e	Chamberlain	1	3/15/16	4:47 PM	5:47 PM	view	print
44725	✔	Brown, Shaunt'e	Brown	Maintenance Request	3/8/16	12:08 PM	1:08 PM	view	print
44665		Soares, Susan	Soares	Employee Test	2/17/16	8:54 PM	9:54 PM	view	print
44628	✔	Schroeder, Barbara	Schroeder	Vacation Request	2/11/16	5:26 PM	6:26 PM	view	print
44356	✔	Vincent, Alan	Vincent	Maintenance Request	1/27/16	9:42 AM	10:42 AM	view	print
44319	☐	Hannah, Shana	Hannah	Maintenance Request	12/31/15	12:41 PM	1:41 PM	view	print
44317		Chamberlain, Bill	Chamberlain	_scw test visit type	10/21/15	3:41 PM	4:41 PM	view	print

EmployeeFormListAll

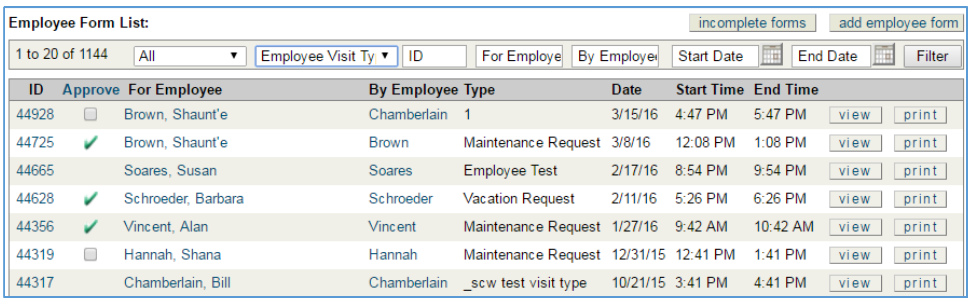
Function:

- Gives the Profile the right to view forms for ALL Employees.
    - NOTE: This setting does not effect whether the “Forms” button displays on the Employee Nav Bar. That is decided by the EmployeeFormList setting.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms
- Admin Tab -> Employee Form Queue

Screenshots:


Employee Form List: incomplete forms add employee form

1 to 20 of 1144 All Employee Visit Ty ID For Employe By Employee Start Date End Date Filter

ID	Approve	For Employee	By Employee	Type	Date	Start Time	End Time		
44928		Brown, Shaunt'e	Chamberlain	1	3/15/16	4:47 PM	5:47 PM	view	print
44725	✔	Brown, Shaunt'e	Brown	Maintenance Request	3/8/16	12:08 PM	1:08 PM	view	print
44665		Soares, Susan	Soares	Employee Test	2/17/16	8:54 PM	9:54 PM	view	print
44628	✔	Schroeder, Barbara	Schroeder	Vacation Request	2/11/16	5:26 PM	6:26 PM	view	print
44356	✔	Vincent, Alan	Vincent	Maintenance Request	1/27/16	9:42 AM	10:42 AM	view	print
44319		Hannah, Shana	Hannah	Maintenance Request	12/31/15	12:41 PM	1:41 PM	view	print
44317		Chamberlain, Bill	Chamberlain	_scw test visit type	10/21/15	3:41 PM	4:41 PM	view	print

EmployeeFormSignAny

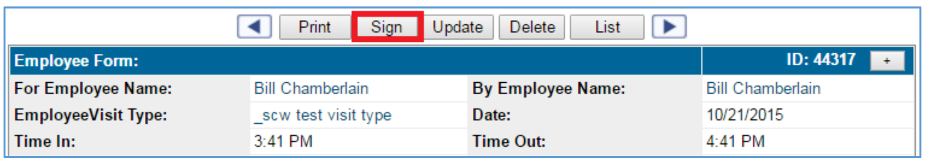
Function:

- Allows the right to utilize the 'Sign' button on any Employee form, regardless of who completed it.
    - If disabled, the 'Sign' button will only display on Employee forms that the user created. In other words, their name is displaying on the 'By Employee' column.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms -> View button
- Admin Tab -> Employee Form Queue -> View button

Screenshots:



When EmployeeFormSignAny is ENABLED, this button will show on all forms.

When EmployeeFormSignAny is DISABLED, this button will only show on forms that you have started.

EmployeeFormUnapprove

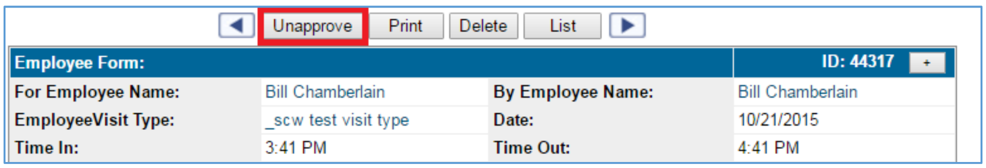
Function:

- Allows the right to utilize the ‘Unapprove’ button on any approved or locked Employee form.

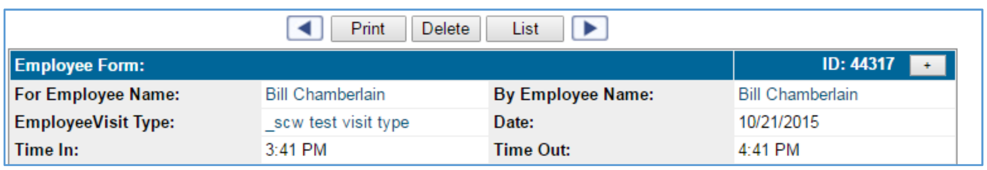
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms -> View button
- Admin Tab -> Employee Form Queue -> View button

Screenshots:



When EmployeeFormUnapprove is ENABLED



When EmployeeFormUnapprove is DISABLED

EmployeeFormUpdate

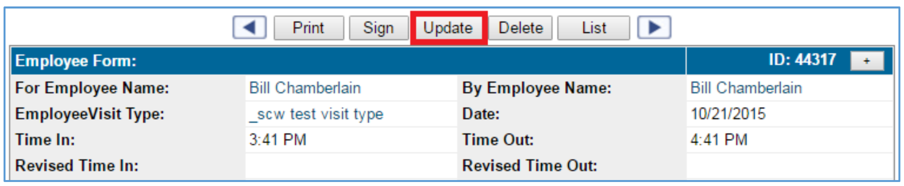
Function:

- Allows the right to utilize the 'Update' button on any unapproved Employee form you can view.
    - NOTE: If disabled, this setting does not affect the right to update your own Employee forms. That is affected by the EmployeeFormUpdateOwn matrix setting.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms -> View button
- Admin Tab -> Employee Form Queue -> View button

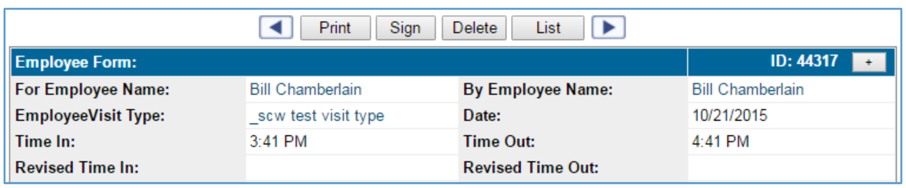
Screenshots:



Print | Sign | Update | Delete | List

Employee Form:			ID: 44317
For Employee Name:	Bill Chamberlain	By Employee Name:	Bill Chamberlain
EmployeeVisit Type:	_scw test visit type	Date:	10/21/2015
Time In:	3:41 PM	Time Out:	4:41 PM
Revised Time In:		Revised Time Out:	

When EmployeeFormUpdate is ENABLED



Print | Sign | Delete | List

Employee Form:			ID: 44317
For Employee Name:	Bill Chamberlain	By Employee Name:	Bill Chamberlain
EmployeeVisit Type:	_scw test visit type	Date:	10/21/2015
Time In:	3:41 PM	Time Out:	4:41 PM
Revised Time In:		Revised Time Out:	

When EmployeeFormUpdate is DISABLED

EmployeeFormUpdateOwn

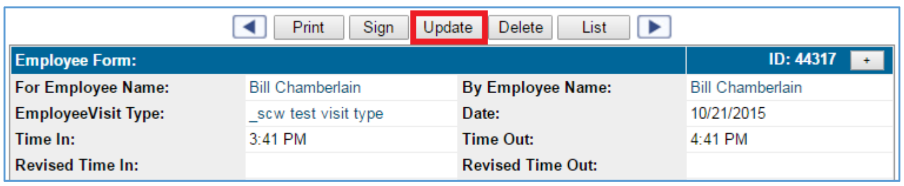
Function:

- Allows the right to utilize the ‘Update’ button on only Employee forms that the user has started.
  - NOTE: If the EmployeeFormUpdate setting is enabled, this setting will have no effect.

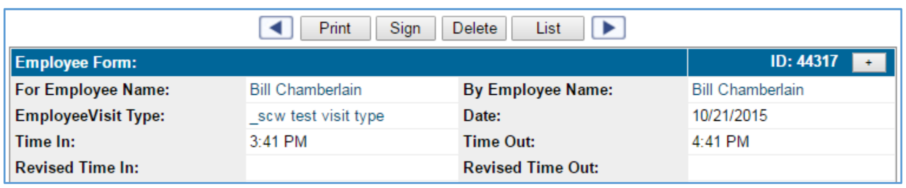
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms -> View button
- Admin Tab -> Employee Form Queue -> View button

Screenshots:



When EmployeeFormUpdateOwn is ENABLED



When EmployeeFormUpdateOwn is DISABLED

EmployeeFormView

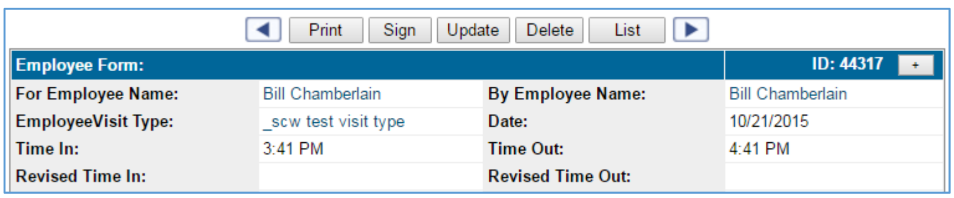
Function:

- Allows the Profile the right to view the details on their own employee forms, the forms of employees they supervise, the forms of employees on teams they supervise and the forms of employees on teams for which they are the team leader.
    - NOTE: If the EmployeeFormViewAll setting is enabled, this setting will have no effect.
- The difference between this setting and EmployeeFormList is that EmployeeFormList determines whether you can see the listed form entries, where this setting determines whether you can click the “View” button on those listed entries.
    - If this setting is disabled, you will receive an Insufficient Rights message when clicking the “View” button.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms -> View button
- Admin Tab -> Employee Form Queue -> View button

Screenshots:



When EmployeeFormView is ENABLED

When EmployeeFormView is DISABLED

EmployeeFormViewAll

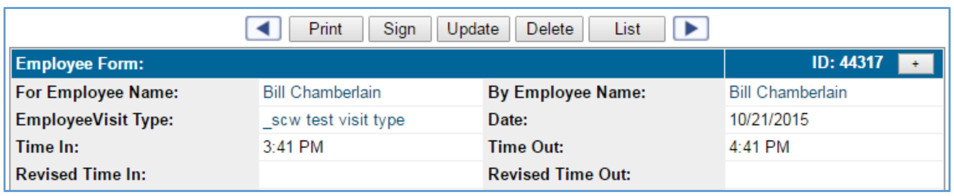
Function:

- Allows the Profile the right to view the details on ALL Employee Forms.
  - NOTE: This matrix setting supercedes the EmployeeFormView setting.
- The difference between this setting and EmployeeFormList is that EmployeeFormList determines whether you can see the listed form entries, where this setting determines whether you can click the “View” button on those listed entries.
  - If this setting is disabled, you will receive an Insufficient Rights message when clicking the “View” button.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms -> View button
- Admin Tab -> Employee Form Queue -> View button

Screenshots:



When EmployeeFormViewAll is ENABLED

When EmployeeFormViewAll is DISABLED

EmployeeFormViewTeam

Function:

- The right to view all forms viewable in EmployeeFormList, plus the forms for Employees assigned to you directly or through a team.
    - NOTE: If enabled, this setting supercedes EmployeeFormTeamListOnly.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Forms -> View button
- Admin Tab -> Employee Form Queue -> View button

Matrix Section: Employees

EmployeeAdd

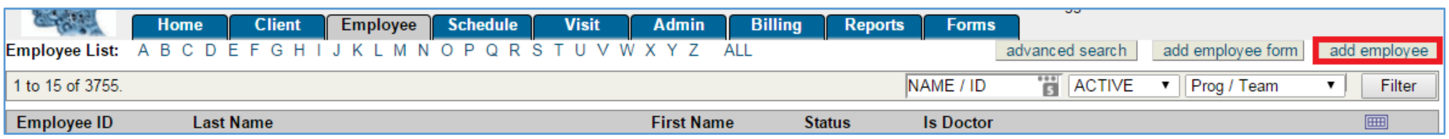
Function:

- Determines whether the "Add Employee" button will appear above the Employee List after clicking the Employee Tab.

Location(s) this setting affects:

- Employee Tab

Screenshots:



When EmployeeAdd is ENABLED

When EmployeeAdd is DISABLED

EmployeeConfig

Function:

- Determines whether the user will be able to view the “Config” button on the Nav Bar of other Employees.
    - If Disabled, the user will only be able to view the “Config” button on their own Employee navbar.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Config

Screenshots:

When EmployeeConfig is ENABLED, shows for all Employees.

When EmployeeConfig is DISABLED, shows only on your Employee Nav Bar.

EmployeeDelete

Function:

- Determines whether the “Delete” button will appear when viewing an Employee’s Profile page.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Profile

Screenshots:

When EmployeeDelete is ENABLED

When EmployeeDelete is ENABLED

EmployeeFormsUpdate

Function:

- Determines whether the user will be able to map to Employee Fields by completing an Employee Form that has a mapping setup. If this setting is disabled, the mapping will not occur, even if the Form is set up to do so.
    - The user can still complete the Form however.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Profile
- Employee Page -> Employee Nav Bar -> Forms -> Add Employee Form
- Employee Tab -> Add Employee Form

EmployeeList

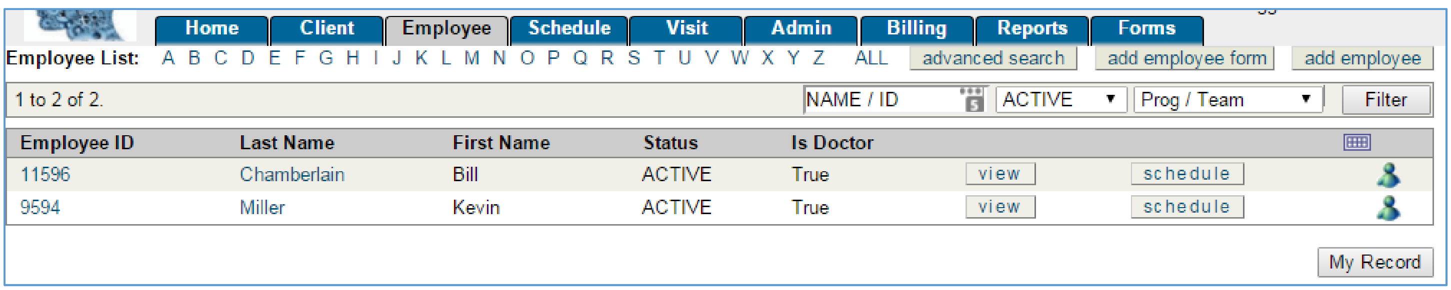
Function:

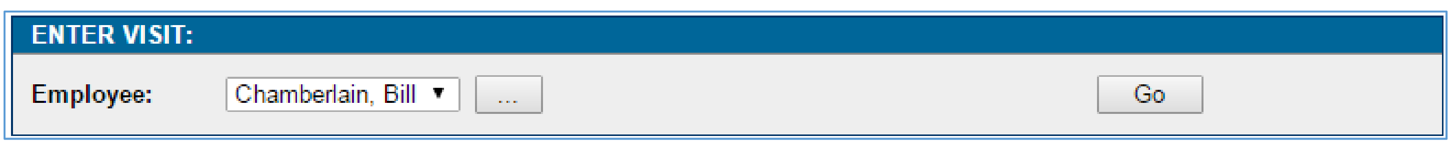
- Allows the Profile the right to display their own employee record plus employees that they supervise, who are on teams they supervise and who are on teams for which they are a team leader.
    - This is the recommended Employee display setting for Staff.
- This setting affects who will display when viewing the Employee List after clicking the Employee Tab, or who will display when adding a Service.
- This setting <u>does not</u> affect the ability to access Employee records in other ways, such as searching for Services that other Employees have completed, and clicking on their name, or by viewing a Team Schedule and doing the same. That is controlled by the EmployeeView matrix setting.
- NOTE: If EmployeeListAll is enabled, this setting will have no effect.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Add Service
- Employee Tab -> Employee List

Screenshots:





Affects what Employees the user will see when accessing the above pages.

EmployeeListAll

Function:

- Allows the Profile the right to display ALL Employees in the system when performing an Employee Search.
  - Will supersede the EmployeeList Security Matrix setting.
  - This setting does not affect the ability to access Employee records in other ways, such as searching for Services that other Employees have completed, and clicking on their name, or by viewing a Team Schedule and doing the same. That is controlled by the EmployeeView matrix setting.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Add Service
- Employee Tab -> Employee List

EmployeeMessageLogViewAll

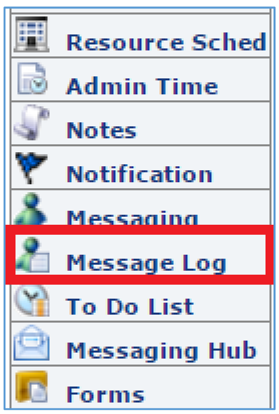
Function:

- Determines whether the “Message Log” button will be visible in ALL Employee navbars.
    - If disabled, the user will only see the “Message Log” button on their own navbar.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Message Log

Screenshots:



When EmployeeMessageLogViewAll is ENABLED, shows for all Employees.

When EmployeeMessageLogViewAll is DISABLED, shows only on your Employee Nav Bar.

EmployeeNoteAdd

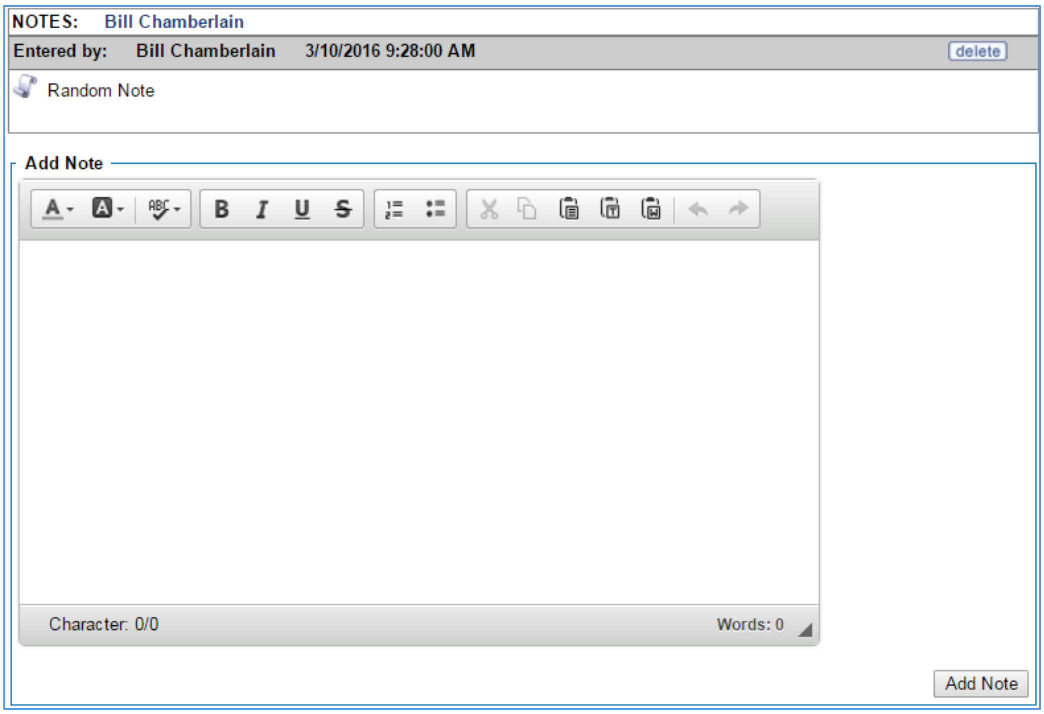
Function:

- Determines whether the user will see the “Add Note” module when viewing an Employees Notes.
    - If Disabled, the user will be able to view any notes, but will not be able to add them.

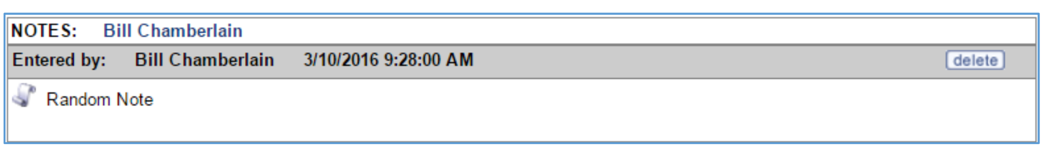
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Notes

Screenshots:



When EmployeeNoteAdd is ENABLED



When EmployeeNoteAdd is DISABLED

EmployeeNoteDelete

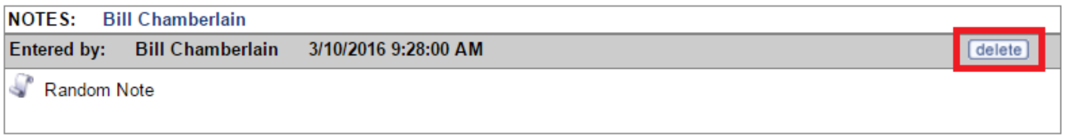
Function:

- Determines whether the user will see the “Delete” button when viewing an Employees Notes.

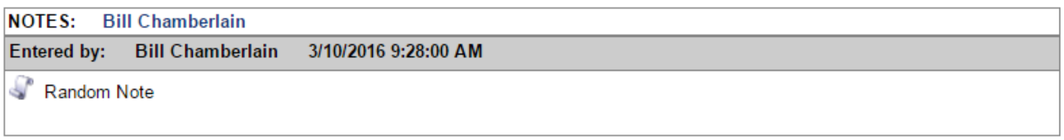
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Notes

Screenshots:



When EmployeeNoteDelete is ENABLED



When EmployeeNoteDelete is DISABLED

EmployeePictureAdd

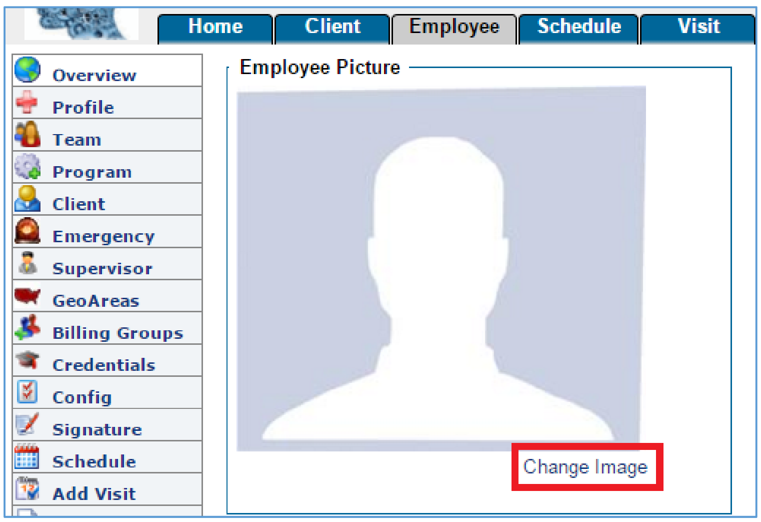
Function:

- Determines whether the user will be able to Add/Remove/Change an Employee's Picture.
    - If Disabled, the "Change Image" link in the Employee Picture module will not display.

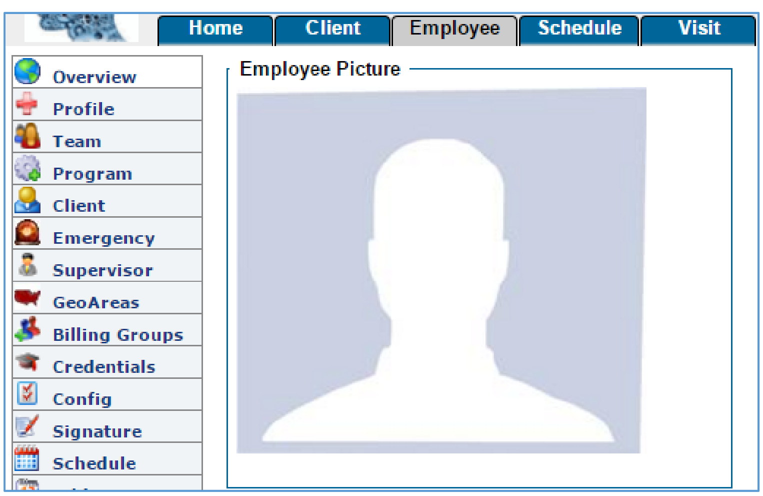
Location(s) this setting affects:

- Employee Page -> Employee Picture

Screenshots:



When EmployeePictureAdd is ENABLED



When EmployeePictureAdd is DISABLED

EmployeeSuperEdit

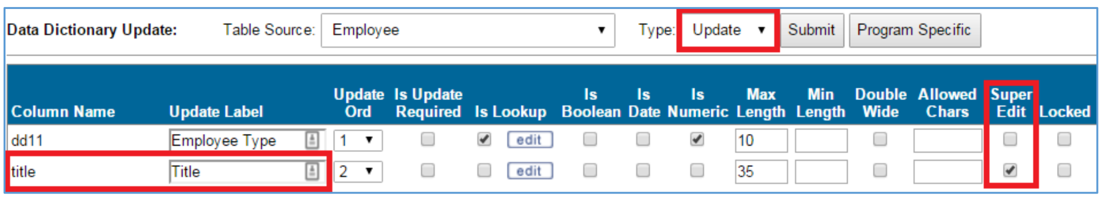
Function:

- Allows the Profile the right to edit specific Employee fields that are marked as “Super Edit” from the Employee Data Dictionary.
    - If this setting is Disabled, any field that is marked as Super Edit will not display when the user is viewing the Employee’s Profile in Update mode.
- NOTE: This setting does not affect the ability to see fields that are marked as “Super View”. That is affected by the EmployeeSuperView setting.

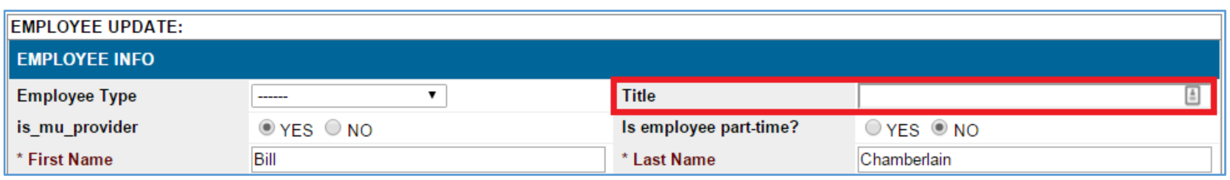
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Profile -> Update
- Employee Page -> Employee Info Module -> Edit

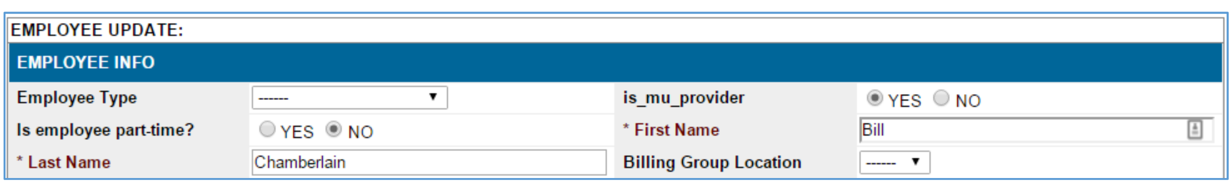
Screenshots:



Where “Super Edit” shows on the Data Dictionary. In this example it’s used on the “Title” field.



When EmployeeSuperEdit is ENABLED, the field will display on the Employee Update page.



When EmployeeSuperEdit is DISABLED, the field will NOT display on the Employee Update page.

EmployeeSuperView

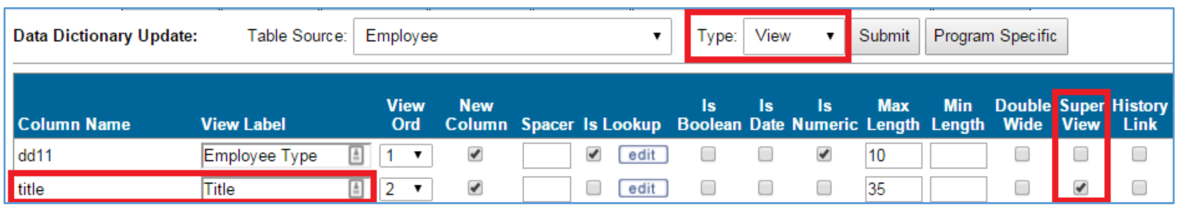
Function:

- Allows the Profile the right to view specific Employee fields that are marked as "Super View" from the Employee Data Dictionary.
    - If this setting is Disabled, any field that is marked as Super View will not display when the user is viewing the Employee's Profile in View mode.
- NOTE: This setting does not affect the ability to see fields that are marked as "Super Edit". That is affected by the EmployeeSuperEdit setting.

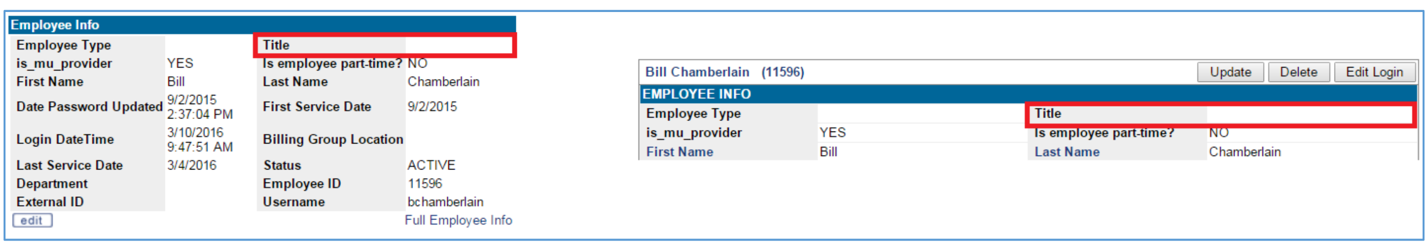
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Profile -> Update
- Employee Page -> Employee Info Module
- Employee Page -> Employee Info Module -> Full Employee Info

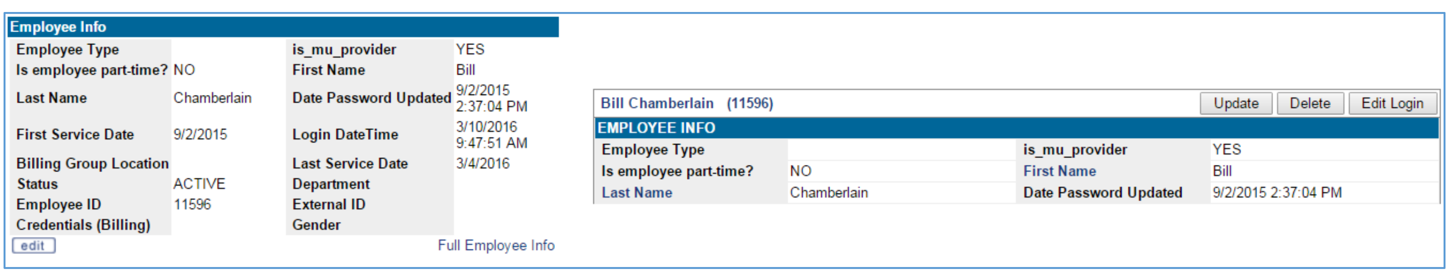
Screenshots:



Where "Super View" shows on the Data Dictionary. In this example it's used on the "Title" field.



When EmployeeSuperView is ENABLED, the field will display.



When EmployeeSuperView is DISABLED, the field will NOT display.

EmployeeTimeClockAll

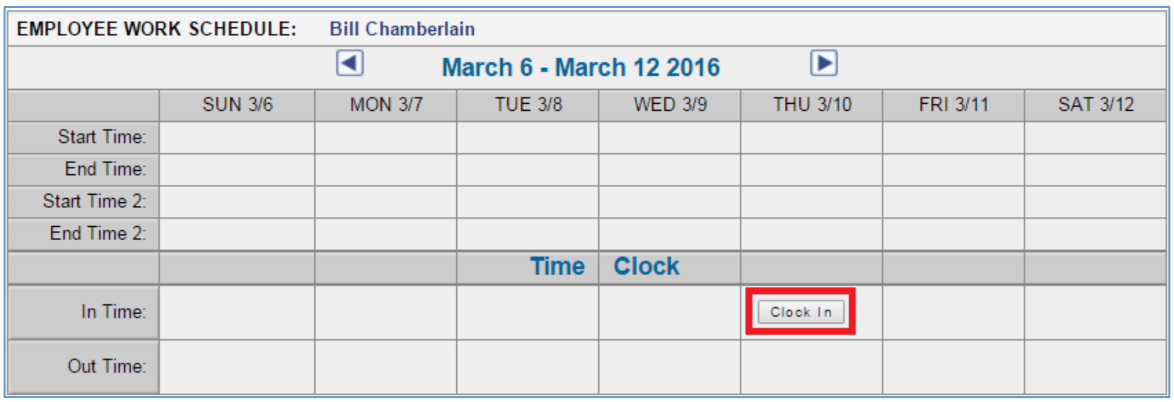
Function:

- Allows the user to Clock In or Clock Out all Employees from the Time Clock module, which is accessed by clicking the "Work Sched" button on the Employee's Nav Bar.
    - If disabled, the user will only have the ability to clock themselves in or out. The buttons will not display for other Employees that they access.

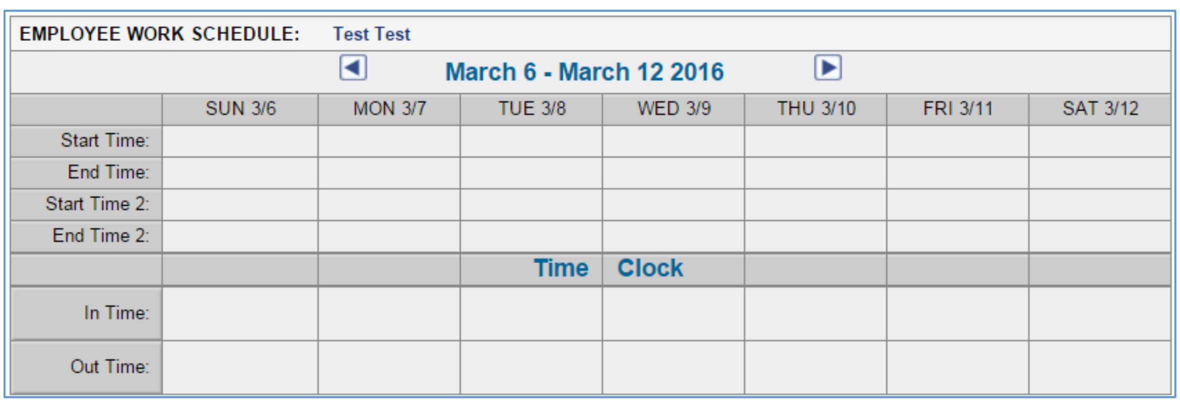
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Work Sched

Screenshots:



When EmployeeTimeClockAll is ENABLED, this button will show on any Employee's Time Clocks that you can access.



When EmployeeTimeClockAll is DISABLED, no buttons will display for other Employees.

EmployeeTimeClockEdit

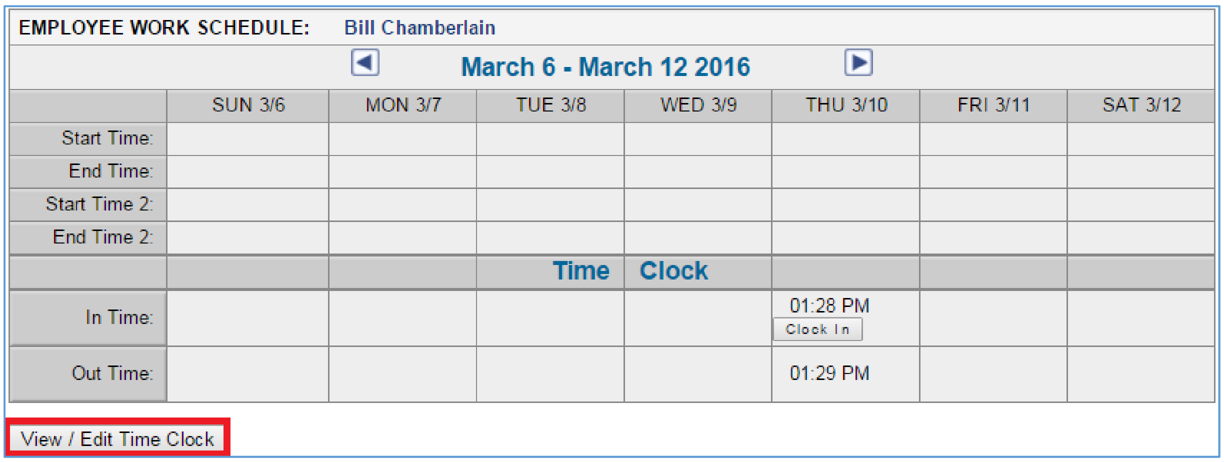
Function:

- Determines whether the “View / Edit Time Clock” button will display when viewing an Employee’s Work Schedule.
  - If disabled, the “View / Edit Time Clock” button will not display, even on the user’s own Work Schedule.

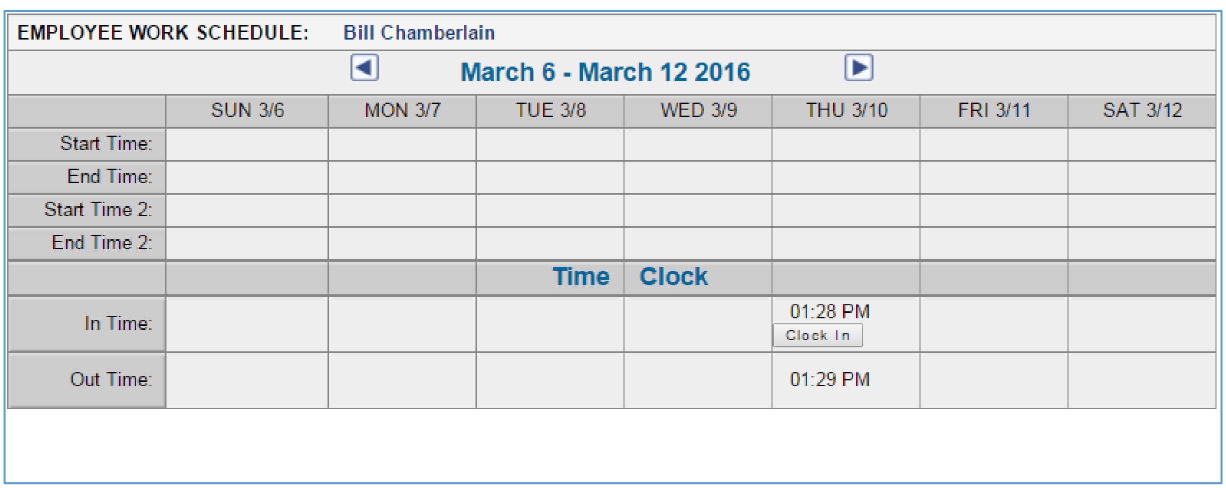
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Work Sched

Screenshots:



When EmployeeTimeClockEdit is ENABLED



When EmployeeTimeClockEdit is DISABLED

EmployeeTimeZone

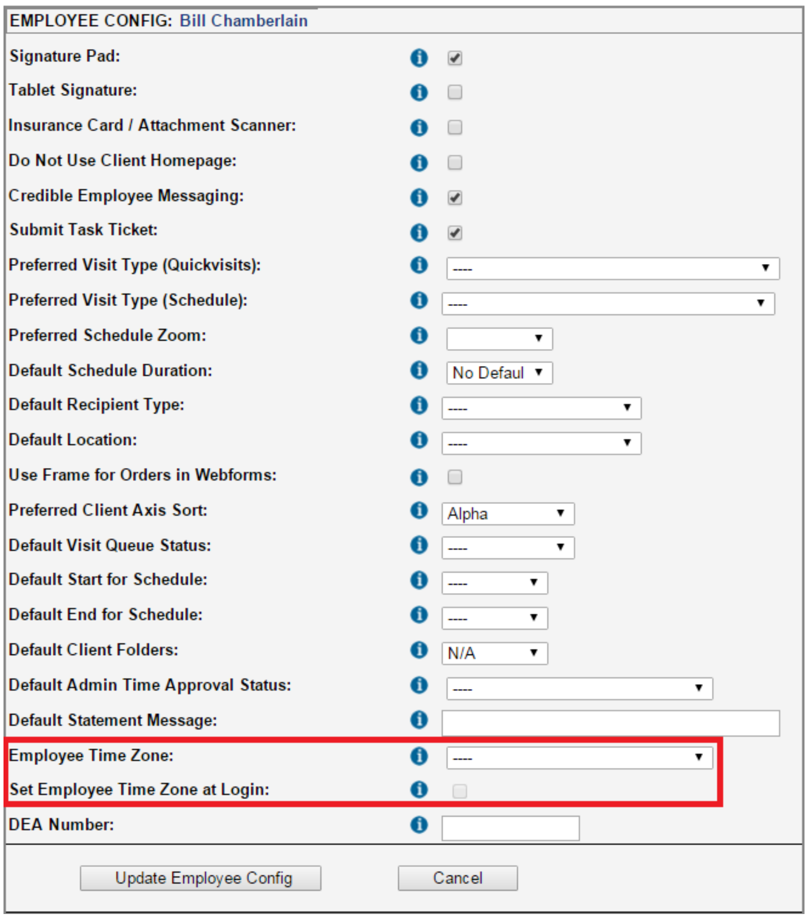
Function:

- Determines whether the user will be able to alter the “Employee Time Zone” or “Set Employee Time Zone at Login” selections that are within the Employee Config.
  - If disabled, the dropdown next to “Employee Time Zone” can’t be clicked, and the checkbox next to “Set Employee Time Zone at Login” will not be able to be checked/unchecked.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Config

Screenshots:



When EmployeeTimeZone is ENABLED, the highlighted options above can be changed. When DISABLED, they cannot.

CREDIBLE

EmployeeUpdate

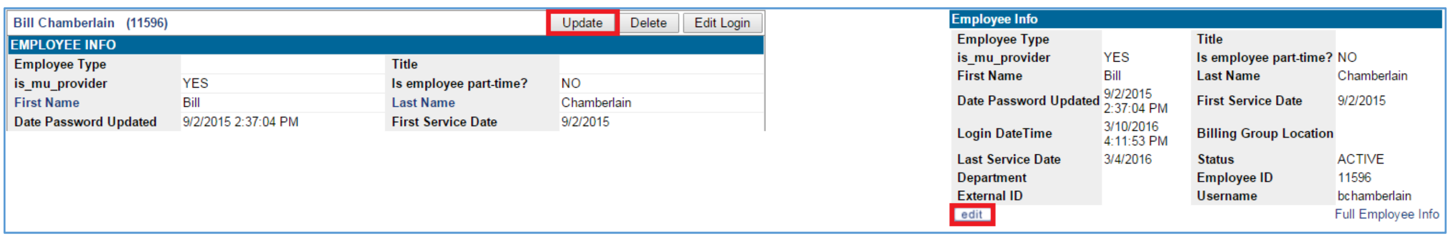
Function:

- Determines whether the user will be able to edit the Employee Profile.
    - If disabled, the “Edit” button will not appear on the Employee Info module, and the “Update” button will not appear when viewing the Profile page in View mode.
    - NOTE: This setting does not affect the user’s ability to edit their own Employee Profile. That is controlled by the EmployeeUpdateOwn matrix setting.

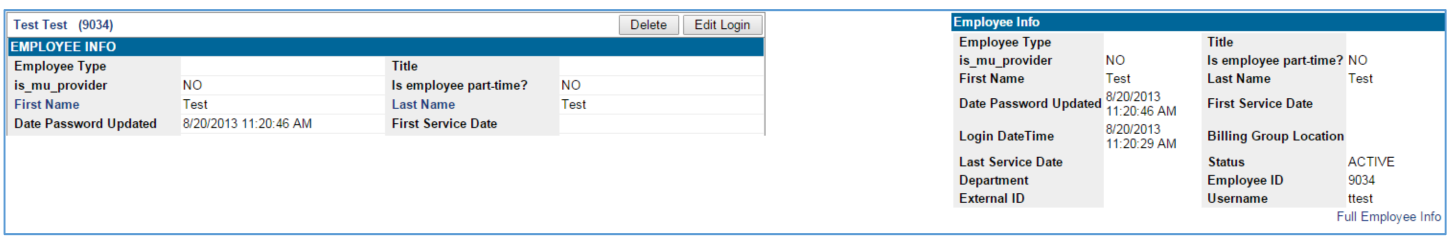
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Profile
- Employee Page -> Employee Info

Screenshots:



When EmployeeUpdate is ENABLED



When EmployeeUpdate is DISABLED

EmployeeUpdateOwn

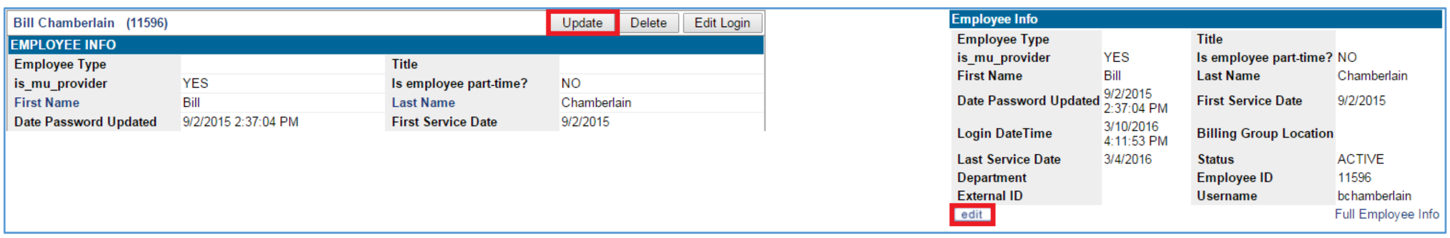
Function:

- Determines whether the user will be able to edit their own Employee Profile.
  - If disabled, the "Edit" button will not appear on their Employee Info module, and the "Update" button will not appear when viewing their Profile page in View mode.
  - NOTE: This setting does not affect the user's ability to edit the Employee Profile of others. That is controlled by the EmployeeUpdate matrix setting.

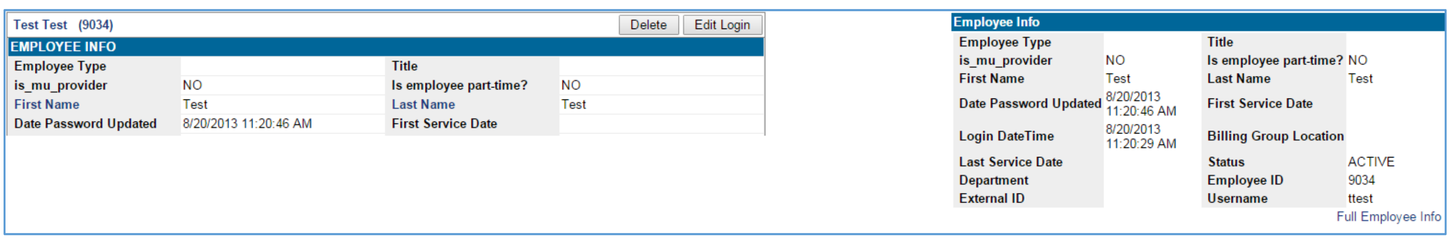
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Profile
- Employee Page -> Employee Info

Screenshots:



When EmployeeUpdate is ENABLED



When EmployeeUpdate is DISABLED

EmployeeView

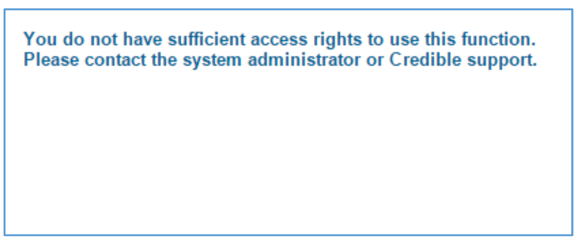
Function:

- Allows the Profile the right to view their own record, the record of Employees they supervise, those on teams that they supervise, and those who are on teams which they are a team leader.
    - Recommended for ALL staff.
    - Unlike the EmployeeList setting which controls what Employees display when searching, this setting prevents the user from accessing Employee records. If the user tries to access an Employee that does not meet the above criteria, they will receive an "Insufficient Rights" error.
    - NOTE: If EmployeeViewAll is enabled, this setting will have no effect.
    - Supercedes the EmployeeViewSupervise setting.

Location(s) this setting affects:

- Employee Page

Screenshots:



Message received if the user tries to access an Employee they do not have access right for.

EmployeeViewAll

Function:

- Allows the Profile the right to view the records of ALL Employees in the system.
    - Will supersede the EmployeeView & the EmployeeViewSupervise Security Matrix settings.

Location(s) this setting affects:

- Employee Page

EmployeeViewSupervise

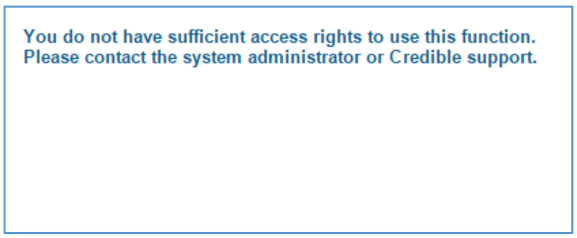
Function:

- Restricts the Profile to view only their own record, and the record of Employees they supervise.
  - Attempting to view the records of any other Employees will result in an “Insufficient Rights” page.
  - NOTE: If EmployeeView or EmployeeViewAll are set for this Profile, this setting will have no effect.

Location(s) this setting affects:

- Employee Page

Screenshots:



Message received if the user tries to access an Employee they do not have access right for.

EmployeeWorkSchedEdit

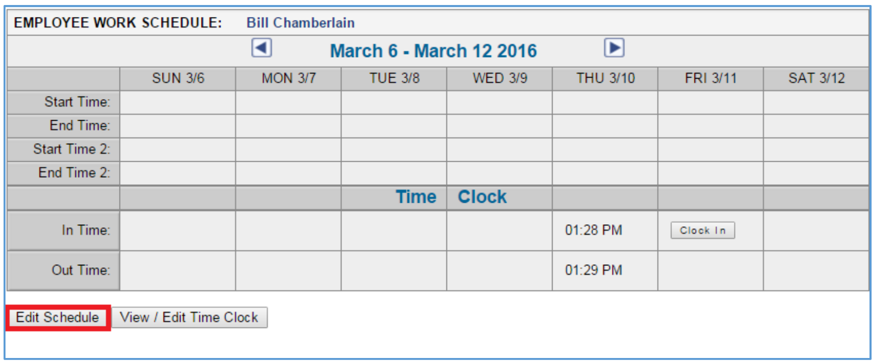
Function:

- Determines whether the user will see an “Edit Schedule” button on an Employee’s Work Schedule page.

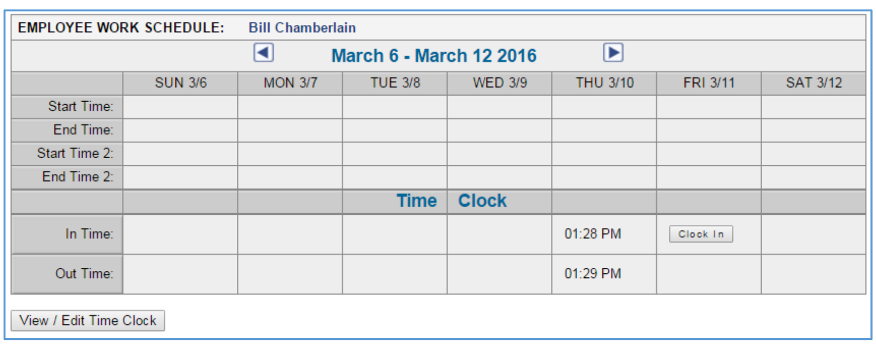
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Work Sched

Screenshots:



When EmployeeWorkSchedEdit is ENABLED



When EmployeeWorkSchedEdit is DISABLED

EmployeeWorkSchedView

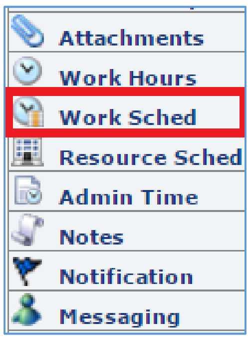
Function:

- Determines whether the user will be able to view the Work Schedule of other Employees.
    - If disabled, the “Work Sched” button will only display on the user’s own Employee nav bar. It will not display on the nav bar of other Employees.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Work Sched

Screenshots:



If ENABLED, this button will display on all Employee Nav Bars.

If DISABLED, this button will only display on the Nav Bar of the Employee that is logged in.

PasswordUpdate

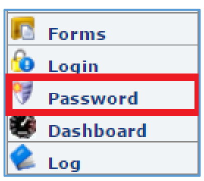
Function:

- Determines whether the "Password" button appears on the Employee Nav Bar of other Employees.
  - If disabled, the "Password" button will only appear on the Nav Bar of the Employee that is logged in.
- Determines whether the "Update Password" button will appear after clicking "Login" on the Employee Nav Bar.
  - If disabled, the "Update Password" button will only appear on the Login page of the Employee that is logged in.

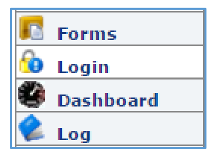
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Password
- Employee Page -> Employee Nav Bar -> Login

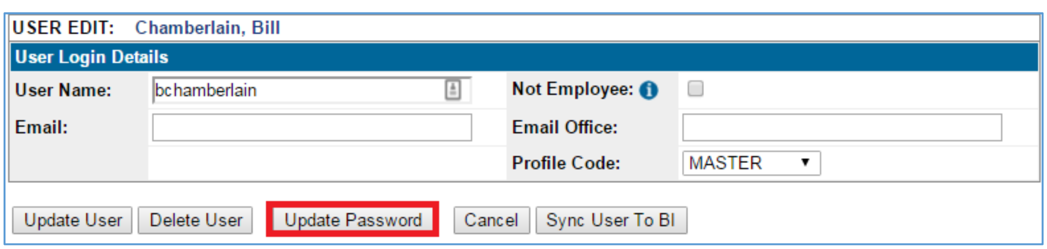
Screenshots:



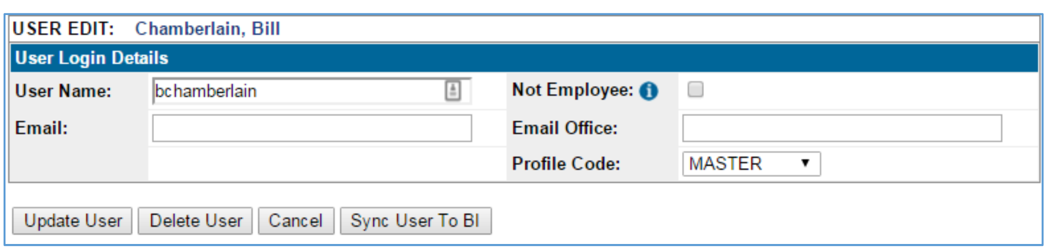
When PasswordUpdate is ENABLED



When PasswordUpdate is DISABLED



When PasswordUpdate is ENABLED



When PasswordUpdate is DISABLED

SendBroadcast

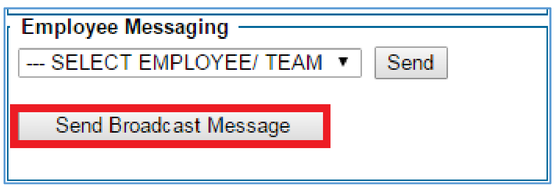
Function:

- Allows the User the right to use the "Send Broadcast Message" button that is within the Employee Messaging module that displays on the Home Page. This sends a message to all Employees.
  - If the Employee Messaging module is not active on the Home Page, this setting will have no effect.

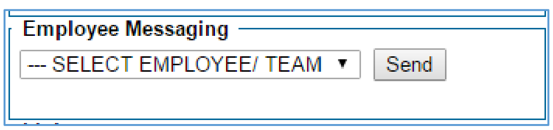
Location(s) this setting affects:

- Home Page -> Employee Messaging

Screenshots:



When SendBroadcast is ENABLED



When SendBroadcast is DISABLED

SendEmpMessage

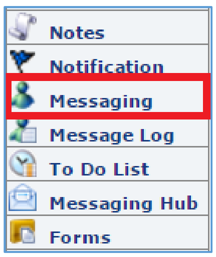
Function:

- Allows the use of the “Messaging” button on the Employee Nav Bar.
- Also determines whether the Messaging icon appears next to an Employee’s name when performing a search on the Employee tab.

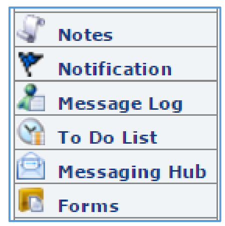
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Messaging
- Employee Tab -> Employee List (after a search)

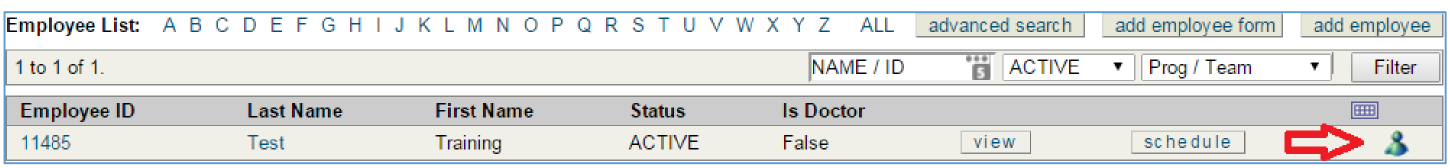
Screenshots:



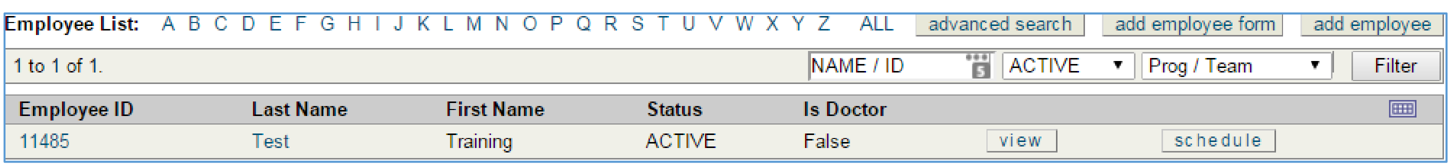
When SendEmpMessage is ENABLED



When SendEmpMessage is DISABLED



When SendEmpMessage is ENABLED



When SendEmpMessage is DISABLED

ToDoListAddOtherEmp

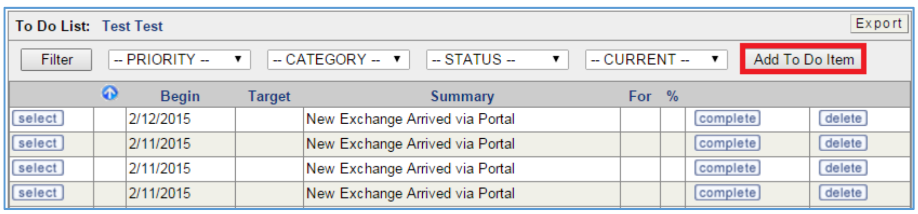
Function:

- Allows the “Add To Do Item” button to appear when viewing the To Do List of other Employees.
  - When disabled, the “Add To Do Item” button will only appear when viewing the To Do List of the Employee that is logged in.
- Also affects the “Detailed To Do List Add” that can be accessed from the Home Page if the “Add To Do Item” module displays on the Home Page. Determines whether the user can choose other Employees.

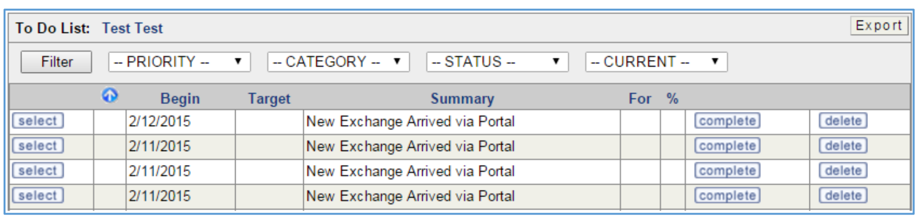
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> To Do List
- Home Page -> Add To Do Item Module -> Detailed To Do List Add

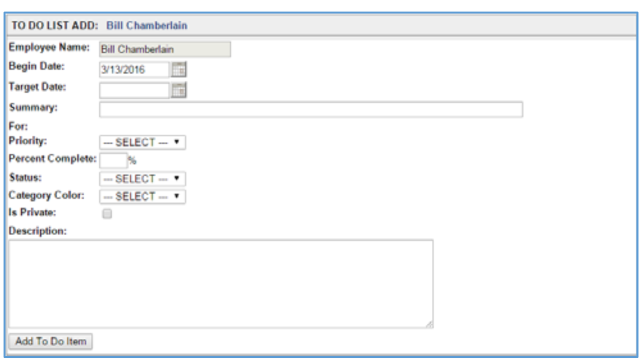
Screenshots:



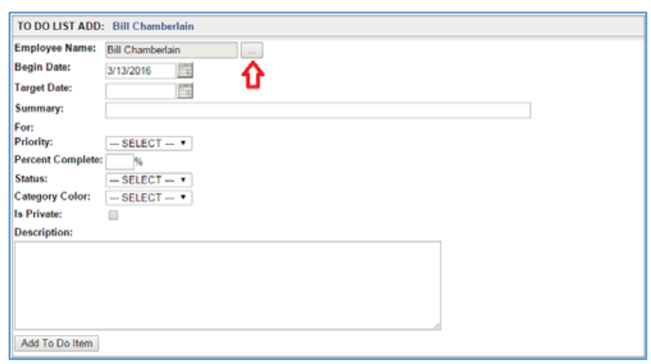
When ToDoListAddOtherEmp is ENABLED



When ToDoListAddOtherEmp is DISABLED



When ToDoListAddOtherEmp is ENABLED



When ToDoListAddOtherEmp is DISABLED

ToDoListDelete

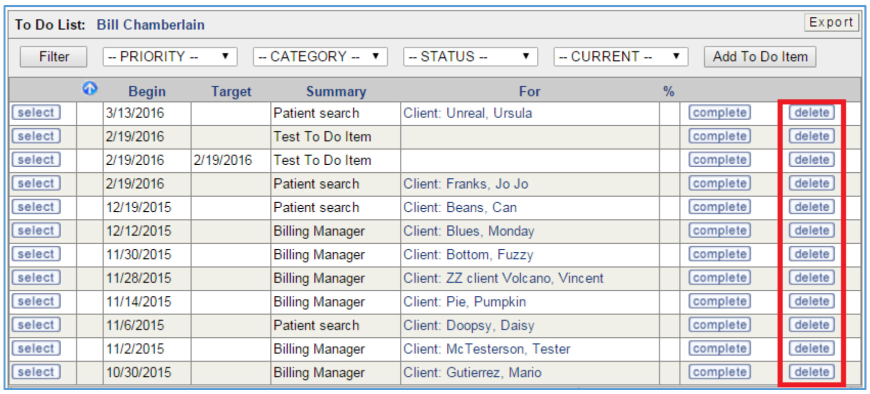
Function:

- Determines whether the “Delete” button will appear next to an Employee’s To Do List entry.

Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> To Do List

Screenshots:

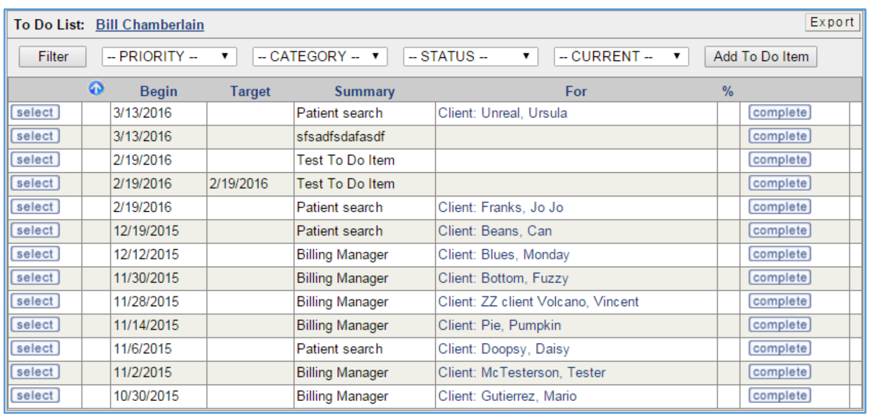


To Do List: Bill Chamberlain Export

Filter -- PRIORITY -- -- CATEGORY -- -- STATUS -- -- CURRENT -- Add To Do Item

	Begin	Target	Summary	For	%		
select	3/13/2016		Patient search	Client: Unreal, Ursula		complete	delete
select	2/19/2016		Test To Do Item			complete	delete
select	2/19/2016	2/19/2016	Test To Do Item			complete	delete
select	2/19/2016		Patient search	Client: Franks, Jo Jo		complete	delete
select	12/19/2015		Patient search	Client: Beans, Can		complete	delete
select	12/12/2015		Billing Manager	Client: Blues, Monday		complete	delete
select	11/30/2015		Billing Manager	Client: Bottom, Fuzzy		complete	delete
select	11/28/2015		Billing Manager	Client: ZZ client Volcano, Vincent		complete	delete
select	11/14/2015		Billing Manager	Client: Pie, Pumpkin		complete	delete
select	11/6/2015		Patient search	Client: Doopsy, Daisy		complete	delete
select	11/2/2015		Billing Manager	Client: McTesterson, Tester		complete	delete
select	10/30/2015		Billing Manager	Client: Gutierrez, Mario		complete	delete

When ToDoListDelete is ENABLED



To Do List: Bill Chamberlain Export

Filter -- PRIORITY -- -- CATEGORY -- -- STATUS -- -- CURRENT -- Add To Do Item

	Begin	Target	Summary	For	%	
select	3/13/2016		Patient search	Client: Unreal, Ursula		complete
select	3/13/2016		sfsadfsdafasdf			complete
select	2/19/2016		Test To Do Item			complete
select	2/19/2016	2/19/2016	Test To Do Item			complete
select	2/19/2016		Patient search	Client: Franks, Jo Jo		complete
select	12/19/2015		Patient search	Client: Beans, Can		complete
select	12/12/2015		Billing Manager	Client: Blues, Monday		complete
select	11/30/2015		Billing Manager	Client: Bottom, Fuzzy		complete
select	11/28/2015		Billing Manager	Client: ZZ client Volcano, Vincent		complete
select	11/14/2015		Billing Manager	Client: Pie, Pumpkin		complete
select	11/6/2015		Patient search	Client: Doopsy, Daisy		complete
select	11/2/2015		Billing Manager	Client: McTesterson, Tester		complete
select	10/30/2015		Billing Manager	Client: Gutierrez, Mario		complete

When ToDoListDelete is DISABLED

UserAdd

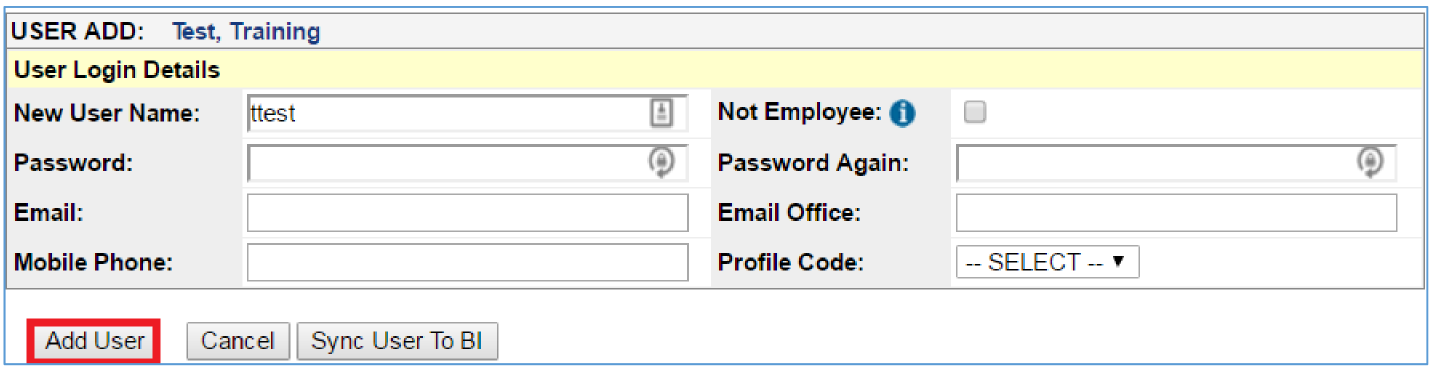
Function:

- Determines whether a Username and Password can be customized for Employee Accounts that don't yet have a username on their account. If disabled, the "Add User" button will not display.
    - NOTE: This setting does not affect updating the username and password of Employee's that already have a username on the account.

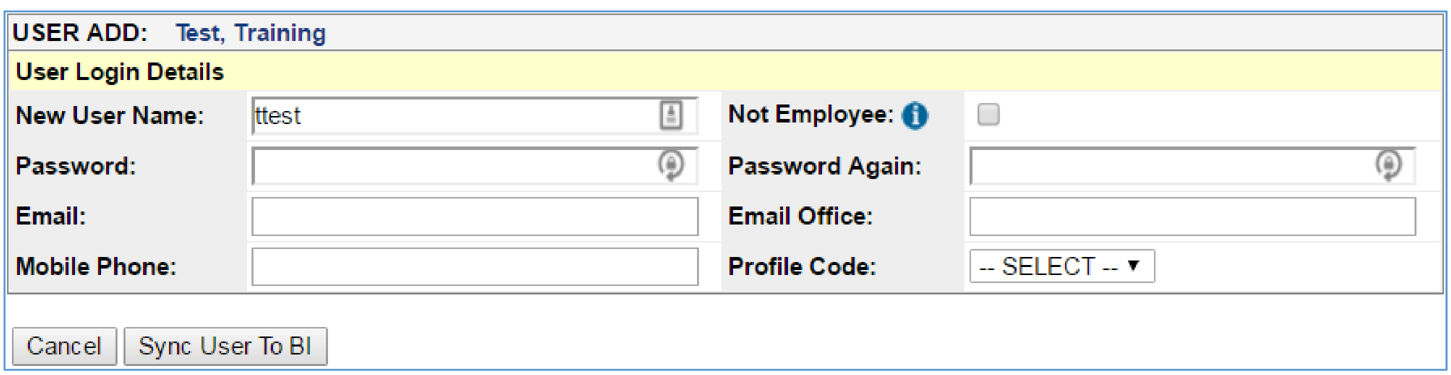
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> To Do List

Screenshots:



When UserAdd is ENABLED



When UserAdd is DISABLED

UserList

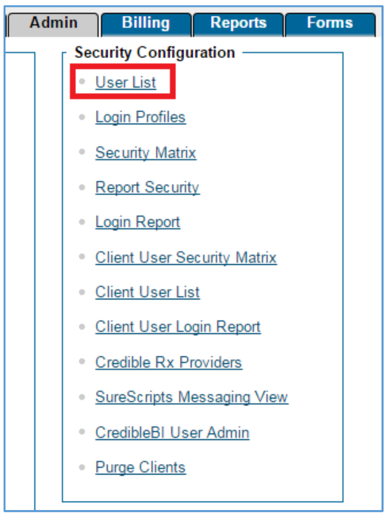
Function:

- Determines whether the user will be able to access the “User List” link that shows on the Admin Tab under the Security Configuration section.

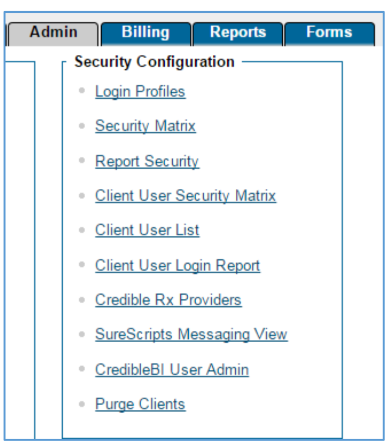
Location(s) this setting affects:

- Admin Tab -> Security Configuration Section -> User List

Screenshots:



With UserList ENABLED



With UserList DISABLED

UserUpdate

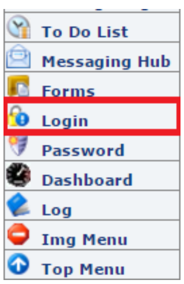
Function:

- Determines whether the user will be able to view/access the "Login" button on an Employee Profile.
- Determines whether the user will be able to click "Update" on a User that shows in the "User List", which is accessed from the Admin Tab.
    - If disabled, the user will receive an "Insufficient Rights Message" when trying to click "Update".

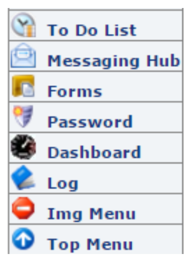
Location(s) this setting affects:

- Admin Tab -> Security Configuration Section -> User List
- Employee Page -> Employee Nav Bar -> Login

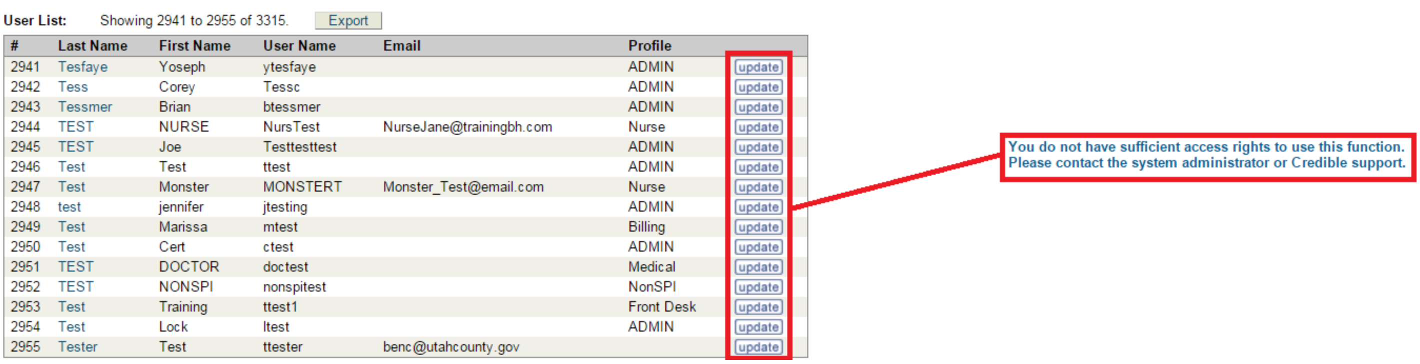
Screenshots:



With UserUpdate ENABLED



With UserUpdate DISABLED



User List: Showing 2941 to 2955 of 3315. Export

#	Last Name	First Name	User Name	Email	Profile	
2941	Tesfaye	Yoseph	ytesfaye		ADMIN	update
2942	Tess	Corey	Tessc		ADMIN	update
2943	Tessmer	Brian	btessmer		ADMIN	update
2944	TEST	NURSE	NursTest	NurseJane@trainingbh.com	Nurse	update
2945	TEST	Joe	Testtesttest		ADMIN	update
2946	Test	Test	ttest		ADMIN	update
2947	Test	Monster	MONSTERT	Monster_Test@email.com	Nurse	update
2948	test	jennifer	jtesting		ADMIN	update
2949	Test	Marissa	mtest		Billing	update
2950	Test	Cert	ctest		ADMIN	update
2951	TEST	DOCTOR	doctest		Medical	update
2952	TEST	NONSPI	nonspitest		NonSPI	update
2953	Test	Training	ttest1		Front Desk	update
2954	Test	Lock	ltest		ADMIN	update
2955	Tester	Test	ttester	benc@utahcounty.gov		update

With UserUpdate DISABLED

Matrix Section: Forms

FormBuilder

Function:

- Allow the user to see and click the “Forms” tab.

Location(s) this setting affects:

- Forms Tab

Screenshots:

When FormBuilder is ENABLED

When FormBuilder is DISABLED

FormBuilderCopy

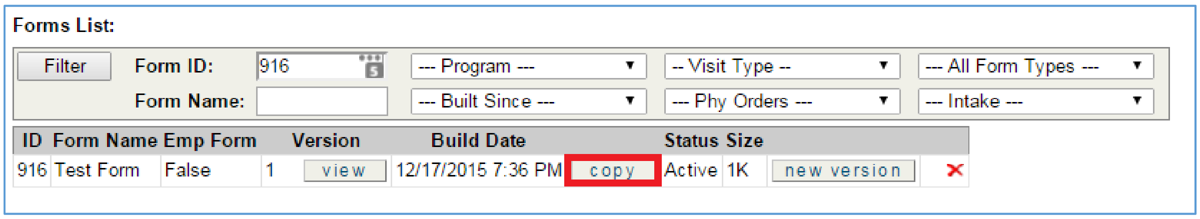
Function:

- Determines whether the user will see the “Copy” button next to each Form that displays on the Form List.

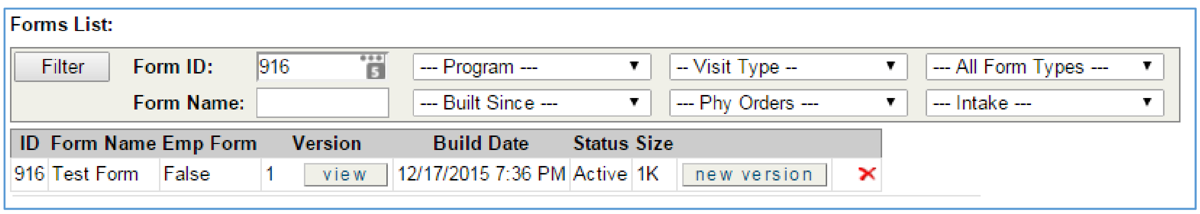
Location(s) this setting affects:

- Forms Tab -> Form List

Screenshots:



When FormBuilderCopy is ENABLED



When FormBuilderCopy is DISABLED

FormBuilderEdit

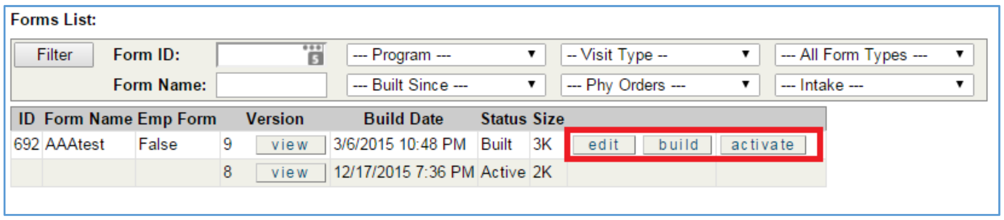
Function:

- Determines whether the user will see the “Edit” button next to each Form that displays on the Form List.

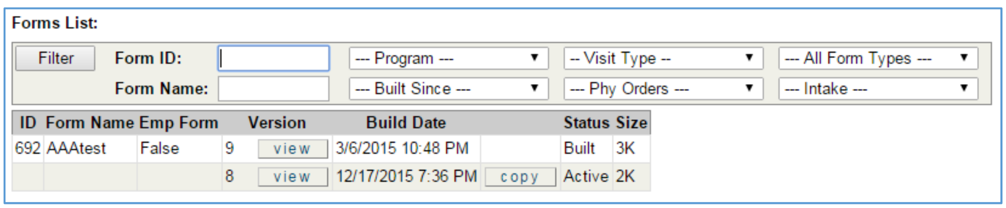
Location(s) this setting affects:

- Forms Tab -> Form List

Screenshots:



When FormBuilderCopy is ENABLED



When FormBuilderEdit is DISABLED

FundsAdd

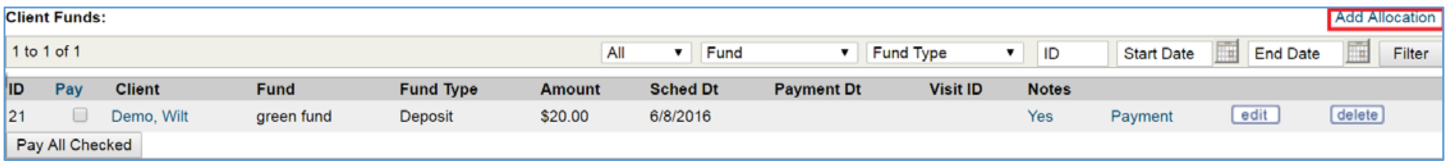
Function:

- Determines whether the user will be able to add a Funds entry to a Client when viewing the Client's "Funds" page.

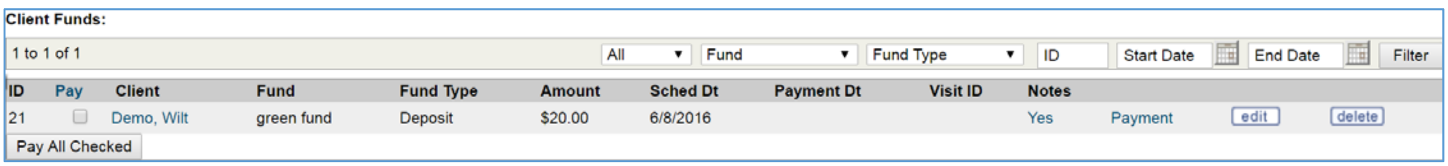
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Funds Button -> Add Allocation

Screenshots:



When FundsAdd is ENABLED



When FundsAdd is DISABLED

FundsBudget

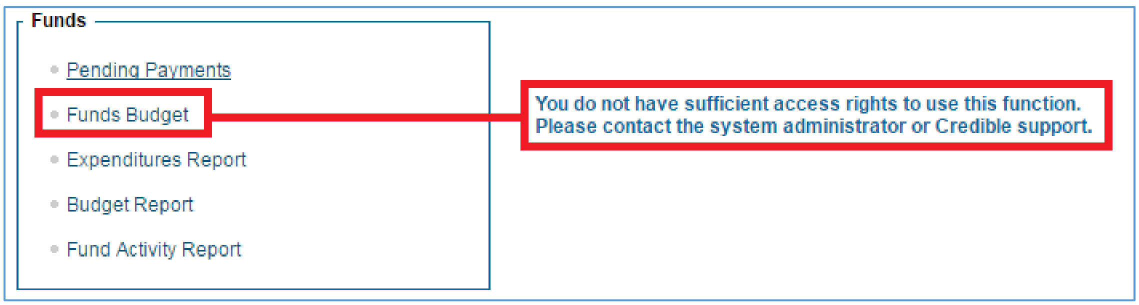
Function:

- Determines whether the user will be able to access the “Funds Budget” page on the Funds Tab.

Location(s) this setting affects:

- Funds Tab -> Funds Budget

Screenshots:



When FundsBudget is DISABLED

FundsConfig

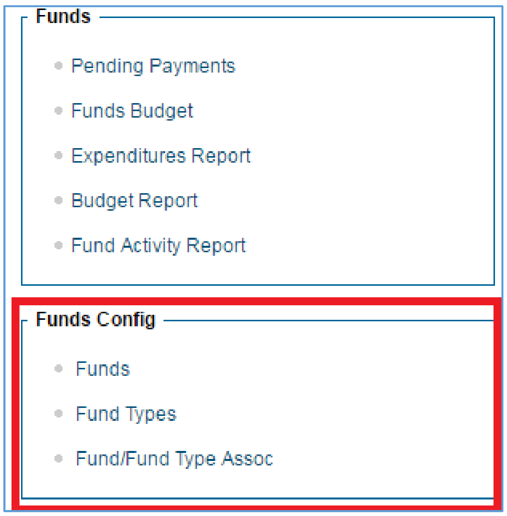
Function:

- Determines whether the user will be able to access the “Funds Config” section of the Funds Tab.
    - This section contains the following links: Funds, Fund Types, and Fund/Fund Type Assoc

Location(s) this setting affects:

- Funds Tab -> Funds Config Section

Screenshots:



When FundsConfig is ENABLED

When FundsConfig is DISABLED

FundsDelete

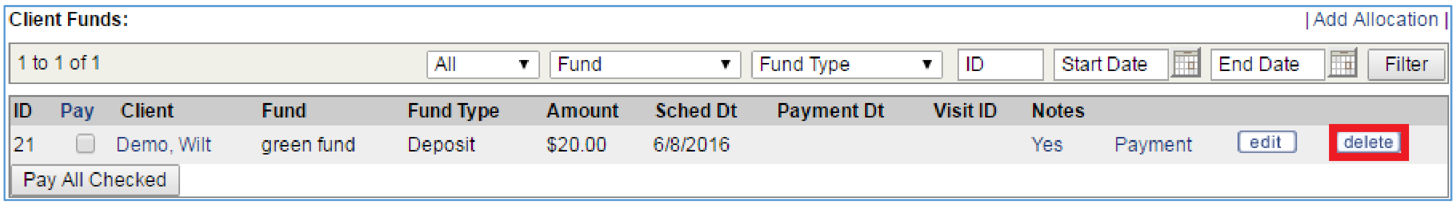
Function:

- Determines whether the user will be able to delete existing Funds entries on a Client.

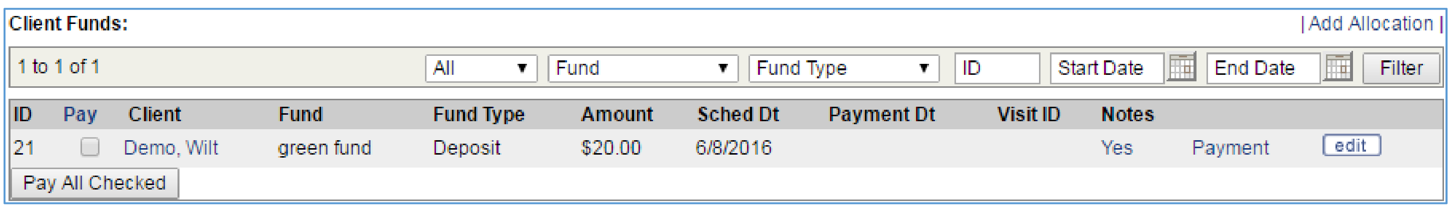
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Funds Button -> Delete Button

Screenshots:



When FundsDelete is ENABLED



When FundsDelete is DISABLED

FundsEdit

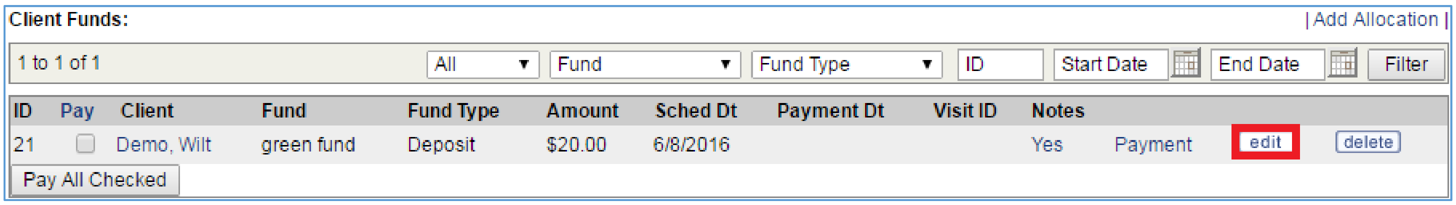
Function:

- Determines whether the user will be able to edit existing Funds entries on a Client.

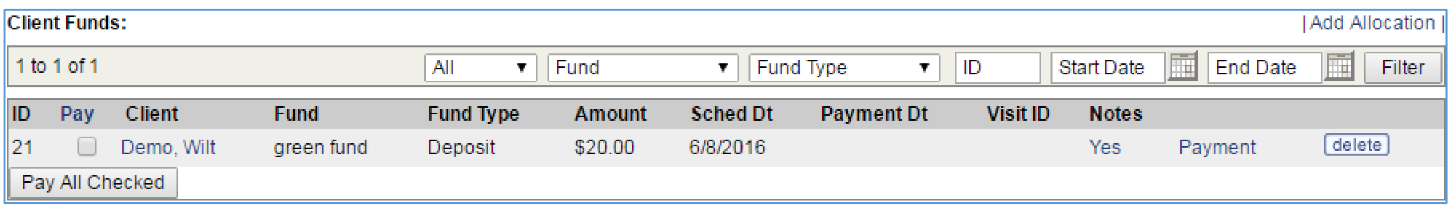
Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Funds Button -> Edit Button

Screenshots:



When FundsEdit is ENABLED



When FundsEdit is DISABLED

FundsModule

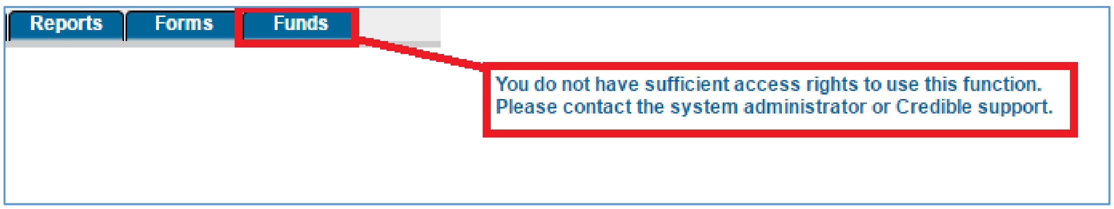
Function:

- Determines whether the user will be able to access the Funds Tab.
  - If disabled, an "Insufficient Rights" message will appear when clicking the Funds Tab.
  - NOTE: The Partner must have the Funds Module activated in their domain, or the Funds Matrix settings will have no effect.

Location(s) this setting affects:

- Funds Tab

Screenshots:



FundsPayment

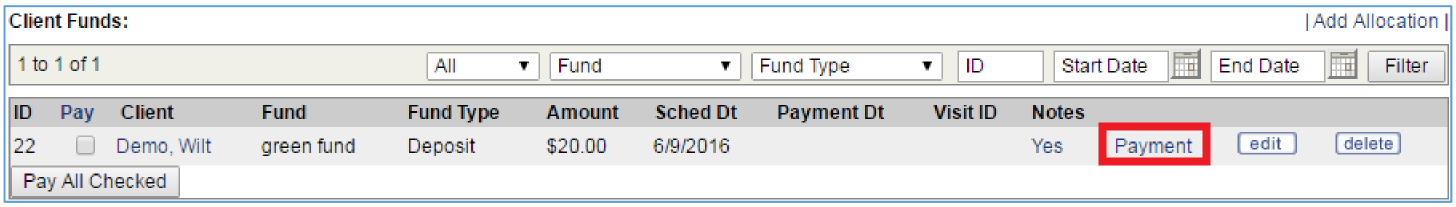
Function:

- Determines whether the user will be able to make payments on Client Fund Allocations, using the "Payment" link on the Client's Funds page.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Funds Button -> Payment

Screenshots:



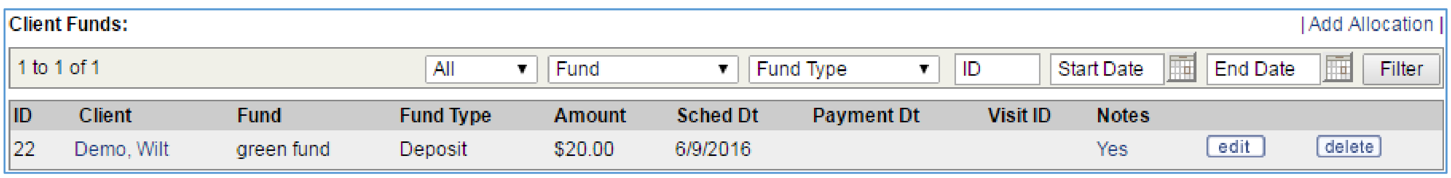
Client Funds: | Add Allocation |

1 to 1 of 1 | All | Fund | Fund Type | ID | Start Date | End Date | Filter

ID	Pay	Client	Fund	Fund Type	Amount	Sched Dt	Payment Dt	Visit ID	Notes			
22		Demo, Wilt	green fund	Deposit	$20.00	6/9/2016			Yes	Payment	edit	delete

Pay All Checked

When FundsPayment is ENABLED



Client Funds: | Add Allocation |

1 to 1 of 1 | All | Fund | Fund Type | ID | Start Date | End Date | Filter

ID	Client	Fund	Fund Type	Amount	Sched Dt	Payment Dt	Visit ID	Notes		
22	Demo, Wilt	green fund	Deposit	$20.00	6/9/2016			Yes	edit	delete

When FundsPayment is DISABLED

FundsReport

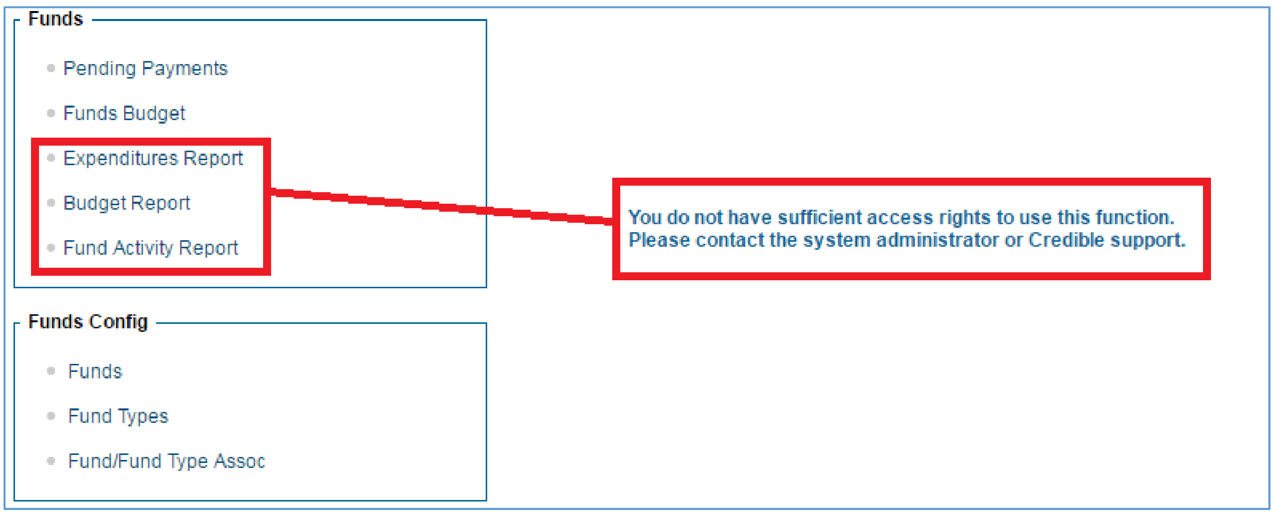
Function:

- Determines whether the user will be able to access the following links on the Funds Tab: Expenditures Report, Budget Report, Fund Activity Report
  - If disabled, an “Insufficient Rights” message will display when clicking either of these links.

Location(s) this setting affects:

- Funds Tab -> Expenditures Report
- Funds Tab -> Budget Report
- Funds Tab -> Fund Activity Report

Screenshots:



When FundsReport is DISABLED

FundsView

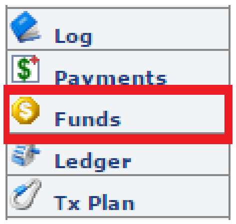
Function:

- Determines whether the user will be able to view Client Funds by clicking on the "Funds" button on the Client Nav Bar.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Funds Button

Screenshots:



When FundsView is ENABLED

When FundsView is DISABLED

Matrix Section: MyCredible Admin

MyCWLinksAdmin

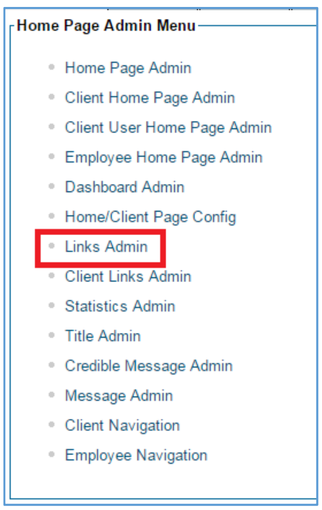
Function:

- Determines whether the user will be able to see the Links Admin link when viewing Admin Tab -> Home Page Config.
    - If the "Links" window is not set to display on the Home Page, this setting won't have a noticeable effect.

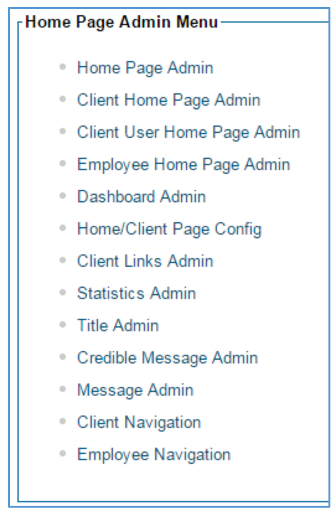
Location(s) this setting affects:

- Home Page
- Admin Tab -> Home Page Config -> Links Admin

Screenshots:



When MyCWLinksAdmin is ENABLED



When MyCWLinksAdmin is DISABLED

MyCWMasterAdmin

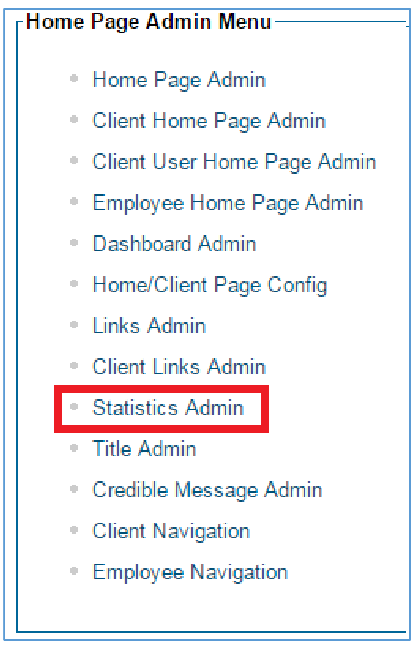
Function:

- Determines whether the "Statistics Admin" link will display when accessing Admin Tab -> Home Page Config

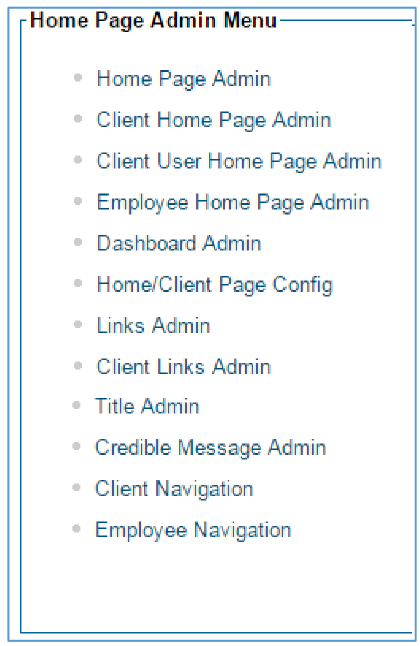
Location(s) this setting affects:

- Home Page
- Admin Tab -> Home Page Config -> Statistics Admin

Screenshots:



If MyCWMasterAdmin is ENABLED



If MyCWMasterAdmin is DISABLED

MyCWMessageAdmin

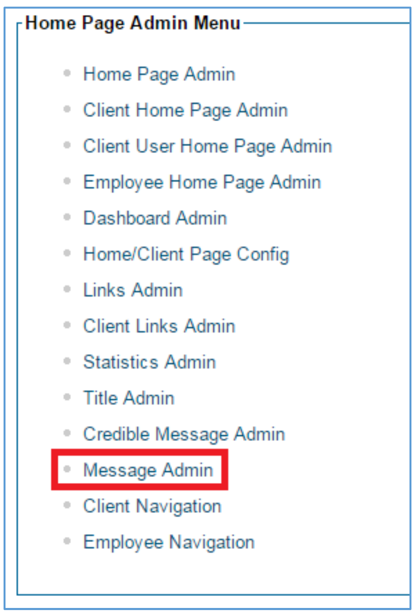
Function:

- Determines whether the “Message Admin” link will display when accessing Admin Tab -> Home Page Config
    - This link allows the user to customize messages that display on the Home Page on the Message Board section.
    - If the Message Board is not active on the Home Page, this setting will not be relevant.

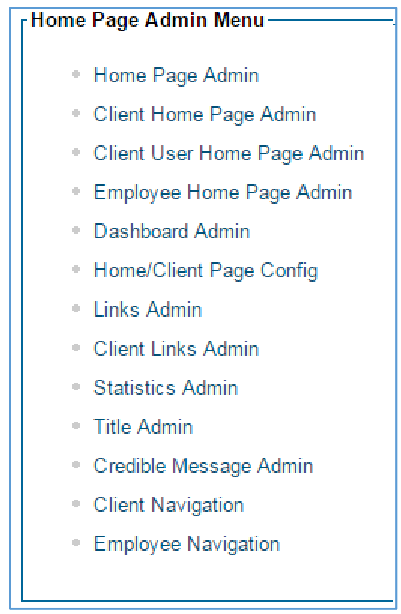
Location(s) this setting affects:

- Home Page -> Message Board
- Admin Tab -> Home Page Config -> Message Admin

Screenshots:



If MyCWMessageAdmin is ENABLED



If MyCWMessageAdmin is DISABLED

Matrix Section: Physician Orders

PendingOnHomePage

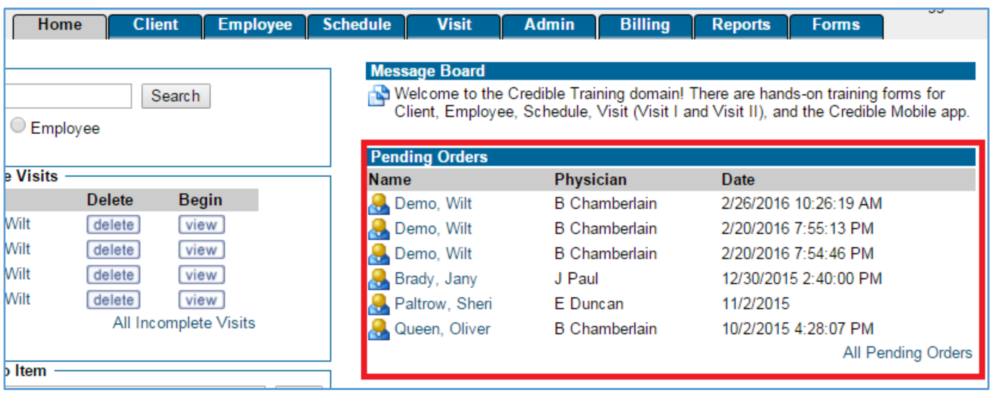
Function:

- Determines whether the user will be able to view the Pending Orders module on the Home Page.
    - If this setting is disabled, the module will not display, and will move on to the next module in the order.
- NOTE: This Matrix setting is only applicable if the Pending Orders module is set to display on the Home Page. This setting can be found at: Admin Tab -> Home Page Config -> Home Page Admin

Location(s) this setting affects:

- Home Page
- Admin Tab -> Home Page Config -> Home Page Admin

Screenshots:



PhysicianOrderLineDelete

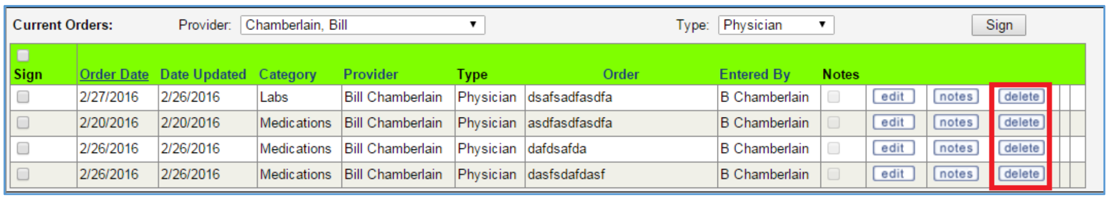
Function:

- Determines whether the “Delete” button displays on a Current Order.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Orders

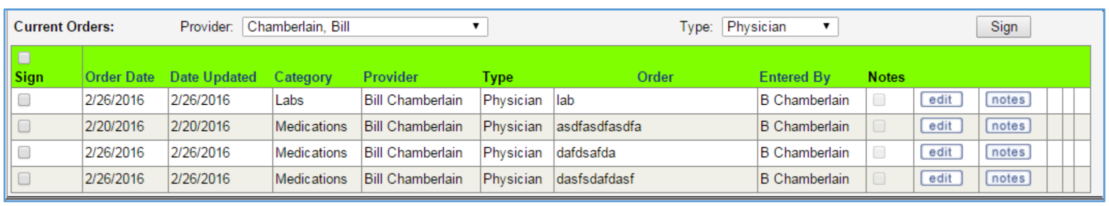
Screenshots:



Current Orders: Provider: Chamberlain, Bill Type: Physician Sign

Sign	Order Date	Date Updated	Category	Provider	Type	Order	Entered By	Notes			
	2/27/2016	2/26/2016	Labs	Bill Chamberlain	Physician	dsafsadfasdfa	B Chamberlain		edit	notes	delete
	2/20/2016	2/20/2016	Medications	Bill Chamberlain	Physician	asdfasdfasdfa	B Chamberlain		edit	notes	delete
	2/26/2016	2/26/2016	Medications	Bill Chamberlain	Physician	dafdsafda	B Chamberlain		edit	notes	delete
	2/26/2016	2/26/2016	Medications	Bill Chamberlain	Physician	dasfsdafdasf	B Chamberlain		edit	notes	delete

When PhysicianOrderLineDelete is ENABLED



Current Orders: Provider: Chamberlain, Bill Type: Physician Sign

Sign	Order Date	Date Updated	Category	Provider	Type	Order	Entered By	Notes		
	2/26/2016	2/26/2016	Labs	Bill Chamberlain	Physician	lab	B Chamberlain		edit	notes
	2/20/2016	2/20/2016	Medications	Bill Chamberlain	Physician	asdfasdfasdfa	B Chamberlain		edit	notes
	2/26/2016	2/26/2016	Medications	Bill Chamberlain	Physician	dafdsafda	B Chamberlain		edit	notes
	2/26/2016	2/26/2016	Medications	Bill Chamberlain	Physician	dasfsdafdasf	B Chamberlain		edit	notes

When PhysicianOrderLineDelete is DISABLED

PhysicianOrdersAdd

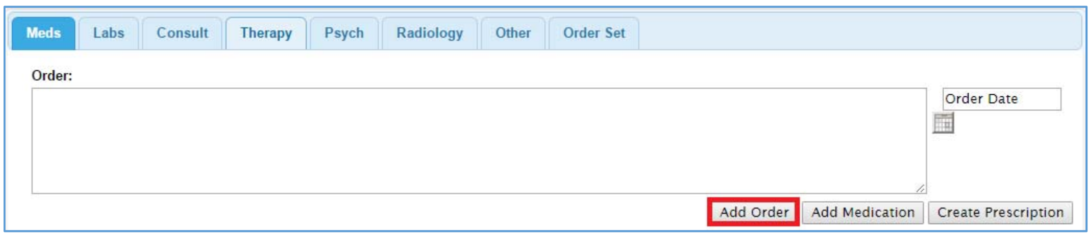
Function:

- Determines whether the “Add Order” button will function in the New Order module.
  - If this setting is disabled, the “Add Order” button will still appear, however it will not function when clicked.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Orders

Screenshots:



PhysicianOrdersSignAll

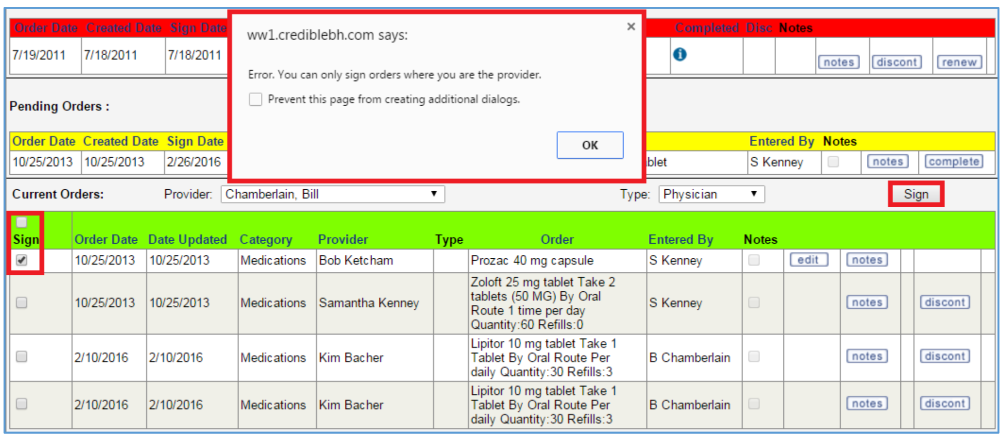
Function:

- Allows the Profile the right to use the 'Sign' functionality on a Client's Current Orders where the User is not the listed person on the Order.
    - If this setting is disabled, when trying to sign Current Orders assigned to a different user, the following pop-up error will display: *Error. You can only sign orders where you are the provider.*

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Orders

Screenshots:



When PhysicanOrdersSignAll is DISABLED, and you are not the user listed on the order.

PhysicianOrdersView

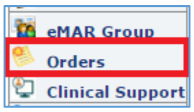
Function:

- Determines whether the "Orders" button will appear on the Client Nav Bar.

Location(s) this setting affects:

- Client Page -> Client Nav Bar -> Orders

Screenshots:



When PhysicianOrdersView is ENABLED. Button will not appear if DISABLED.

AdvSearch

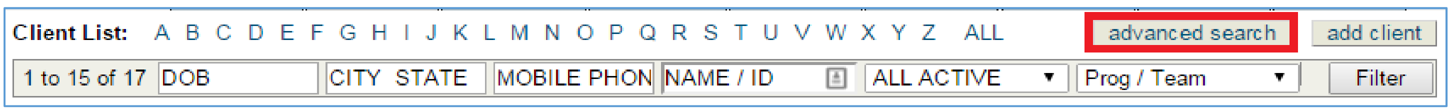
Function:

- Determines whether the user will be able to access the Advanced Search module.
- Determines whether the "Advanced Ledger Search" link will display on the Billing Tab.

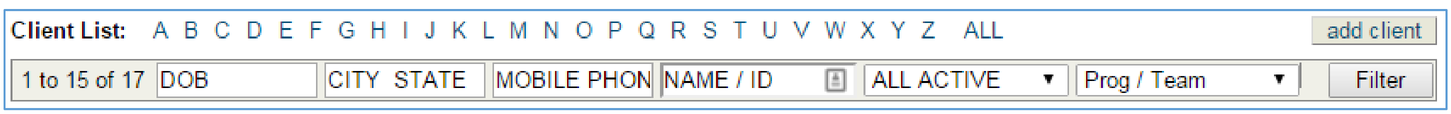
Location(s) this setting affects:

- Client Tab -> Advanced Search
- Employee Tab -> Advanced Search
- Visit Tab -> Advanced Search
- Billing Tab -> Advanced Ledger Search

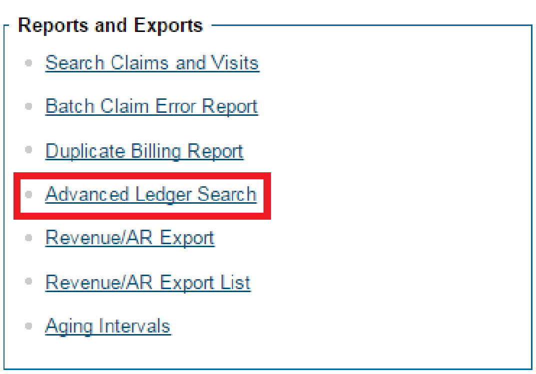
Screenshots:



When AdvSearch is ENABLED



When AdvSearch is DISABLED



When AdvSearch is ENABLED

When AdvSearch is DISABLED

AdvSearchExport

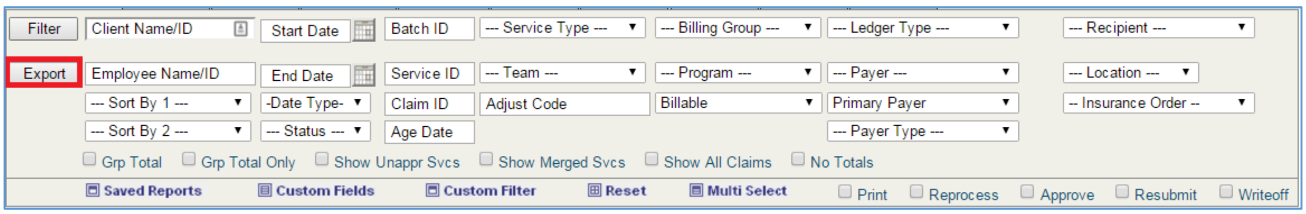
Function:

- Determines whether the user will be able to Export the results of an Advanced Search.
  - If Disabled, the “Export” button will not appear on any of the Advanced Search modules.

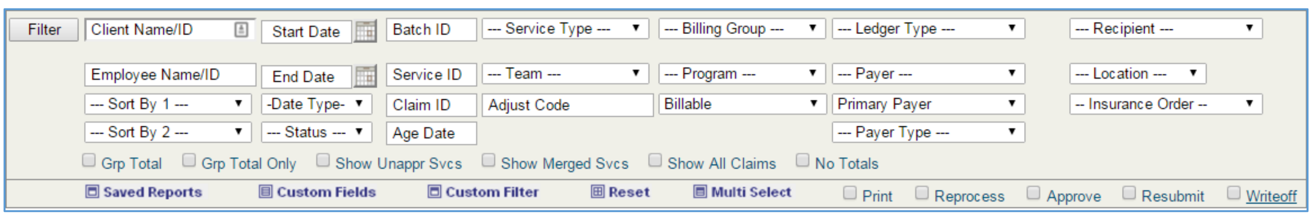
Location(s) this setting affects:

- Client Tab -> Advanced Search
- Employee Tab -> Advanced Search
- Visit Tab -> Advanced Search
- Billing Tab -> Advanced Ledger Search

Screenshots:



When AdvSearchExport is ENABLED



When AdvSearchExport is DISABLED

ClinicalQualityMeasurements

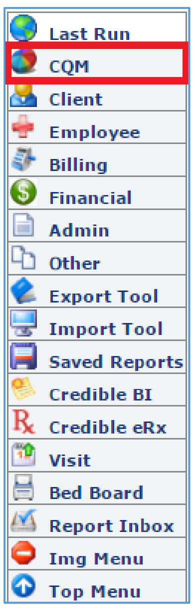
Function:

- Allows the user to run and report Clinical Quality Measurements (CQM's). Will display a CQM button in the left navbar of the Reports Tab.
    - NOTE: Your domain must also be setup on the database side to run CQM's, before this setting will take effect. Please contact Credible if CQM's need to be configured.

Location(s) this setting affects:

- Report Tab -> CQM

Screenshots:



This button appears when ClinicalQualityMeasurements is marked as ENABLED.

CredibleBIView

Function:

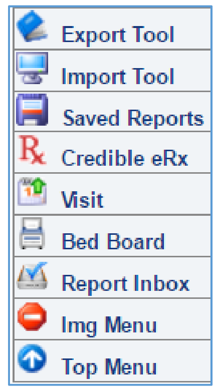
- Allows the user to view the 'Credible BI' link on the Reports Tab.
  - NOTE: The user will still need a valid BI username in order to click the link and actually reach the BI environment. If a user is in need of a BI account, please submit a Task Ticket.

Location(s) this setting affects:

- Report Tab -> Credible BI

Screenshots:

When CredibleBIView is ENABLED



When CredibleBIView is DISABLED

DataPortability

Function:

- This setting is no longer utilized, and is now controlled through the Report Security Matrix.
    - NOTE: This setting is in regards to the “170.314(b)(7) Data Portability” report that allows CDA (Clinical Summaries) to be generated for all patients, and would generate in the Report Inbox.

Screenshots:

Report Security Matrix:

Report		@SuperUser	Adm Dir	ADMIN
170.314(b)(7) Data Portability	i	☐	☐	☐
Admin Logging	i	☑	☐	☑
Admin Time		☐	☐	☐
adult intake		☐	☐	☐

Where the DataPortability Report is viewed in the Report Security Matrix

EditAdvancedSearches

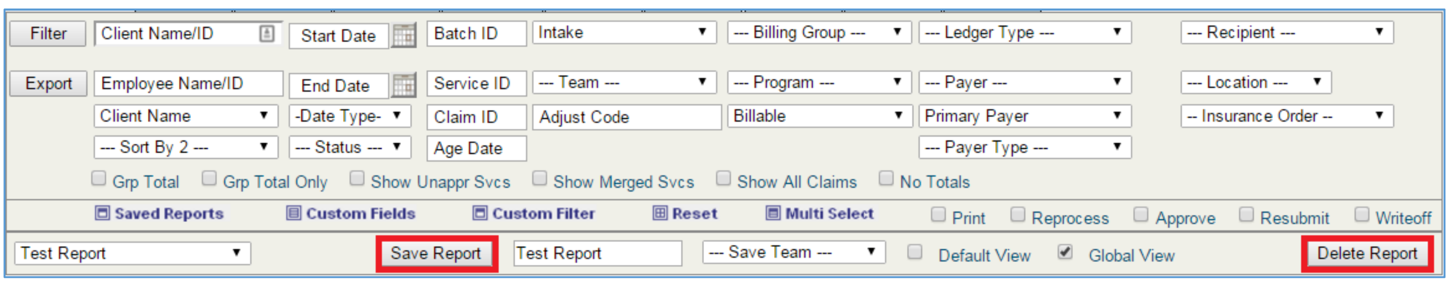
Function:

- Allows the user to Edit or Delete any previously saved Advanced Search Report on the Client, Employee, or Visit tabs, as well as the Advanced Ledger Search screen.
    - NOTE: If this setting is disabled, the user will still be able to click the “Save Report” and “Delete Report” buttons, and the page will reload, however no Save/Delete action will actually occur.

Location(s) this setting affects:

- Client Tab -> Advanced Search
- Employee Tab -> Advanced Search
- Visit Tab -> Advanced Search
- Billing Tab -> Advanced Ledger Search

Screenshots:



The buttons affected by this setting. If EditAdvancedSearches is DISABLED, no action will occur when clicking these.

ExportBuild

Function:

- Allows the user to view and use the “Edit”, “Delete”, and “Batch” buttons within the Export Tool module.
- Allows the user to view the module to create new Exports at the bottom of the Export List.

Location(s) this setting affects:

- Reports Tab -> Export Tool

Screenshots:

Export List:

#	Export Name	Form/Table Name	Form	Format	Created	Last Run	Template	Notes		
645	***Test Time***	CUSTOMADHOC		XLS	12/15/2015	12/15/15 12:43 PM			edit delete	run
199	835 test	CUSTOM		HTML	12/16/2011	2/8/16 12:12 PM			edit delete	run
638	BC approvalrole	CUSTOMADHOC		HTML	12/2/2015	2/16/16 10:10 AM			edit delete	run
639	BC Planner	CUSTOMADHOC		HTML	12/3/2015	2/5/16 1:31 PM			edit delete	run

New Export **Export Name:** **Form / Table Name:** --- Select Form / Table ---

Custom Query:

When ExportBuild is ENABLED

Export List:

#	Export Name	Form/Table Name	Form	Format	Created	Last Run	Template	Notes	
645	***Test Time***	CUSTOMADHOC		XLS	12/15/2015	12/15/15 12:43 PM			run
199	835 test	CUSTOM		HTML	12/16/2011	2/8/16 12:12 PM			run
638	BC approvalrole	CUSTOMADHOC		HTML	12/2/2015	2/16/16 10:10 AM			run
639	BC Planner	CUSTOMADHOC		HTML	12/3/2015	2/5/16 1:31 PM			run

When ExportBuild is DISABLED

ExportEditLocked

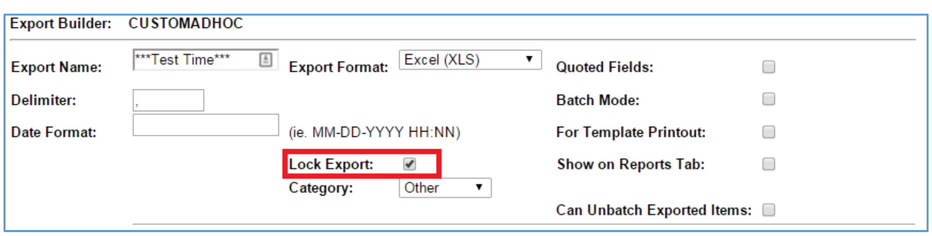
Function:

- Determines whether a user will be able to Edit or Delete an Export that has been marked as locked by the report creator.
    - NOTE: This setting will not affect Exports that you've created. Even if this setting is disabled for your Profile, and an export is marked as locked, you will have full access to the export if you are its creator.

Location(s) this setting affects:

- Reports Tab -> Export Tool

Screenshots:



Marking an Export as locked. You'll see this screen after clicking the "Edit" button near an Export entry.

Export List:

#	Export Name	Form/Table Name	Form	Format	Created	Last Run	Template	Notes	
645	***Test Time***	CUSTOMADHOC		XLS	12/15/2015	12/15/15 12:43 PM			edit delete run
199	835 test	CUSTOM		HTML	12/16/2011	2/8/16 12:12 PM			edit delete run
638	BC approvalrole	CUSTOMADHOC		HTML	12/2/2015	2/16/16 10:10 AM			edit delete run
639	BC Planner	CUSTOMADHOC		HTML	12/3/2015	2/5/16 1:31 PM			edit delete run

When ExportEditLocked is ENABLED

Export List:

#	Export Name	Form/Table Name	Form	Format	Created	Last Run	Template	Notes	
645	***Test Time***	CUSTOMADHOC		XLS	12/15/2015	12/15/15 12:43 PM			run
199	835 test	CUSTOM		HTML	12/16/2011	2/8/16 12:12 PM			edit delete run
638	BC approvalrole	CUSTOMADHOC		HTML	12/2/2015	2/16/16 10:10 AM			edit delete run
639	BC Planner	CUSTOMADHOC		HTML	12/3/2015	2/5/16 1:31 PM			edit delete run

When ExportEditLocked is DISABLED

ExportRun

Function:

- Allows the user to view and use the “Run” button within the Export Tool module.

Location(s) this setting affects:

- Reports Tab -> Export Tool

Screenshots:

Export List:

#	Export Name	Form/Table Name	Form	Format	Created	Last Run	Template	Notes	
645	***Test Time***	CUSTOMADHOC		XLS	12/15/2015	12/15/15 12:43 PM			edit delete run
199	835 test	CUSTOM		HTML	12/16/2011	2/8/16 12:12 PM			edit delete run
638	BC approvalrole	CUSTOMADHOC		HTML	12/2/2015	2/16/16 10:10 AM			edit delete run
639	BC Planner	CUSTOMADHOC		HTML	12/3/2015	2/5/16 1:31 PM			edit delete run

When ExportRun is ENABLED

Export List:

#	Export Name	Form/Table Name	Form	Format	Created	Last Run	Template	Notes	
645	***Test Time***	CUSTOMADHOC		XLS	12/15/2015	12/15/15 12:43 PM			edit delete
199	835 test	CUSTOM		HTML	12/16/2011	2/8/16 12:12 PM			edit delete
638	BC approvalrole	CUSTOMADHOC		HTML	12/2/2015	2/16/16 10:10 AM			edit delete
639	BC Planner	CUSTOMADHOC		HTML	12/3/2015	2/5/16 1:31 PM			edit delete

When ExportRun is DISABLED

ImportBuild

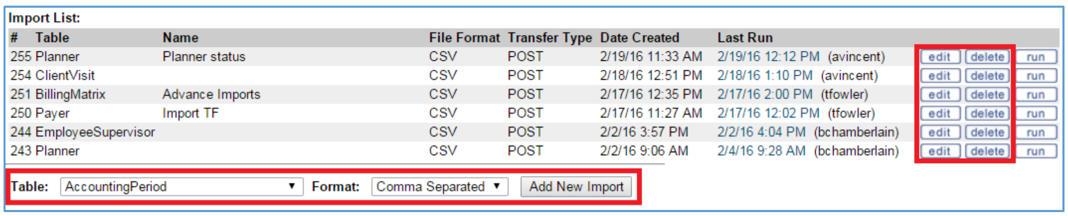
Function:

- Allows the user to view and use the “Edit” and “Delete” buttons within the Import Tool module.
- Allows the user to view the module to create new Imports at the bottom of the Import List.

Location(s) this setting affects:

- Reports Tab -> Import Tool

Screenshots:

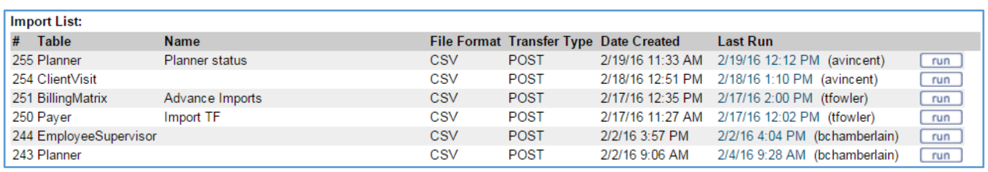


Import List:

#	Table	Name	File Format	Transfer Type	Date Created	Last Run			
255	Planner	Planner status	CSV	POST	2/19/16 11:33 AM	2/19/16 12:12 PM (avincent)	edit	delete	run
254	ClientVisit		CSV	POST	2/18/16 12:51 PM	2/18/16 1:10 PM (avincent)	edit	delete	run
251	BillingMatrix	Advance Imports	CSV	POST	2/17/16 12:35 PM	2/17/16 2:00 PM (tfowler)	edit	delete	run
250	Payer	Import TF	CSV	POST	2/17/16 11:27 AM	2/17/16 12:02 PM (tfowler)	edit	delete	run
244	EmployeeSupervisor		CSV	POST	2/2/16 3:57 PM	2/2/16 4:04 PM (bchamberlain)	edit	delete	run
243	Planner		CSV	POST	2/2/16 9:06 AM	2/4/16 9:28 AM (bchamberlain)	edit	delete	run

Table: AccountingPeriod Format: Comma Separated Add New Import

With ImportBuild ENABLED



Import List:

#	Table	Name	File Format	Transfer Type	Date Created	Last Run	
255	Planner	Planner status	CSV	POST	2/19/16 11:33 AM	2/19/16 12:12 PM (avincent)	run
254	ClientVisit		CSV	POST	2/18/16 12:51 PM	2/18/16 1:10 PM (avincent)	run
251	BillingMatrix	Advance Imports	CSV	POST	2/17/16 12:35 PM	2/17/16 2:00 PM (tfowler)	run
250	Payer	Import TF	CSV	POST	2/17/16 11:27 AM	2/17/16 12:02 PM (tfowler)	run
244	EmployeeSupervisor		CSV	POST	2/2/16 3:57 PM	2/2/16 4:04 PM (bchamberlain)	run
243	Planner		CSV	POST	2/2/16 9:06 AM	2/4/16 9:28 AM (bchamberlain)	run

With ImportBuild DISABLED

ImportRun

Function:

- Allows the user to view and use the “Run” button within the Import Tool module.

Location(s) this setting affects:

- Reports Tab -> Import Tool

Screenshots:

Import List:

#	Table	Name	File Format	Transfer Type	Date Created	Last Run			
255	Planner	Planner status	CSV	POST	2/19/16 11:33 AM	2/19/16 12:12 PM (avincent)	edit	delete	run
254	ClientVisit		CSV	POST	2/18/16 12:51 PM	2/18/16 1:10 PM (avincent)	edit	delete	run
251	BillingMatrix	Advance Imports	CSV	POST	2/17/16 12:35 PM	2/17/16 2:00 PM (tfowler)	edit	delete	run
250	Payer	Import TF	CSV	POST	2/17/16 11:27 AM	2/17/16 12:02 PM (tfowler)	edit	delete	run
244	EmployeeSupervisor		CSV	POST	2/2/16 3:57 PM	2/2/16 4:04 PM (bchamberlain)	edit	delete	run
243	Planner		CSV	POST	2/2/16 9:06 AM	2/4/16 9:28 AM (bchamberlain)	edit	delete	run
242	ClientAxisDetail	DiagError5546	CSV	POST	1/28/16 3:41 PM	1/28/16 3:44 PM (avincent)	edit	delete	run
241	Z_ServiceLedger	testing service ledger accounting date import	CSV	POST	1/18/16 4:17 PM	1/18/16 4:19 PM (ejjohnson)	edit	delete	run
239	RevenueCode	Revenue Test	CSV	POST	1/5/16 7:16 PM		edit	delete	run
238	Clients	RB Import Lab	CSV	POST	12/28/15 12:23 PM	12/28/15 12:28 PM (rbarinbaum)	edit	delete	run

When ImportRun is ENABLED

Import List:

#	Table	Name	File Format	Transfer Type	Date Created	Last Run		
255	Planner	Planner status	CSV	POST	2/19/16 11:33 AM	2/19/16 12:12 PM (avincent)	edit	delete
254	ClientVisit		CSV	POST	2/18/16 12:51 PM	2/18/16 1:10 PM (avincent)	edit	delete
251	BillingMatrix	Advance Imports	CSV	POST	2/17/16 12:35 PM	2/17/16 2:00 PM (tfowler)	edit	delete
250	Payer	Import TF	CSV	POST	2/17/16 11:27 AM	2/17/16 12:02 PM (tfowler)	edit	delete
244	EmployeeSupervisor		CSV	POST	2/2/16 3:57 PM	2/2/16 4:04 PM (bchamberlain)	edit	delete
243	Planner		CSV	POST	2/2/16 9:06 AM	2/4/16 9:28 AM (bchamberlain)	edit	delete
242	ClientAxisDetail	DiagError5546	CSV	POST	1/28/16 3:41 PM	1/28/16 3:44 PM (avincent)	edit	delete
241	Z_ServiceLedger	testing service ledger accounting date import	CSV	POST	1/18/16 4:17 PM	1/18/16 4:19 PM (ejjohnson)	edit	delete
239	RevenueCode	Revenue Test	CSV	POST	1/5/16 7:16 PM		edit	delete
238	Clients	RB Import Lab	CSV	POST	12/28/15 12:23 PM	12/28/15 12:28 PM (rbarinbaum)	edit	delete

When ImportRun is DISABLED

ProviderPortalAgreements

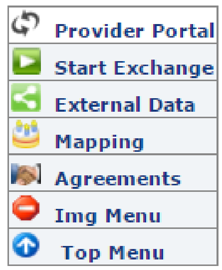
Function:

- Determines whether the user will be able to view the Agreements and Mapping buttons on the Nav Bar within the Provider Portal.

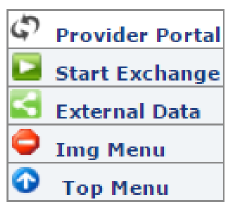
Location(s) this setting affects:

- Reports Tab -> Provider Portal

Screenshots:



When ProviderPortalAgreements is ENABLED



When ProviderPortalAgreements is DISABLED

ProviderPortalOperate

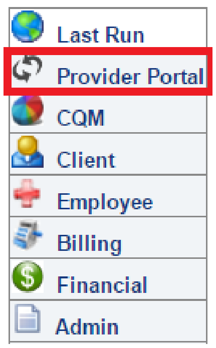
Function:

- Determines whether the user will be able to view the “Provider Portal” link on the Reports Tab.

Location(s) this setting affects:

- Reports Tab -> Provider Portal

Screenshots:



When ProviderPortalOperate is ENABLED

When ProviderPortalOperate is DISABLED

ReportList

Function:

- Determines whether the Reports Tab will be accessible.
  - If disabled, the tab will disappear.
- If you want to only limit the Profile from accessing a selection of reports, this Matrix setting should be enabled, and you will want to instead limit the user by accessing the “Report Security” section of the Admin Tab.

Location(s) this setting affects:

- Schedule Tab -> Day View
- Home Tab -> Notification Events

Screenshots:

When ReportList is ENABLED

When ReportList is DISABLED

Matrix Section: Scheduler

NotificationDelete

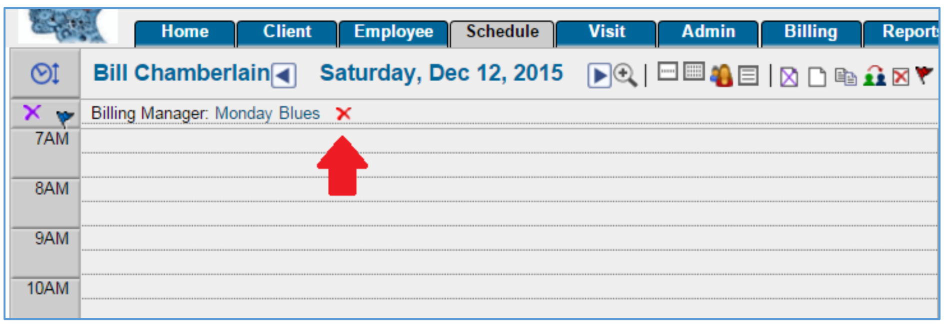
Function:

- Determines whether a Profile will be able to delete a notification, alert, to do item, etc. from the Day View Schedule.
    - NOTE: If a notification is deleted that was created for multiple Employees, it is removed for all.

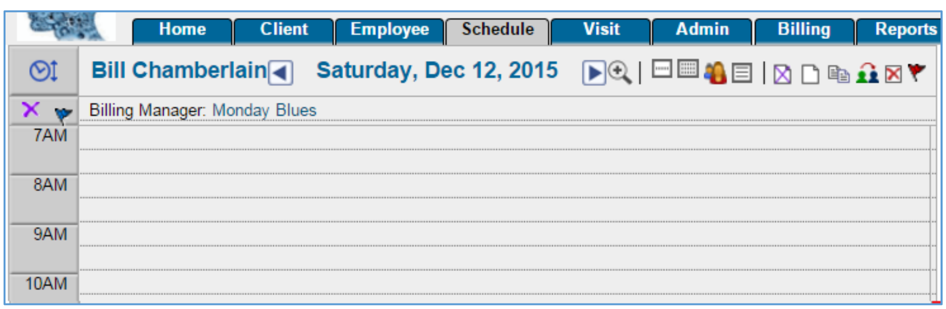
Location(s) this setting affects:

- Schedule Tab -> Day View
- Home Tab -> Notification Events

Screenshots:



When NotificationDelete is ENABLED



When NotificationDelete is DISABLED

NotificationRelink

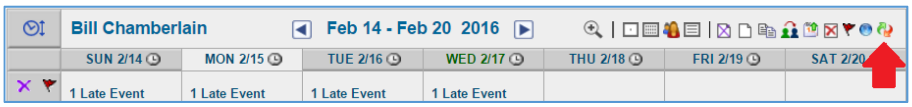
Function:

- Determines whether the green and red “Relink Notifications” icon appears on the Schedule tab.

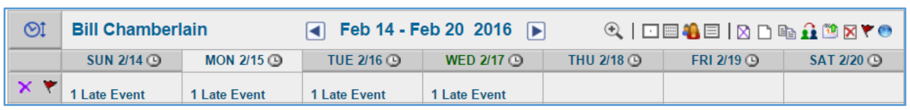
Location(s) this setting affects:

- Schedule Tab
- Employee Page -> Employee Nav Bar -> Schedule

Screenshots:



When NotificationRelink is ENABLED



When NotificationRelink is DISABLED

PlannerAdd

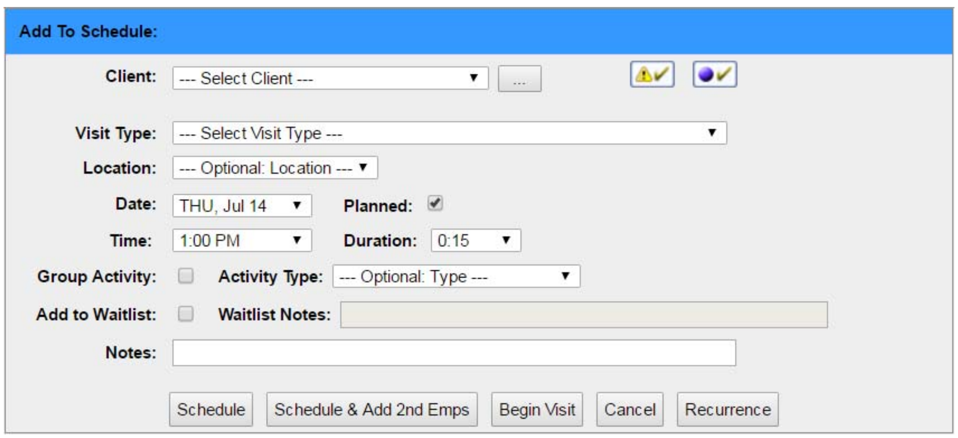
Function:

- If PlannerAddOther is disabled, having PlannerAdd enabled will allow you to still add scheduled visits to your own Schedule.
  - NOTE: To clarify, even if PlannerAdd is disabled, you will still be able to add schedule entries to your own schedule if PlannerAddOther is enabled. So this setting only has effect if PlannerAddOther is disabled.
  - NOTE: If both settings are disabled, an Insufficient Rights message will appear on the pop-up when trying to add a schedule entry.

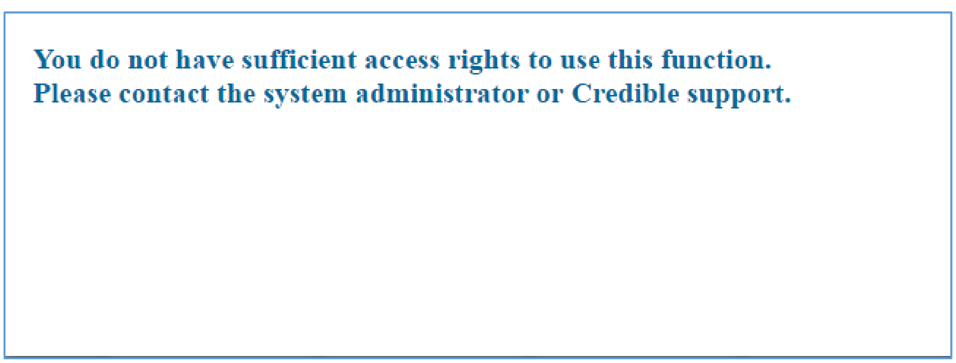
Location(s) this setting affects:

- Schedule Tab
- Employee Page -> Employee Nav Bar -> Schedule

Screenshots:



When PlannerAdd is ENABLED



When PlannerAdd is DISABLED

PlannerAddOther

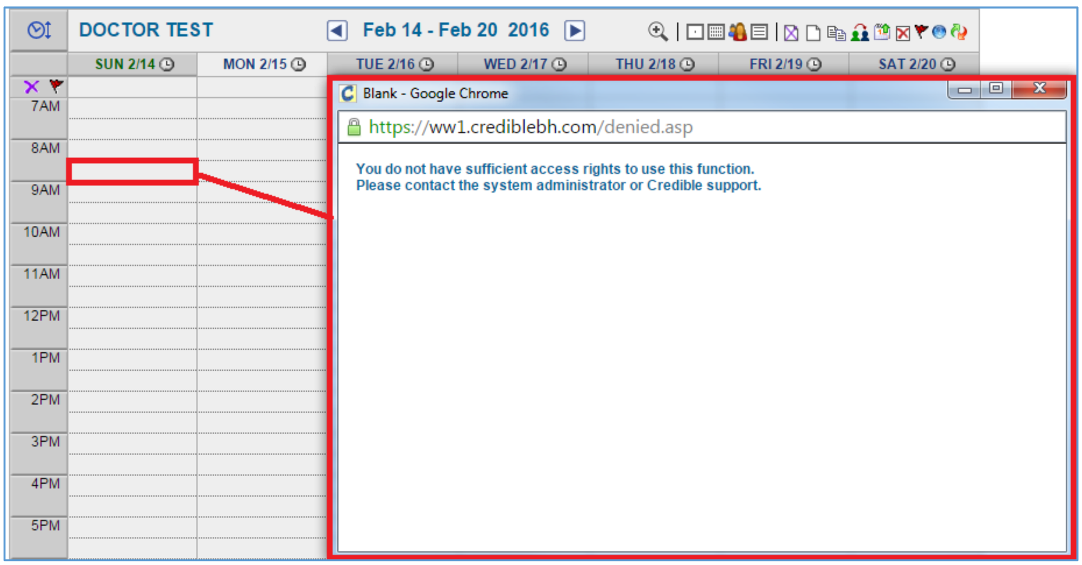
Function:

- Determines whether the user can add a Schedule entry for another user.
  - If disabled, the user will receive an Insufficient Rights message on the pop-up that displays.
  - NOTE: The user will still be able to add entries on their own Schedule if PlannerAdd is enabled.

Location(s) this setting affects:

- Schedule Tab
- Employee Page -> Employee Nav Bar -> Schedule

Screenshots:



When PlannerAddOther is DISABLED

PlannerDelete

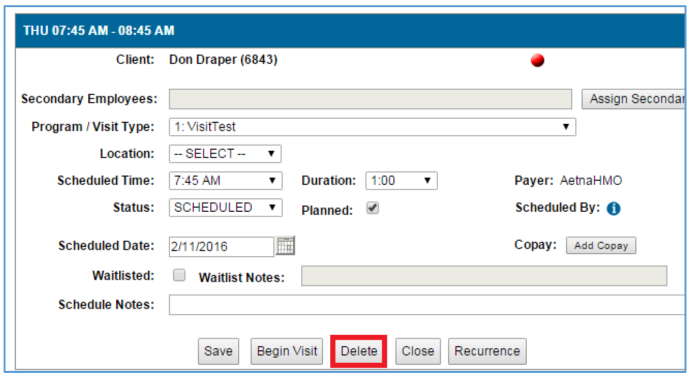
Function:

- Determines whether the “Delete” button displays when viewing a Scheduled Entry that has not yet been completed.

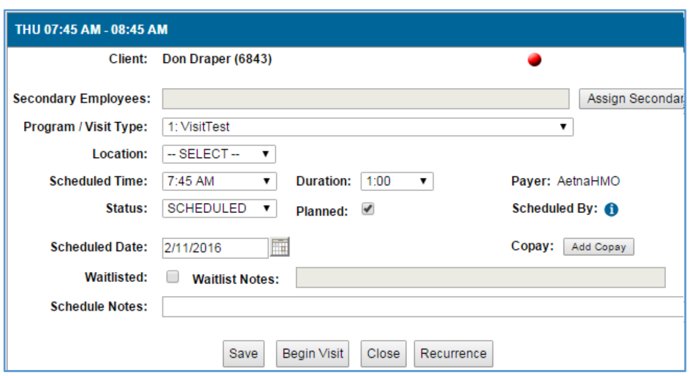
Location(s) this setting affects:

- Schedule Tab -> Clicking a non-completed Scheduled Entry.

Screenshots:



When PlannerDelete is ENABLED



When PlannerDelete is DISABLED

PlannerFrontDesk

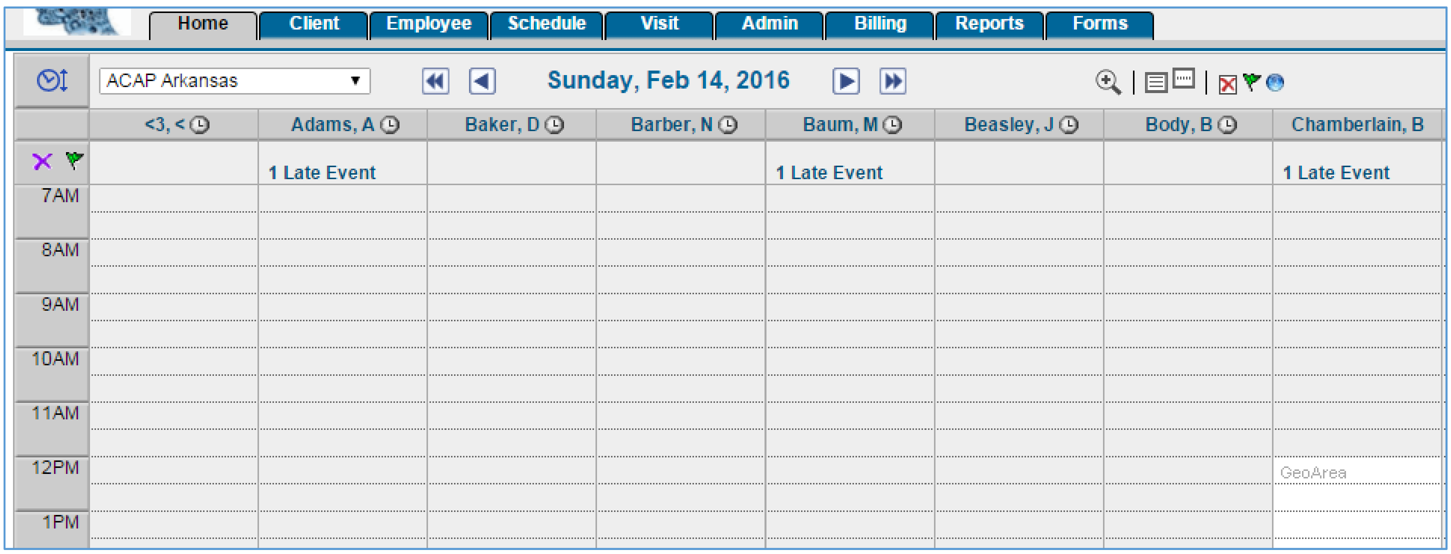
Function:

- When enabled, the User will immediately be brought to the Team View Schedule when logging in.
  - Typically utilized by Front Desk Staff.
  - The user will also see this version of the Schedule when clicking the Schedule Tab.

Location(s) this setting affects:

- Page when logging in
- Schedule Tab

Screenshots:



Page you're brought to on Login with PlannerFrontDesk ENABLED

PlannerReassign

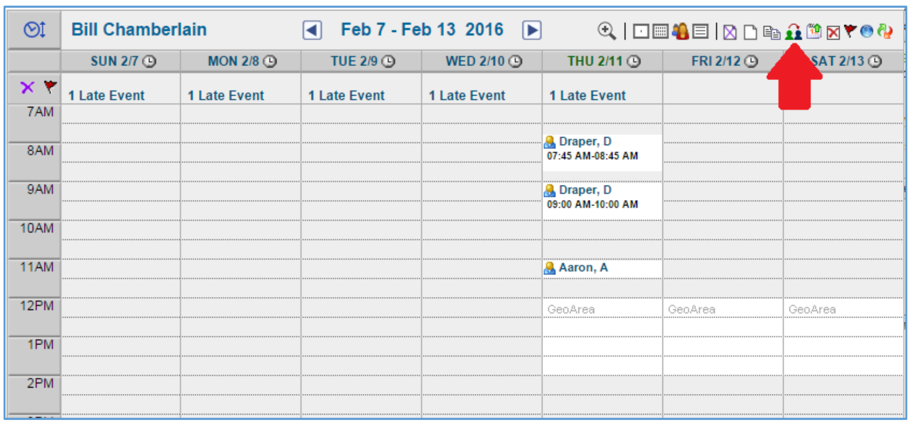
Function:

- Determines whether the user will see the “Reassign” icon when viewing an Employee’s schedule.

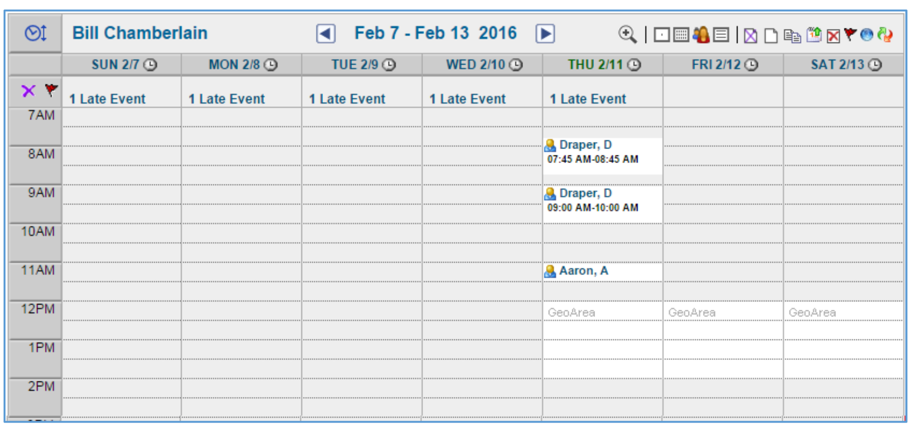
Location(s) this setting affects:

- Schedule Tab
- Employee -> Employee Nav Bar -> Schedule

Screenshots:



When PlannerReassign is ENABLED



When PlannerReassign is DISABLED

PlannerResourceDelete

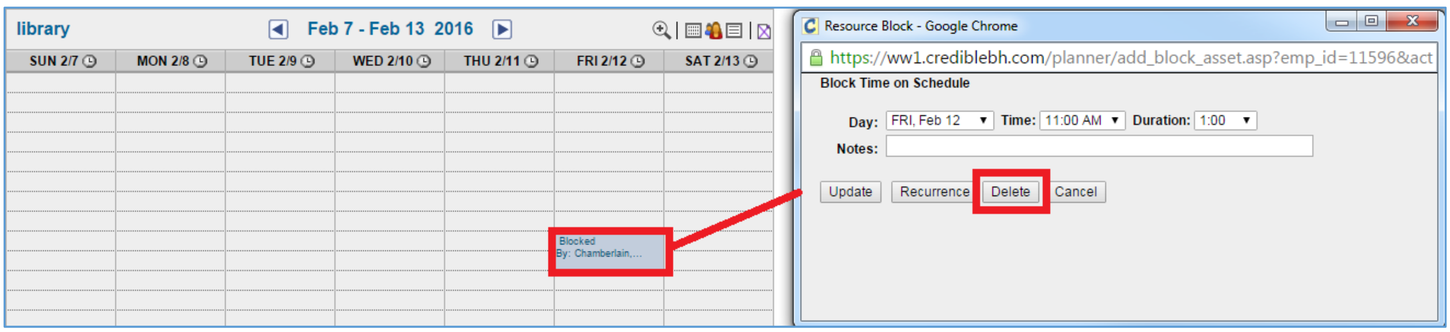
Function:

- Determines whether the user will be able to click an existing schedule entry for a resource, and have the option to Delete it.
    - If disabled, the “Delete” button will not appear when viewing a scheduled resource entry.

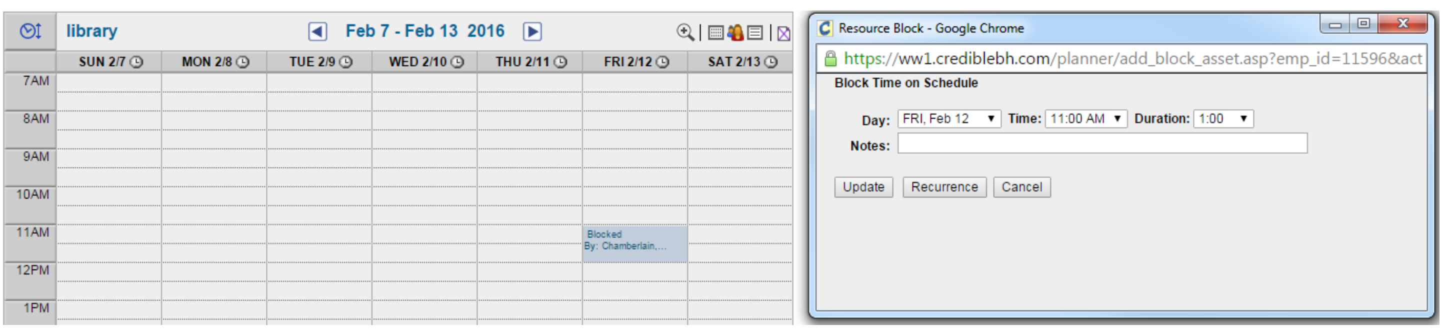
Location(s) this setting affects:

- Admin Tab -> Manage Resources -> Schedule Button -> Clicking an Existing Schedule Entry
- Employee -> Employee Nav Bar -> Resource Sched -> Schedule Button -> Clicking an Existing Schedule Entry

Screenshots:



When PlannerResourceDelete is ENABLED



When PlannerResourceDelete is DISABLED

PlannerResourceSchedule

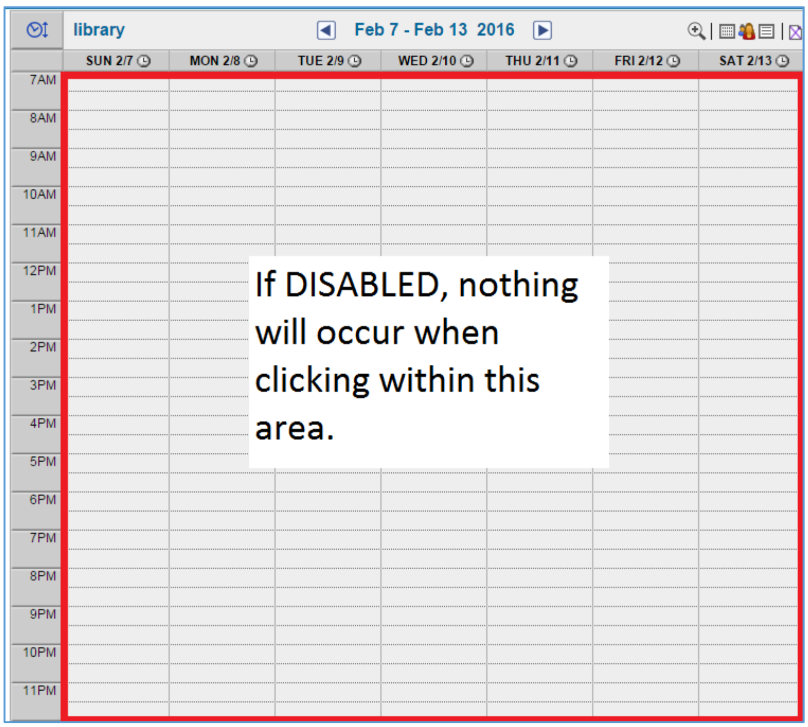
Function:

- Determines whether the user can click a cell on a resource's schedule and create an entry.
    - If this setting is disabled, nothing will occur when the user clicks.
- NOTE: If 'PlannerResourceView' is disabled, this setting will have no effect, as the Schedule won't be viewable.

Location(s) this setting affects:

- Admin Tab -> Manage Resources -> Schedule Button
- Employee -> Employee Nav Bar -> Resource Sched -> Schedule Button

Screenshots:



PlannerResourceView

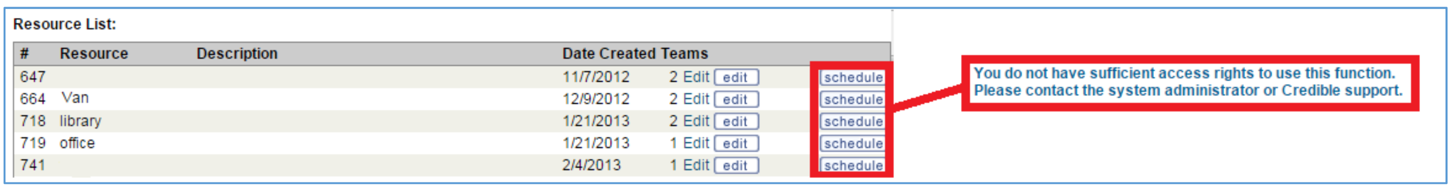
Function:

- When viewing the Resource List, determines whether the user will be able to advance after clicking “Schedule” near a Resource entry.
    - If this setting is disabled, then the user will receive an “Insufficient Rights” message, and will not be able to view the Schedule for that Resource.
- NOTE: If the “ScheduleResources” Matrix setting is disabled, this setting will have no effect.

Location(s) this setting affects:

- Admin Tab -> Manage Resources -> Schedule Button
- Employee -> Employee Nav Bar -> Resource Sched -> Schedule Button

Screenshots:



When PlannerResourceView is DISABLED

PlannerTemplateAdmin

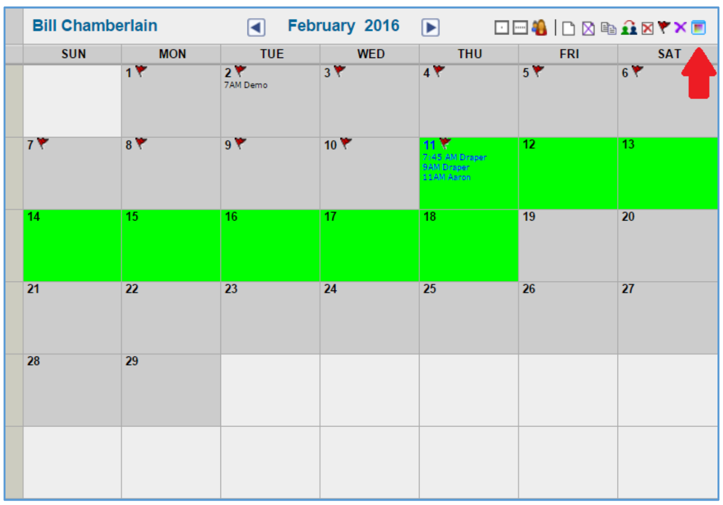
Function:

- Determines whether the user can set a Template on an Employee's schedule when viewing it from the Month View.
  - If this setting is Disabled, the icon used to set the Template will not appear on the schedule.

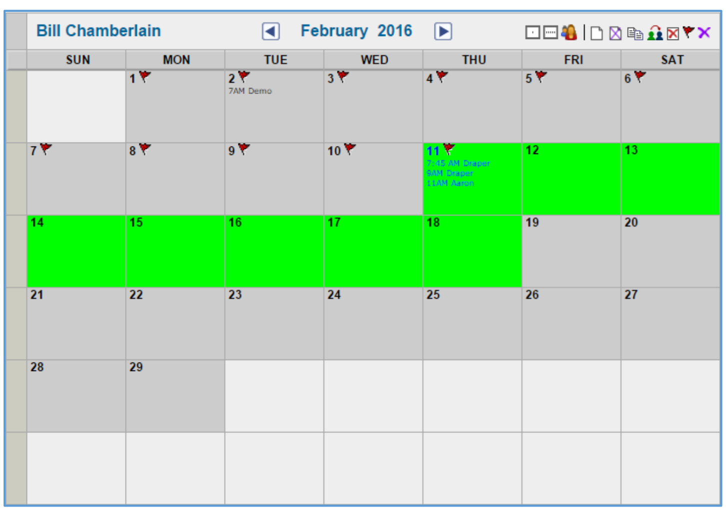
Location(s) this setting affects:

- Schedule -> Month View
- Employee -> Employee Nav Bar -> Schedule -> Month View

Screenshots:



When PlannerTemplateAdmin is ENABLED



When PlannerTemplateAdmin is DISABLED

PlannerTemplateCreate

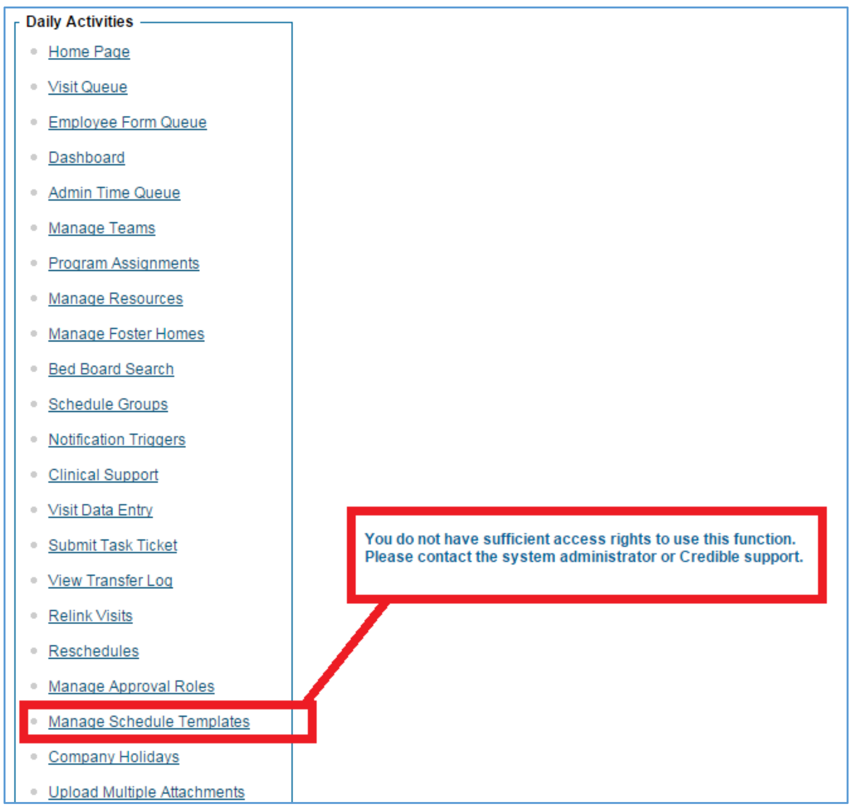
Function:

- Determines whether the user can access the “Manage Schedule Templates” link within the Admin Tab.
    - If this setting is disabled, the user will receive an Insufficient Rights message when clicking the link.

Location(s) this setting affects:

- Admin Tab -> Manage Schedule Templates

Screenshots:



When PlannerTemplateCreate is DISABLED

PlannerUpdateOther

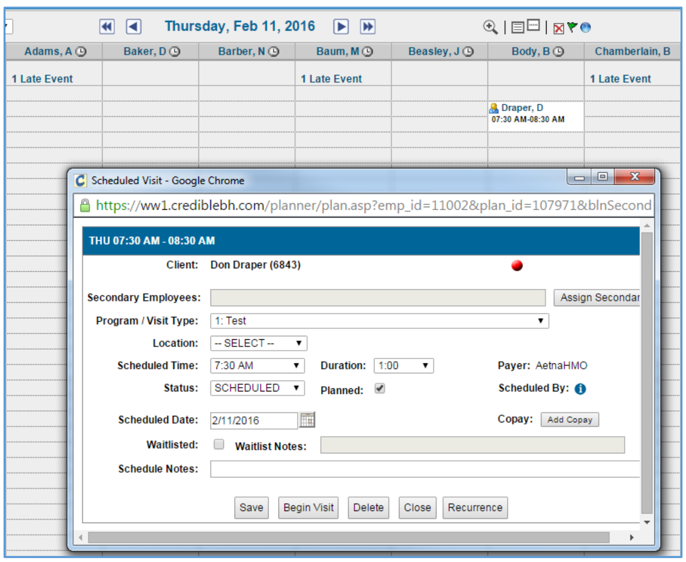
Function:

- Determines whether the user can update the Scheduled Visits of others.
    - If Disabled, an Insufficient Rights message appears in the pop-up window.

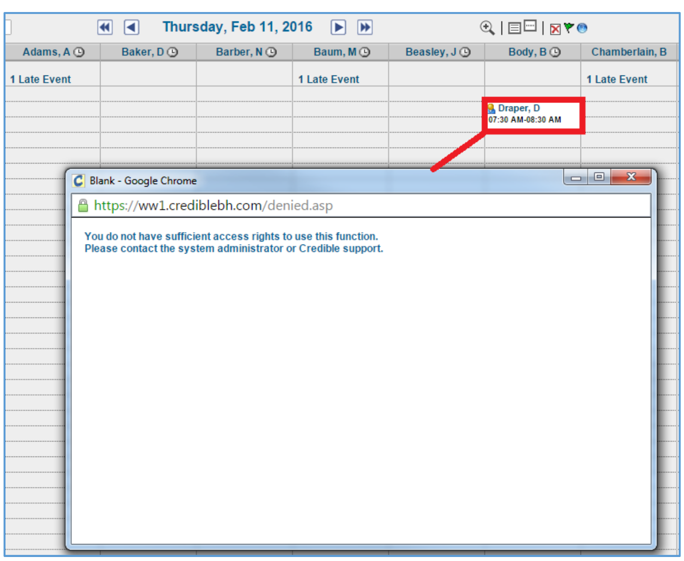
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Schedule
- Schedule Tab

Screenshots:



When PlannerUpdateOther is ENABLED



When PlannerUpdateOther is DISABLED

PlannerView

Function:

- Determines whether the user can view any Schedule, including their own.
  - If disabled, the user will receive an Insufficent Rights message when clicking the 'Schedule' tab.
- Allows the 'Schedule' button to display on the Employee Nav Bar. If this setting is disabled, that button will not appear.

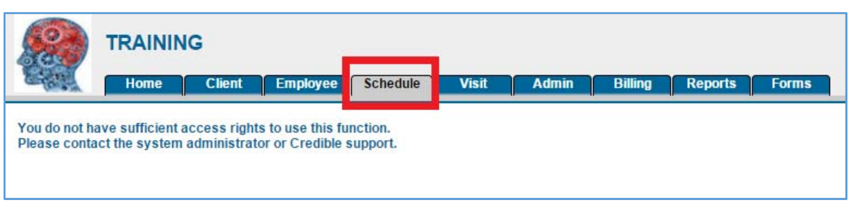
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Schedule
- Schedule Tab

Screenshots:

When PlannerView is ENABLED

When PlannerView is DISABLED



When PlannerView is DISABLED

PlannerViewAll

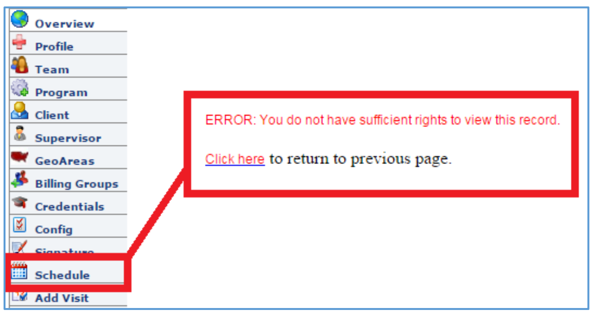
Function:

- Affects whether the user will be able to view ALL Employee's schedules.
- NOTE: If the 'PlannerViewTeam' Matrix setting is enabled, the user will still be able to view the schedules of those Employees on the same Team, but ONLY in Team View. If the user then tries to view the individual schedule of one of their teammates, they will receive an error.
- If the PlannerView Matrix setting is disabled, this setting will have no effect.

Location(s) this setting affects:

- Employee Page (that is not your Employee page) -> Employee Nav Bar -> Schedule
- Schedule -> Team View -> Clicking an Employees Name that is not yours

Screenshots:



When PlannerViewAll is DISABLED

PlannerViewTeam

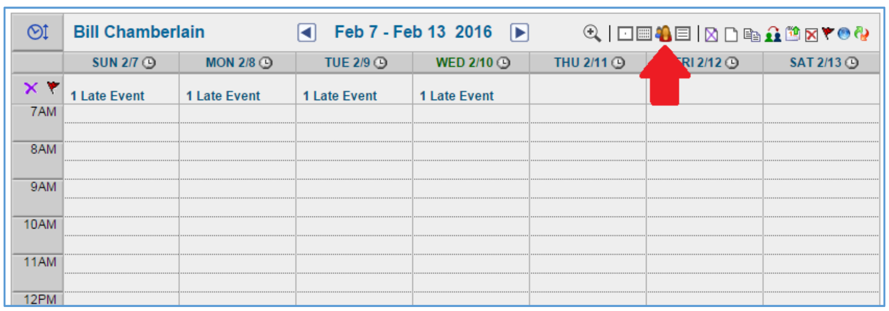
Function:

- Affects whether the user will be able to see the 'Team View' icon when viewing the Schedule tab.
- If the PlannerView Matrix setting is disabled, this setting will have no effect.

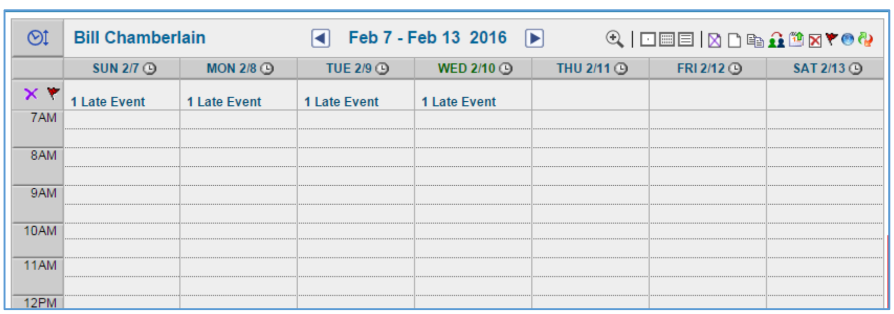
Location(s) this setting affects:

- Schedule

Screenshots:



With PlannerViewTeam ENABLED



With PlannerViewTeam DISABLED

Reschedule

Function:

- Affects whether the “Reschedules” link on the Admin Tab will be accessible.
  - If this setting is disabled, the link will still display, but the user will receive an Insufficient Rights message when

Location(s) this setting affects:

- Admin Tab -> Reschedule

Screenshots:

When Reschedule is DISABLED

ResourceAdd

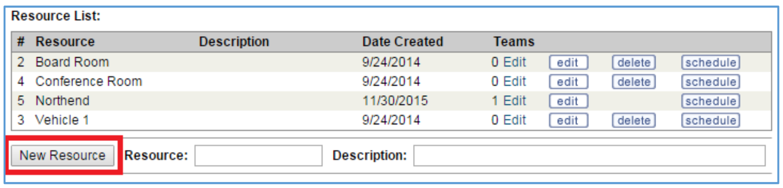
Function:

- Affects whether the "New Resource" button will display on the Manage Resources page that is accessed from the Admin Tab.

Location(s) this setting affects:

- Admin Tab -> Manage Resources

Screenshots:

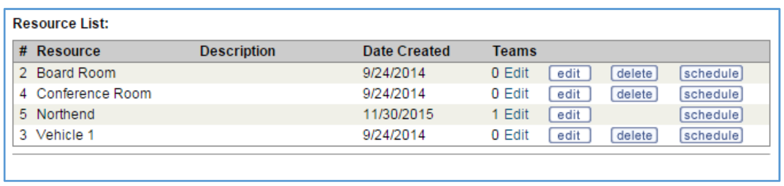


Resource List:

#	Resource	Description	Date Created	Teams			
2	Board Room		9/24/2014	0 Edit	edit	delete	schedule
4	Conference Room		9/24/2014	0 Edit	edit	delete	schedule
5	Northend		11/30/2015	1 Edit	edit		schedule
3	Vehicle 1		9/24/2014	0 Edit	edit	delete	schedule

New Resource Resource: Description:

With ResourceAdd ENABLED



Resource List:

#	Resource	Description	Date Created	Teams			
2	Board Room		9/24/2014	0 Edit	edit	delete	schedule
4	Conference Room		9/24/2014	0 Edit	edit	delete	schedule
5	Northend		11/30/2015	1 Edit	edit		schedule
3	Vehicle 1		9/24/2014	0 Edit	edit	delete	schedule

With ResourceAdd DISABLED

ScheduleResources

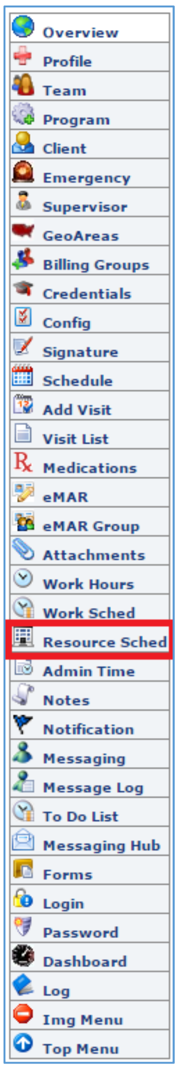
Function:

- Affects whether the “Resource Sched” button will display on the Employee Nav Bar.

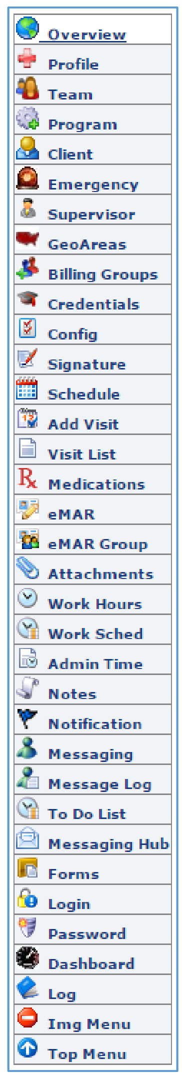
Location(s) this setting affects:

- Employee Page -> Employee Nav Bar -> Resource Sched

Screenshots:



With ScheduleResources ENABLED



With ScheduleResources DISABLED

SOSActivate

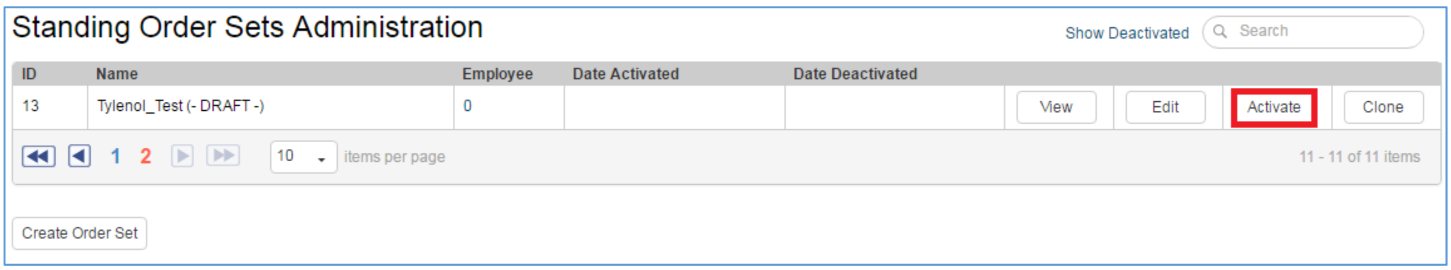
Function:

- Determines whether the user will be able to activate Standing Order Sets on the “Standing Order Sets Admin” page. If disabled, the “Activate” button will not display.

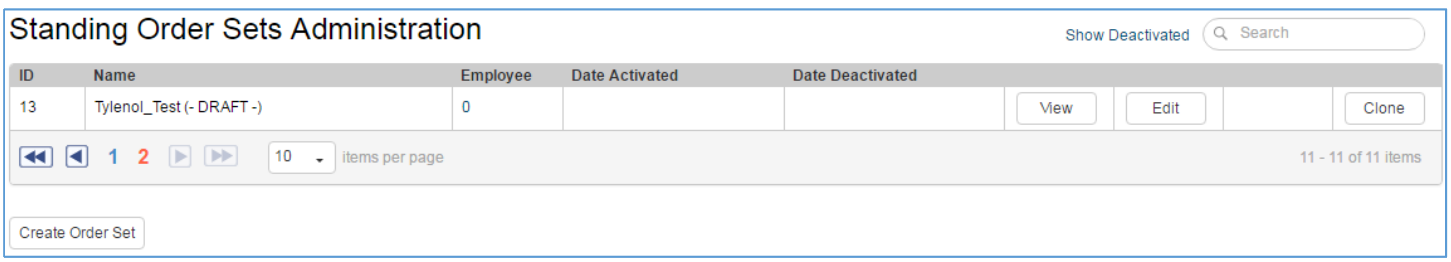
Location(s) this setting affects:

- Admin Tab -> Daily Activities Section -> Standing Order Sets Admin -> Activate Button

Screenshots:



When SOSActivate is ENABLED



When SOSActivate is DISABLED

SOSAdmin

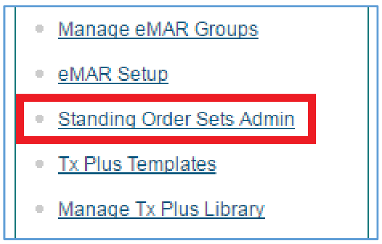
Function:

- Determines whether the user will be able to access the "Standing Order Sets Admin" page. If disabled, the link will not display.

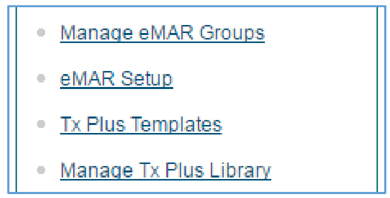
Location(s) this setting affects:

- Admin Tab -> Daily Activities Section -> Standing Order Sets Admin

Screenshots:



When SOSAdmin is ENABLED



When SOSAdmin is DISABLED

SOSAssignEmployee

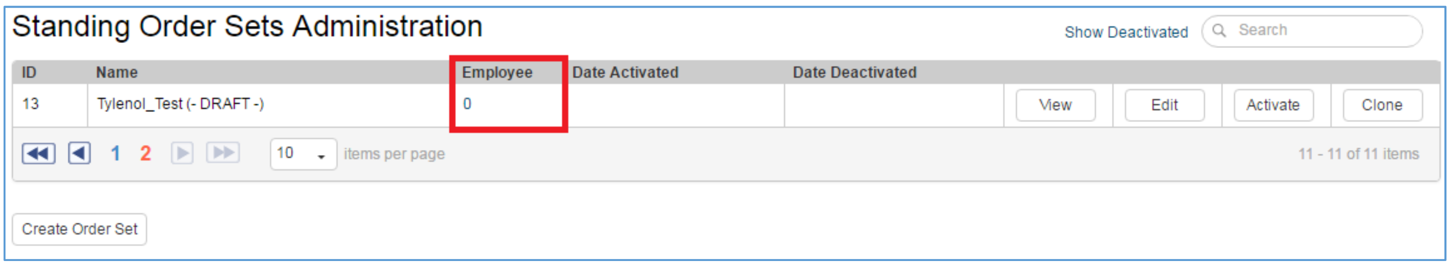
Function:

- Determines whether the user will be able to assign Employees to Standing Order Sets via the "Standing Order Sets Admin" page. If disabled, the number in the Employee column will not be able to be clicked, and will be read-only.

Location(s) this setting affects:

- Admin Tab -> Daily Activities Section -> Standing Order Sets Admin -> Number Under Employee Column

Screenshots:



When SOSAssignEmployee is DISABLED, this number will not be able to be clicked.

SOSClone

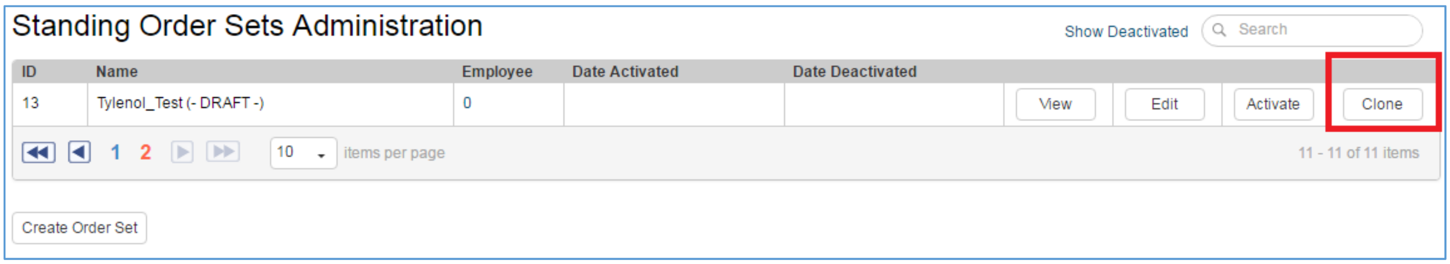
Function:

- Determines whether the user will be able to Clone Standing Order Sets via the “Standing Order Sets Admin” page. If disabled, the “Clone” button will not display.

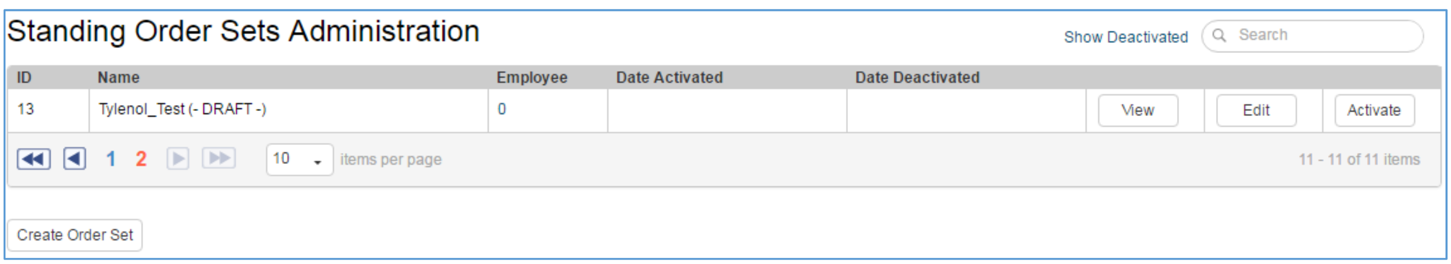
Location(s) this setting affects:

- Admin Tab -> Daily Activities Section -> Standing Order Sets Admin -> Clone Button

Screenshots:



When SOSClone is ENABLED



When SOSClone is DISABLED

SOSDeactivate

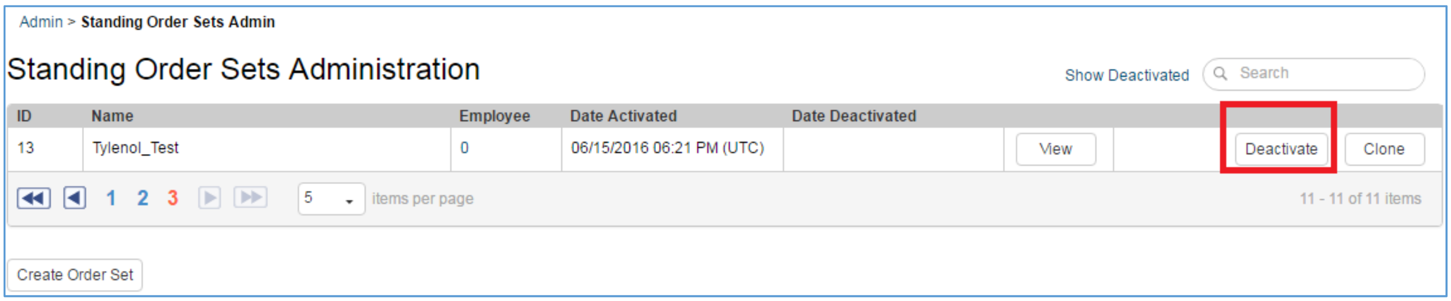
Function:

- Determines whether the user will be able to Deactivate any Activated Standing Order Sets via the "Standing Order Sets Admin" page. If disabled, the "Deactivate" button will not display.

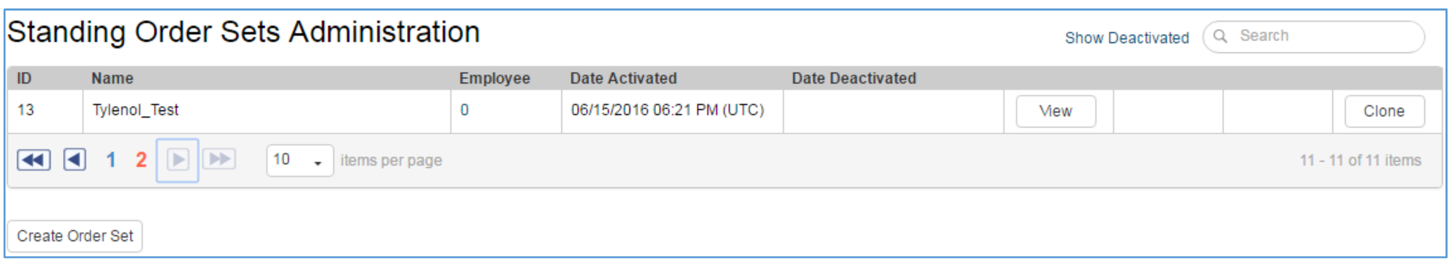
Location(s) this setting affects:

- Admin Tab -> Daily Activities Section -> Standing Order Sets Admin -> Deactivate Button

Screenshots:



When SOSDeactivate is ENABLED



When SOSDeactivate is DISABLED

SOSUpdate

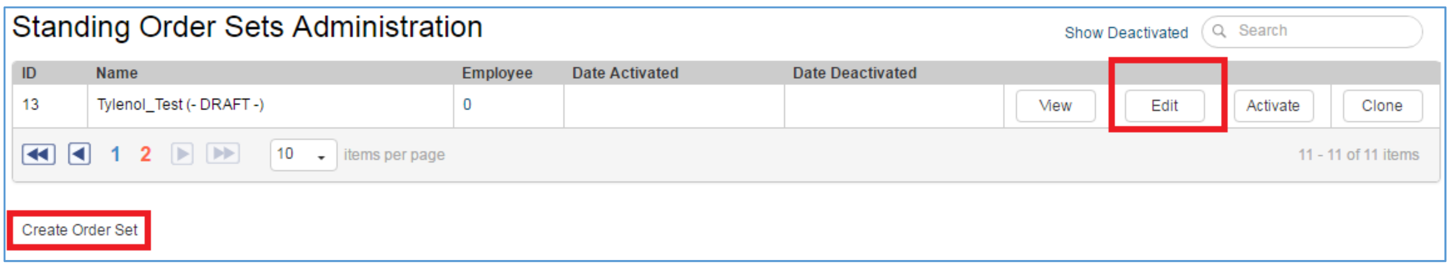
Function:

- Determines whether the user will be able to update or add Standing Order Sets via the "Standing Order Sets Admin" page. If disabled, the "Edit" and "Create Order Set" buttons will not display.

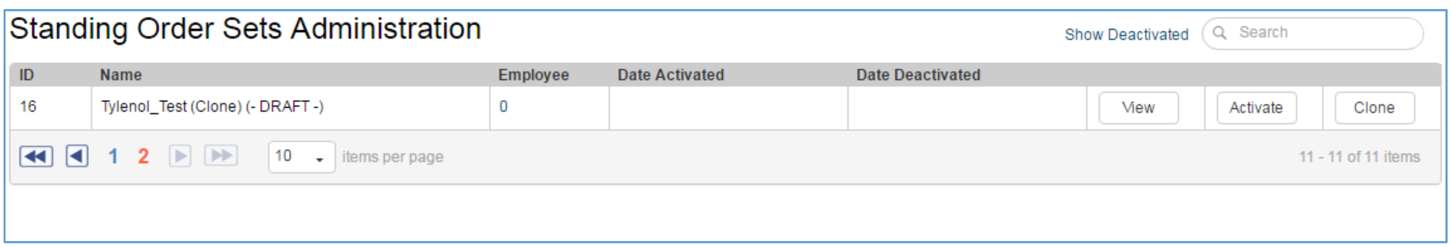
Location(s) this setting affects:

- Admin Tab -> Daily Activities Section -> Standing Order Sets Admin -> Edit Button
- Admin Tab -> Daily Activities Section -> Standing Order Sets Admin -> Create Order Set Button

Screenshots:



When SOSUpdate is ENABLED



When SOSUpdate is DISABLED

SOSView

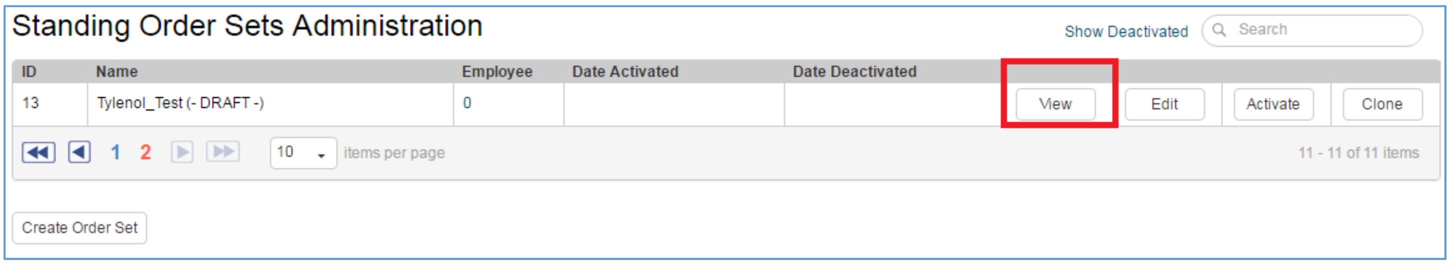
Function:

- Determines whether the user will be able to view the details on Standing Order Sets via the "Standing Order Sets Admin" page. If disabled, the "View" button will not display.

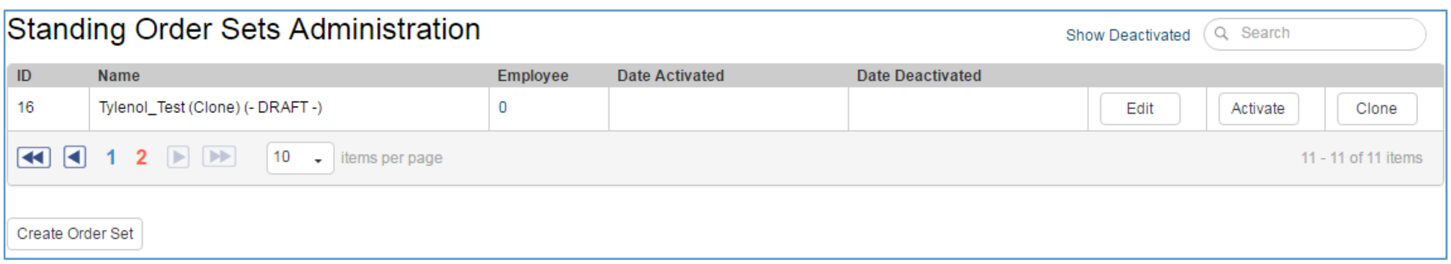
Location(s) this setting affects:

- Admin Tab -> Daily Activities Section -> Standing Order Sets Admin -> View Button

Screenshots:



When SOSView is ENABLED



When SOSView is DISABLED