

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.

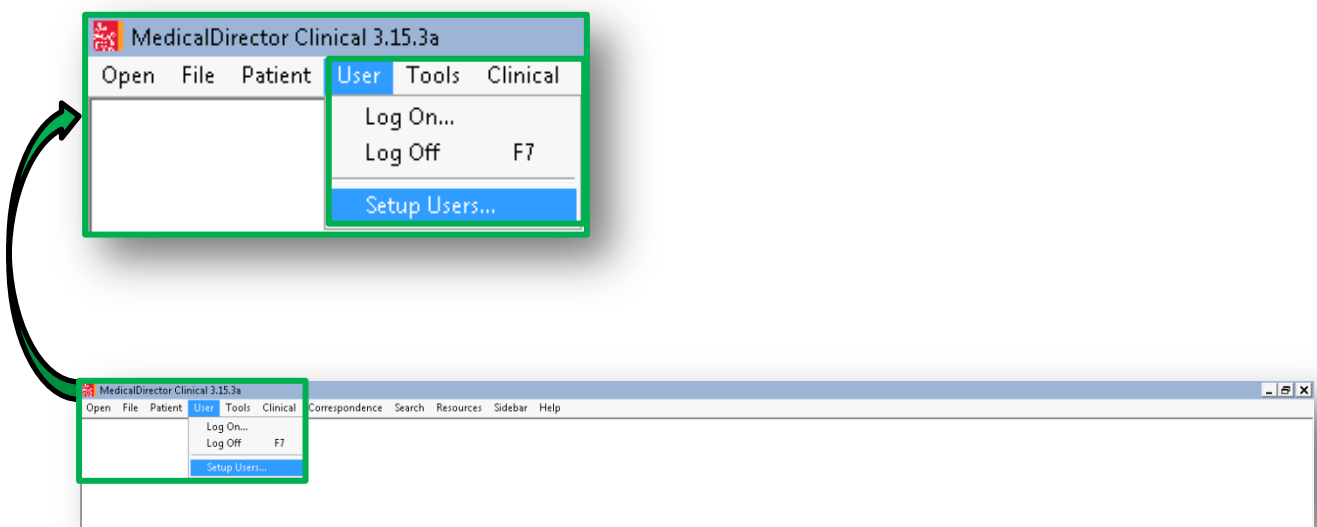
Medical Director advises creating a GP or Nurse Practitioner accounts in MDC BEFORE creating it in PS.

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](#))

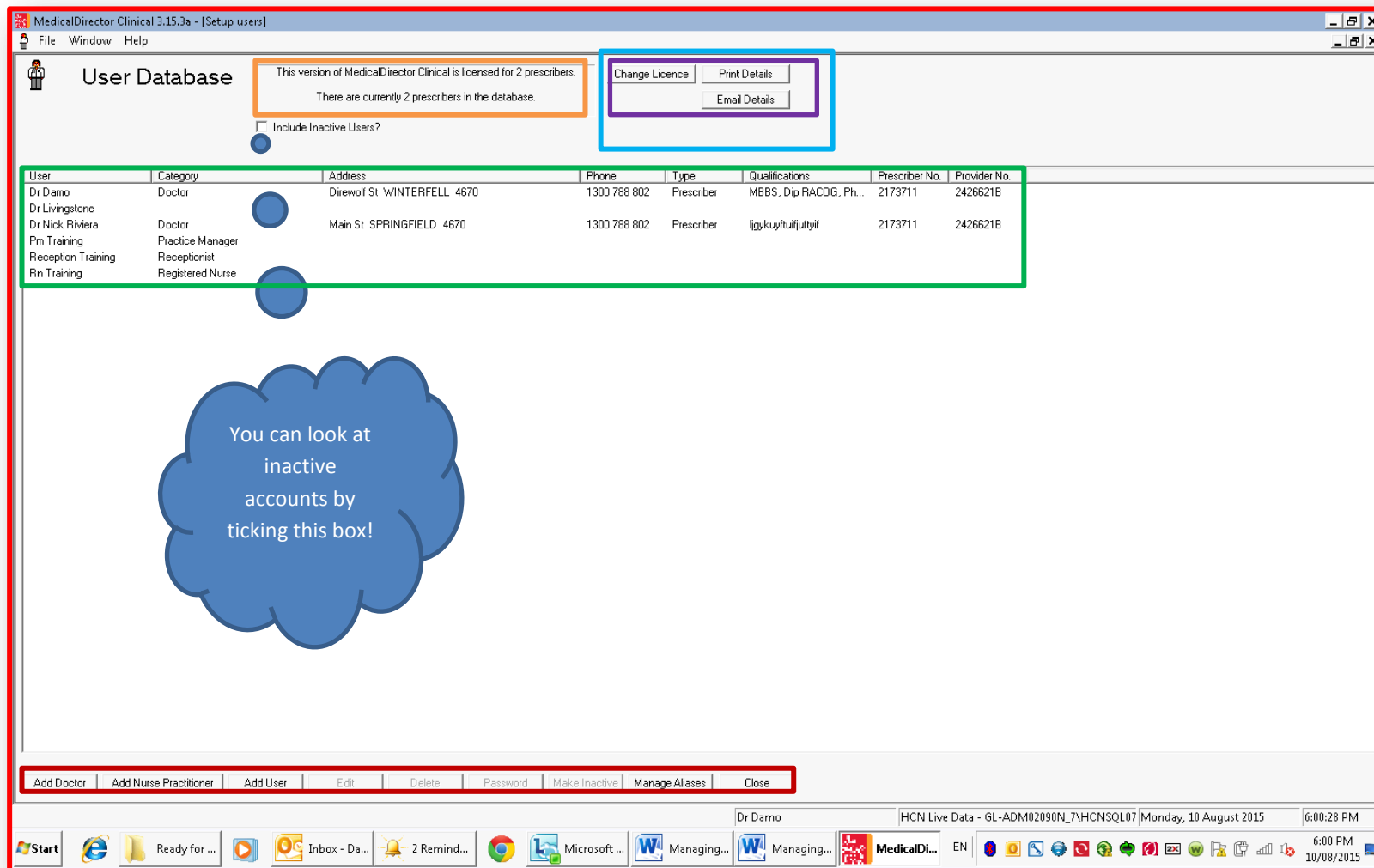


2. From the MDC home screen, select **User**, then **Setup Users...**



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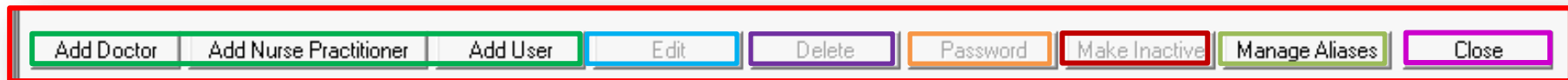
3. This will open the **Setup users** window where **current users will be displayed**. There is the **upper button set**, where you can **print/email details, change licences** and **see how many prescribers you have currently licenced**. The **lower button set** (covered below) is for managing user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



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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**.



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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**.

The screenshot shows a software window titled "Add Doctor" with a red border. It is divided into several sections:

- User Details:** Includes fields for Name (Dr), Address (205 Bourbong Street), City/Suburb (Bundaberg), Postcode (4670), Phone (1300 788 802), Fax (07 4151 1896), Prescriber No., Provider No., HPI No., State Registration No., Qualifications, and E-mail. A red asterisk indicates required fields.
- PCEHR Details:** Includes a checked box for "Participate in PCEHR" and explanatory text about clinical document and prescription record management. It also has fields for Title, First Name, Middle Name, and Last Name.
- ePrescribing:** Includes a dropdown for "Status" and radio buttons for "Enable ePrescribing" (with sub-options for "Receive dispense notification - Ask Patient" and "Receive dispense notification - Dont Ask Patient") and "Disable ePrescribing".
- Bottom Right:** A green box highlights a set of checkboxes: "Top Level Access?", "Data Export Privileges?", "Options Editing?", "PKI Encryption", "Auto-capitalise names" (checked), and "PCEHR Assisted Registration".
- Status:** Radio buttons for "Prescriber" and "Locum".
- Buttons:** "OK" and "Cancel" buttons at 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

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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.



The image shows a standard Windows-style dialog box titled "New Password". It features a close button (X) in the top right corner. The dialog contains two text input fields: "New Password:" and "Confirm New Password:", both of which are filled with a series of black dots to mask the characters. Below these fields are two buttons: "Save" and "Cancel". The "Save" button is highlighted with a green rectangular border, indicating it is the recommended action to take.

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.

Managing Users MDC/PS

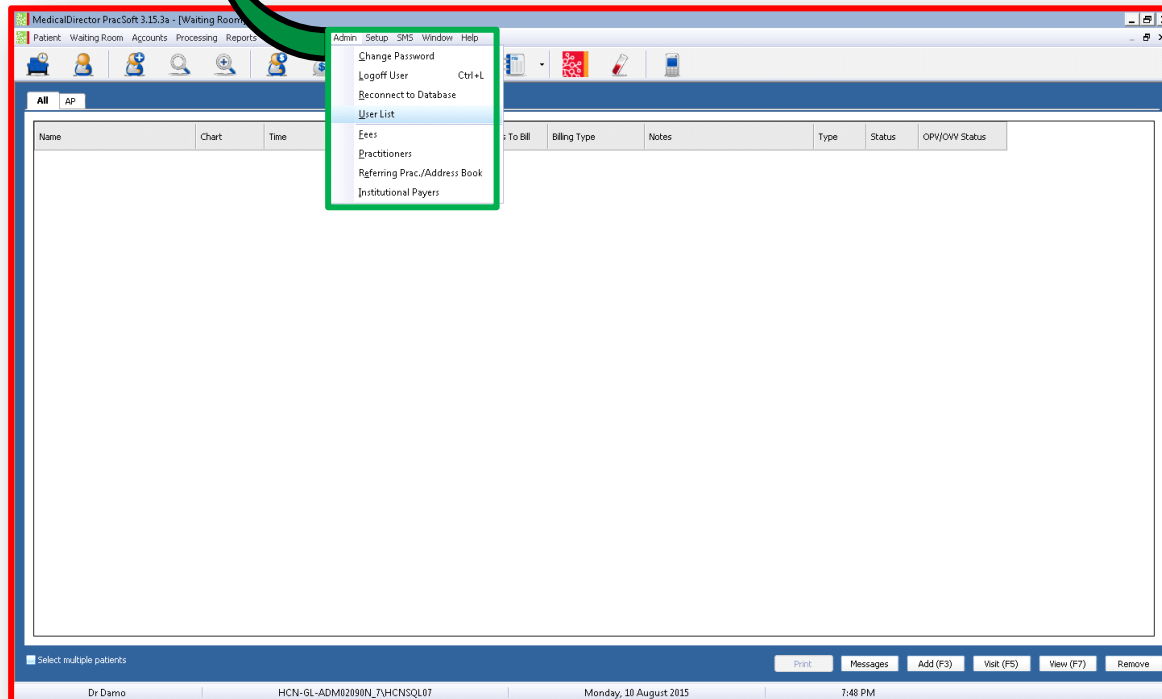
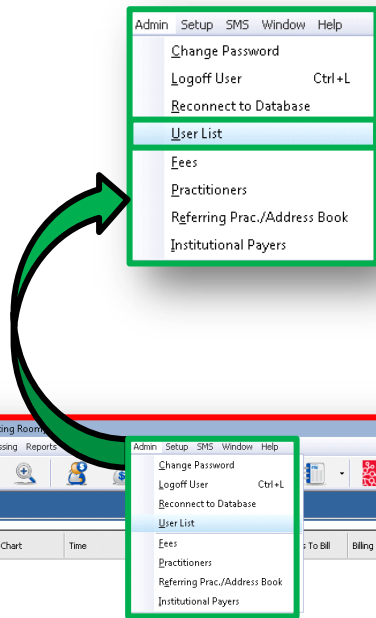
Medical Director PracSoft

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



Managing Users MDC/PS

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



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

The screenshot shows a window titled "User List" with a table of users. The table has four columns: "User ID", "Full Name", "Inactive", and "Security Level". The user "Dr Bender Rodriguez" is highlighted in green. Below the table, there is a checkbox labeled "Show inactive users" and three buttons: "Add", "Edit", and "Close". The "Edit" button is highlighted in blue.

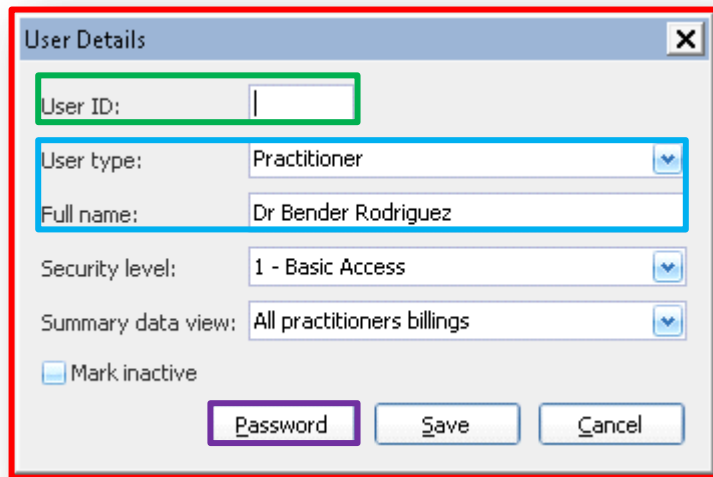
User ID	Full Name	Inactive	Security Level
AP	Dr Training	<input type="checkbox"/>	9 - Full Access
DDAMO	Dr Damo	<input type="checkbox"/>	9 - Full Access
DNR	Dr Nick Riviera	<input type="checkbox"/>	1 - Basic Access
LIV	Dr Livingstone	<input type="checkbox"/>	9 - Full Access
PM	Pm Training	<input type="checkbox"/>	9 - Full Access
RN	Rn Training	<input type="checkbox"/>	2 - Billing/Receipting
RR	Reception Training	<input type="checkbox"/>	5 - Quick Adjustments/Toggle Non-pat...
SP	Sally Physio	<input type="checkbox"/>	2 - Billing/Receipting
	Dr Bender Rodriguez	<input type="checkbox"/>	1 - Basic Access

Show inactive users

You can also view inactive accounts by ticking this box!

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



The screenshot shows a 'User Details' dialog box with the following fields and controls:

- User ID:** A text input field, currently empty, highlighted with a green border.
- User type:** A dropdown menu set to 'Practitioner', highlighted with a blue border.
- Full name:** A text input field containing 'Dr Bender Rodriguez', highlighted with a blue border.
- Security level:** A dropdown menu set to '1 - Basic Access', highlighted with a blue border.
- Summary data view:** A dropdown menu set to 'All practitioners billings', highlighted with a blue border.
- Mark inactive:** An unchecked checkbox.
- Buttons:** 'Password' (highlighted with a purple border), 'Save', and 'Cancel' buttons.

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.

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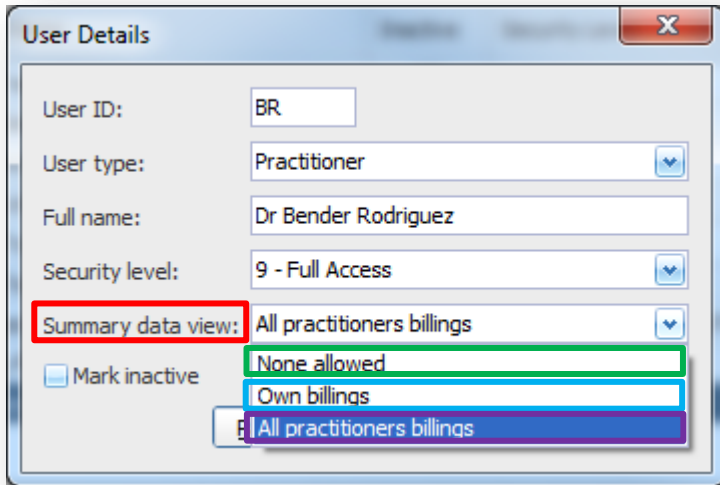
14. To continue creating the user account, you will need to set the **Security Level** & **Summary data view permissions**. Every user account **MUST** have a security level. Below is the security level matrix, set the user account security level to the access the user will require to complete their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

Managing Users MDC/PS

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.

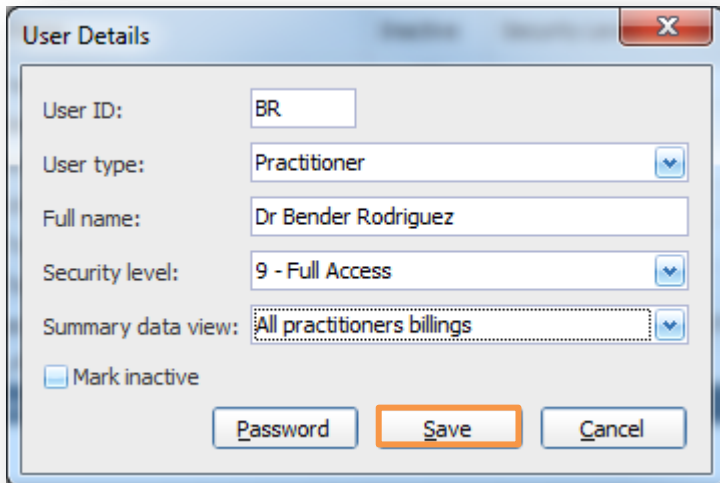


The screenshot shows the 'User Details' dialog box with the following fields: User ID: BR; User type: Practitioner; Full name: Dr Bender Rodriguez; Security level: 9 - Full Access; Summary data view: All practitioners billings. The dropdown menu is open, showing three options: None allowed (highlighted in green), Own billings (highlighted in blue), and All practitioners billings (highlighted in purple). A red box highlights the 'Summary data view' label.

None allowed:No access to billings reports

Own billings:Access to users own billings reports

All practitioners billings:Unrestricted access to all billings reports

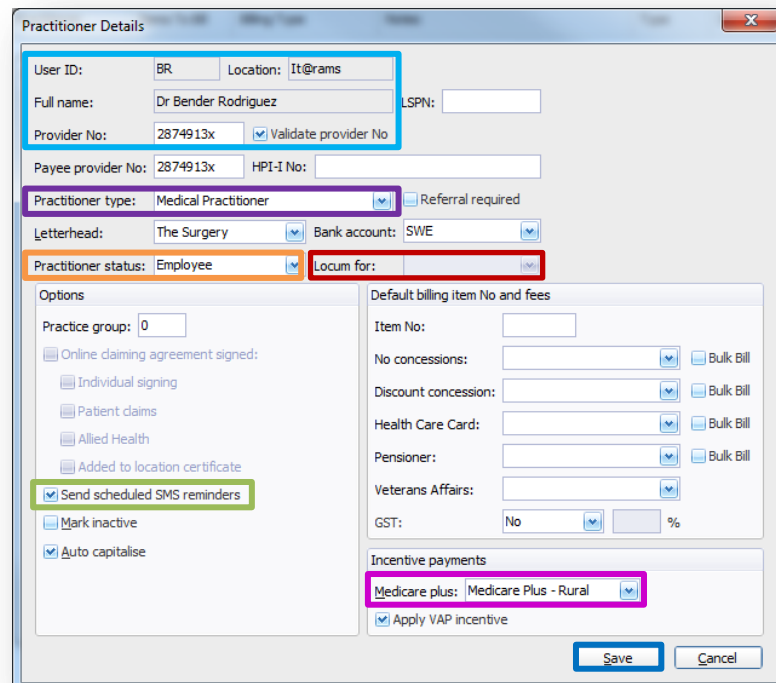
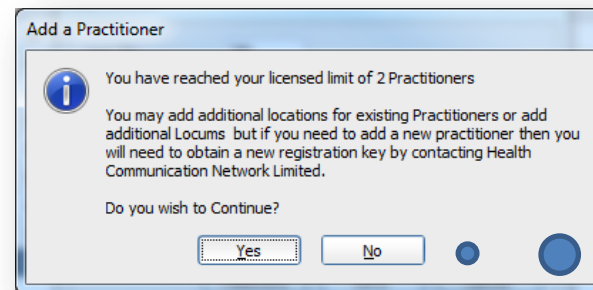
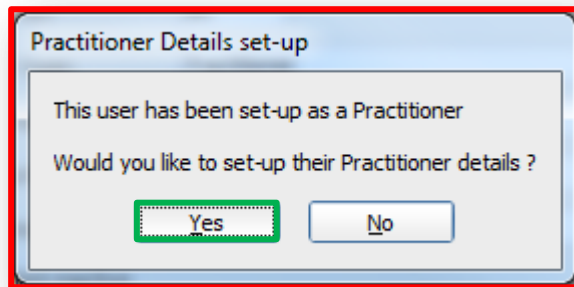


The screenshot shows the 'User Details' dialog box with the following fields: User ID: BR; User type: Practitioner; Full name: Dr Bender Rodriguez; Security level: 9 - Full Access; Summary data view: All practitioners billings. The 'Mark inactive' checkbox is unchecked. At the bottom, there are three buttons: Password, Save (highlighted in orange), and Cancel.

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 one of these 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.

Managing Users MDC/PS

Setting up Users

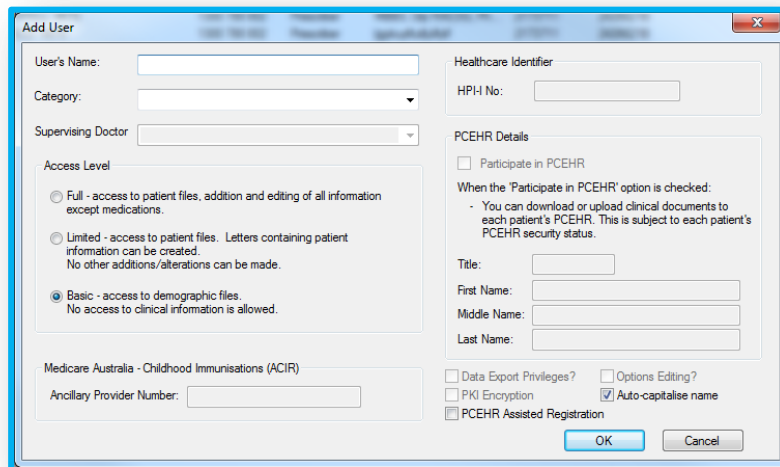
There is no recommended process for creating accounts for users by Medical Director and user accounts can be created initially in either MDC or PS, depending on the user's role. This guide will go through MDC first, followed by PS. A user account created initially in either system will carry over to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



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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.

The screenshot shows the 'Add User' dialog box. A red rectangle highlights the 'User's Name', 'Category', 'Supervising Doctor', and 'Access Level' fields. A blue callout bubble points to the 'Category' dropdown menu with the text: "Can't find the right category? You can free text into this field!!!". The 'Access Level' section has three radio buttons: 'Full', 'Limited', and 'Basic'. The 'Basic' option is selected. The 'OK' button is highlighted with a green box.

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.

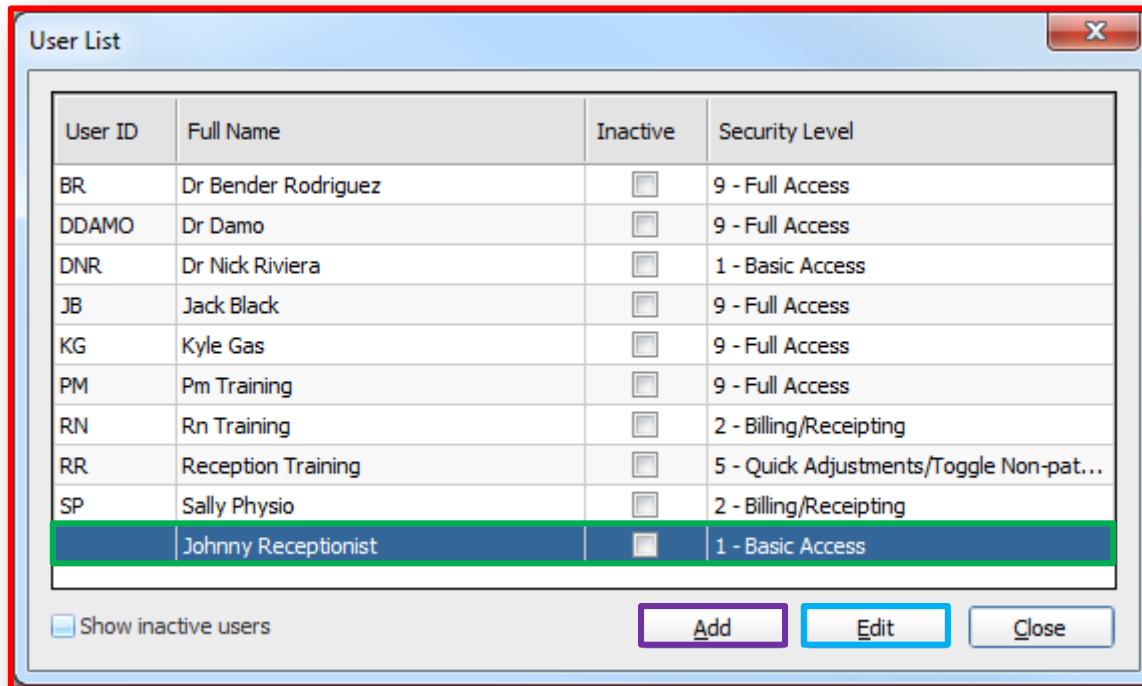
The screenshot shows the 'New Password' dialog box. It has two text input fields: 'New Password:' and 'Confirm New Password:'. Below the fields are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a purple box.

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

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PracSoft: Adding a User

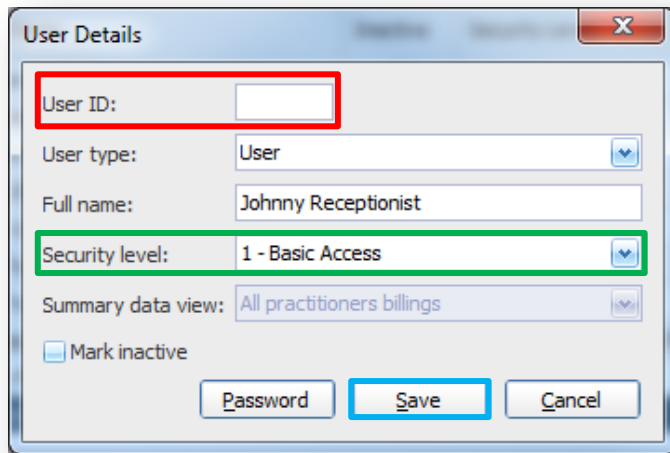
22. Follow steps 9 & 10 of guide to open the **User List** window.
If completing the user account creation for an account already created in MDC, **highlight user** and hit **Edit**.
If adding a new user directly into PS, hit **Add**.



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.

Managing Users MDC/PS

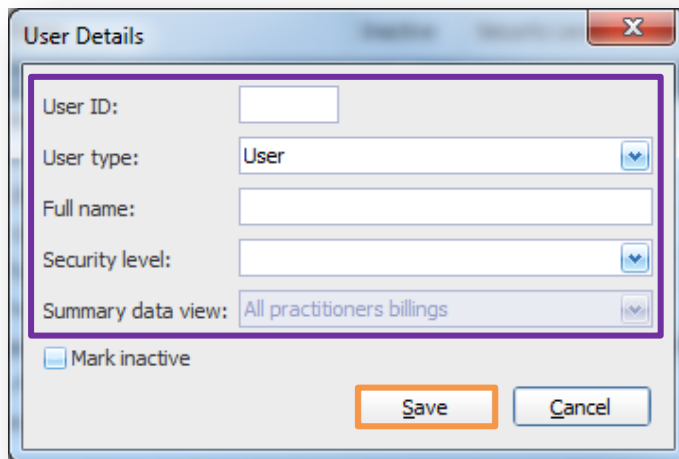
Complete User Details: User ID: User type: Full Name: Security level: and hit **Save**. Fig2.



The 'User Details' dialog box contains the following fields and controls:

- User ID: [Empty text box, highlighted with a red border]
- User type: [User (dropdown menu)]
- Full name: [Johnny Receptionist (text box)]
- Security level: [1 - Basic Access (dropdown menu, highlighted with a green border)]
- Summary data view: [All practitioners billings (dropdown menu)]
- Mark inactive
- Buttons: Password, Save, Cancel

Fig1.



The 'User Details' dialog box contains the following fields and controls:

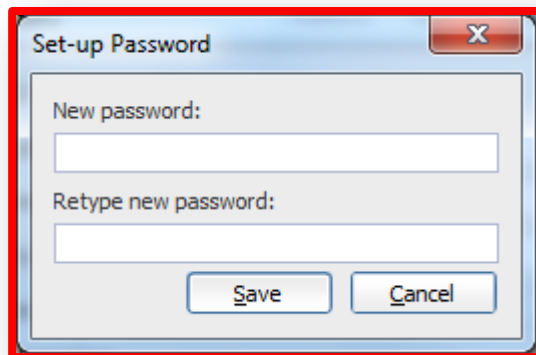
- User ID: [Empty text box]
- User type: [User (dropdown menu)]
- Full name: [Empty text box]
- Security level: [Empty dropdown menu]
- Summary data view: [All practitioners billings (dropdown menu)]
- Mark inactive
- Buttons: Save, Cancel

Fig2.

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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.

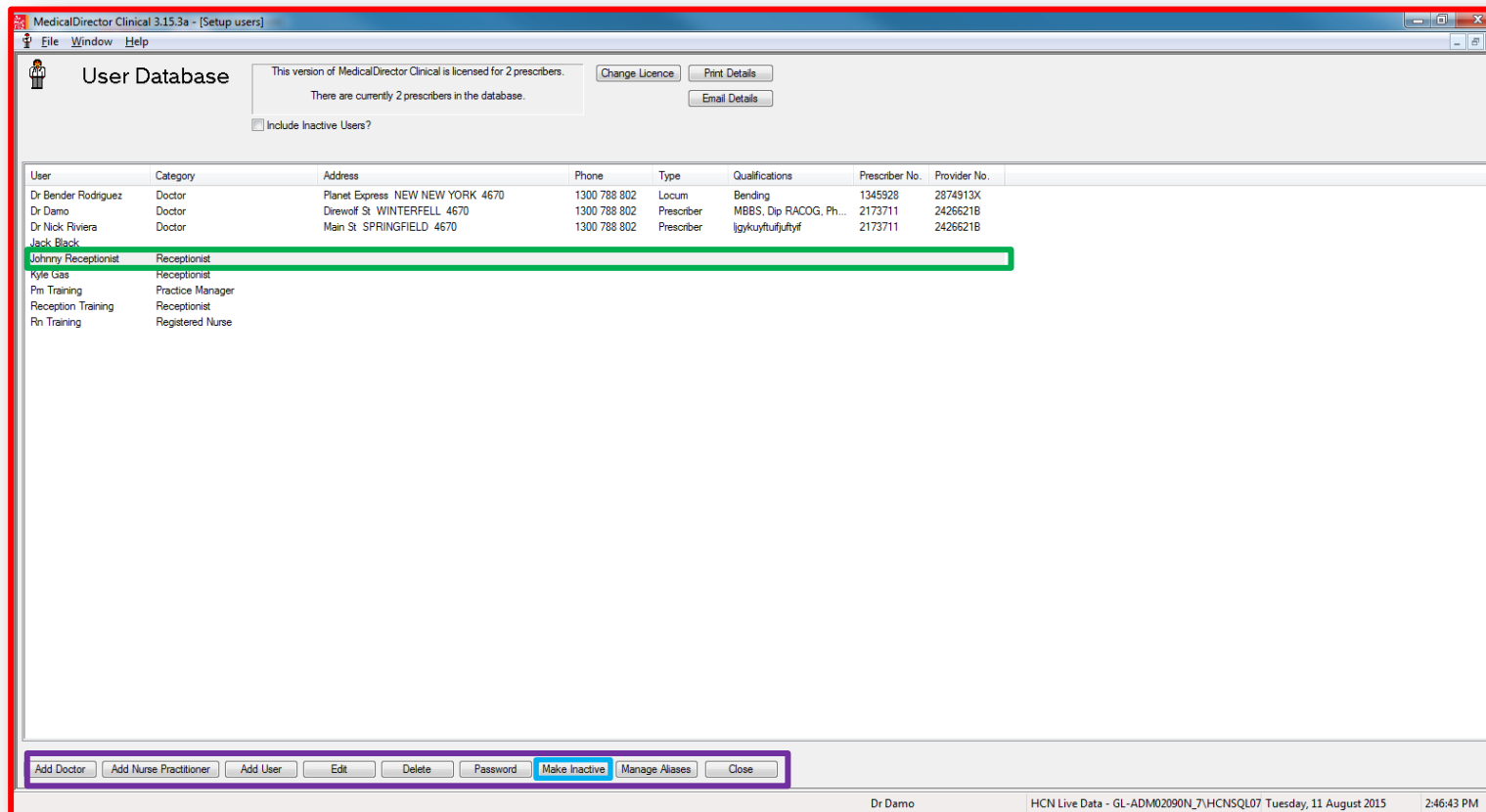


The image shows a 'Set-up Password' dialog box. It has a title bar with the text 'Set-up Password' and a close button (X). The dialog contains two text input fields: 'New password:' and 'Retype new password:'. Below the input fields are two buttons: 'Save' and 'Cancel'.

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Inactivating Accounts: Medical Director Clinical

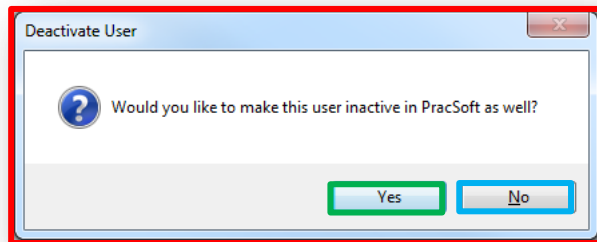
25. Follow steps 1-3 of this guide to access the **User Database** in MDC.



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

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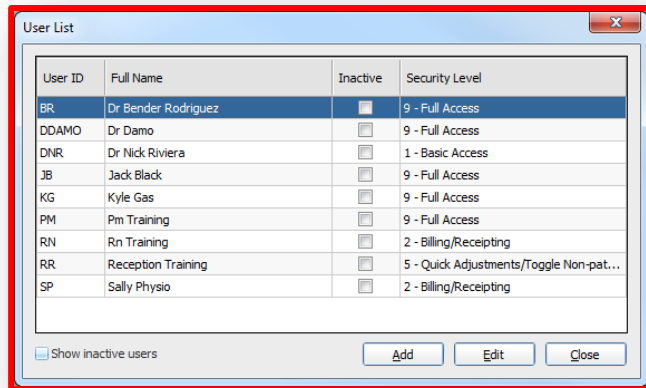
27. If the user has a PS account, you will see the below **Deactivate User window** asking if you want to make this user inactive in PS as well. Select **Yes** to inactivate and **No** to leave access to PS.



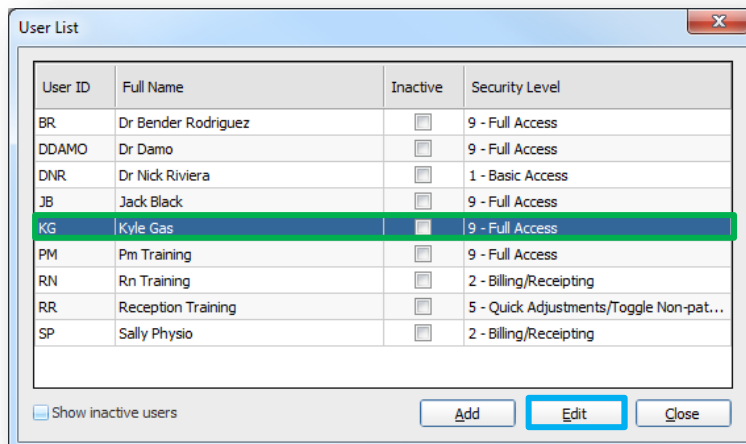
Managing Users MDC/PS

Inactivating Accounts: PracSoft

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

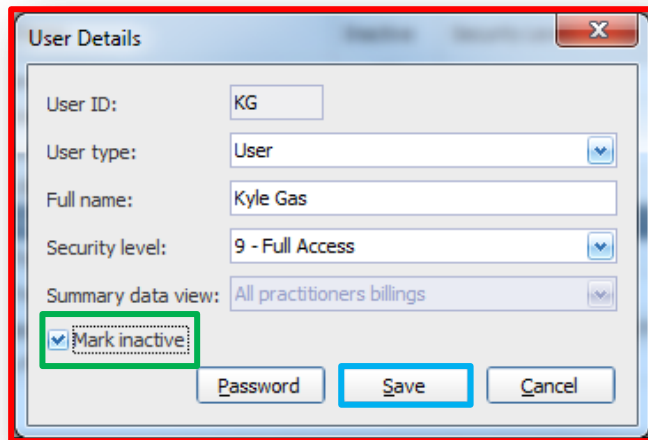


29. **Highlight user** to be inactivated and hit **Edit**.

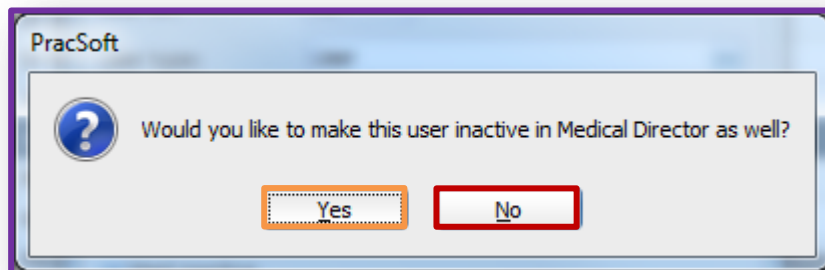


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30. From the **User Details window**, tick the **Mark inactive** box and hit **Save**.



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.