PointClickCare®

Session Guide:
Security Setup and Employee
File Management

After this session, admin staff in charge of system security will be able to:

- Create and manage users in Home Health Care

- Assign Home Health Care access to existing users

- Assign and manage roles in Home Health Care

- Create a custom user role

- Add an employee

- Manage basic employee information

Overview

You must create a Security User Setup for all employees who require access to Home Health. (Be aware that some users who work in another PointClickCare business line may already have a user setup.)

After you create a Security User Setup, you must assign appropriate security roles to the user. Security roles determine the level of access that users have in the system. For example, a Security User Setup with a Biller role assigned would have access only to items needed to bill. They can view but cannot create or edit clinical documentation. All Security Users must have associated security roles.

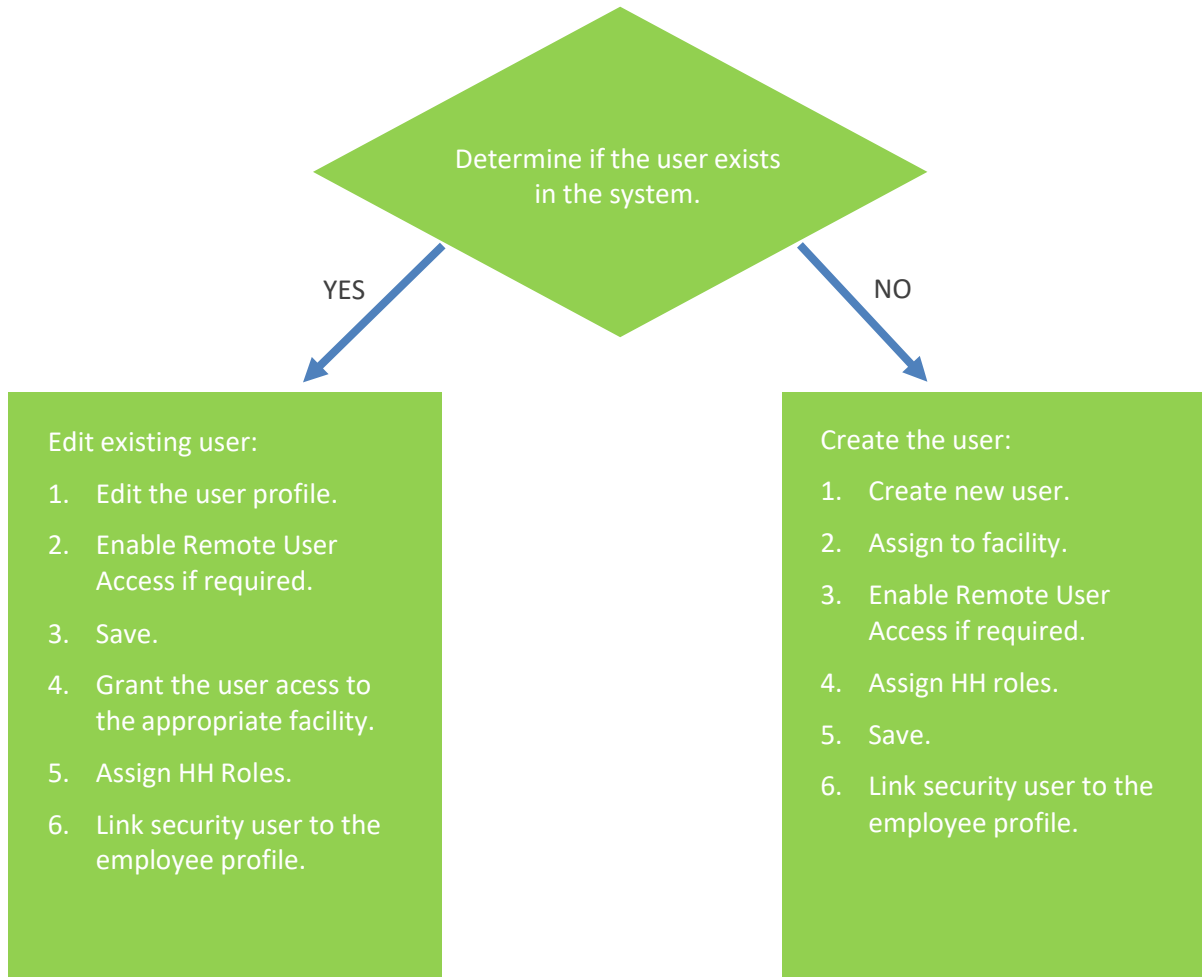The Security User must then be linked to the Employee file.

Think of setting up an employee to use the Home Health Care Database as a four-step process:

| Create Security User	→	Assign Security Role	→	Associate Security User to Employee File	→	Assign Discipline
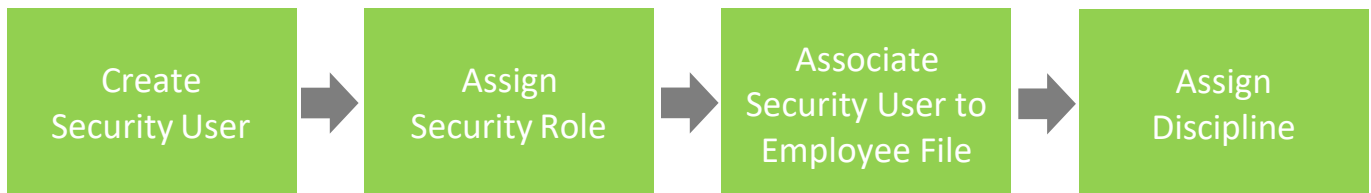
Policy Considerations

- You might have personal working in several lines of business. Consider who in your organization requires remote access.

- What is your password reset policy? (PointClickCare does not reset passwords.)

- Who will administer Home Health Care user set up?

- Home Health Care works best on Google Chrome. Make sure all devices are set up with Chrome.

Process at a Glance

Determine if the user exists in the system.

YES

NO

Edit existing user:

1. Edit the user profile.
2. Enable Remote User Access if required.
3. Save.
4. Grant the user acess to the appropriate facility.
5. Assign HH Roles.
6. Link security user to the employee profile.

Create the user:

1. Create new user.
2. Assign to facility.
3. Enable Remote User Access if required.
4. Assign HH roles.
5. Save.
6. Link security user to the employee profile.

Creating New Security Users

Every employee must have a Security User Setup to access the Home Health Care database. After you create the User Setup, personnel responsible for employee setup must associate the User Setup to the Employee Profile. Employees cannot access the database until their Employee File is associated with a Security User Setup.

Create Security User	→	Assign Security Role	→	Associate Security User to Employee File	→	Assign Discipline
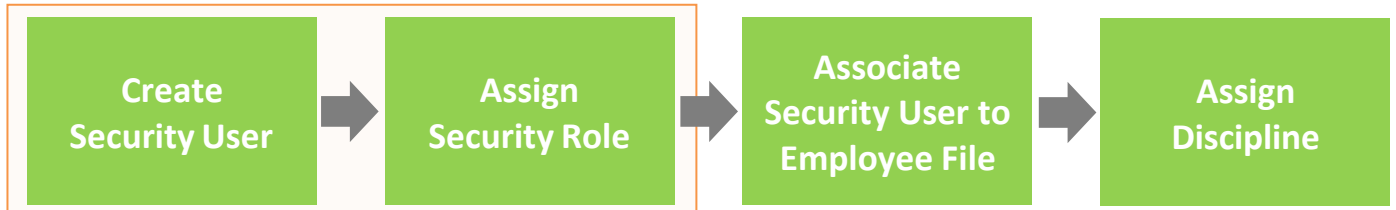
Procedure

1. To start:

   Enterprise User (also use a Senior Living or Skilled Nursing PointClickCare product):

   a. If you have access to the Management Console in the Branch Menu, go to **Standards > Financial Management > Security Users**.

   b. If you do not have access to the Management console, go to **Admin > Setup**.

   Home Health Care only:

   Go to **Setup > Security Users**.

2. Search for the user you want to enter to be sure they are not already listed.

   Note: Use the filters across the top of the screen to narrow the list. Pay particular attention to the Active/Inactive filter and the Facility filter.
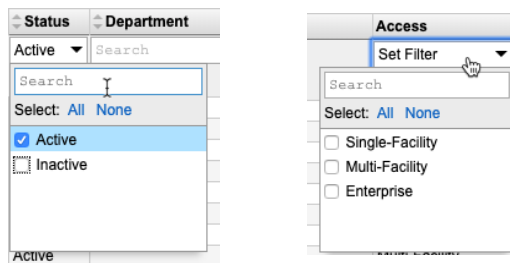
   Tip: Any user with a pcc- before their name is a PointClickCare global user. These are support personnel who need access to all databases to troubleshoot problems.

3. Edit an existing user or create a new user.

   Editing Existing Security Users

   If the employee already has a Security User Setup, you must edit the setup to allow access to the Home Health Care database.

From the Facility User Security page, you have the option to change several user settings:

To edit a user	Click **Actions > Edit** and change fields as required.
To enable remote use for Home Health Care	Click **Actions > Edit** and check the **Remote Use** option.
To change user security roles	Click **Actions > Roles**.
To change access to facilities if you have several locations	Click **Actions > Access**.
To disable a user	Click **Actions > Disable**.
To change a password	Click **Actions > Pwd**.

Creating a New Security User

a. If the user is not already existing in the system, click **New** to create a new user. Complete the following fields:

Field Name	Description
Long User Name	Enter the first and the last name (i.e. John Smith).
Login Name	Enter the user's Login Name.
	This is part of the Username that the user enters to access the system. The Username takes the following form:
	<organization code>.<Login Name>.
	For example, for a user named John Smith at an organization with a code of fst, the login name might be smithj. In this case, the complete login would be:
	fst.smithj.
Email	Enter the email address that should populate support tickets when the user submits a help request to PointClickCare through the program.
Communication Email	Enter the email address where the user should receive communications from PointClickCare (for example, service outage messages).
Password	Strong passwords enhance the security of your database. Enter a password that is confidential to the user. If a user forgets his/her password, your organization's Security Administrator must assign a new password.
	The Password can have alphanumeric characters, and it is case sensitive. It must also follow the password rules set by your organization.
	We recommend you <u>do not</u> select the "Must change password on first login" option.
	Alternate password/PINS are not required for Home Health Care.
Confirm Password	Confirm the password by re-entering it exactly as it was entered the first time.
Auto Page Setup	Select for all users to initialize the auto set-up of printing formats.
Remote User	Select to allow permission to access the Home Health Care application from a system outside of the facility.
Default Facility	Your home health agency name.

b. Click **Save and Next**. The Roles Assigned list appears.

c. Check boxes for the security roles the user needs.

Important: When you view security roles, all PointClickCare product roles are listed in the database. Home Health security roles are identified with an HH.

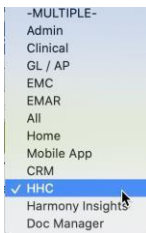d. Click **Save** to create the new user.

Creating a Custom Security Role

At times it may be necessary to create a custom security role for your agency.

Procedure

1. With Admin privileges, click **Setup** and select **Security Roles**.
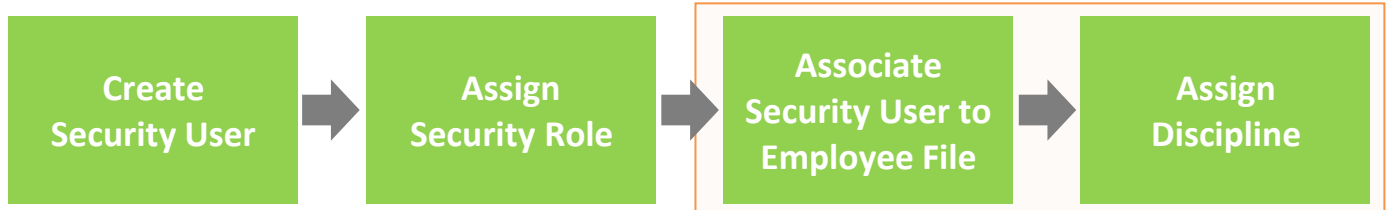

2. Select **New**.

3. Enter a role name in the **Description** field and select HHC for **Module**. (This scopes the permissions for Home Health Care.)

4. Select permissions for the new role. See the Appendix for a definition of permissions.

Adding an Employee

Employees are added from the Employee tab.

| Create Security User | → | Assign Security Role | → | Associate Security User to Employee File | → | Assign Discipline |

Procedure

1. Click **Employees** and click **Add**.

2. Complete the employee information. (Required fields are indicated with an asterisk.)

   - Enter first*, middle, and last name*.

   - Enter DOB*. It is important to add DOB if utilizing the exclusion check.

   - Enter Social Security Number (SSN).

   - Select employment type*.

   - Select employee status*.

   - Enter start date*.

   - Select Line of Business*.

   - **Select the User Account to associate the employee with the Security User Setup. The employee cannot access the Home Health Care database unless they are associated with a Security User Setup.**

- Do one of the following*:

    - Mark All Branches if user is to be active in all branches.

    - Select the branch to which the employee is associated.

3. Click **Accept**.

Defining Password Rules

Strong passwords enhance the security of your database. Always follow password rules established by your organization. To define password rules for Home Health Care, use the following procedure.

Procedure:

1. With Admin user privileges, select **Setup**.

2. Select **Password Rules**.

3. Select Password Rules and click **Save**.

Changing Passwords

Users can change their own passwords from the web portal, or an Administrator can set Security User passwords.

Note: Always follow your organization's password rules.

Administrator Password Reset

If a user has locked themselves out of the system, it may be necessary for an administrator to reset the employee's password.

1. Navigate to the Security User.

2. Select **Actions**.

3. Click **Password**.
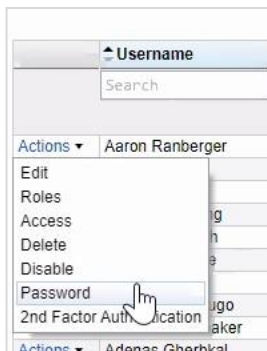
4. Enter the **New Password** and enter the password again in the **Confirm Password** field.

5. Click **Save**.

User Password Change

At times a user may need to change their password. This is done from the Home Health Care web portal.

1. Hover over your username and select User Settings

2. Click the **Change Password** tab.
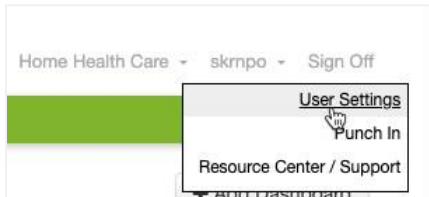
3. Enter your **Old password**.

4. Enter your **New Password**.

5. Enter your new password in the **Confirm Password** field.

6. Click **Accept**.

Managing the Employee File

Employee information such as user account, disciplines, and certifications are managed in the Employee tabs.

Procedure

1. In the Employee list, select edit next to the employee's name.

2. Edit information in the following tabs as necessary:

    Employee tab

Demographics	Enter employee information as required by your agency. **Add Credentials** to the free text credentials field to populate aside the clinician's name when signing documents in the software.
Account	Associate the employee with the system user. Begin typing the username in the search field. Predictive text narrows your search. Select the username and click Accept. **If this field is left blank, the user will not be able to log into the Home Health Care database.**
Identifiers	Not generally used. Some agencies are associated with a program that has an alternate payment model. For example, the state may pay an employee directly. Contact your Home Health Care specialist if you believe this field is required.
Discipline	Click **Add Disciplines** to associate a discipline to an employee. Multiple disciplines can be added for each employee. If licensed, you must add the licensure information to schedule visits.
Certifications	Click **Add** to select the employee's certifications.
Preferences	Click **Edit** to select employee preferences (such as not willing to work with smokers, pets, behavior issues, etc.). This field links to the patient attributes section of the Home Health Care program. For example, if a patient is a smoker

	and the employee prefers not to work with smokers, this information will be available when scheduling.
Requirements	You can add, edit or remove requirements as needed to ensure compliance with agency policies. Requirements are items that an employee must have in place to provide care. Requirements may include items such as TB tests, chest X ray, CPR completion, background checks, unrestricted license to practice, and various other types of agency or industry requirements. Some agencies include orientation and competency testing to ensure the employee meets requirements for employment.
Locations	Agencies may have multiple locations, and employees are scheduled based on geographical areas to reduce travel time. Locations are identified at the patient level and employee level. Employees can work in multiple locations.
Communication Notes	Notes specifically for an employee file.
Emergency Contacts	Add contacts according to your agency's requirements.

Payroll tab

Payroll	Employment Type, Employee Status, Branch, Start Date, and Line of Business are required.
Payroll ID	Insert your employee payroll identifier if you wish to create an export file to your time and attendance vendor.

Exclusion Checks (Office of Inspector General (OIG))

Exclusion checks are automatic monthly checks against the employee's name and date of birth for all employees. They identify any complaints or license problems for the employee.

Procedure

1. In the Employee list, select **edit** next to the employee's name.

2. Edit information in the **Exclusion Checks** tab as necessary:

Exclusion Checks tab

|	
Run Check	Manually Checks the Office of Inspector General (OIG) utilizing the employee's DOB, First Name, Last Name. **Notes:** • This is not a full background check. • You must include a date of birth, otherwise there may be false results.
Auto Check	Runs Monthly.
Check defined	Indicates the Check Date, Verify Date, Status-Passed Automated Lookup no action needed, Not Passed Lookup will require signing into OIG website and providing additional information such as social security number, etc.

Using Employee Dashboard Widgets

Employees with Incomplete Requirements	Employees With Incomplete Requirements 0
Unreviewed Exclusion Checks	Unreviewed Exclusion Checks 1

Using Employee Reports

This section summarizes employee-based reports. If this information is not tracked in your payroll system, you may find these reports useful.

To access a report, the user role must be enabled on the specific report. An admin user can configure this access by going to the **Reports** tab > select **Edit** > select the **user role** (reminder to use HH specific roles) > click **Accept**.
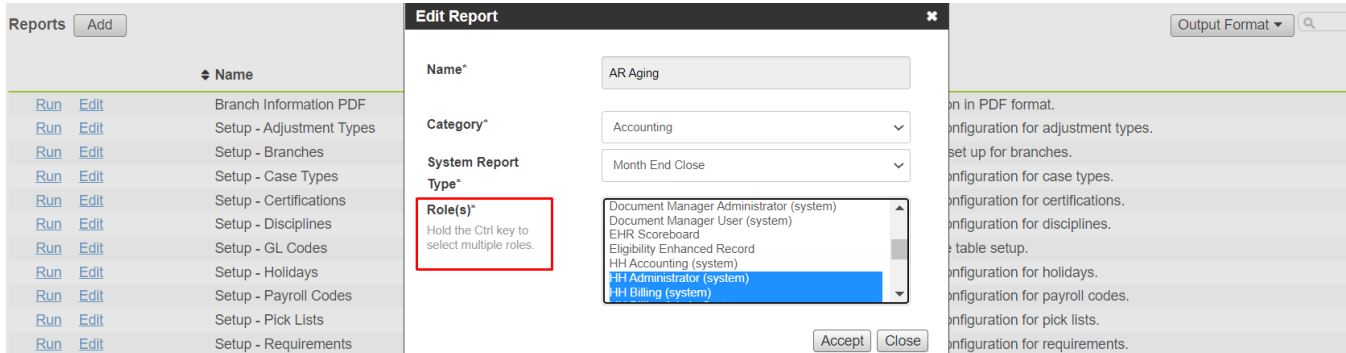
Note: An employee must have an assigned discipline to appear in a report.

- **Employee Certifications (XLS format)**
  Shows certifications (such as those issued by governments or agencies) held by employees. Does not include license renewal dates. Includes the following fields:

  PayID, Employee Name, Branch-Business Line, Employer, Jobs, Emp. Status, Certification Name, State, Issue Date, Exp. Date, Verified By, Ver. Date

- **Employee Information for Survey (PDF format)**
  Shows basic information required for audit survey. Includes the following fields:

  Employee Name, EmpID, Jobs, Employee Status, Employee Type

- **Employee Requirements Excel (XLS format)**
  Shows employee requirements with completed date prior to specific date or all, plus any required employee requirements that have not been entered on the employees. Includes the following fields:

  EmpID, Employee Name, Branch, PayID, EmpType, Employer, Jobs, Status, Hire Date, Requirement, Date Complete, Date Due

- **Employee Roster (XLS)**
  A listing of employees along with their addresses and phone numbers. Use this list to create contact lists. For example, use if an on-call nurse needs to call in HHA or back up. Includes the following fields:

  Pay ID/PCC ID, Employee Name, Disciplines, Address, Emp Type, Employers Phone1, Phone2, Default Business Line, Branches Allowed, Status, Hire Date, Term Date

- **Employee Terms and Hires (XLS)**
  Shows employees with a hire or term date within a specific date range. Can be used by HR to see hire and terms. May be required if HR is comparing PointClickCare information with their HR files. Includes the following fields:

Payroll ID, Employee Name, Default Business Line, Jobs Status, Emp Type, Wage Type, Hire Date, Term Date, Termination Reason

- **Employees with No Appointments (XLS)**
  Shows employees with no appointments since a specified date. Review for employees that may have been terminated to update employee records. Includes the following fields:

  Emp ID, Employee Name, Pay ID, BranchBL, Hire Date, Emp Type, Employer, Wage Type, Jobs, Last Appt

- **Missing Employee Information (XLS)**
  Shows Employees who have active/inactive or unprocessed payroll appointments. Includes the following fields:

  Pay ID, Employee Name, Issue, Default Business Line, Branches Allowed, Hire Date, Status, Type, Employer, SSN, DOB, Appt, Pay

- **Employee Schedule List (PDF)**
  List of appointments by Employee for printing. Verify patients have an Employee assigned. Includes the following fields:

  Patient, Disc., Shift, Date Beg - End Time, Hrs, Service, Case, Payer – Plan

- **Employee Unreviewed Appointments (PDF)**
  Shows appointments in Open or Held status. Run pre-payroll processing. Useful for tracking employees that are not reviewing their appointments in a timely way. Includes the following fields:

  Patient Name, Case, Start, Disc, Service, Appt, Status

- **Employees on Patients XLS or PDF**
  Shows all employees who have ever been scheduled to clients. Useful if there is a legal request for records. Includes the following fields:

  EntID, Patient Name, Med RecNumber, CaseType, CaseStatus, Employee, Employee Phone, EmployeeStatus, Discipline, First ApptDate, Last ApptDate, Employer

- **Employee Appointment Calendar (PDF)**
  Shows all employees who have ever been scheduled to clients in calendar form. Includes up to 90 days. Includes the following fields:

  Employee Name, Employee Status, Sunday Monday Tuesday Wednesday Thursday Friday Saturda

Notes:

Along with entering a communication email within your user-name setup, we recommend signing up for service alerts to get the most up to date notifications during possible outages or disruptions.

Navigate to the link https://status.pointclickcare.com to subscribe to alerts. Select **subscribe** and enter the email you would like notifications to go to.

Once you subscribe, you will receive an email confirming the notifications. This email provides a link to manage your subscription. The subscription automatically links you to every PointClickCare application, to avoid excessive notifications around applications, you want to select only the applications that apply to you and deselect the rest.

There are two sections that could apply to home health users, PointClickCare Web Application, and the Home Health Care Production Group.

Tip: Only users with access to our CORE application would need to utilize the Web Application notifications AND the Home Health Production Group notifications. Home Health only users, will only need to select a Home Health Production Group.
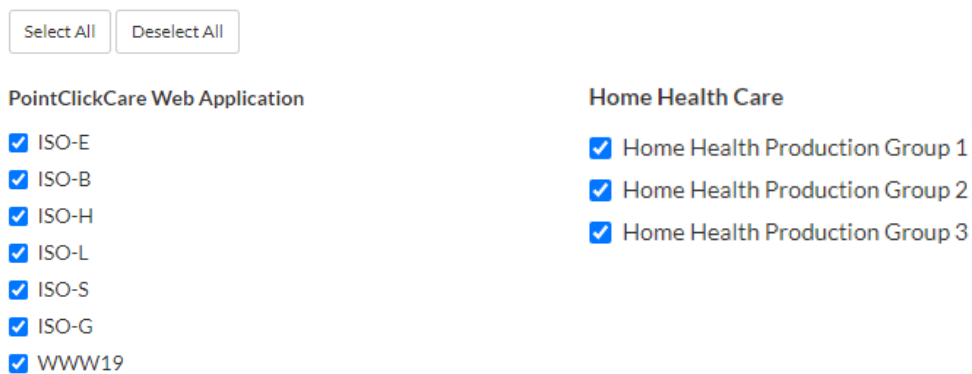
To determine which Web Application to select, log into your database, and check the URL at the top of the web address bar as shown below. The number indicated here is the number you select on the web application list.
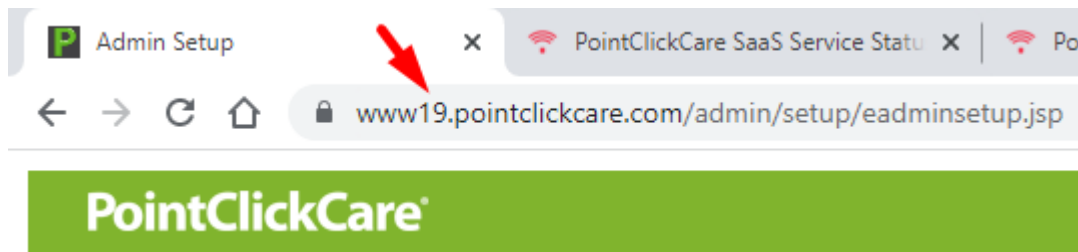
To determine which Home Health Care Production Group to select, log into your Home Health database, and check the URL at the top of the web address bar as shown below. The number indicated here is the number you select on the Home Health Care Production Group list.
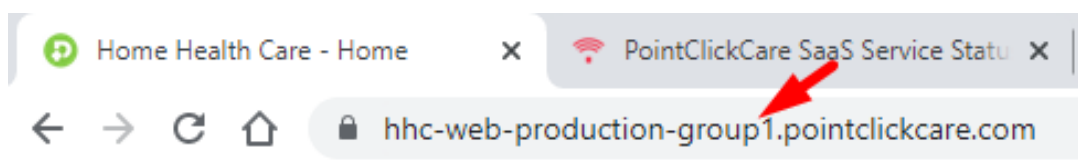
Appendix

Security Permissions in HNC Security/Role Setup

ACCOUNTS RECEIVABLE	Associated admin tab. Admin must be enabled to be accessible. Used for billing.
ACCOUNTS RECEIVABLE EXPORT	Used for billing exports.
ADMIN	Full privilege for all security permissions but may still need to manually give privilege (system-wide role for development and testing).
ADMINISTRATION	Access to the administration tab for configuration of database.
ASSESSMENT ADMIN	Sign and Unsign other users' documents.
BILLING	Allows access for billing. Also requires administration andbranch service rate access.
BRANCH SERVICE RATE	Needed for billing access and to set up service rates.
BRANCH TEAM	Needed for access to any report that has a requirement for abranch team field in order to run the report.
CARE PLAN	Access to care plan tab. Note: Will also need access to chartcharting for this option to work
CARE PLAN ALL DISCIPLINE	All discipline care plans will be accessible under the care plantab AND within the discipline's notes and assessments.
CARE PLAN OWN DISCIPLINE	Will only have access to own discipline's care plan under thecare plan tab AND within the discipline's notes and assessment.
CHART AUTHORIZATIONS	Allows access to authorizations.
CHART CASE	Allows access to client case details, will need this access forcase details/case record information sub-tab access and anyother sub-tabs under case details.
CHART CERT PERIOD	Allows access to add/edit cert periods.
CHART CHARTING	Allows access to charting, must have this to access medications and care plan tabs.
CHART DISCHARGE PATIENTS	Allows access to chart in d/c patients in case details, must alsohave access to chart cases.
CHART FOLLOW UP	Applies to allowing access to communication notes section in chart.
CHART JOURNAL	Same as above.

CHART MEDICATION	Access to medications. Must also have access to Chart > Charting.
CHART MEDICATION INTERACTION	Allows access to med interactions page, see above note.
CHART OASIS	Allows access and charting for OASIS, must also have accessto chart case.
CHART ORDER	Allows access to plan of care/485 tab and orders. Must alsohave access to chart case.
CHART PATIENT	Allows access to client details and client financial payers.
CHART PATIENT SSN	Allows access to add/access SSN. Biller will need access tothis.
CHART REOPEN ORDER	Allows order to be re-opened that has been sent or signed, isthis linked now to the assessment admin tab. Must also haveaccess to chart case.
CHART SUPPLY ORDER	Supply section will be added in the future.
DELETE A POSTED APPT	Able to delete posted appointment.
EMPLOYEE	Access to employee, demographics, identifiers, disciplines.
EMPLOYEE ACCT	Access to full employee account, user account.
EMPLOYEE FOLLOW UP	Related communication notes in chart.
EMPLOYEE JOURNAL	Related to communication notes in chart.
EMPLOYEE SSN	Access to employee SSN.
EPISODIC CLAIM TAB	Required for billers to access episodic claims.
EPISODIC PPS	Access to episodic review dashboard. Clinicians and billersneed access.
INTAKE	Access to intakes.
MY SCHEDULE ON HOME PAGE	Access to clinician's schedule on their home page.
OASIS EXPORT	Allows access to export OASIS.
PAYMENTS	Necessary for biller to access/post payments.
PAYROLL EXPORT	Access to allow you to upload a file into your payroll system.
PHYSICIAN	Linked to accessing physicians in Intake and in the client'sChart.
REFERRAL SOURCE	Linked to accessing referral source in intake and in the client'schart.
REPORT	Access to reports. MUST be in place to assign roles to reports.
REVENUE EXPORT	Access to allow users to upload a file into accounting system.
SCHEDULE APT	Allows scheduling of appointments.