KONICA MINOLTA HEALTHCARE IT

Exa® PACS/RIS

Feature Summary

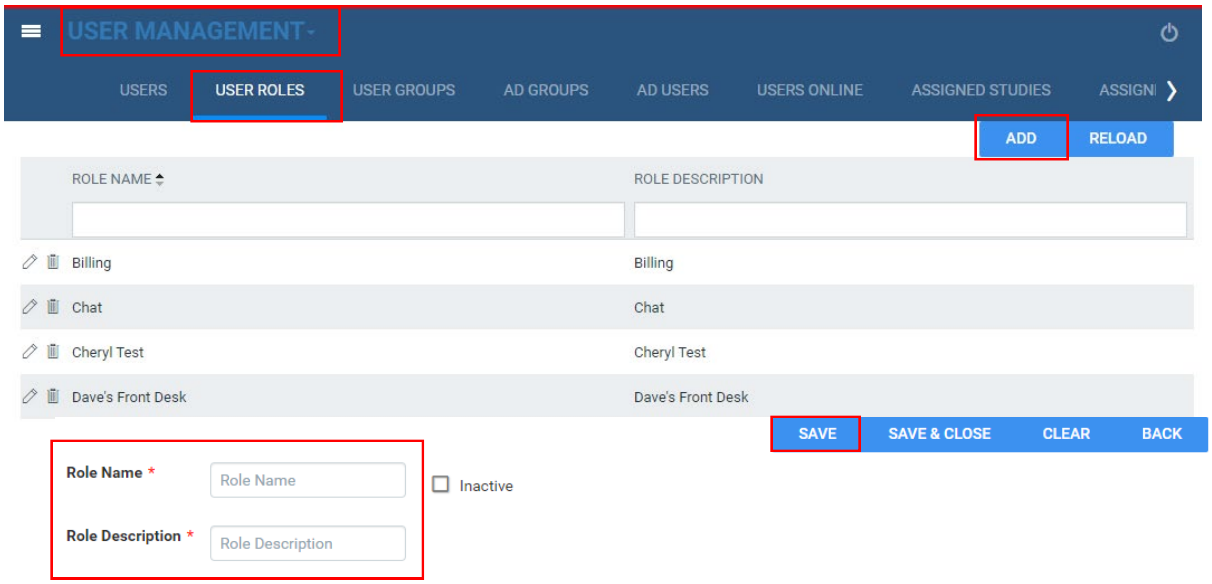
Adding Users, User Roles, and User Groups

500-000711A

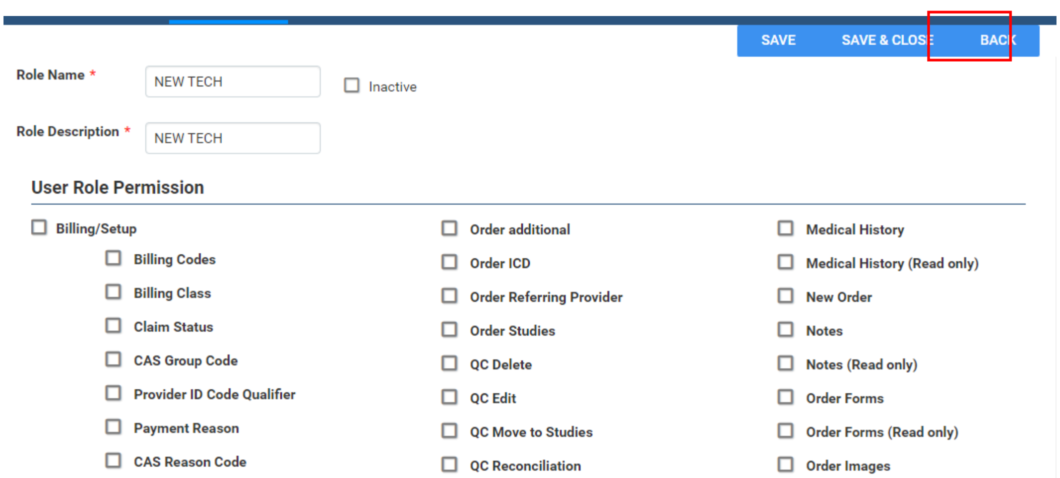
Add a user role

A user role is a set of user rights that can be assigned to user groups. To add a user role:

1. **SETUP** > **OFFICE** > **USER MANAGEMENT** > **USER ROLES** > **ADD**.
2. Type a **role name** and **role description**, and then select **SAVE**.



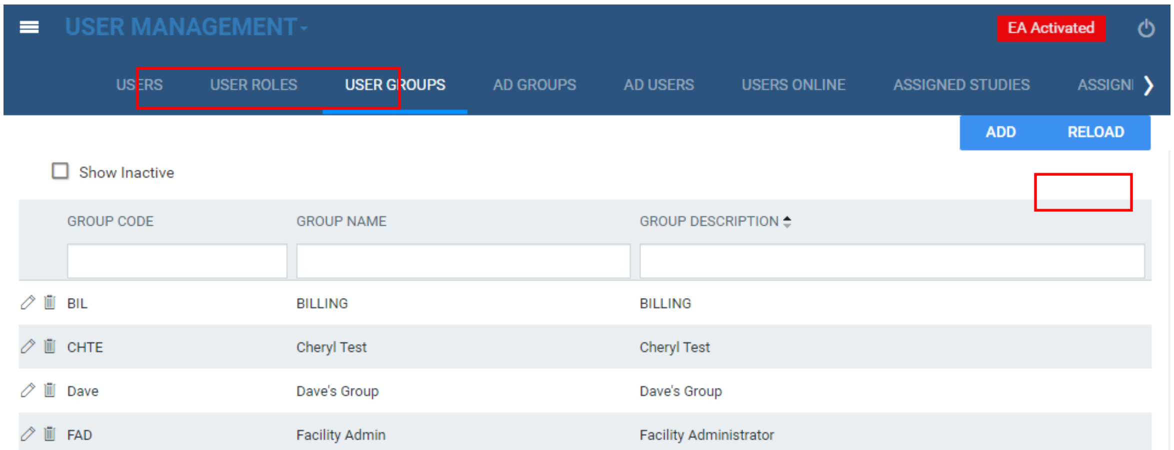
3. Under **User Role Permissions**, select all the rights that you want to assign to the user role.
   - Hover over each right for a description
   - Use **Ctrl + F** to find rights
4. Select **SAVE** or **SAVE & CLOSE** to save the user role.



Add a user group

A *user group* contains users to which you can assign user role permissions, access to certain documents types, and access to navigation menu tabs. To add a user group:

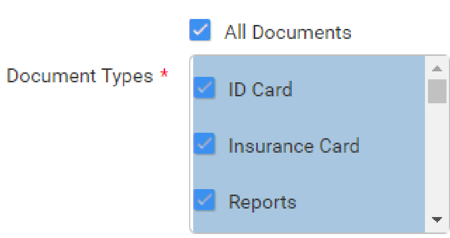
1. **SETUP** > **OFFICE** > **USER MANAGEMENT** > **USER GROUPS** > **ADD**.



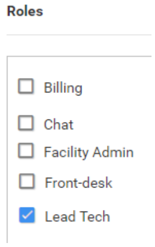
2. Enter the **group code**, **group name**, and **group description**.

Setting	Description
Group Code	Type your internal code for the group. For example, RAD.
Group Name	Type your internal name for the group. For example, Radiologist.
Group Description	Type a description for the group.
Document Types	Select the document types that group members can access. For example, select All Documents.
Roles	Select all user roles that you want the group members to have.
Navigation	Select the areas of the program that group members can access (items available on the burger menu).

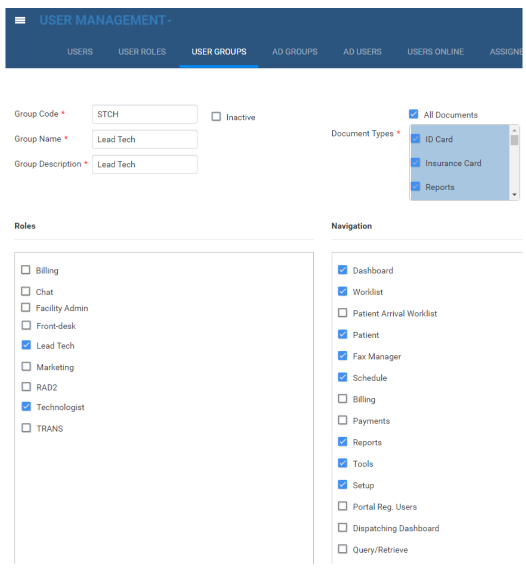
3. Select the document types that the group members have access to. If new document types are added in COMPANY, then an admin must add the new type to each USER GROUP for the group members to have access to it.



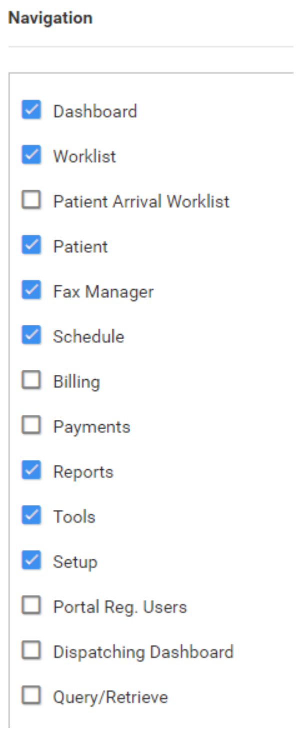
4. Assign a user role to the user group members.

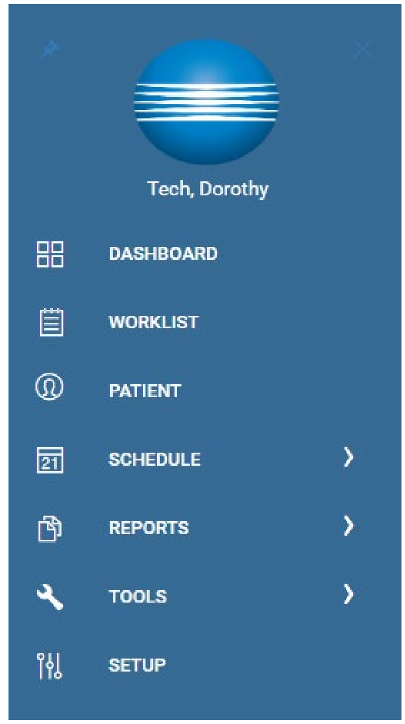


Choose only one user role for a user group unless elevated specific permissions. **Example**: The Technologist User group has the Technologist User role. Only the lead technologist is permitted to purge studies and merge studies. To accommodate this, create a user role with only the merge and purge rights, then create a separate user group and select the technologist user role and the new user role. Finally, apply the separate user group to the Lead Tech User.



5. Under **Navigation**, select tabs in the navigation menu to assign to user group members.
   - Even if the user group has permission to see and select a tab on the navigation menu it does not mean they have the permissions associated with actions with that tab.
   - Even if **FAX MANAGER** is turned on in the **USER GROUP,** there are additional settings that must be activated for a user to have access to the **FAX MANAGER.**



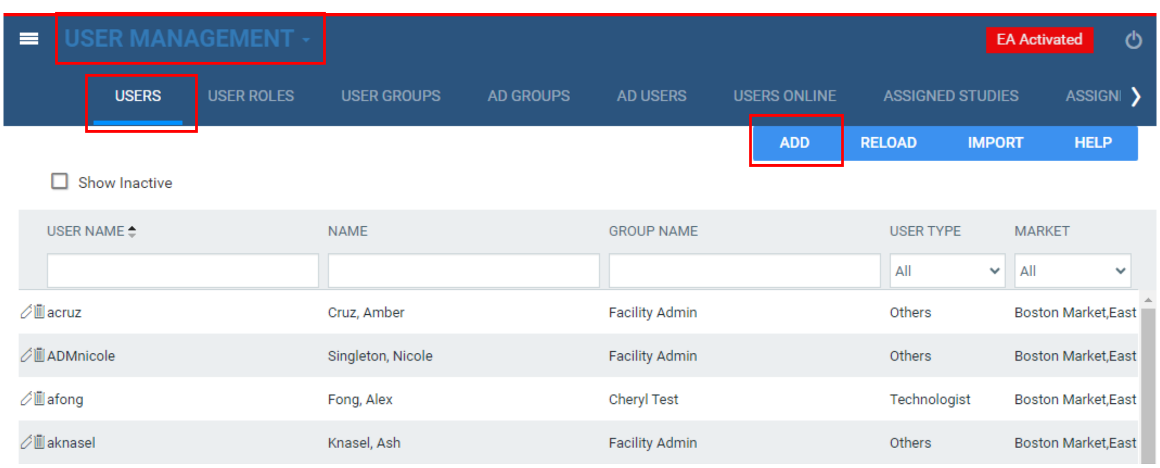


Add a user

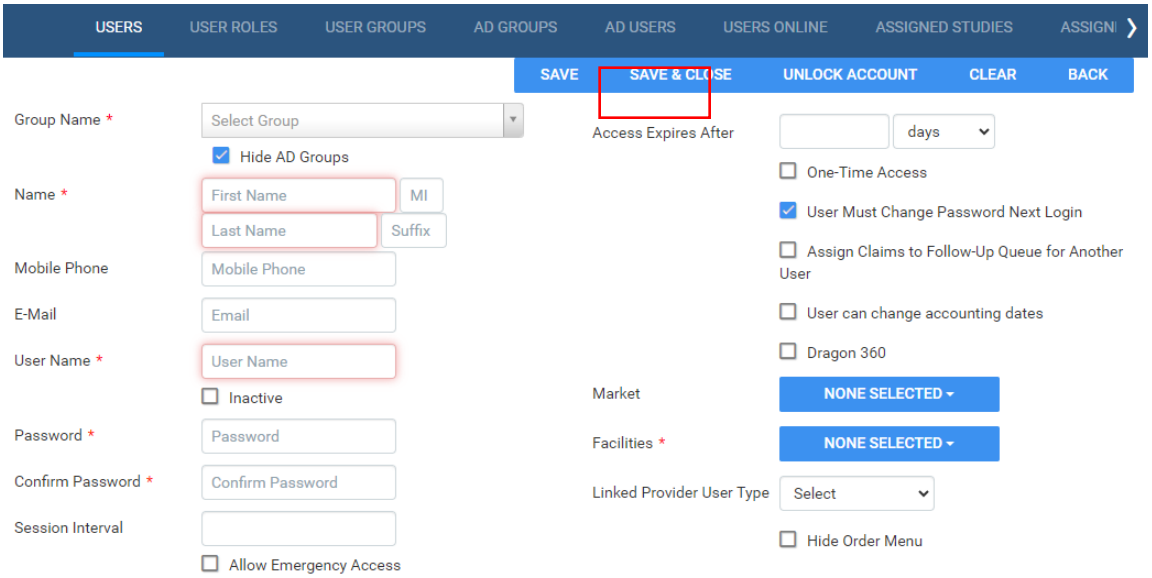
A **USER** is a member of a **USER GROUP** for whom permissions are configured in the **USER ROLES.**

To add a user:

1. **SETUP** > **OFFICE** > **USER MANAGEMENT** > **USERS** > **ADD**.

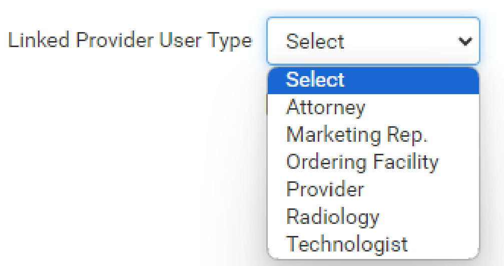


2. Enter required fields indicated by the red asterisks and select **SAVE**.

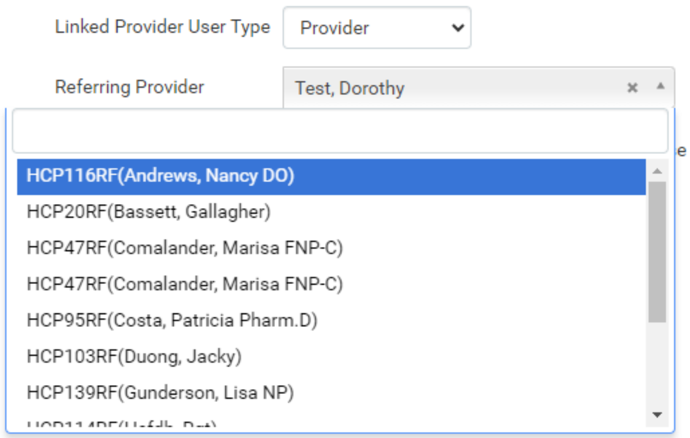


3. Enter the following:

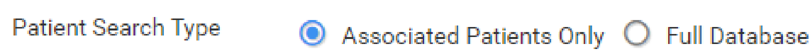
- Select the **GROUP NAME (USER GROUP)** that the user belongs to
- Type the **FIRST NAME** and **LAST NAME**
- Type the **USERNAME** for signing in to Exa PACS/RIS.
- Type the default **PASSWORD** and then **CONFIRM PASSWORD**
- Select the **FACILITIES** that the user can view and edit
- If the user is also a resource (referring, radiologist, attorney or technologist) then select the resource type under **LINKED PROVIDER USER TYPE**



- Select the resource name from the dropdown to link the user to the resource



- If the **LINKED PROVIDER USER TYPE** is a referring provider, select one of the following:
    - **ASSOCIATED PATIENTS ONLY:** Only the referring physician sees patients associated with their resource on the worklist



    - **FULL DATABASE:** Does not restrict the referring physician to show their patients only

Setting	Description
Group Name	Select the user group to which the user belongs.
Name	Type the user's name.
Mobile Phone/ E-Mail	Type the user's mobile phone number and/or email address. The email address must be unique, and is required for two-factor authentication.
User Name	Type a sign-in user name for the user.
Login with Google	When selected, the user can sign in through their Google account.
Netcare access	Select to grant permission to access Alberta Netcare (Alberta only).
Password	Type a sign in password for the user. This option is only available the first time you configure the user.
Session Interval	Type or select the number of minutes before the user's session times out.
Allow Emergency Access	Select to assign "super user" rights to the user regardless of roles or groups.
Linked Ordering Facility	This dropdown list becomes available when you select Ordering Facility in the Linked Provider User Type dropdown list. Select ordering facilities to appear on orders the user creates in the Ordering Facility portal.
Access Expires After	Type and select a duration after which the user's account expires. Leave blank to keep the account open indefinitely.
One-Time Access	When selected, the user can sign in only one time.
User Must Change Password Next Login	Select to require the user to create their own password after signing in the first time.
Assign Claims to Follow-Up Queue for Another User	Select to give the user the ability to add claims to another user's follow-up queue.
User Can Change Accounting Dates	When selected, the user can edit accounting dates under Billing > Payments.
Dragon 360	[reserved, do not select]
Market	Select the market that the user serves. This setting narrows search results in other parts of the program. For example, when the user searches for a patient chart, Exa PACS/RIS only returns charts of patients in the same market as the user.
Facilities	Select the facilities that the user can view and modify.
Linked Provider User Type	Select the user type if linking to one. If you select Ordering Facility, the previous Linked Ordering Facility and Ordering Facility dropdown lists appear.
Hide Order Menu	Available only if no linked provider type is selected. Hides the navigation menu within the Edit Study screen.

4. Select **SAVE** for an additional section to populate.

The **WORKLIST FILTER** tab allows further limiting of what is available to a user on their worklist.

- You can limit access based on date/time, patient information, study information, resources, insurance, and other criteria.
- Users can edit their own worklists, but not the worklist filter that was placed on their profile in this section.