InteliChart Patient Portal Permission Map

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The content in this article is relevant to the InteliChart Portal.

For documentation on the OP Portal, pleaseclick here.

Overview

The InteliChart Patient Portal Permission Map below lists permission:

- Descriptions
- Paths to follow to give someone access to configure a portal setting
- Paths to follow to configure the setting in the portal

Note: To find a form in this table:

- **Filter**: Enter specific key words (or a character string) in the filter bar. As you enter characters in the filter bar, the rows not containing those characters become hidden. The visible rows display based upon the characters in the row that match the characters in the filter bar. The Table filters as you enter characters. Please only use key words and correct spelling. You can use letters and numbers. **Do not use commas to separate keywords**
- **Sort**: You can sort A - Z and Z - A by clicking on a column header.

Java must be enabled in order to use the search and sort capability.

InteliChart Patient Portal Permission Map

Show 50 entries

Filter:

Permission	Relevant Roles	Description	Path to Give Access	Path to Configure Access
Allergies	Practice Admin Front Desk	Allows Practice Portal staff ability to view the Allergy history for a patient. Associated with the Allergies icon within the Chart Summary tab.	Navigation Panel > User Administration > Roles > Permissions > Patient Administration > Patient Chart > Allergies	Navigation Panel > Patient Administration > Chart > Search/Select Patient > Chart Summary > Allergies
Allow Appointment Requests	Practice Admin	Gives patients the ability to request appointments in the Patient Portal. Associated with the Request an Appointment link in the Patient Portal.	Navigation Panel > User Administration > Roles > Permissions > Patient Interface > Allow Appointment Requests	Navigation Panel > Portal Management > Patient Interface > Manage Setup > Allow Appointment Requests
Allow Med Refill Requests	Practice Admin	Gives patients the ability to request medication refills in the Patient Portal. Associated with the Refill Medication link in the Patient Portal.	Navigation Panel > User Administration > Roles > Permissions > Patient Interface > Allow Med Refill Requests	Navigation Panel > Portal Management > Patient Interface > Manage Setup > Allow Med Refill Requests

Permission	**Relevant Roles**	**Description**	**Path to Give Access**	**Path to Configure Access**
Appointment Campaigns (OP Notify clients only)	Practice Admin Front Desk	Allows Practice Portal staff to set and manage Appointment Campaigns for appointment reminder notifications. Associated with the Events tab found on the Enterprise level under Notify > Events.	Navigation Panel > User Administration > Roles > Permissions > Reporting > Notifications > Appointment Campaigns	Navigation Panel > Reports > Notification Reports
Appointment Reminder Notification	Practice Admin	Gives patients the ability to create and manage Upcoming appointment reminders. Associated with the Appointment Reminder Notification setting on the Patient Interface - Manage Setup screen.	Navigation Panel > User Administration > Roles > Permissions > Patient Interface > Allow Patient Configured Notifications > Appointment Reminder Notification	Navigation Panel > Portal Management > Patient Interface > Manage Setup > Allow Patient Configured Notifications
Build Event (OP Notify clients only)	Practice Admin	Gives Practice Portal staff the ability to manage notification campaigns for their practice's patients. Associated with the Notifications tab within the Notify parent tab.	Navigation Panel > User Administration > Roles > Permissions > Notify > Build Event	Navigation Panel > PatientNOTIFY > Events
Cancel Appointment Notification	Practice Admin	Gives patients the ability to create and manage Cancelled appointment notifications. Associated with the Cancel Appointment Notification setting on the Patient Interface - Manage Setup screen.	Navigation Panel > User Administration > Roles > Permissions > Patient Interface > Allow Patient Configured Notifications > Cancel Appointment Notification	Navigation Panel > Portal Management > Patient Interface > Manage Setup > Allow Patient Configured Notifications
Custom Practice URL	Practice Admin	Allows Practice Portal staff access to the Custom URL setting within Practice General Settings. Associated with the practice links listed on the navigation panel in the Patient Portal.	Navigation Panel > User Administration > Roles > Permissions > Custom Practice URL	Navigation Panel > Portal Management > General Settings
Diagnosis	Practice Admin	Allows Practice Portal staff the ability to access and manage diagnosis codes that are allowed to be published to the patient portal for their practice. Associated with the Diagnosis tab within the Code Management parent tab.	Navigation Panel > User Administration > Roles > Permissions > Code Management > Diagnosis	Navigation Panel > Portal Management > Code Management > Diagnosis Tab

Permission	Relevant Roles	Description	Path to Give Access	Path to Configure Access
Enable Associated Accounts	Practice Admin	Gives Practice Portal staff the ability to include child/associated accounts as an account type for their practice. Associated with the Child/Associated Account checkbox found on General Settings screen.	Navigation Panel > User Administration > Roles > Permissions > General Settings > Enable Associated Accounts	Navigation Panel > Portal Management > General Settings > Child/Associated Accounts checkbox
Encounters	Practice Admin Front Desk	Allows Practice Portal staff the ability to view the encounter history for a patient. Associated with the Encounters icon within the Chart Summary tab	Navigation Panel > User Administration > Roles > Permissions > Patient Administration > Patient Chart > Encounters	Navigation Panel > Patient Administration > Chart > Search/Select Patient > Chart Summary > Encounters
Immunizations	Practice Admin Front Desk	Allows Practice Portal staff the ability to view immunization clinical data for a patient. Associated with the Immunizations icon within the Chart Summary tab	Navigation Panel > User Administration > Roles > Permissions > Patient Administration > Patient Chart > Immunizations	Navigation Panel > Patient Administration > Chart > Search/Select Patient > Chart Summary > Immunizations
Location Details	Practice Admin	Gives Practice Portal staff the ability the ability to edit their practice's location details. Associated with the Locations tab found within the Portal Management parent tab.	Navigation Panel > User Administration > Roles > Permissions > Location Details	Navigation Panel > Portal Management > Locations
Logo Setting	Practice Admin	Allows Practice Portal staff the ability to alter their practice's logo. Associated with the Change Logo button found on General Settings screen.	Navigation Panel > User Administration > Roles > Permissions > General Settings > Logo Settings	Navigation Panel > Portal Management > General Settings
Manage Patient Account	Practice Admin Front Desk	Allows Practice Portal staff the ability to edit the credentials for a patient's InteliChart Patient Portal account. Associated with the Update link in Login Email field and Reset Password link in Password field, all found within the Account Settings table on the patient account screen.	Navigation Panel > User Administration > Roles > Permissions > Patient Administration > Manage Patient Account	Navigation Panel > Patient Administration > Account

Permission	Relevant Roles	Description	Path to Give Access	Path to Configure Access
Manage Proxy Users	Practice Admin Front Desk	Allows Practice Portal staff the ability to add/remove proxy associations for a patient's account. Associated with the Add Proxy button within the Actions drop-down menu and Remove link for proxy associations found within the Associations table.	Navigation Panel > User Administration > Roles > Permissions > Patient Administration > Manage Proxy Users	Navigation Panel > Patient Administration > Account > Search/Select Patient > Actions drop-down menu > Add Proxy
Manage User Dependents	Practice Admin Front Desk	Allows Practice Portal staff the ability to add/remove child/ dependent associations for a patient's account. Associated with link for child/dependent accounts that exist within the Associations table, found on the patient account screen.	Navigation Panel > User Administration > Roles > Permissions > Patient Administration > Manage User Dependents	Navigation Panel > Patient Administration > Account > Search/Select Patient > Associations
Meaningful Use (available only to MU clients)	Practice Admin	Allows Practice Portal staff the ability to access and select procedure codes for Meaningful Use denominator calculations. Associated with the Meaningful Use tab within the Code Management parent tab.	Navigation Panel > User Administration > Roles > Permissions > Code Management > Meaningful Use	Navigation Panel > Portal Management > Code Management > Meaningful Use Tab
Medications	Practice Admin Front Desk	Allows Practice Portal staff the ability to view medications for a patient. Associated with the Medications icon within the Chart Summary tab	Navigation Panel > User Administration > Roles > Permissions > Patient Administration > Patient Chart > Medications	Navigation Panel > Patient Administration > Chart > Search/Select Patient > Chart Summary > Meds
Minor Age	Practice Admin	Allows Practice Portal staff the ability to adjust the maximum age limit for someone to be considered a minor. Associated with the Minor Age Limit text field found on General Settings screen.	Navigation Panel > User Administration > Roles > Permissions > General Settings > Minor Age	Navigation Panel > Portal Management > General Settings > Minor Age Limit field
New Appointment Notification	Practice Admin	Gives patients the ability to create and manage New appointment notifications. Associated with the Controls the New Appointment Notification setting on the Patient Interface - Manage Setup screen.	Navigation Panel > User Administration > Roles > Permissions > Patient Interface > Allow Patient Configured Notifications > New Appointment Notification	Navigation Panel > Portal Management > Patient Interface > Manage Setup > Allow Patient Configured Notifications > New appointment notifications

Permission	Relevant Roles	Description	Path to Give Access	Path to Configure Access
New Medication Notification	Practice Admin	Gives patients the ability to create and manage New medication notifications. Associated with the New Medication Notification setting on the Patient Interface - Manage Setup screen.	Navigation Panel > User Administration > Roles > Permissions > Patient Interface > Allow Patient Configured Notifications > New Medication Notification	Navigation Panel > Portal Management > Patient Interface > Manage Setup > Allow Patient Configured Notifications > New Medication Notification
New Message Notification	Practice Admin	Gives patients the ability to create and manage New message notifications. Associated with the New Message Notification setting on the Patient Interface - Manage Setup screen.	Navigation Panel > User Administration > Roles > Permissions > Patient Interface > Allow Patient Configured Notifications > New Message Notification	Navigation Panel > Portal Management > Patient Interface > Manage Setup > Allow Patient Configured Notifications
Notifications Opt-out	Practice Admin Front Desk	Allows Practice Portal staff the ability to manage the patient's notification preferences for practice notifications. Associated with Notifications tab on the Patient Account screen in Patient Administration. If patient is minor the notifications Opt-out would be found on the Parent/Guardian associated screen.	Navigation Panel > User Administration > Roles > Permissions > Patient Administration > Notifications Opt-out	Navigation Panel > Patient Administration > Account > Search/Select Patient > Select Parent/Guardian Association > Notifications
Patient Authentication	Practice Admin Front Desk	Allows Practice Portal staff the ability to merge match a patient's account with EMR data from their practice. Associated with the Merge-matching feature for patient accounts that are self-registered.	Navigation Panel > User Administration > Roles > Permissions > Patient Administration > Patient Authentication	Navigation Panel > Patient Administration > Account> Search/Select Patient > Merge Matching
Patient Registration	Practice Admin Front Desk	Allows Practice Portal staff the ability to PIN register a patient and control the status of their account. Associated with the Register icon on the Patient Search screen, Generate PIN, Enable and Disable links found within the Account Settings table located on the Patient Account screen.	Navigation Panel > User Administration > Roles > Permissions > Patient Administration > Patient Registration	Navigation Panel > Patient Administration > Chart > Search/Select Patient > Account Setting links

Permission	Relevant Roles	Description	Path to Give Access	Path to Configure Access
Portal Advanced Links	Practice Admin	Gives the Practice Portal staff the ability to add and manage Portal Advanced Links. Associated with the Portal Advanced Links settings within Patient Interface > Manage Setup screen.	Navigation Panel > User Administration > Roles > Permissions > Patient Interface > Portal Advanced Links	Navigation Panel > Portal Management > Patient Interface > Manage Setup > Portal Advanced Links section
Portal Features	Practice Admin	Allows Practice Portal staff the ability to select specific features that can be used by patients within the Patient Portal. Associated with the Portal Features section found within Portal Management > Patient Interface > Manage Setup.	Navigation Panel > User Administration > Roles > Permissions > Patient Interface > Portal Features	Navigation Panel > Portal Management > Patient Interface > Manage Setup
Problems	Practice Admin Front Desk	Allows Practice Portal staff the ability to view the problems for a patient. Associated with the Problems icon within the Chart Summary tab	Navigation Panel > User Administration > Roles > Permissions > Patient Administration > Patient Chart > Problems	Navigation Panel > Patient Administration > Chart > Search/Select Patient > Chart Summary > Problems
Provider Data Sharing	Practice Admin	Allows Practice Portal staff the ability to establish the level at which a provider shares clinical data for his/her patients. Associated with Data Sharing w/ setting within the User Administration > Providers tab.	Navigation Panel > User Administration > Roles > Permissions > User Administration > Provider Administration > Provider Data Sharing	Navigation Panel > User Administration > Providers > Data Sharing w/ drop-down menu
Provider Setup	Practice Admin	Allows Practice Portal staff the ability to add new provider accounts and edit existing provider accounts for their practice. Associated with Ability to edit ALL other fields and tables aside from the Data Sharing setting and the ability to add new providers.	Navigation Panel > User Administration > Roles > Permissions > User Administration > Provider Administration > Provider Setup	Navigation Panel > User Administration > Providers
Proxy Terms and Conditions	Practice Admin	Allows Practice Portal staff the ability to upload/remove a document that serves as their practice's proxy terms and conditions, for patients adding a proxy and for proxy users to view upon login. Associated with the Proxy Terms and Conditions field found within Portal Management > Patient Interface > Manage Setup.	Navigation Panel > User Administration > Roles > Permissions > Patient Interface > Proxy Terms and Conditions	Navigation Panel > Portal Management > Patient Interface > Manage Setup > Proxy Terms and Conditions field

Permission	**Relevant Roles**	**Description**	**Path to Give Access**	**Path to Configure Access**
Reschedule Appointment	Practice Admin	Gives patients the ability to create and manage New appointment notifications. Associated with the Reschedule Appointment setting on the Patient Interface - Manage Setup screen.	Navigation Panel > User Administration > Roles > Permissions > Patient Interface > Allow Patient Configured Notifications > Reschedule Appointment	Navigation Panel > Portal Management > Patient Interface > Manage Setup > Allow Patient Configured Notifications > New Message Notification
Role Administration	Practice Admin	Allows Practice Portal staff the ability to manage and assign roles for staff members and providers for the practice. Associated with Display of Roles tab within User Administration parent tab.	Navigation Panel > User Administration > Roles > Permissions > User Administration > Role Administration	Navigation Panel > User Administration > Roles
Self Registration	Practice Admin	Allows Practice Portal staff the ability to control the ability of patient to create a self registered Patient Portal. Associated with the Self registered checkbox located on the General Settings screen on both the Enterprise and Practice Level.	Navigation Panel > User Administration > Roles > Permissions > General Settings > Self Registration	Navigation Panel > Portal Management > General Settings > Self Registration checkbox
Settings (OP Notify clients only)	Practice Admin	Gives Practice Portal staff the ability the ability to manage settings for Appointment notifications. Associated with the Settings tab within the Notification parent tab.	Navigation Panel > User Administration > Roles > Permissions > Notify > Settings	Navigation Panel > PatientNOTIFY > Settings
Staff Administration	Practice Admin	Allows Practice Portal staff the ability to manage and add new staff members for the practice. Associated with Display of Staff Members tab within User Administration parent tab.	Navigation Panel > User Administration > Roles > Permissions > User Administration > Staff Administration	Navigation Panel > User Administration > Staff Members
Templates	Practice Admin	Allows Practice Portal staff the ability to create and edit templates that are displayed in the patient portal and sent to patients via email. Associated with the Page Templates tab found within Portal Management > Patient Interface.	Navigation Panel > User Administration > Roles > Permissions > Patient Interface > Templates	Navigation Panel > Portal Management > Patient Interface > Page Templates

Permission	Relevant Roles	Description	Path to Give Access	Path to Configure Access
Time Zone	Practice Admin	Allows Practice Portal staff the ability to edit the time zone for their practice and whether daylight savings adjustment are applied to their practice.Associated with the Time Zone drop-down and Observe Daylight Savings checkbox.	Navigation Panel > User Administration > Roles > Permissions > General Settings > Time Zone	Navigation Panel > Portal Management > General Settings > Time Zone drop-down menu
View Patient	Practice Admin Front Desk	Allows Practice Portal staff the ability to view patients under Patient Administration. Associated with User access to Patient Administration.	Navigation Panel > User Administration > Roles > Permissions > Patient Administration > View Patient	Navigation Panel > Patient Administration
Vitals	Practice Admin Front Desk	Allows Practice Portal staff the ability to view the vitals data for a patient. Associated with Vitals icon within the Chart Summary tab	Navigation Panel > Roles > Patient Administration > Patient Chart > Vitals	Navigation Panel > Patient Administration > Chart > Search/Select Patient > Chart Summary > Vitals
Appointment Types	Practice Admin	Allows Practice Portal staff to set and manage which scheduled appointments appear on the Patient Portal.	Navigation Panel > User Administration > Roles > Permissions > Code Management > Appointment Types	Navigation Panel > Portal Management > Code Management > Appointment Types
Audit Report	Practice Admin	Allows Practice Portal staff ability to access and process an Audit report.	Navigation Panel > User Administration > Roles > Permissions > Reporting > Audit Report	Navigation Panel > Reports > Audit Report
Canned Reports	Practice Admin Front Desk	Allows Practice Portal staff ability to access and process Canned Reports.	Navigation Panel > User Administration > Roles > Permissions > Reporting > Canned Reports	Navigation Panel > Reports > Canned Reports
Generic Schedule Settings	Practice Admin	Allows Practice Portal staff the ability to set and manage the schedule settings associated with the Generic Appointment Request settings found within Patient Interface > Scheduling	Navigation Panel > User Administration > Roles > Permissions > Patient Interface > Scheduling Settings > Generic Scheduling Settings	Navigation Panel > Portal Management > Patient Interface > Scheduling
Message Groups	Practice Admin	Allows Practice Portal staff the ability to add provider and staff member accounts to specific message groups for a practice. Associated with Message Groups section within the User Administration > Providers and Staff Members tabs.	Navigation Panel > User Administration > Roles > Permissions > User Administration > Message Groups	Navigation Panel > User Administration > Message Groups

Permission	Relevant Roles	Description	Path to Give Access	Path to Configure Access
Patient Chart	Practice Admin	Allows Practice Portal staff the ability to select which sections of a patient chart is viewed on the Patient Portal.	Navigation Panel > User Administration > Roles > Permissions > Patient Interface > Patient Chart	Navigation Panel > Portal Management > Patient Interface > Patient Chart
Regulatory Reports	Practice Admin	Allows Practice Portal staff the ability to access Promoting Interoperability (Meaningful Use) Reports.	Navigation Panel > User Administration > Roles > Permissions > Reporting > Regulatory Reports	Navigation Panel > Reports > Regulatory Reports

Showing 1 to 48 of 48 entries

Previous

1

Next