

Title: ICP – Adding New Users and Locking Users

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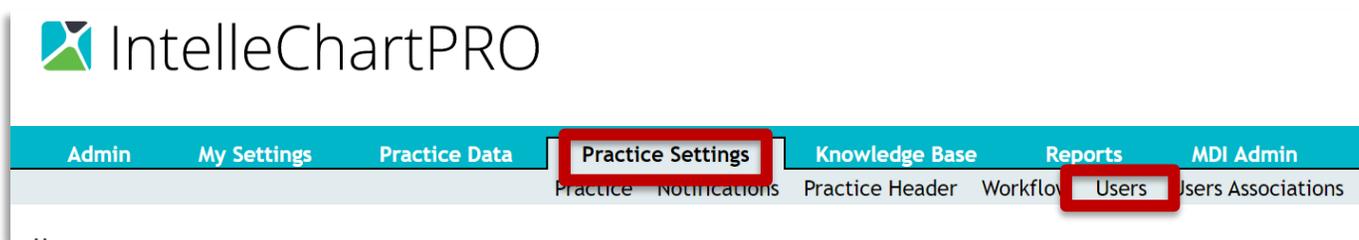
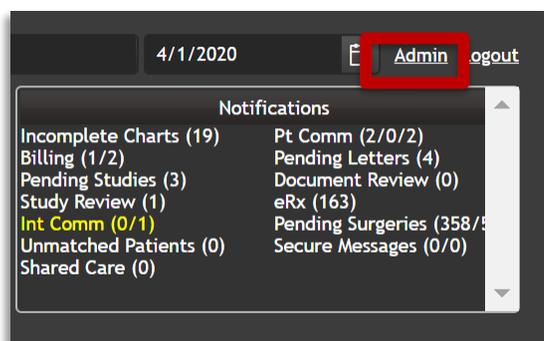
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Purpose

In order to maintain HIPAA compliance with electronic medical records, all clinical staff must have their own user login created upon onboarding so they can document under their own user credentials for auditing purposes. Upon leaving the practice, they should also be locked out of the system in order to prohibit the user from accessing protected health information (PHI).

Adding New Hires

1. Click on Admin button located on the upper right hand corner of the workflow page
2. Click on Practice Settings Tab
3. Click on Users Tab
4. Scroll to the bottom of the page and complete the necessary criteria
5. Click Insert once information is complete



Necessary Fields:

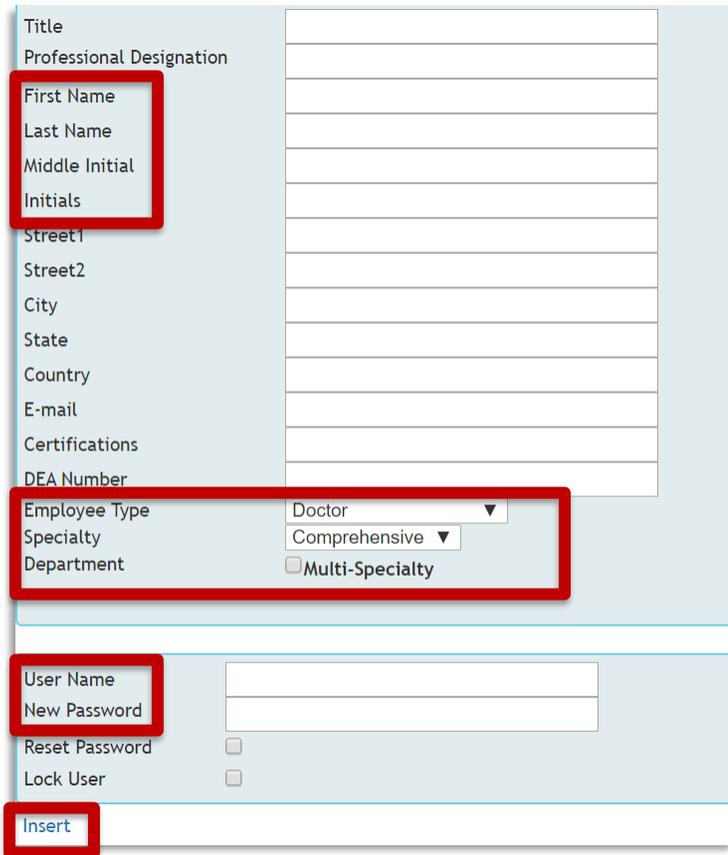
- First Name
- Last Name
- Initials – (this will display in drop down menu throughout chart)
- E-mail
- Employee Type (Front Desk, Tech, Admin, Doctor)
- Department (usually just one option ex. Comprehensive, Multi-Specialty, etc.)

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The screenshot shows a user profile form with the following fields and red highlights:

- Title
- Professional Designation
- First Name
- Last Name
- Middle Initial
- Initials
- Street1
- Street2
- City
- State
- Country
- E-mail
- Certifications
- DEA Number
- Employee Type: Doctor (dropdown)
- Specialty: Comprehensive (dropdown)
- Department: Multi-Specialty
- User Name
- New Password
- Reset Password:
- Lock User:
- Insert button

Password Reset

1. Locate existing username
2. Create new password (ex. Passw0rd!)
Criteria: Longer than 8 characters, one capitalized, one lowercase, one special character, one number
3. Check off "Reset Password". This will prompt the user to automatically change their password upon login



The screenshot shows a password reset form with the following fields and red highlights:

- mdiadmin (dropdown)
- User Name: mdiadmin
- New Password
- Reset Password:
- Lock User:

Locking Users – Exiting / Termination process

1. Locate existing username
2. Check off "Lock User". This will prohibit this user from being able to login and access PHI

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Users are never deleted for compliance purposes as their initials may be attached to patient records and this information may be needed for auditing purposes. Instead, you lock them out of the system to prohibit user from accessing protected health information (PHI).

Tip: Add "zzz" in front of user initials to move user to the end of the list in drop down menus for chart and/or communications



The screenshot shows a user management interface. At the top, there is a dropdown menu with 'mdiadmin' selected. Below it are two input fields: 'User Name' containing 'mdiadmin' and 'New Password' which is empty. There are two checkboxes: 'Reset Password' and 'Lock User'. The 'Lock User' checkbox is highlighted with a red rectangular box.

Revision History

Revision	Date	Changes	Requested By
V001	6/24/2020	Initial Release	