Title: ICP – Adding New Users and Locking Users

Document Date: 6/24/2020

## 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
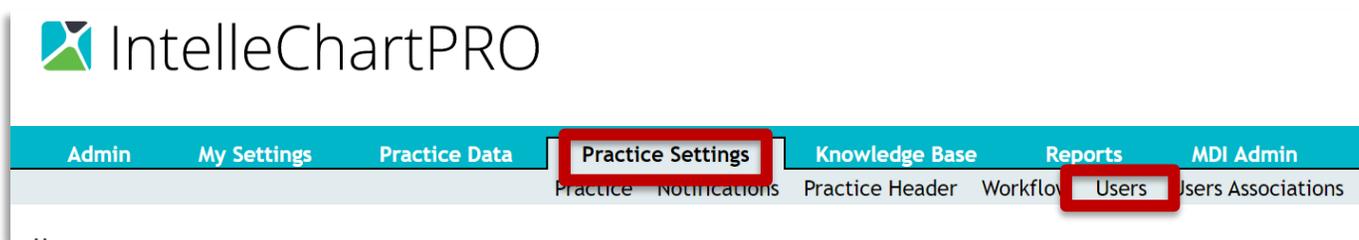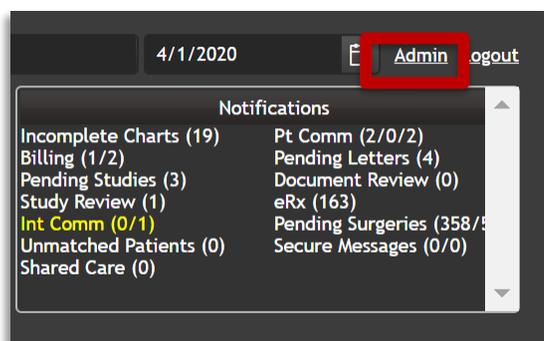
Necessary Fields:

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

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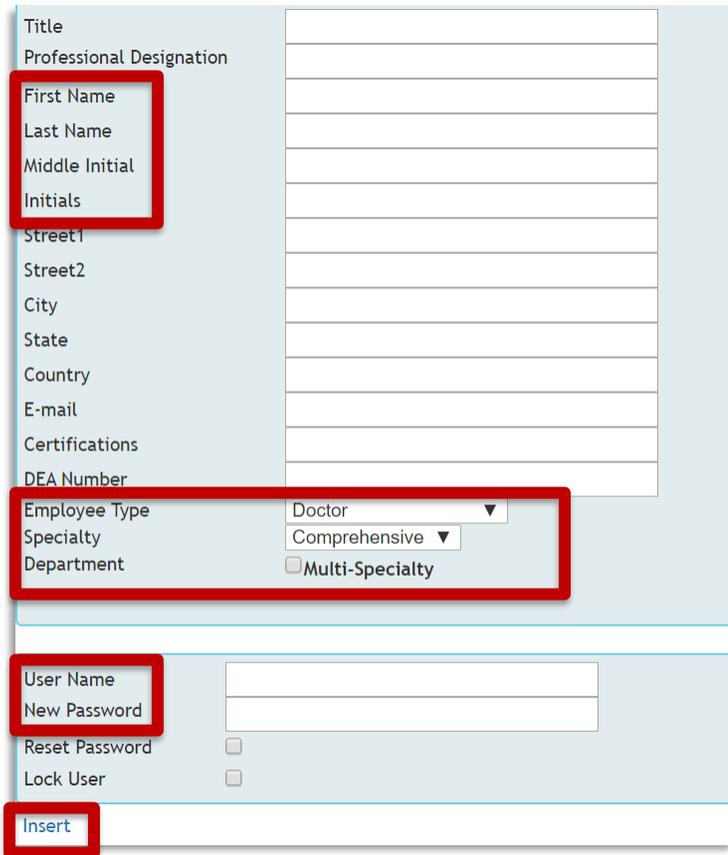
Password Reset

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

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

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

Revision History

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