External Policies and Procedures

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Provider Account Types and Privileges (Legacy)

Clinical Manager Account Policy

A Clinical Manager, usually the first account set up for the group, is responsible for the following:

- Add additional clinician accounts.
- Change the credit/debit card used as payment for the accounts.
- Create or delete administrator and supervisor accounts.
- Manage the permissions of all accounts in the group.

If this Clinical Manager is a clinician, they will use this account to schedule their own patients, chart notes, etc. Permissions they can grant/remove from all the other accounts in their group include the following:

- Permission to change password.
- Permission to edit patient posting/accounting.
- Permission to edit/manage preferences.
- Permission to share charts with other clinicians.
- Permissions to view statistics.

An individual clinician is always classified as a Clinical Manager.

Administrative Account Policy

An administrative account can view information for all clinicians in the group if the clinician has given it permission to do so. It CANNOT view private clinical information such as chart notes but can do everything necessary for billing and scheduling. An administrative account can receive the messages about electronic claims rejections and ERA's as well as messages about any client who registers online or schedules online. The Clinical Manager can further restrict the admin account from seeing reports, changing posting, etc.

Who might need an administrative 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 person who needs to keep tabs on the group but is not a clinician or an admin – such as the owner

Clinical Account

A clinical account may or may not be a Clinical Manager account. A regular clinical account only has the ability to view the information and charting for the clinician assigned to the account. The ability to view certain areas may be restricted by the Clinical Manager account holder.

Supervisor Account

The supervisor account is intended for the use of a Clinical Supervisor who needs to oversee charts of certain clinicians, manage charts, audit all clinicians, or provide supervision to new therapists and/or interns. It is an enhanced administrative account and has the potential to have access to ALL CHARTING, including private process notes of any clinician who allows a supervisor access. Be very cautious if you have one of these accounts – you usually have to ensure that your HIPAA disclosure to your clients spells out who has access to their private chart notes. To create a supervisor account, you must first create an administrative account and ask tech support to 'turn it into' a supervisor account. We require the Clinical Manager account holder to sign a release of liability for us in order to document that they are aware of the HIPAA requirements surrounding unlimited access to all 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

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Reviewed by	Susan Whitehead		
Revision History			
9/22/2014	Updated to customer support center		
8/24/2016	Standardized policy template Standardized reference to Clinical Manager (previously 'Head Honcho')		
12/31/2017	Minor changes to clarify wording in the area of the Clinical Manager and Solo Practitioners.		
03/16/2018	Minor changes to clarify individual clinicians, clarify titles, and remove some redundancies		

3/28/2019	• Changed title to reflect that this document refers only to the Legacy version of the application • Clarify language for the administrative account