Managing Users MDC/PS

Managing Users – For Practice Managers / Supervisors

The guide will run through the steps required to setup user accounts in Medical Director Clinical (MDC) & Medical Director PracSoft (PS). Please note that a User Access Request form (signed by an authorised delegate) must to be sent to the helpdesk for new users to be granted access to the applications but it is the responsibility of the site to create/disable user accounts.

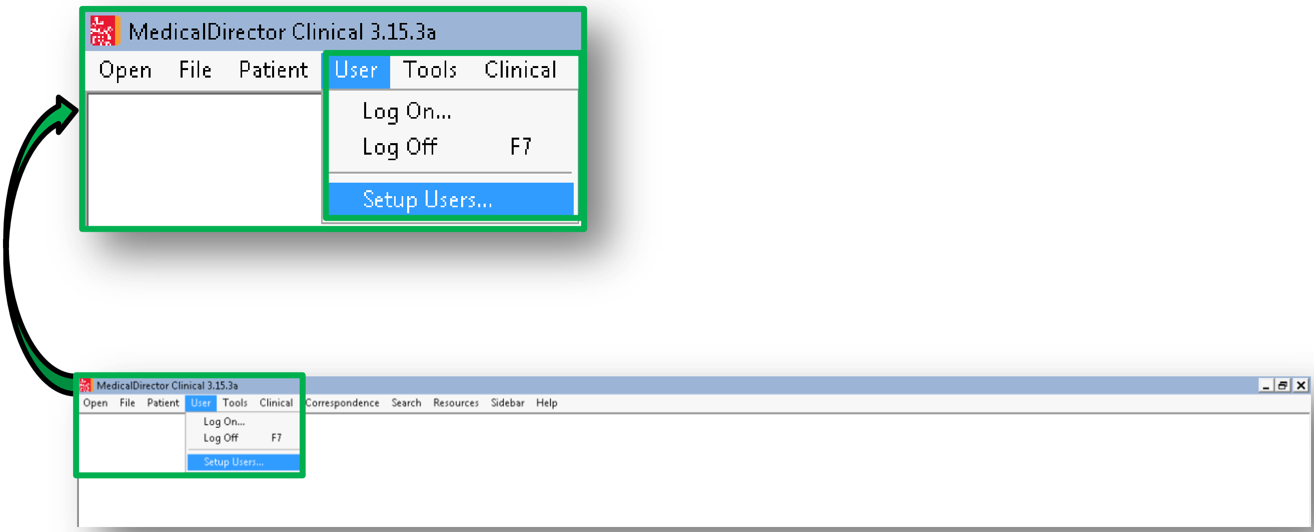
To perform the tasks in this guide, you need either ***Practice Manager*** or ***Practitioner*** (with 'Top Level Access') in MDC and ***Level 6 or above*** access in PS.

Medical Director advises creating a GP or Nurse Practitioner accounts in MDC BEFORE creating it in PS.

This guide will be broken into 2 sections for account creation – (Setting up Practitioners & Setting up Users) and also how to inactivate Accounts.

1. To begin, log into MDC. (if unsure how to login, please see: Medical Director – Getting Started guide here)

2. From the MDC home screen, select User, then Setup Users...



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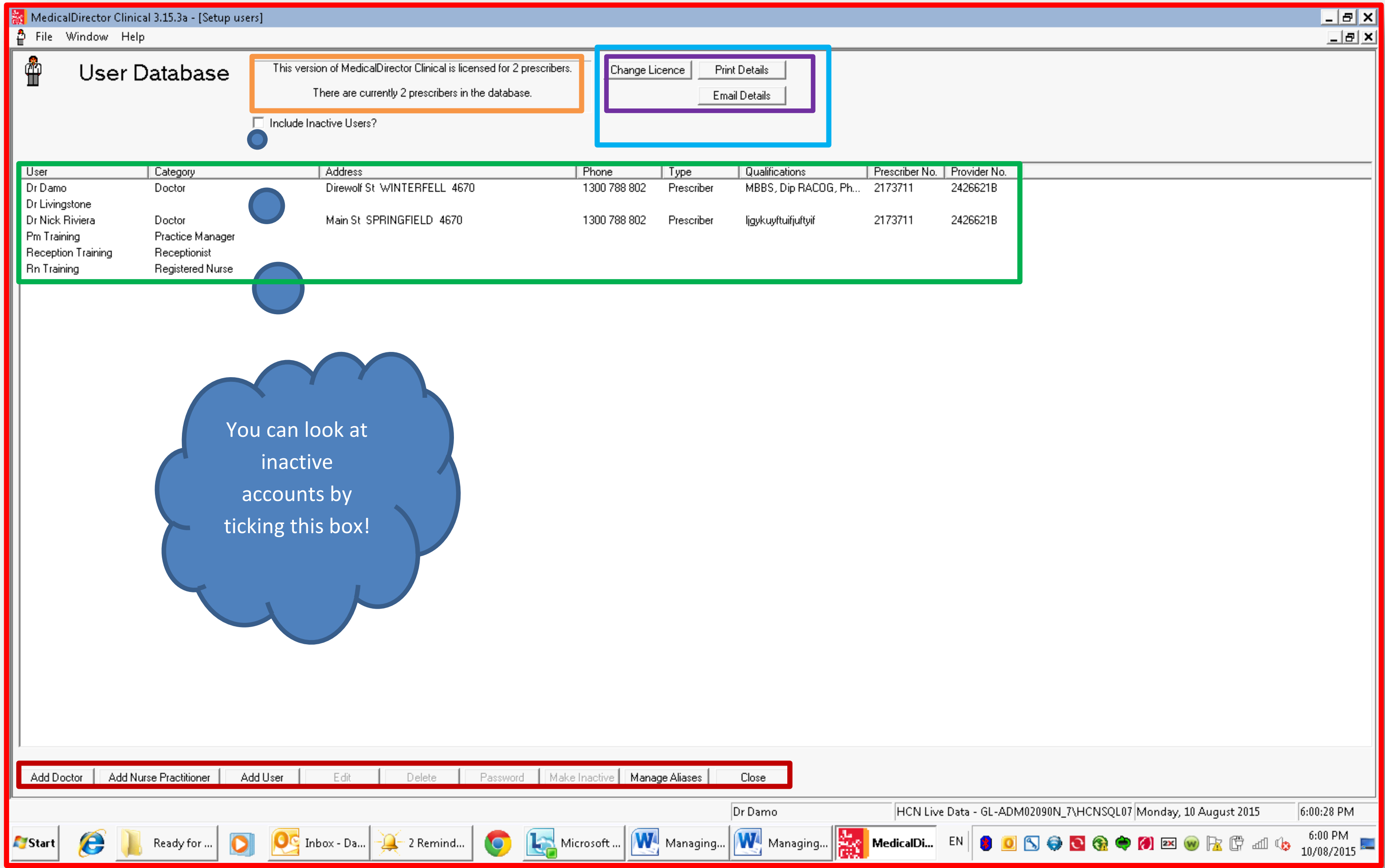
3. This will open the Setup users window where current users will be displayed. There is the upper button set, where you can print/email details, change licences and see how many prescribers you have currently licenced. The lower button set (covered below) is for managing user accounts.

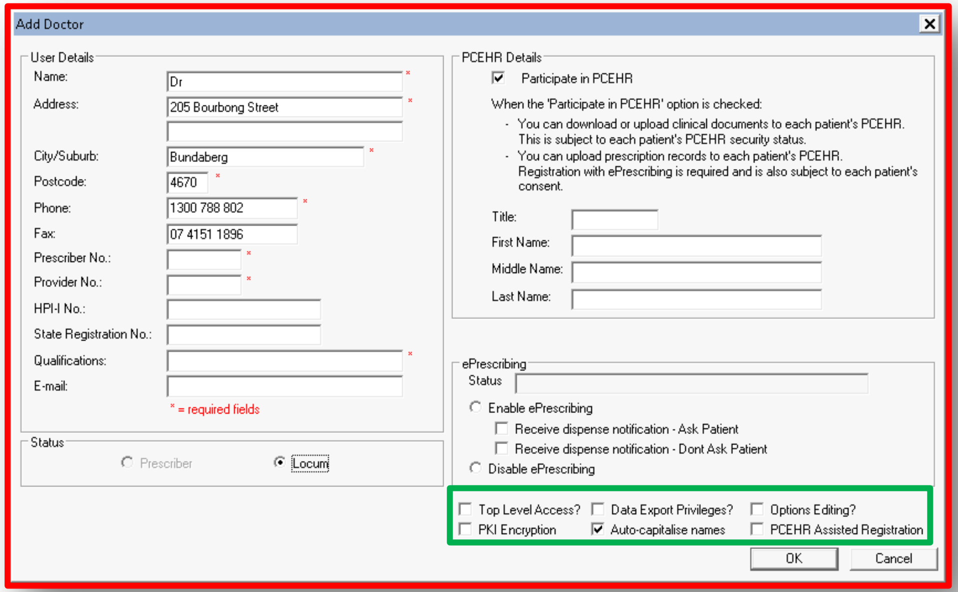


Lower Button Set

The lower button set is where you can Add users, edit selected users, delete users, change the password for selected users, make users inactive, manage aliases for users and close the Setup users window.

Adding a Practitioner

4. Clicking on the Add Doctor or Add Nurse Practitioner buttons from the lower button set will bring up the below Add user window below, which is the same for Doctors and Nurse Practitioners. Fill out all the user details taking note of the tick boxes in the bottom right.



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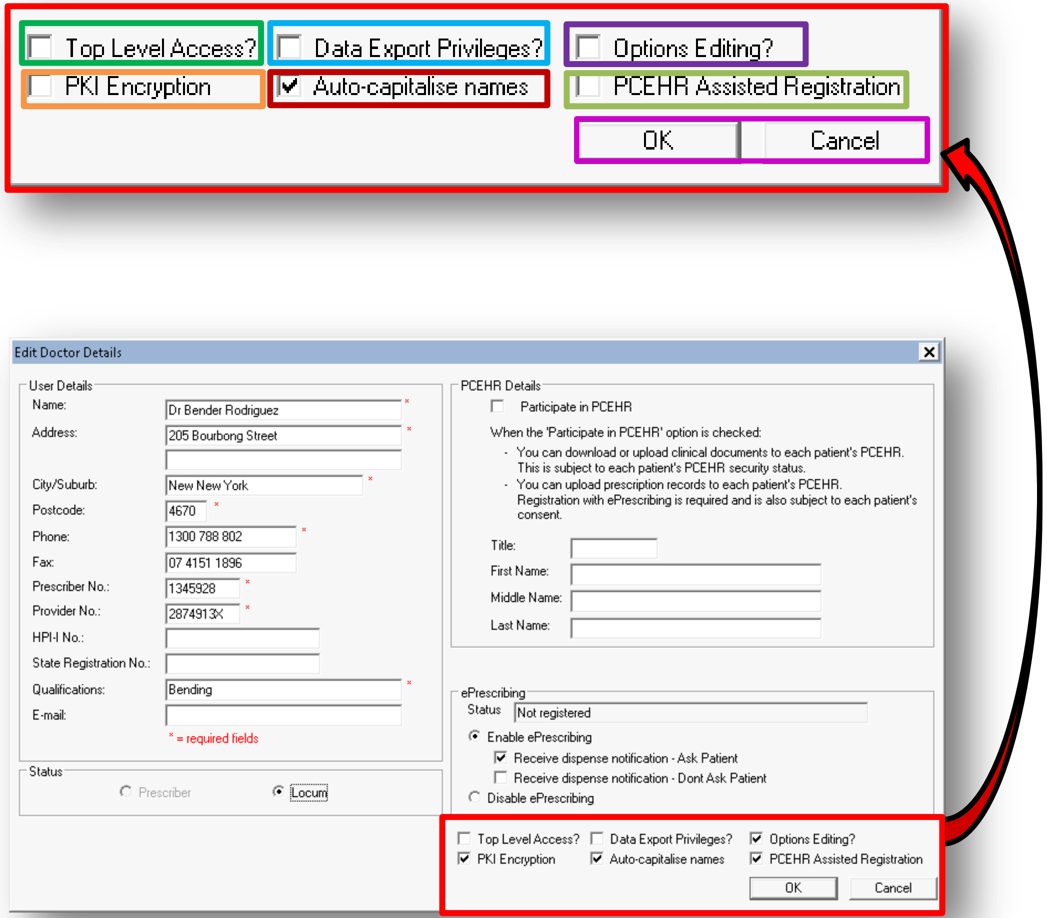
5. The tick boxes in the bottom right grant special access/permissions to a users' account as outlined below.



Top Level Access: ....Allows access to user database

Data Export Privileges: ....Allows export of data**

Options Editing:...................Access to clinical and print options

PKI Encryption: ....Allows encrypted emails to be send from MDC

Auto-capitalise names:.........Auto-capitalise names in certain windows

PCEHR Assisted Rego:..........Access to ART to register patients for ehealth*

OK & Cancel:........................Enters or cancels changes to user

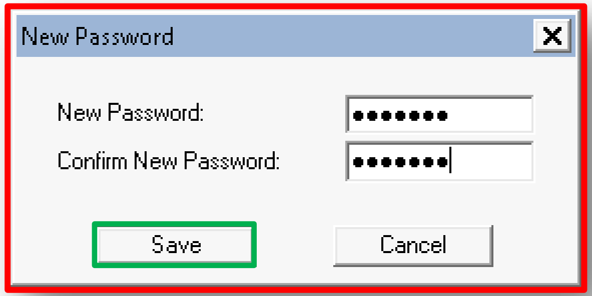
6. Once all the details and permissions are set, hitting OK will create the account.

** Please see guide to Medical Director Maintenance here.

* Please see guide to ART here

7. You will next be prompted to create a password for the account; it will need to be between 6 and 10 letters and/or numbers for a password.

   Please note: It is highly recommended that you make all passwords at least 8 characters, containing a combination of numbers, letters and special characters and that passwords are not used for more than on account. It is also recommended to get the user to change their password upon initial login. See guide here.



8. Please note the password for the new user and hit Save to complete the MDC aspect of account creation. You will now need to complete the PS part with most of the details already in PS.

Medical Director PracSoft

9. To begin, log into Medical Director PracSoft. (if unsure how to login, please see: Medical Director PracSoft – Getting Started guide here)

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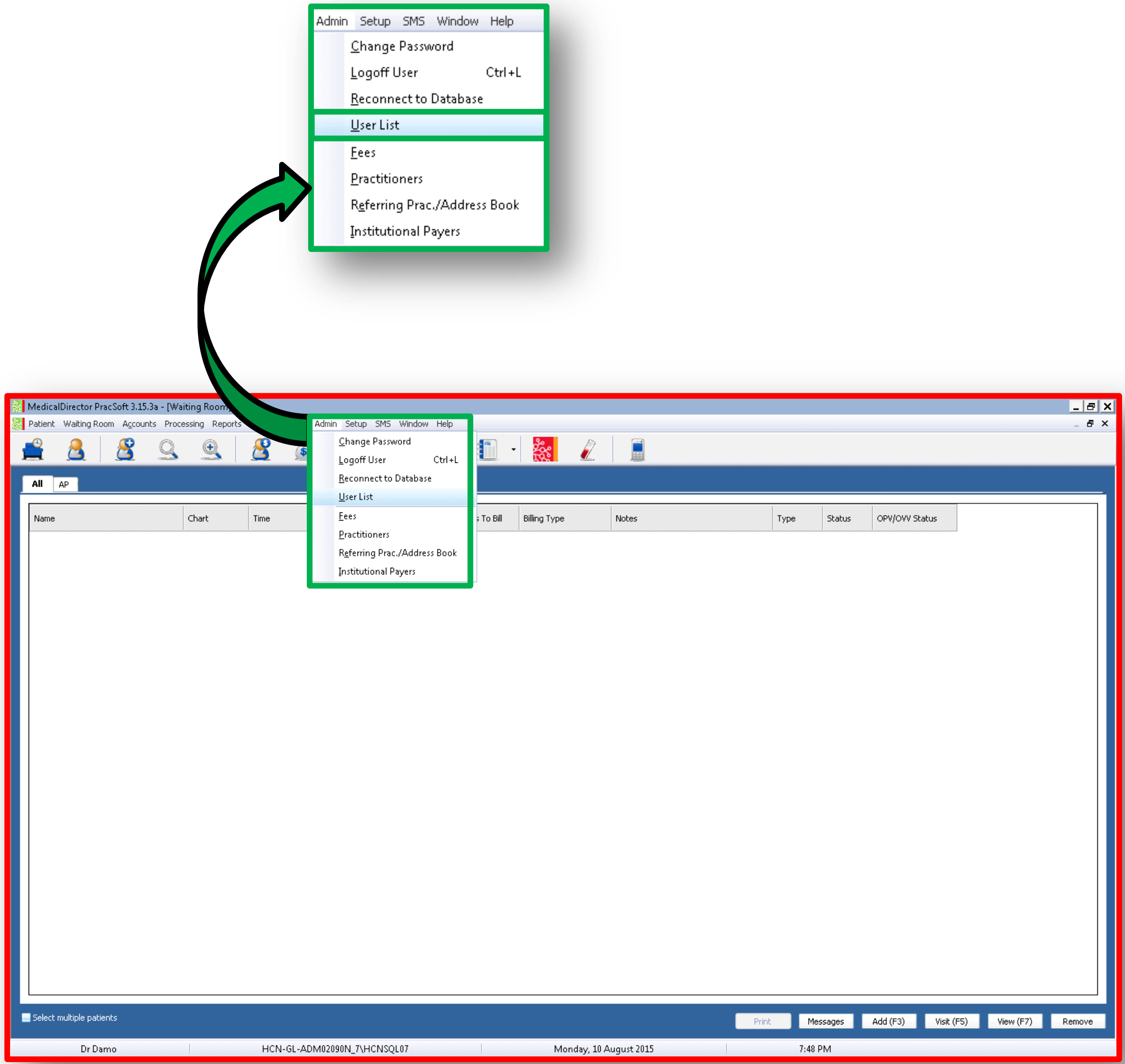
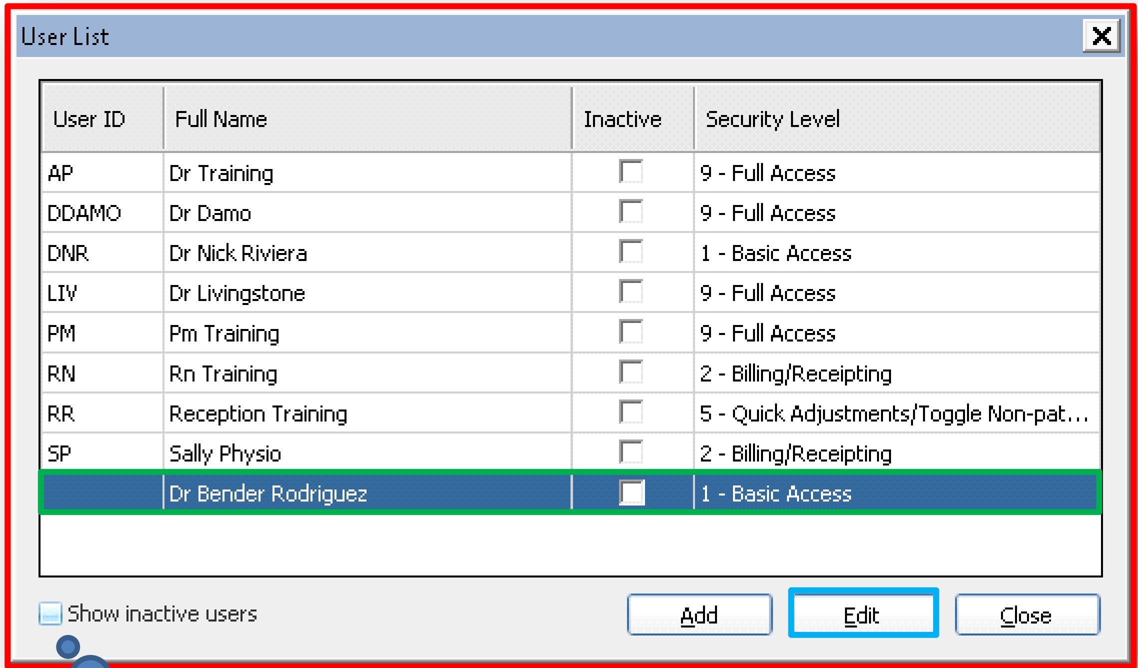
10. From the PS home screen, select Admin then User List

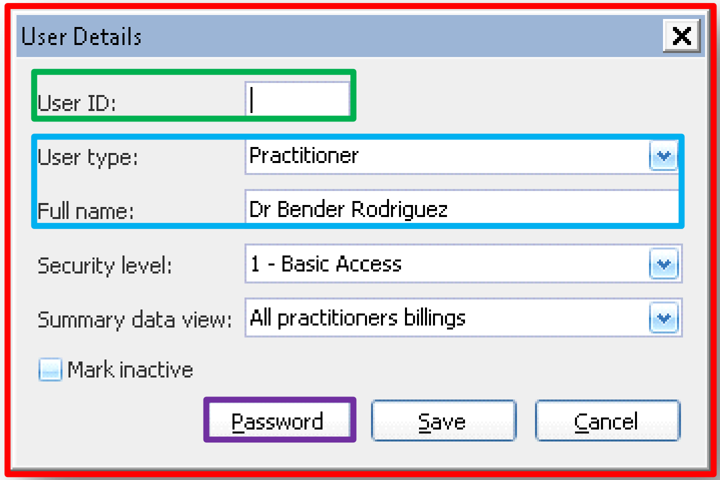


11. This will open the User List window. Highlight the newly setup Practitioner and hit Edit.



You can also view inactive accounts by ticking this box!

12. This will open the User Details window where you can set the users PS access/permissions.

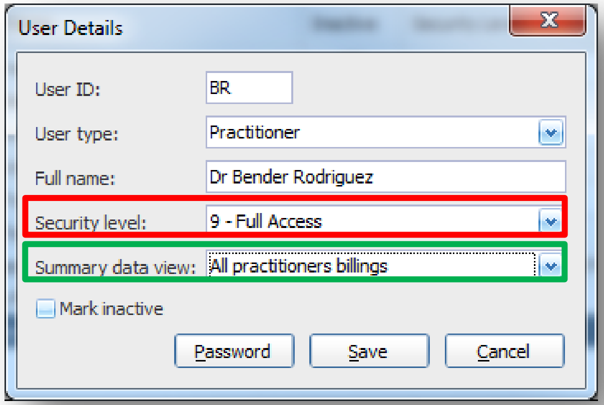


13. You will first need to give the user a unique User ID: usually the users' initials or number but there can be ***NO DUPLICATE*** User ID's.

    The User type and Full name carry across from MDC and should already be populated.

    The Password would have already been set from MDC and hitting the Password button now will set a ***NEW*** password for the user.

14. To continue creating the user account, you will need to set the Security Level & Summary data view permissions. Every user account ***MUST*** have a security level. Below is the security level matrix, set the user account security level to the access the user will require to complete their role.



Security Level Matrix

Level	Summary	Description
1	Read Only	Enables a user to view patients and their details. They are not be able to add or edit anything.
2	Billing Receipting	This enables the user to undertake adding and editing patients and producing accounts and receipts. This is suitable for the general front desk staff. No summary information is available in this level.
3	Batching/Daily Reports/Basic Adjustments	The user is able to access everything in 2 plus the Practitioners' Daysheet Report and has the ability to batch bulk claims and add adjustments to accounts.
4	Banking	The user may use everything in 3, plus the Banking.
5	Quick Adjustments/ Toggle Non-patient	The user may use everything in 4, plus the ability to change the non-patient status of a visit (in the Visits tab) and to adjust the Practitioner seen through the Visits tab (when this becomes available).
6	Add/Edit Practitioners/ Workstation & Global Settings	The user may use everything in 5, plus adding/editing Practitioner's and changing Global Settings.
7	Reports	The user may use everything in 6, plus has the ability to run all Reports.
8	Reserved	N/A
9	Full Access	The user has unlimited access to every functionality. They have access to all Set up functionality (via Global Settings).

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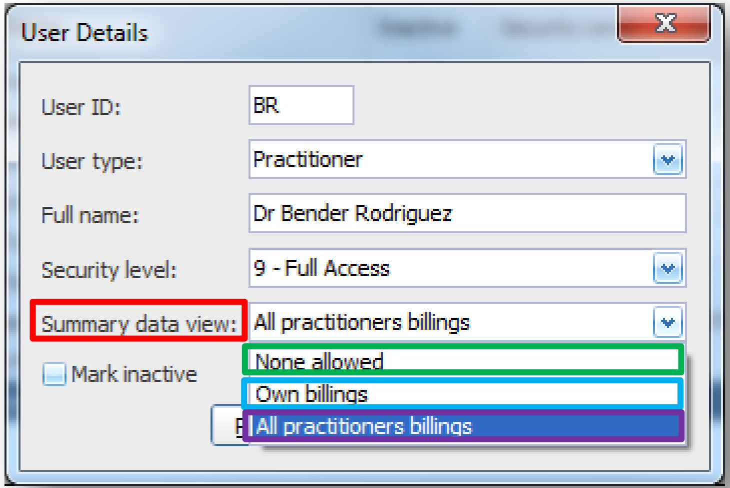
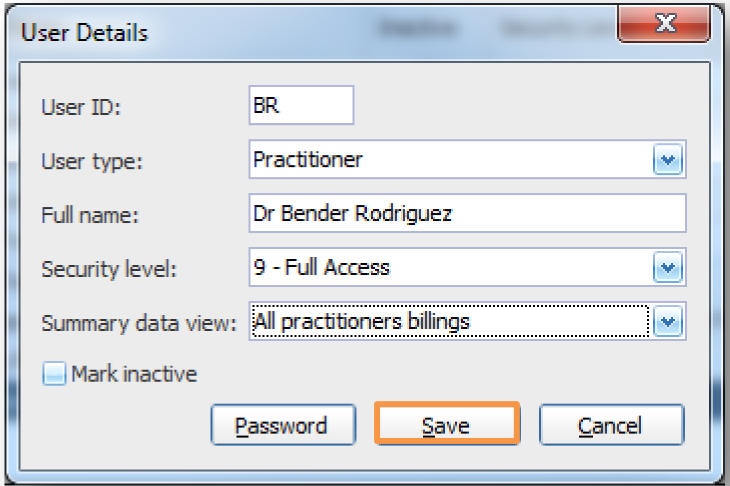
15. The Summary data view option permits a user account to view billings through PS on three levels. None allowed, Own billings and All practitioners billings.



None allowed: ....No access to billings reports

Own billings:.........................Access to users own billings reports

All practitioners billings:.......Unrestricted access to all billings reports



Click Save to save all changes made to the User Details.

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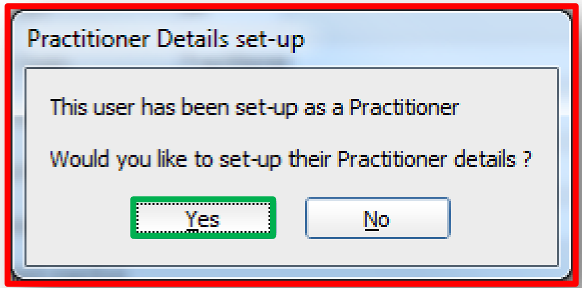
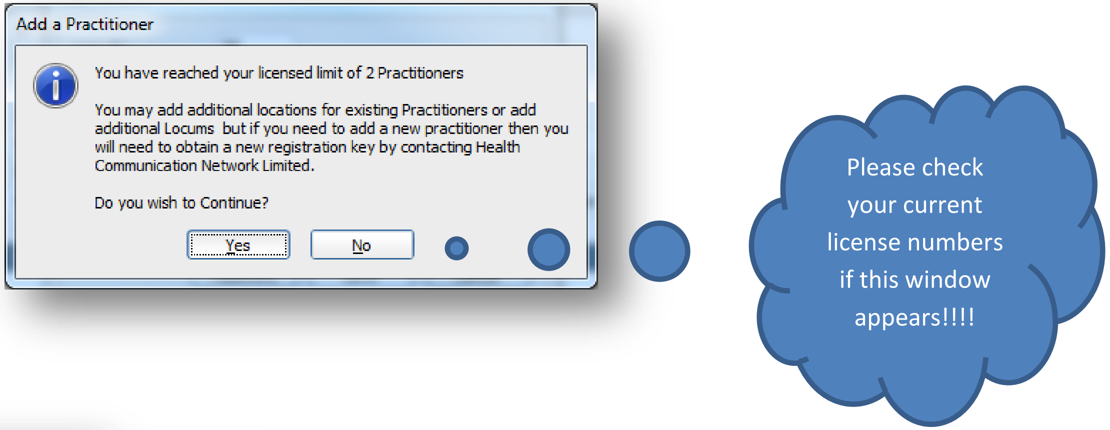
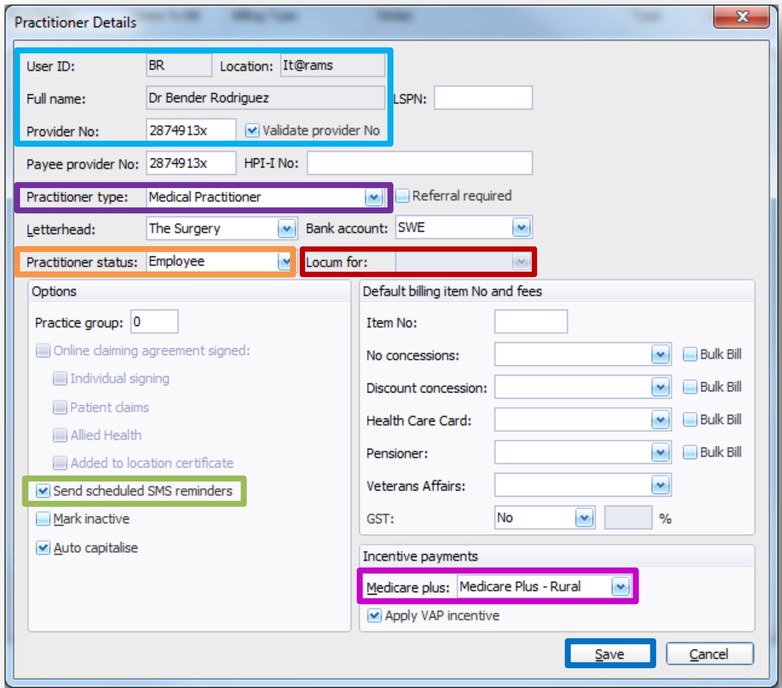
16. You will now be prompted to set-up the users Practitioner details. This step activates the practitioner within PS for Medicare billing. Hit Yes.







Fill out all the practitioner details for the user account including Location & Provider No. The provider No. must be valid for successful on-line claiming.

A list of Practitioner types is supplied. Use onof th3ese if possible although free text can be entered into the field if an appropriate option is not listed.

If the Practitioner status is a Locum, you will need to indicate the practitioner that the user is Locum for.

You can also choose if the user is a part of the scheduled SMS reminders (See SMS scheduled reminders guide here for more info on SMS's)

Incentive payments: All IT@RAMS sites are within Medicare designated Rural centres. Please select Medicare Plus – Rural.

Once complete, hit Save and the account creation process is now complete.

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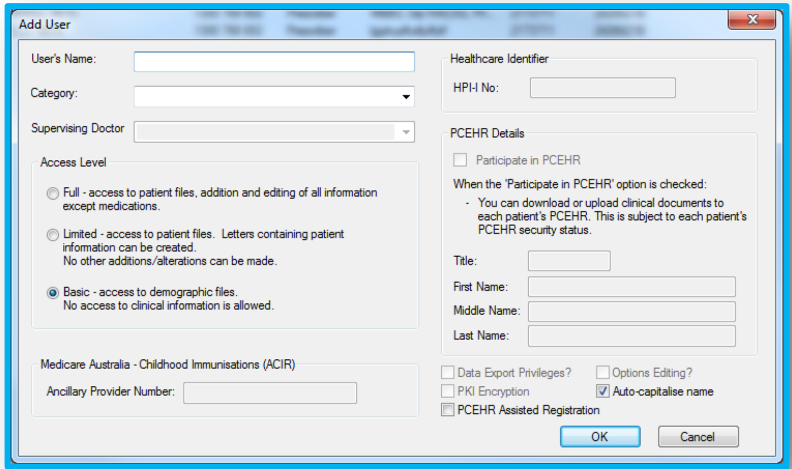
Setting up Users

There is no recommended process for creating accounts for users by Medical Director and user accounts can be created initially in either MDC or PS, depending on the user's role. This guide will go through MDC first, followed by PS. A user account created initially in either system will carry over to the other software package.

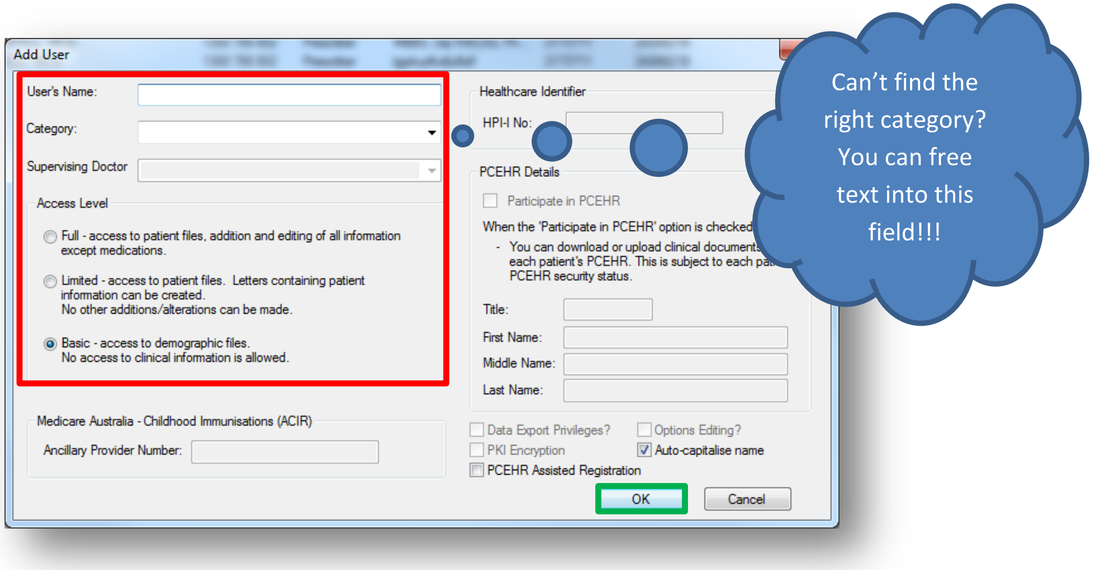
17. Follow steps 1-3 of this guide to access the User Database in MDC.

18. Select Add User from the lower button set.

19. This will open the Add User window.

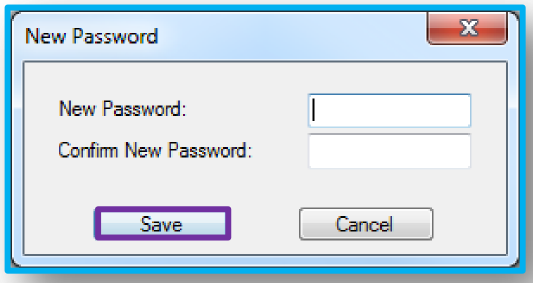


20. Complete the User details including User's Name, Category and Access Level and hit OK. Access levels are explained in the Add User window.



21. You will now be prompted to enter and confirm a password for the user. Please note the password to issue to the user. Hit Save.

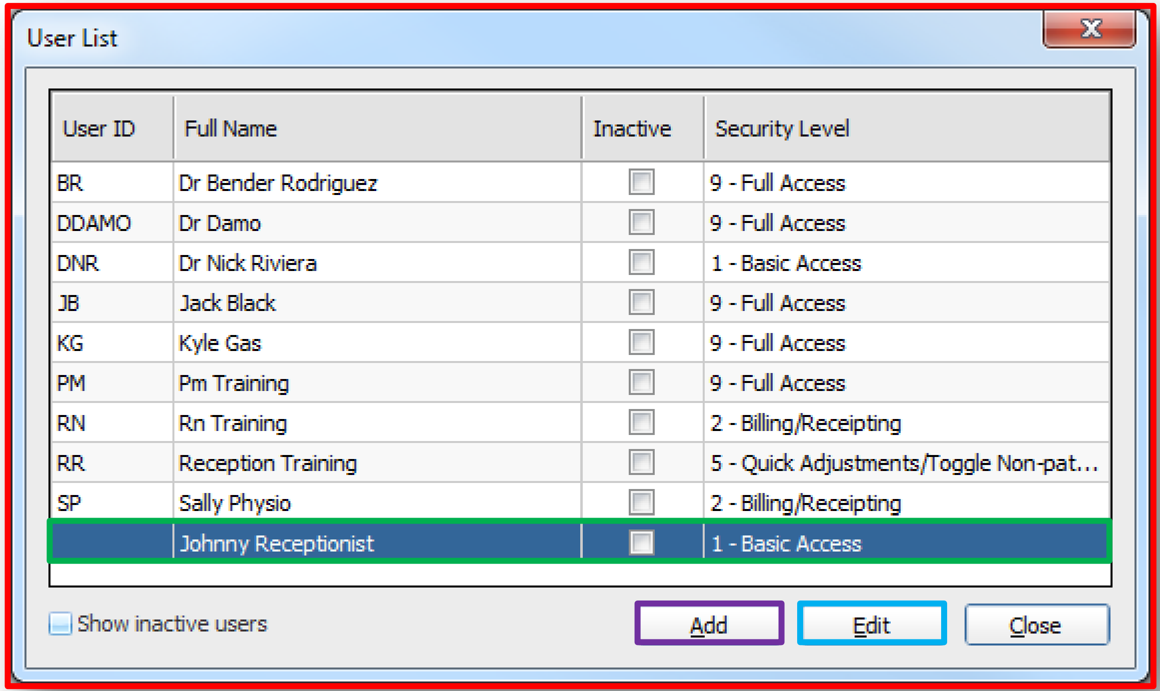
Please note: It is highly recommended that you make all passwords at least 8 characters, containing a combination of numbers, letters and special characters and that passwords are not used for more than on account. It is also recommended to get the user to change their password upon initial login. See guide here.



The user account is now created in MDC & PS. If the user only requires access to one of systems, please see Inactivating Users below.

PracSoft: Adding a User

22. Follow steps 9 & 10 of guide to open the User List window.
    If completing the user account creation for an account already created in MDC, highlight user and hit Edit.
    If adding a new user directly into PS, hit Add.



23. You will need to give the user a User ID for PS and select their Security Level. Hit Save when complete and the user is now setup in both MDC & PS. Fig1.

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Complete User Details: User ID: User type: Full Name: Security level: and hit Save. Fig2.

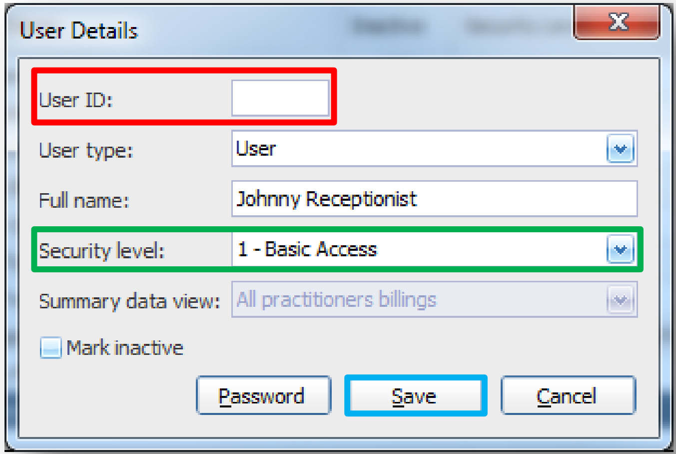


Fig1.

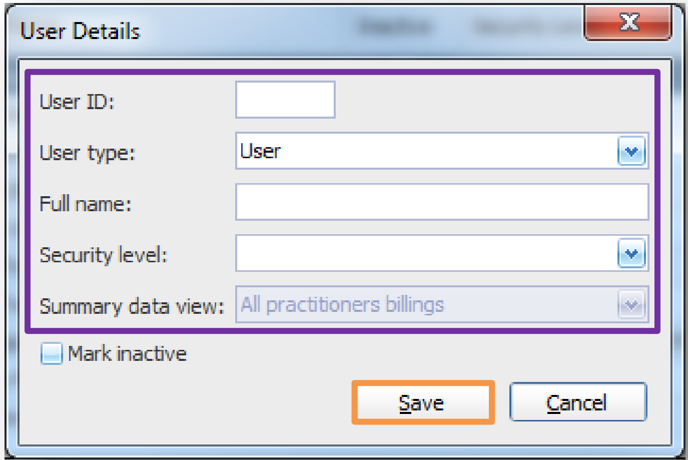
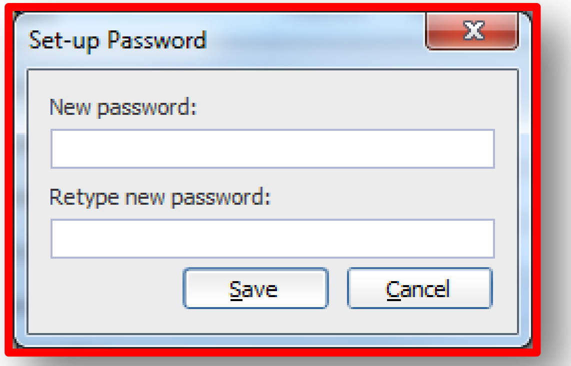


Fig2.

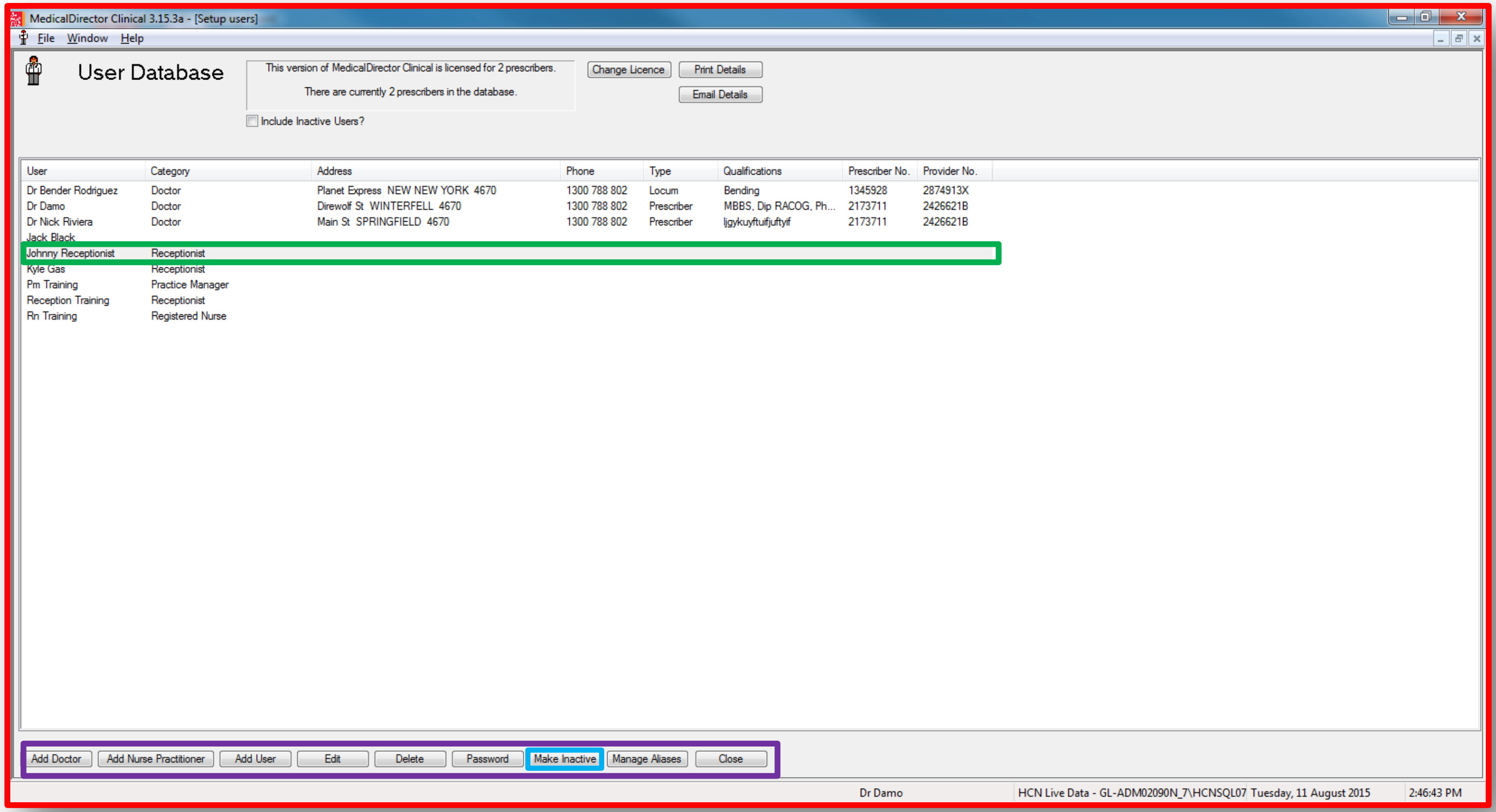
24. If you have created the account in PS, you will now be prompted to setup a password for the user. Please note the password to issue to the user. The user is now created in PS.

    Please note: It is highly recommended that you make all passwords at least 8 characters, containing a combination of numbers, letters and special characters and that passwords are not used for more than on account. It is also recommended to get the user to change their password upon initial login. See guide here.



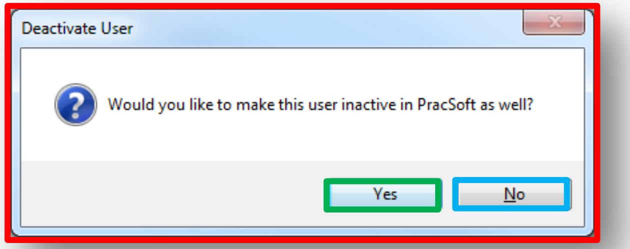
Inactivating Accounts: Medical Director Clinical

25. Follow steps 1-3 of this guide to access the User Database in MDC.



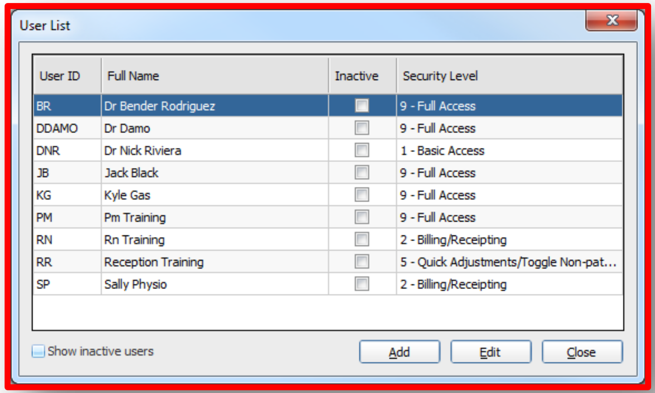
26. Highlight user to be inactivated and hit Make Inactive from the bottom button set.

27. If the user has a PS account, you will see the below Deactivate User window asking if you want to make this user inactive in PS as well. Select Yes to inactivate and No to leave access to PS.

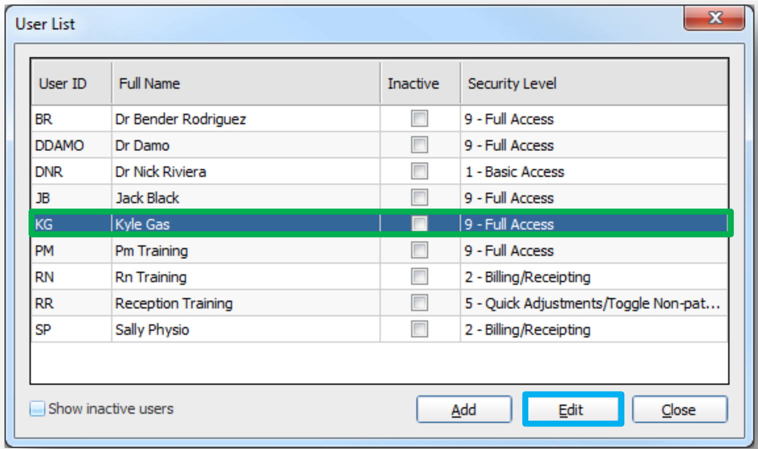


Inactivating Accounts: PracSoft

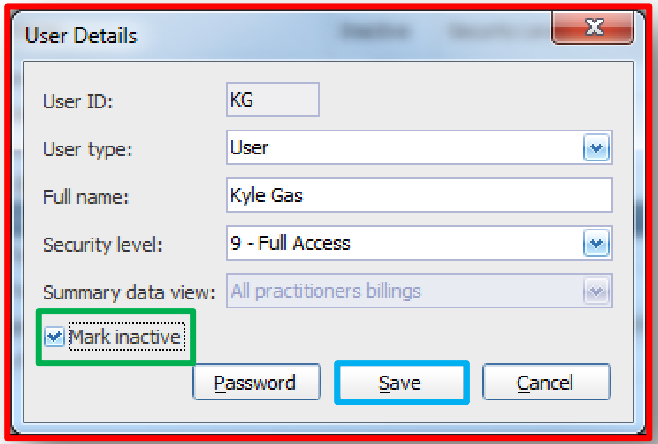
28. Follow steps 9 & 10 of this guide to open the User List window.



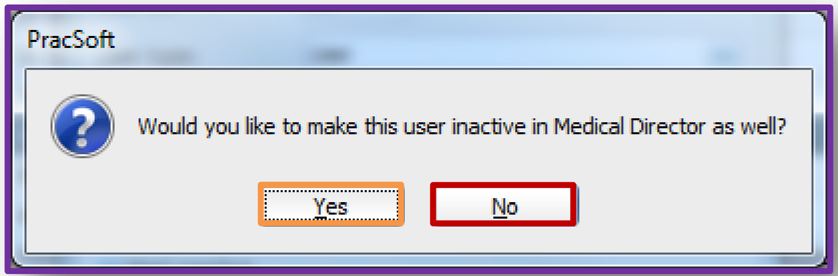
29. Highlight user to be inactivated and hit Edit.



30. From the User Details window, tick the Mark inactive box and hit Save.



31. If the user has an active MDC account, you will see a PracSoft window open asking if you would like to inactivate the user in MDC. Select Yes to delete or No to leave access to MDC.



The user is now inactive in PS.