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Security Statuses Defined

- **View Only =** Staff member can see information, but cannot add, update, or delete information
    - **Example:**
        - If Patient Visit access is set to View Only, then the staff member can:
            - View the details within a Patient Visit
            - Fax/email out reports.
        - However, they cannot:
            - Add new Patient Visits
            - Edit an existing Patient Visit
            - Delete an existing Patient Visit

- **View/Add/Update =** Staff member has the privileges of the View Only status plus they can add new information and update existing information. However, they cannot delete existing information.
    - **Example:**
        - If Patient Invoices is set to View/Add/Update, then the staff member can:
            - View and update existing invoices
            - Create new invoices
            - Print and email out invoices
        - However, they cannot:
            - Delete an existing invoice

- **View/Add/Update/Delete =** Staff member has the privileges of the View/Add/Update status plus information can be deleted.
    - **Example:**
        - If Schedule Appointments is set to View/Add/Update/Delete, then the staff member can:
            - View and update existing appointments
            - Create new appointments
            - Delete an existing appointment

<u>Security Status Rules apply directly to:</u>

1. **User Administration**
2. **Physician Administration**
3. **Schedule Administration**
4. **Patient Visits**
5. **Patient Questionnaires**
6. **Patient Documents**
7. **Patient Policies**
8. **Patient Devices**
9. **Patient Invoices**
10. **Schedule Appointments**

11. **Company Administration**
    - Manage Clinic List (under Administration > Clinics)
    - Manage User List (under Administration > Users)
    - Manage Invoice Options (under Administration > Invoices)

12. **Template Administration**
    - Clinics > Documents
    - Appointments > Appointment Rooms
    - Appointments > Appointment Types
    - Invoices > Adjustment Types
    - Invoices > Line Item Bundles
    - Invoices > Line Item List (including managing Stock)
    - Invoices > Line Item Types
    - Invoices > Loaner Devices
    - Invoices > Invoice Notes
    - Invoices > Payer List
    - Invoices > Payer Types
    - Invoices > Statuses
    - Invoices > Tax Rates
    - To-Do List > Tasks
    - Prof Report > History Templates
    - Prof Report > OAE Configuration
    - Prof Report > Results Templates
    - Prof Report > Recommendation Templates
    - Prof Report > Custom Section Templates
    - Patient Report > Audiogram Templates
    - Patient Report > Recommendation Templates
    - Chart Notes > Notes Templates
    - Questionnaire > Patient Questionnaires
    - Patient Setup > Documents
    - Patient Setup > Note Templates
    - Patient Setup > Note Types
    - Patient Setup > Portal Videos
    - Patient Setup > Tags
    - Patient Setup > Visit Checklist
    - Forms and Letter > Cover Letters
    - Forms and Letter > Email Templates
    - Forms and Letter > Fax Cover Sheets
    - Forms and Letter > Form Documents
    - Forms and Letter > Marketing Letters
    - Forms and Letter > Medical Clearance
    - Forms and Letter > Text Message Templates
    - Setup > CounselEAR Insight
    - Setup > Audiometers
    - Setup > Transducers
    - Setup > Word Lists
    - Setup > Physician List
    - Setup > PQRS Measures
    - Setup > Referral Types
    - Stock Reporting Generator
    - Stock Reporting Summary Report

13. Patient Administration

- Patient Search feature
    - Limited to 100 results unless staff member has Company Admin View/Add/Update access level
- To-Do List
- To-Do List Subscriptions
- Send emails, texts, and faxes
- To-Do Task Report Generator and Summary Reports
- CounselEAR Synergy (also need Patient Visit access)
    - Minimum access needed: View/Add/Update

14. Patient Visits

- CounselEAR Synergy
    - Minimum access needed: View/Add/Update (Also need Patient Administration access)
- Patient Visit Search feature
    - Limited to 100 results unless staff member has Company Admin View/Add/Update access level

Additional Tools

1. **Business Reporting**
    - Available for:
        - Patient Policies
            - Policy Report Generator
        - Patient Devices
            - Device Report Generator and Summary Reports
        - Patient Invoices
            - Invoice Report Generator and Summary Reports
            - Line Item Report Generator and Summary Reports
            - Payment Report Generator and Summary Reports
            - Claim Report Generator and Summary Reports
        - Schedule Appointments
            - Schedule Business Reporting and Summary Reports
            - Appointment Life Cycle Summary
2. **Business Hours**
    - Set the range of hours to be available for your daily scheduling within CounselEAR
3. **Online Business Hours**
    - Set the range of hours to be available for online patient scheduling
4. **API / Webhooks**
    - Allowed to access and make changes to these developer resources
5. **Cost of Goods**
    - Allowed to view/modify Cost of Goods for items sold
6. **Patient Upload**
    - Allowed to mass add/update patients from a spreadsheet
7. **Noah**
    - Allowed to launch CounselEAR Noah Cloud and perform activities (if activated for your clinic)
8. **Multi-Factor Authentication (MFA)**
    - Requires staff members to receive / enter a code to be able to login to CounselEAR
    - Process completed via Google Authenticator

User Specific Settings (Controlled personally by each staff member)

1. My Profile (under Administration > Setup)
2. Schedule Options (under Administration > Appointments)
3. Professional Report Options (under Administration > Professional Report)
4. Patient Report Options (under Administration > Patient Report)
5. Chart Notes Report Options (under Administration > Chart Notes)
6. Questionnaire Options (under Administration > Questionnaire)
7. Portal Options (under Administration > Patient Setup)
8. Envelope Options (under Administration > Setup)

University Alliance Features

- User Specific
  - University Alliance Tools > Assignment Center
  - University Alliance Tools > Time Tracking
- Template Administration
  - Assignments (under University Alliance Setup)
  - Audiometer Simulator Cases (under University Alliance Setup)