External Policies and Procedures

TherapyAppointment.com

Provider Account Types and Privileges (2.0)

Role-Based Access Control

The HIPAA Privacy rule requires that covered entities provide the members of their practice with access to only the minimum necessary information needed to perform their work, given their particular role in the organization. Health care organizations are expected to develop policies and procedures and implement security measures that comply with the minimum necessary standards. One way that TherapyAppointment assists you in meeting and your minimum necessary access requirements and documenting your minimum necessary access decisions is by defining the various levels of privilege for the account designations and roles within the application. Below, you will find the general levels of privilege granted to each potential account designations and role options within the application.

Owner Account

A practice Owner, usually the first account set up for the group, can:

- Manage general practice settings.
- Manage chart templates and documents.
- View, add, remove, and manage Therapist, Manager, and Front Office accounts for the practice.
- Manage all payment information for the practice.
- Create and manage all claims settings for the practice, CPT codes, and practice insurance configurations.
- View all practice level reports.
- Manage supervisor/supervisee designations.
- Manage the role designations of all accounts in the group.
- View all patients and patient records in the practice.
- Print/Release chart notes for the practice.
- Send messages to all clients of the practice and all members of the practice.
- Perform administrative actions on behalf of a Therapist in their practice.

If this practice Owner is a clinician, they will use this account to schedule their own patients, chart notes, etc.

An individual clinician is always classified as a practice Owner.

Manager Account

A manager for a practice account, can:

- Manage general practice settings.
- Manage chart templates and documents for the practice on behalf of a therapist.
- Print/Release chart notes for the practice.
- View all practice level reports.
- Perform all Front Office capabilities as designated under Front Office, Scheduler, and Biller below.
- Perform administrative actions on behalf of a Therapist in their practice.
- Send messages to all clients of the practice and all members of the practice.

Front Office Account

A Front Office account is the gateway account permission that must be in place in order to designate the Scheduler or Billing roles.

A Front Office Account (in isolation) can:

- See/edit all client contacts.
- Send messages to clients and members of the practice.
- Edit insurance for a client.

Who might need a Front Office account:

- Anyone helping a clinician or group of clinicians with billing, scheduling, or accounting.
- A person who needs to schedule appointments for other clinicians in the group

A Front Office account holder CANNOT view private clinical information such as chart notes but can do everything necessary for billing and scheduling if assigned those roles.

Biller Role

This role can only be assigned to an account that has the Front Office designation activated.

In addition to the general Front Office permissions, a Front Office account with the Biller role active can:

- View all client accounts in the practice.
- View practice-level billing information.
- Manage client claims.
- Manage client insurance.
- Manage client payments.
- Generate account statements.
- Manage non-clinical client documents.
- Send messages to all members of the practice.

Scheduler Role

This role can only be assigned to an account that has the Front Office designation activated.

In addition to the general Front Office permissions, a Front Office account with the Scheduler role active can:

- View all client accounts in the practice.
- View the master schedule.
- Manage scheduling for the practice.
- Manage client insurance.
- Manage non-clinical client documents.
- Send messages to all members of the practice.

Therapist Account

A Therapist account may or may not be a practice Owner account.

A regular Therapist account can:

- Manage their clients.
- Manage their schedule and availability.
- Manage their forms, templates, and documents.
- Manage their client charts.
- View therapist-level reports.
- Send messages to their clients and other members of the practice.

Supervisor Role

The Supervisor role is intended for the use of a Clinical Supervisor who needs to oversee charts of certain clinicians, review charts, or provide supervision to therapists and/or interns that have been designated as supervisees by the Practice Owner or Manager. It is an enhanced Therapist account and has the potential to have access to review charts, including private notes of any clinician who is designated as a supervisee. Be very cautious if you have one of these role designations – you usually have to ensure that your HIPAA disclosure to your clients spells out who has access to their private chart notes. Practice Owner or Manager assigning the supervisor/supervisee designation acknowledges that they are aware of the HIPAA requirements surrounding access to review chart notes.

Who might need a Supervisor account:

- Supervisor of interns
- A person in charge of releasing chart notes for the group practice
- A person in charge of ensuring continuity of treatment and auditing the charting practices of the group

Version Control Log

Approved	Susan Whitehead	**Effective**	7/17/2019

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