

# User Permissions

Last Modified on 04/01/2024 11:14 am EDT



OP sets **all defaults to share all information**. Any individual decisions by Practice-users to restrict information sharing (access, use, or exchange) are the responsibility of the Practice in the implementation of its 21st Century Cures Act Information Blocking policies and procedures for its Practice and patients.

Version 21.3

The following table is a detailed list of available user permissions and their definitions. Permissions that do not appear in this table but are displayed in the **Security Settings** window in OP have been deprecated or replaced with a permission in this table. For a simple way to see what permissions each staff member is assigned, an SQL query can be used. To access the SQL, click [here](#).



**Tip:** To quickly search this table, use the Filter and Sort options. Java must be enabled in order to use these capabilities.

- **Filter:** Enter specific keywords (or a character string) in the filter bar. As you enter characters in the filter bar, the rows not containing those characters will become hidden. The visible rows display based upon the characters in the row that match the characters in the filter bar. Do not use commas to separate keywords.
- **Sort:** Click one of the column headers to sort A-Z or Z-A.

Show  entries

Filter:

User Permission Code	Description
AA_AccessSecurity_mi	Allows users to access Security Administration to manage Security Settings, see who is logged in, and allow force correspondence to sync in the Correspondent table.
AA_SystemAdmin_mi	Allows users to access e-Labs Administration functions, EPCS Access Control, and Global Preferences.
Account_View	Allows users to access the Account Group and the Account Summary in the Patient Chart.
AddressBook_Modify	Allows users to modify Address Book entries.
AddressBook_View	Allows users to view the Address Book.
Admin_Archive_Records	Allows users to archive medical records.
Admin_Audit_Records	Allows users to view audit logs including, who has accessed, added, changed, or deleted patient records and who has printed medical information from a patient record.
Admin_CDA_Export_Batch	Allows users to create a recurring or one-time CDA export job from the Demographic Analysis and Recall report or from the CDA Export window.
Admin_CDA_Export_Single	Allows users to create a CDA for a single patient from a finalized visit note or from a patient's medical records.
Admin_Data_Reconciliation	Allows users to accept/reject changes in the Reconciliation window.
Admin_Manage_Connections	Allows users to manage Correspondents.
Admin_Manage_Documents	Allows users to access the Administrative Document Repository.

User Permission Code	Description
Admin_Manage_Workstations	Allows users to configure, modify and disable workstations.
Alerts_Access	Ability to access and view patient alert setup in the patient's charts.
Alerts_Complete	Ability to complete a patient alert.
Alerts_Modify	Ability to add, edit, or delete patient alerts.
Billing_Admin_mi	Allows users to access Advanced Workflow Rules and Billing Groups.
Billing_BasicUser	Allows users to access the Billing Center button.
Billing_ClaimReview_Queue	The ability to queue claims that returned scrubbing errors and appear on the Claims in Review tab. Users with this permission must also have the <i>Billing_Manage_Queue</i> permission.
Billing_Concierge	The ability to access the concierge module.
Billing_Concierge_Date	The ability to run the concierge fee without date parameters.
Billing_Contracts_Modify	Allows users to add and modify Insurance contracts in the Contracts window and from posting ERA payments.
Billing_Contracts_View	Allows users to view Insurance contracts.
Billing_Delete_Charges	Allows users to delete current charges
Billing_Delete_Credits	Allows users to delete current credits.
Billing_Facilities_Modify	Allows users to add, edit, and delete facilities in the Laboratories and Hospitals window.
Billing_Facilities_View	Allows users to view facilities in the Laboratories and Hospital window.
Billing_FeeSched_Modify	Allows users to use the Modify Fee Schedules button and edit the fee fields in the CPT Code table.
Billing_Insurance_Modify	Allows users to add, edit, and delete patient insurance information.
Billing_InsurancePatRec	Allows users to access and view the Insurance record in the Patient Chart.
Billing_Manage_Queue	Allows users to manage the claims in the Transmit Queue of the Billing Center. Includes: queuing claims, printing CMS-1500s, editing claims, deleting from the queue, fetching payer reports, adding a status to a claim, checking claim status (when supported), and creating follow-up tasks.
Billing_Overview	Allows users to access the Billing Group in the Main Navigation Panel and to see the Billing Overview in Billing Center.
Billing_Payers_Modify	Allows users to add, edit, and delete an insurance payer, copy credential and eligibility check information, connect providers to insurances, edit provider insurance records, and create Advanced Workflow rules.
Billing_Payers_View	Allows users to view and print the Insurance Payers List.
Billing_Payment_Supervisor	Allows users to access the Override Out of Balance checkbox in the ERA Transactions window and the Payment Confirmed checkbox in the ERA Payments window.
Billing_Post_Adjudications	Allows users to post adjudications in the Billing Center and fetch adjudication reports from the clearinghouse.
Billing_Post_Charges	Allows users to post and edit charges in the Billing Center, Patient Chart, and Tracking.

User Permission Code	Description
Billing_Post_Payments	Allows users to access the Bulk Payments button, capitation entry buttons, to post payments and apply copayments to claims, delete unmatched adjudications, and add a credit or payment.
Billing_Post_Refunds	Allows users to create refunds in a Patient Chart.
Billing_RCMLibrary_RuleScope	<i>*For use by OP's RCM team only*</i>
Billing_RunDaysheet	Allows users to process the daysheet.
Billing_Send_Queue	Allows users to see the Billing Transmit Queue in the Billing Center, create claim files, and transmit claims to the clearinghouse.
Billing_Send_Statements	Allows users to manage the statements in the Statement queue of the Billing Center. Including: creating statement files, printing statements, and transmitting statement files.
Billing_SuperBill	Allows users access to the Superbill button.
Billing_View_Adjudications	Allows users to access Remits in the Main Navigation Panel and see Adjudications in the Billing Center.
Billing_View_Charges	Allows users to access and view unposted charges in a Patient Chart.
Billing_View_Claims	Allows users to access Claims, Rejected, and Not Ack in the Main Navigation Panel and view claims in the Billing Center and Patient Chart.
Billing_View_Credits	Allows users to view credits in the Billing Center and in the Patient Chart.
Billing_View_ERA_Payments	Allows users to view ERA payments in the Billing Center.
Billing_View_Payments	Allows users to view Receipts in the Billing Center and Payments in the Patient Chart.

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Version 20.18

The following table is a detailed list of available user permissions and their definitions. Permissions that do not appear in this table but are displayed in the **Security Settings** window in OP have been deprecated or replaced with a permission in this table. For a simple way to see what permissions each staff member is assigned, an SQL query can be used. To access the SQL, click [here](#).



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AddressBook_View	Allows users to view the Address Book.
Admin_Archive_Records	Allows users to archive medical records.
Admin_Audit_Records	Allows users to view audit logs including, who has accessed, added, changed, or deleted patient records and who has printed medical information from a patient record.
Admin_CDA_Export_Batch	Allows users to create a recurring or one-time CDA export job from the Demographic Analysis and Recall report or from the CDA Export window.
Admin_CDA_Export_Single	Allows users to create a CDA for a single patient from a finalized visit note or from a patient's medical records.
Admin_Manage_Connections	Allows users to manage Correspondents.
Admin_Manage_Documents	Allows users to access the Administrative Document Repository.
Admin_Manage_Workstations	Allows users to configure, modify and disable workstations.
Billing_Admin_mi	Allows users to access Advanced Workflow Rules and Billing Groups.
Billing_BasicUser	Allows users to access the Billing Center button.
Billing_Contracts_Modify	Allows users to add and modify Insurance contracts in the Contracts window and from posting ERA payments.
Billing_Contracts_View	Allows users to view Insurance contracts.
Billing_Delete_Charges	Allows users to delete current charges
Billing_Delete_Credits	Allows users to delete current credits.
Billing_Facilities_Modify	Allows users to add, edit, and delete facilities in the Laboratories and Hospitals window.
Billing_Facilities_View	Allows users to view facilities in the Laboratories and Hospital window.
Billing_FeeSched_Modify	Allows users to use the Modify Fee Schedules button and edit the fee fields in the CPT Code table.
Billing_Insurance_Modify	Allows users to add, edit, and delete patient insurance information.
Billing_InsurancePatRec	Allows users to access and view the Insurance record in the Patient Chart.
Billing_Manage_Queue	Allows users to manage the claims in the Transmit Queue of the Billing Center. Includes: queuing claims, printing CMS-1500s, editing claims, deleting from the queue, fetching payer reports, adding a status to a claim, checking claim status (when supported), and creating follow-up tasks.
Billing_Overview	Allows users to access the Billing Group in the Main Navigation Panel and to see the Billing Overview in Billing Center.

User Permission Code	Description
Billing_Payers_Modify	Allows users to add, edit, and delete an insurance payer, copy credential and eligibility check information, connect providers to insurances, edit provider insurance records, and create Advanced Workflow rules.
Billing_Payers_View	Allows users to view and print the Insurance Payers List.
Billing_Payment_Supervisor	Allows users to access the Override Out of Balance checkbox in the ERA Transactions window and the Payment Confirmed checkbox in the ERA Payments window.
Billing_Post_Adjudications	Allows users to post adjudications in the Billing Center and fetch adjudication reports from the clearinghouse.
Billing_Post_Charges	Allows users to post and edit charges in the Billing Center, Patient Chart, and Tracking.
Billing_Post_Payments	Allows users to access the Bulk Payments button, capitation entry buttons, to post payments and apply copayments to claims, delete unmatched adjudications, and add a credit or payment.
Billing_Post_Refunds	Allows users to create refunds in a Patient Chart.
Billing_RCMLibrary_RuleScope	<i>*For use by OP's RCM team only*</i>
Billing_RunDaysheet	Allows users to process the daysheet.
Billing_Send_Queue	Allows users to see the Billing Transmit Queue in the Billing Center, create claim files, and transmit claims to the clearinghouse.
Billing_Send_Statements	Allows users to manage the statements in the Statement queue of the Billing Center. Including: creating statement files, printing statements, and transmitting statement files.
Billing_SuperBill	Allows users access to the Superbill button.
Billing_View_Adjudications	Allows users to access Remits in the Main Navigation Panel and see Adjudications in the Billing Center.
Billing_View_Charges	Allows users to access and view unposted charges in a Patient Chart.
Billing_View_Claims	Allows users to access Claims, Rejected, and Not Ack in the Main Navigation Panel and view claims in the Billing Center and Patient Chart.
Billing_View_Credits	Allows users to view credits in the Billing Center and in the Patient Chart.
Billing_View_ERA_Payments	Allows users to view ERA payments in the Billing Center.
Billing_View_Payments	Allows users to view Receipts in the Billing Center and Payments in the Patient Chart.
Billing_View_Queue	Allows users to access Queue in the Main Navigation Panel and view the Queue in the Billing Center.
Billing_View_RCM_Performance	Allows users to access the RCM Performance report.
Billing_View_Statements	Allows users to view Disclosures in the Patient Chart as well as patient statements, insurance statements, and CMS-1500s in the Billing Center and Patient Chart.
Billing_View_Superbills	Allows users to access Superbills in the Main Navigation Panel and view Superbills in the Billing Center and Patient Chart.
Care_Plan_Global_Manage	Allows users to create custom Care Plans including triggers, actions, and CQM lists.

<u>User Permission Code</u>	<u>Description</u>
Care_Plan_Global_View	Allows users to view Care Plans.
Care_Plan_Item_Manage	Allows users to manage Care Plan items and item types.

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