Staff Directory

Last Modified on 12/28/2022 8:51 am EST

Version 21.0

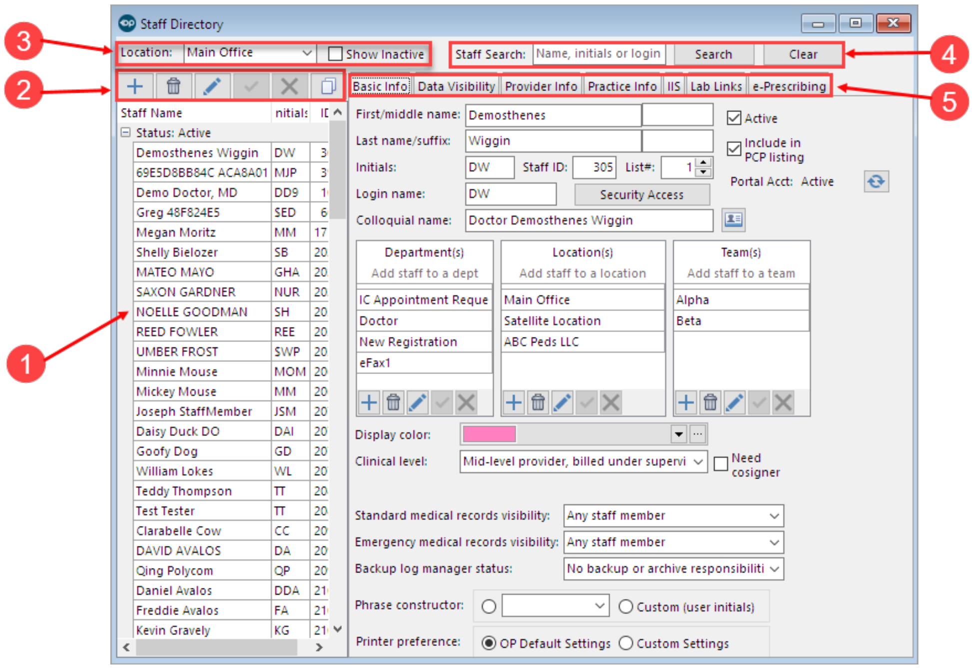
*This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.*

About Staff Directory

Path: Practice Management tab > Staff/Providers button

The Staff Directory stores, edits, and displays information for all staff members and Providers, including their basic login information, their security access, their data visibility, Provider and Practice information, lab links, and ePrescribing privileges.

Note: Staff members can be added to multiple locations by assigning the locations in the Location(s) section of the window. They should not be added more than once to the Staff Directory, unless instructed by OP's Implementation team.



Staff Directory Map

Number	Section	Description
1	Staff List panel	The Staff List panel displays all of the users who have been entered into the Staff Directory, based on the filter options selected. Selecting a user in the Staff List displays their information, in the respective tabs, in the main section of the window.

2	Function buttons	The function buttons are used to add a staff member, remove a staff member, edit a staff member's information, save changes, cancel changes, and copy an existing user.
3	Staff List filter options	• **Location**: The Location drop-down is used to display only users who have been associated with a specific Practice location. • **All**: The All checkbox is used to display all users who have been added to the Staff Directory. Selecting the All checkbox removes the Location selection. • **Show Inactive**: The Show Inactive checkbox is used to include in the Staff List any users whose Active checkbox has been deselected.
4	Staff Search field, Search, and Clear buttons	The Staff Search field allows users to locate a staff member without having to scroll through the staff list panel. Users can search by entering a user's login name, name, or initials, and clicking the Search button. The Clear button will allow users to quickly clear any fields entered in the Staff Search fields.
5	Staff Directory tabs	The available Staff Directory tabs depend on the selected user's Clinical Level. Staff who have their Clinical Level set to "non-clinical" only include the Basic Info and Data Visibility tab. Users with a higher Clinical Level display all of the remaining tabs. • **Basic Information tab**: sets the staff member's login credentials, Colloquial Name used in the Patient Message eXchange, Location, Department(s), Clinical Level, Visibility Access Levels, Backup log Manager status, Status with the practice, and Portal account status (for practices using the InteliChart Patient Portal). • **Data Visibility tab**: determines the data-visibility permissions for each data domain (Patient, Financial, Administrative, Workflow, and Clinical) and assigns one permission level to each data domain. This tab also includes the option to activate the 'multiple office location feature'. For each user, the data visibility will be set to Use system default. • **Provider Info tab**: sets the Provider's full name as it should appear for chart entries (in the Signature name field) and contains the Provider's signature and credentials. This tab also houses the option for a patient's PCP to be auto-populated as the Referring Provider on the selected Provider's claims. **Note**: The Signature name field must also be completed for anyone giving vaccines or drawing labs (such as a Nurse or MA) as this information is important to show in the patient chart. • **Practice Info tab**: contains the full practice information for the staff member's location. The **Copy Primary Provider** button is used to copy the information from the primary provider. • **IIS tab**: contains the practice registry-issued provider ID, facility code, facility/unit name, contact information and CLIA ID. • **Lab Links tab**: inserts and displays test facilities with their facility ID and Provider's Lab ID. • **e-Prescribing tab**: sets the prescription handling privileges for the staff and provider.

Version 20.18

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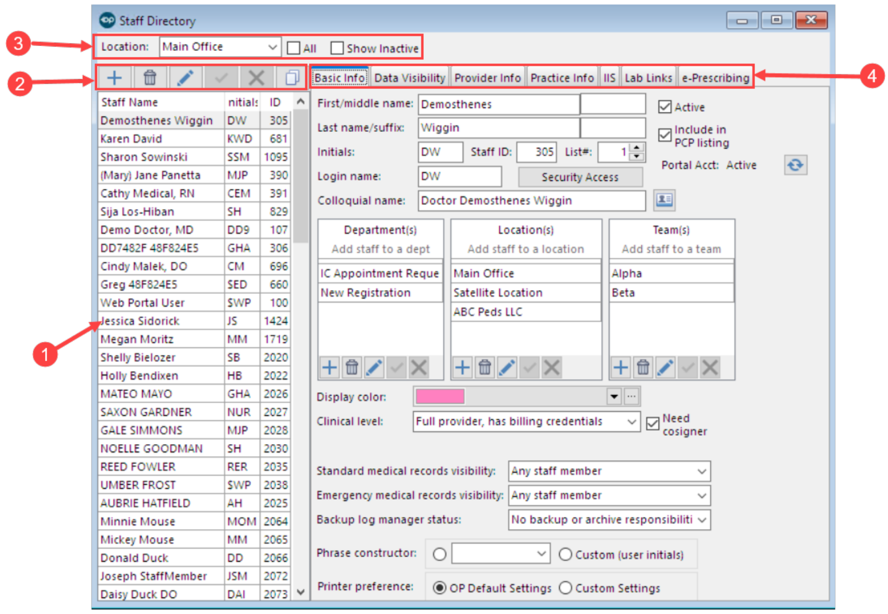

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