Adding Staff into the Staff Directory

Last Modified on 12/28/2022 8:43 am EST

⚠️ 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 21.0

Path: Practice Management tab > Staff/Providers

About

The Staff Directory houses all of the staff and provider details. All records include the Basic Info and Data Visibility tabs. If a Clinical Level higher than non-clinical is selected for a staff member or Provider, an additional set of tabs are displayed. To easily view a list of staff and Providers, the following options are available:

- The **Location** drop-down can be used to view only staff/Providers by Practice Location
- The **All** checkbox can be selected to display All staff/Providers, regardless of their assigned Location(s)
- The **Show Inactive** checkbox can be selected to display staff/Providers who do not have the Active checkbox selected. When this checkbox is selected, the Staff/Providers list includes a grouping of users by Active and Inactive, which can be expanded and collapsed.

The instructions below cover completing the Basic Info tab (both by entering all information from scratch and by duplicating an existing user) and the Data Visibility tab. If you're adding a clinical staff member or Provider to the Staff Directory, complete the steps below and then proceed to complete the setup process by **Setting Up Providers in the Staff Directory.**
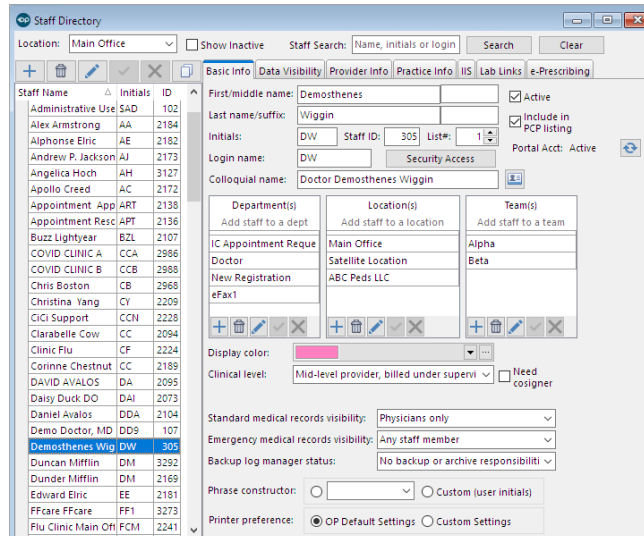
📌 **Note:** Once a user is created in the Staff/Provider directory in OP, they cannot be deleted. Users can be deactivated by navigating to the user's profile in the Staff Directory and deselecting the Active checkbox on the Basic Information tab. It is also recommended to enter the words *Do Not Use* in the First Name field.

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- Complete the Data Visibility Tab
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Complete the Basic Info Tab

The Basic Info tab includes details such as name, Department and Location assignments, Clinical Level, and Medical Record Visibility level, to name a few. It also includes the option to include the user in PCP listings. If the practice is using the InteliChart Patient Portal, the user's Portal Account Status is also displayed with a refresh button to fetch an updated status in real-time, when necessary.

1. Navigate to the Staff Directory by following the path above, and click the **Basic Info** tab.
2. Click the **Add** button ➕ above the Staff Name column.
3. Enter the **First/middle name** and **Last name/suffix**.
4. Enter the **Staff Initials** in the Initials field (must be unique, three-character maximum).
5. Enter a **Login Name** in the **Login** field. This is what the user will use to sign into OP. OP will generate the Staff ID # and the List #. The list number indicates the order in which Staff members are listed in drop-down menus, such as when composing a Message and selecting the message recipient.
6. For providers, enter the **Colloquial name**. This is a nickname used by patients (for example, Doctor Sue).

> 📌 **Note**: The Colloquial Name is used in the Patient Message eXchange (PMX). For this reason, it is important to remember to enter the full word *Doctor*. Abbreviating as *Dr.* will communicate as *drive* in the PMX.

7. Select the **Active** checkbox to indicate this staff member is active with the practice.
8. If the staff member is a PCP, select the **Include in PCP listing** checkbox to include this provider in PCP drop-down menus.

> ❗ **Warning**: These items are necessary for a provider to successfully e-Prescribe. If these items are left blank, an error will occur while trying to e-prescribe.

9. Add the staff member to a **Department**:

   a. Click the **Add** button in the Department(s) section.
   b. Select a **Department** from the drop-down menu.
   c. Click the **Save** button ✓
   d. Repeat this process to add multiple Departments.

10. Add the staff member to a **Location** (required in order for staff to be able to log into OP and be visible in drop-down lists throughout the software):

   a. Click the **Add** button in the Location(s) section.
   b. Select a Location from the drop-down menu.
   c. Click the **Save** button.
   d. Repeat this process to add users to multiple Locations.

11. *(Optional)* Add the staff member to a **Team**:

   a. Click the **Add** button in the **Team(s)** section.
   b. Select a **Team** from the drop-down menu.
   c. Click the **Save** button.
   d. Repeat this process to add users to multiple Teams.

12. Select a **Display color** from the drop-down menu for the staff member. If the staff member is a Provider, this color will be the ribbon in which their name is displayed on the Tracking screen.
13. Select the **Clinical level** from the drop-down menu. To see how these are defined, navigate to the **Clinical Levels** article.
14. **Need cosigner**: Select this checkbox if the staff member needs to have all Encounter and Well Visit Notes co-signed by a Supervising Provider. If this checkbox is deselected, they will not be able to finalize.

> ☆ **Example**: If your mid-levels only require 20% of notes to be co-signed, you could choose to deselect this checkbox. If deselected, the mid-level selects random visit notes to be co-signed. For example, if the provider has 20 patients on their schedule for the day, they would select four patients for which they will request a co-signature for those visit notes. In the Visit Info tab, the selected provider in the Supervised by field will be assigned the notes for co-signature. For all other patient visit notes, that field can be left blank.

15. Select the **Standard medical records** and **Emergency medical records visibility levels** from the drop-down menus. To see how these are defined, navigate to **Privacy Constraints (Visibility Settings)**.
16. Select a **Backup log manager status** from the drop-down menu:

   - **Cloud Practices**: Select **No backup** or **archive responsibilities**.
   - **On-Premise Practices**: Select **Backup log manager only** or **Backup log + archive notes manager**. Each day, the first Backup log manager signing in will review the status of the backup from the previous night.

17. **Phrase Construction:** Select the **First Radio Button**.
18. **Printer Preference:** Select the **OP Default Settings** radio button.
19. Click the **Save** button at the top of the window.
20. If the staff member is a Provider or clinical staff member that will be sending prescriptions electronically, click the **Address Book** button. 🖼️ .

   a. From the **Name/Phone** tab, enter the **Office Phone Number** and **Fax Number**.
   b. From the **Address** tab, enter the **Office Address**. If these fields are left blank, an error will occur while trying to e-prescribe.
   c. Click the **Post Edit** button to save **Address Book** entries.
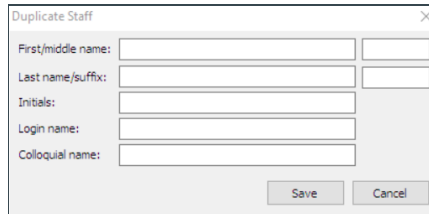   d. Click the **X** to exit the Address Book.

Duplicate a Staff or Provider Record

A user with Administrative privileges has the ability to create a new staff or Provider record by duplicating an existing record.

> 📌 **Note**: When you duplicate an existing record, the following will be copied: Department(s), Location(s), Team(s), Clinical level, Standard and Emergency medical record visibility, all information from the Practice Info tab, User and Group Permissions, and Saved Preferences.

1. Navigate to the Staff Directory: **Practice Management tab > Staff/Providers**. Confirm you are on the **Basic Info** tab.
2. Highlight the staff to duplicate in the panel on the left.
3. Click the **Duplicate** button 🗐 . The Duplicate Staff window displays.

4. Enter the new user's information in the Duplicate Staff window, and click the **Save** button.
5. Complete the user's OP record by making any edits necessary to the copied information and save the record.

Complete the Data Visibility Tab

For each user, the data visibility will be set to **Use system default**. If the data visibility for a user should be different than the system default:

1. Click the **Edit** button.
2. Make the appropriate selection from the list.

Next Steps

You have completed the basic setup for staff members in OP. Remember, if you are adding a new clinical staff member or Provider, you must complete additional information. Click **here** for more information.

Additionally, you want to be sure to assign a **password** to each newly entered staff member and grant them the appropriate **permissions** to ensure they have access to all areas in OP they will need.

Version 20.18

Path: Practice Management tab > Staff/Providers

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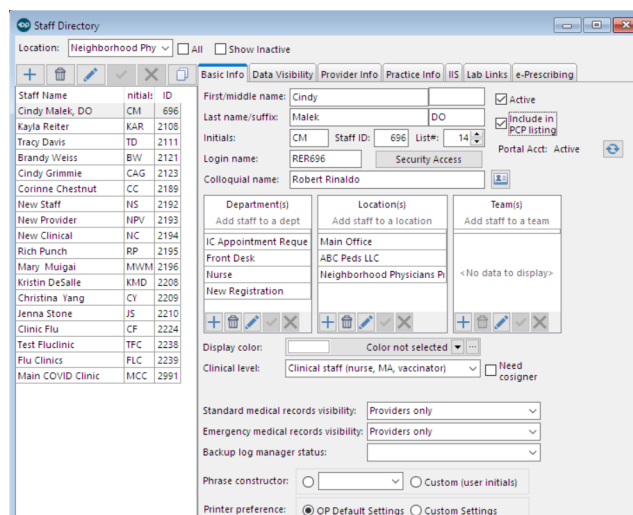
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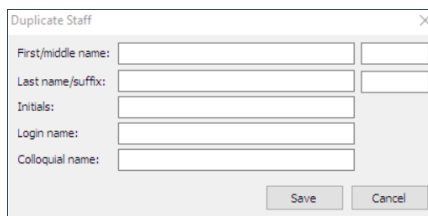   d. Click the **X** to exit the Address Book.

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