

USER GUIDE

User Roles



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GENERAL

User Roles manage what actions users can perform in the system. Users with the same role have the same permissions but are restricted to their location assignments.

Click the Add/Edit User Role link on the Human Resource Manager page to access.

A screenshot of the Human Resource Manager page in the Adaptive Care Provider Software. The page has a blue header with navigation links: Task Directory, Change Location, Client Profile, Emergency, Log Off, Home, and Messages. Below the header is a "New Save" button and the word "Employee". The main content area is divided into several sections: "HR Search" with input fields for First Name and Last Name, and a Search button; "Basic HR Information" with fields for Employee Name (with a dropdown), UID, Birth Date, Tour ALS, Hire Date, Password, Background Check, First Contact, Messaging, Position, Employee ID, Account Number, and User Type; "Location Assignment" with a dropdown; "User Role Assignment" with a dropdown; and "Password Reset" with a dropdown. A red circle highlights the "Add/ Edit User Role" link in the bottom right corner of the form. A blue arrow points from the text above to this link.

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Add/Edit User Role

New User Role:

User Roles are accessed from the Human Resource Manager page. All users have
Enter the name, description and click Save
You will see a table of existing Roles below.

Manage an existing User Role

Click Edit on the desired role to be maintained. (Scroll to the bottom of the page to find this table.)
User roles can be deleted if they are not associated with any active or inactive user.

SecureChannel Messaging

See SecureChannel Messaging (Communication Logs) in the Knowledge Base.

SecureChannel Messaging Console Options and what they mean:

- Console Blank / All Locations Blank – access to only the user’s messages sent/received
- Console Blank / All Locations Checked – User can send and receive messages from all locations, but can only see their messages.
- Console Checked / All Locations Blank – access to all messages sent/received at the user’s permitted locations
- Console Checked / All Locations Checked – access to ALL messages sent/received

The above only applies if the user has access to SecureChannel Messaging.

A screenshot of a web browser showing the "Create User Role" form. The browser address bar displays "https://achieve.assistedlivingsoft.com/Administrative/CreateUserTemplatePopup.aspx?CompanyId=26". The form has a title bar "Create User Role" and a red asterisk indicating mandatory fields. It contains two text input fields: "User Role:" with the value "ADAPTIVE" and "User Role Description:" with the text "This user role grants Administrators full system access.". Below these is a section titled "SecureChannel Messaging Console Options" with two checked checkboxes: "Console:" and "All Locations:". A red asterisk is next to the "User Role:" field.

https://achieve.assistedlivingsoft.com/Administrative/CreateUserTemplatePopup.aspx?CompanyId=26

Create User Role

* Mandatory Fields

User Role: ADAPTIVE *

User Role Description: This user role grants Administrators full system access.

SecureChannel Messaging Console Options

Console:

All Locations:

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Company Module and Screen Access

Screen Name	
<input checked="" type="checkbox"/>	Limit IP address

Allows users to log in from only permitted locations, this is managed from Company Preferences

Allowed IP Address

[Show my IP Address](#)

IP Address: . . . *
e.g. 255.255.255.255

Location: --Select-- *

No record found.

Home Page

<input checked="" type="checkbox"/>	Home Page
<input checked="" type="checkbox"/>	Location Select
<input checked="" type="checkbox"/>	Client Select
<input checked="" type="checkbox"/>	Record Time/Expense

Location Select: Allow user to select a location other than their default

Client Select: Access a Client Master Information without knowing their Base Location

Record Time: manage their time/expense/mileage records. See Time and Billing User Guide

Occupancy / Attendance

For more information review these areas in the Knowledge Base

- Occupancy
- Schedule Clients (and Attendance Tracking)
- Time and Billing

<input checked="" type="checkbox"/>	Occupancy / Attendance / Time
<input checked="" type="checkbox"/>	Occupancy Check Out/In
<input checked="" type="checkbox"/>	Edit Check Out/In
<input checked="" type="checkbox"/>	Occupancy Approval
<input checked="" type="checkbox"/>	Claims Management
<input type="checkbox"/>	Occupancy Report(retired)
<input checked="" type="checkbox"/>	Attendance
<input checked="" type="checkbox"/>	Time Approval

Manage ability to check client out and in based on location type (attendance or occupancy)

- Occupancy Check Out/In: Check to allow user to check a client out in order to track for billing (and presence) from an Occupancy Location
- Edit Check Out in record previously added (prior to billing for that date)
- Occupancy Approval – lock in dates present/absent and pass to Billing – Claims Management
- Claims Management – Submit Claims to MNITS

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- Occupancy (retired) cannot be used in conjunction with Check Out/In – deselect to use Claims
- Attendance: (Attendance locations only) Check to allow the user to mark a client present or absent for that location.
- Time Approval – Approve time /expense records for others

Location Home

For more information review these areas in the Knowledge Base

- 1. Schedule Staff
- 2-5 Administrator: Attach Documents
- 6-7 Administrator: Configuration and Setup

<input checked="" type="checkbox"/>	Location Home
<input checked="" type="checkbox"/>	Staff Schedule
<input checked="" type="checkbox"/>	View Company Attachments
<input checked="" type="checkbox"/>	Manage Company Attachments
<input checked="" type="checkbox"/>	View Location Attachments
<input checked="" type="checkbox"/>	Manage Location Attachments
<input checked="" type="checkbox"/>	Event Calendar
<input checked="" type="checkbox"/>	House Keeping

1. Staff Schedule: Check to show the users work schedule upon sign-in
2. View Company Attachments: Check to allow user to view company attachments
3. Manage Company Attachments: Check to allow user to MANAGE company attachments
4. View Location Attachments: Check to allow user to view company attachments
5. Manage Location Attachments: Check to allow user to MANAGE company attachments
6. Event Calendar: Check to allow user to view Event Calendar on home page, Access to manage Event Calendar is in the Administrative section of User Role
7. House Keeping: Old method of tracking general duties, a better solution is to setup the location as a client.

Legacy E-Mail and Messaging, Emergency Report, Change Password

<input type="checkbox"/>	E-Mail and Messaging
<input checked="" type="checkbox"/>	Emergency
<input checked="" type="checkbox"/>	Change Password

1. E-Mail and Messaging – **unused this is NOT SecureChannel Messaging.**
2. Emergency – ability to print the Emergency Report
3. Change Password – ability for user to change their own password

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Client Information and Program

Program Services = Client Library

See Client Master section in the Knowledge Base.

<input checked="" type="checkbox"/>	Client Information and Program
<input checked="" type="checkbox"/>	Client Admissions
<input checked="" type="checkbox"/>	Addresses
<input checked="" type="checkbox"/>	Client Location and Schedule
<input checked="" type="checkbox"/>	Personal Information
<input checked="" type="checkbox"/>	Personal Information
<input checked="" type="checkbox"/>	Hygiene,Nutritional,Toileting,Mobility
<input checked="" type="checkbox"/>	Behavioral
<input checked="" type="checkbox"/>	People Involved In Care
<input checked="" type="checkbox"/>	Organizations Involved In Care
<input checked="" type="checkbox"/>	Organization
<input checked="" type="checkbox"/>	Organization Employee
<input checked="" type="checkbox"/>	Pharmacies Involved In Care
<input checked="" type="checkbox"/>	Pharmacies Providing Medications
<input checked="" type="checkbox"/>	Pharmacy Employee
<input checked="" type="checkbox"/>	Case Manager
<input checked="" type="checkbox"/>	Company Library: Case Manager
<input checked="" type="checkbox"/>	Medical Professionals Involved In Care
<input checked="" type="checkbox"/>	Company Library: Medical Professionals
<input checked="" type="checkbox"/>	Program Services
<input checked="" type="checkbox"/>	Payer
<input checked="" type="checkbox"/>	Financial
<input checked="" type="checkbox"/>	Service Agreements
<input type="checkbox"/>	SILS Employee
<input type="checkbox"/>	SILS Shift

If Checked:

1. **Client Admissions:** user can see and maintain client master fields. This can be deselected and access granted to other blue ribbons on the page.
 2. **Addresses:** use can access Addresses Blue Ribbon
 3. **Client Location and Schedule:** Manage which locations are available to schedule a client, Set Schedule, Adjust daily schedule (for residential/day programs) Also See Schedule Clients User Guide for alternate method.
 4. **Personal Information**(and sub ribbons): user can access and maintain
 5. **People Involved in Care:** user can access and maintain. Access to report is in Dashboard in Administrative
 6. **Organizations Involved in Care:** user can access and maintain
 7. **Pharmacies Involved in Care:** user can access and maintain
 8. **Case Manager:** user can associate existing case managers with clients and indicate primary
 9. **Company Library: Case Manager:** user can add and modify existing case manager master records
 10. **Medical Professionals Involved in Care:** user can associate existing MPs with clients and indicate primary
 11. **Company Library: Medical Professionals:** user can add and modify existing MPs master records
 12. **Program Services = Client Library** User can create and Schedule Program Services for Clients
 13. **Payer:** user can access and maintain
 14. **Financial:** user can access and maintain
 15. **Service Agreements:** user can enter and maintain Service Agreements and Diagnosis Code Management
- Semi-Independent Living Skills – Call before you check these.**
16. **SILS Employee:** User can manage client/staff services association for Semi-Independent Living
 17. **SILS Shift:** Special Scheduling for Semi-independent Living

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Client Additional Information

See these sections in the Knowledge Base.

Administrative (IAPP) (Progress Reports) (Attach Documents)

Client Master

Period Reports

Client Additional Information	
<input checked="" type="checkbox"/>	Periodic Reports: Maintain Calendar, Notes and Print
<input type="checkbox"/>	Periodic Reports: Only Notes and Print
<input checked="" type="checkbox"/>	Directive
<input checked="" type="checkbox"/>	Diagnosis
<input checked="" type="checkbox"/>	Vital Precautionary Information
<input checked="" type="checkbox"/>	Risk Report Management
<input type="checkbox"/>	Risk Management (Vulnerability Assessments)
<input checked="" type="checkbox"/>	Resident Evacuation Assessment
<input type="checkbox"/>	Individual Service Plan (ISP)
<input checked="" type="checkbox"/>	View Client Attachments
<input checked="" type="checkbox"/>	Manage Client Attachments
<input checked="" type="checkbox"/>	Restricted Folders

- 1. Periodic Reports: Maintain Calendar, Notes and Print:** Maintain Client Calendars (ISP and Calendar Year)
Add/Edit notes on Progress Reports
Ability to print
 - Progress Reports
 - Health Care Reports
 - Medication Errors by Client
- 2. Periodic Reports: Only Notes and Print:** Cannot Maintain Client Calendars, but can add /edit notes and print reports
- 3. Directive:** Ability to manage
- 4. Diagnosis:** Ability to manage
- 5. Vital Precautionary Information:** Ability to manage Allergies
- 6. Risk/Abuse and Neglect Reports:** Individual Abuse Prevention Plan - Manage See User Guide for details in Administrative section
- 7. Risk Management (Vulnerability Assessments)** (retired – do not check)
- 8. Resident Evacuation Assessment:** Ability to Manage
- 9. Individual Service Plan (ISP):** Retired do not check – see Plan of Care below
- 10. View Client Attachments:** User can view documents in unrestricted, current folders
- 11. Manage Client Attachments:** Ability to Manage documents
- 12. Restricted Folders:** User can view documents in Restricted and Unrestricted folders.

Plan of Care

See Plan of Care section in the Knowledge Base

<input checked="" type="checkbox"/>	Plan of Care
<input checked="" type="checkbox"/>	Read Plan of Care
<input checked="" type="checkbox"/>	Manage Plan of Care
<input checked="" type="checkbox"/>	Rate

Read Plan of Care User can read only or read and manage Care Plans.

Manage Plan of Care: User can update Plan of Care, Notify others to read, and monitor who has read.
See Plan of Care User Guide

Rate: User can maintain Rate field on Programs and Medical Services and print on POC Report.

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Medication Inventory, Create/Manage Services Provided

See Medication and Medical Services in the Knowledge Base.

<input checked="" type="checkbox"/>	Medication Inventory
<input checked="" type="checkbox"/>	General Medication Change
<input checked="" type="checkbox"/>	Create / Manage Services Provided

- Medication Inventory:** Ability to add/manage Medications and schedule Medical Services
- General Medication Change:** allows the user to change non-key medication fields without inactivating the old version and creating a new one.
* This was done to allow for general changes like adding missed dose information to existing records.
We advise restricting this ability.
- Create/Manage Services Provided:** Ability to create and manage Program and Medical Services

Charting on Program Services

See Programs and Services section in the Knowledge Base.

Scheduled Direct Care Client Services Provided

<input checked="" type="checkbox"/>	Scheduled Direct Care
<input checked="" type="checkbox"/>	Add/Edit Recreation Activities
<input checked="" type="checkbox"/>	Recreation
<input checked="" type="checkbox"/>	Can change actual time
<input checked="" type="checkbox"/>	Task Transaction List
<input checked="" type="checkbox"/>	Client Services Provided
<input checked="" type="checkbox"/>	Document Services Provided
<input checked="" type="checkbox"/>	Counts and Monitoring
<input checked="" type="checkbox"/>	Health Care Services
<input checked="" type="checkbox"/>	Add/Edit Recreation Activities
<input checked="" type="checkbox"/>	Recreation
<input checked="" type="checkbox"/>	Financial Review

Schedule Direct Care: Ability to chart on non-medical services
Add/Edit Recreation Activities: ability to maintain master file
Recreation: Ability to chart Recreation
Can Change Written Date/Time – user can change the system time that defaults to record when a note was saved. (planned)
Task Transaction List(Report) – ability to run .csv reports for a single client or multiple clients

Client Services Provided: Used Rarely

Used to build special forms used by administrative staff.
Document Services Provided – ability to chart on unscheduled services (no scheduled services show)
Counts and Monitoring – unused
Health Care Services – ability to chart
Add/Edit Recreation Activities: ability to maintain master file
Recreation: Ability to chart Recreation
Financial Review- ability to record account balances

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Incident Reports and Quality of Care

See Incident Reports and Quality of Care Analysis section in the Knowledge Base.

<input checked="" type="checkbox"/>	Incident Reports (Retired)		<p>If your company has not used Adaptive Incident Reports uncheck this. If you have used Incident Reports You may check for specific individuals who need access to old incident records. <u>This option will appear only in the task directory if checked.</u></p>
	<input checked="" type="checkbox"/> Report an Incident		
	<input checked="" type="checkbox"/> Controlled Procedure		
	<input checked="" type="checkbox"/> Manage Incident Reports		
	<input checked="" type="checkbox"/> Notify - Default location		
<input checked="" type="checkbox"/>	Incident Reports		<p>Submit a new ticket –can add a new incident ticket View only authored IRs –can see only tickets that the user entered Access Manage Tickets Page can view this page Add Follow-up notes –add follow-up notes Manage Status –change an Incident Ticket Status and add close date Attach Document – can attach a document Body Diagram – can maintain the body diagram 3rd Party Process – can record which 3rd parties were contacted and how Staff Notes- can record and read notes regarding the ticket. Administrative Analysis – can answer questions required for 3rd party reports and assign Service Quality Indicator to a ticket Create AZ Incident Report – Print in AZ format Create MN Report – Print in MN format Quality of Care Analysis –can access this area</p>
	<input checked="" type="checkbox"/> Submit a new ticket		
	<input type="checkbox"/> View only authored tickets		
	<input checked="" type="checkbox"/> Access Manage Tickets page		
	<input checked="" type="checkbox"/> Add Follow-up notes		
	<input checked="" type="checkbox"/> Manage Status		
	<input checked="" type="checkbox"/> Attach document		
	<input checked="" type="checkbox"/> Body Diagram		
	<input checked="" type="checkbox"/> 3rd Party Process		
	<input checked="" type="checkbox"/> Staff Notes		
	<input checked="" type="checkbox"/> Administrative Analysis		
	<input checked="" type="checkbox"/> Create AZ Incident Report		
	<input checked="" type="checkbox"/> Create MN Report		
	<input checked="" type="checkbox"/> Quality of Care		
<input checked="" type="checkbox"/>	Non-Medical Segregated Records		<p>Non-Medical Segregated Records User Can create Transactions User can run Report See Non-Medical Forms User Guide</p>
	<input checked="" type="checkbox"/> Create Transactions		
	<input checked="" type="checkbox"/> Report		

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Medication Administration

See Medication and Medical Services sections in the Knowledge Base.

<input checked="" type="checkbox"/>	Medication Administration
<input checked="" type="checkbox"/>	Chronologic MAR
<input checked="" type="checkbox"/>	Medication Revision
<input checked="" type="checkbox"/>	Multi Chart
<input checked="" type="checkbox"/>	Medication Administration Recording
<input checked="" type="checkbox"/>	Segregated Services
<input checked="" type="checkbox"/>	Medication Error Recording
<input checked="" type="checkbox"/>	Manage Medication Error Reports
<input checked="" type="checkbox"/>	Compliance
<input checked="" type="checkbox"/>	eMAR
<input type="checkbox"/>	Prevent All Clients/location eMAR Request
<input checked="" type="checkbox"/>	Medical Services

Medication Administration: Ability to access the page

Chronologic MAR: Run this report

Medication Revision – UNUSED – do not check.

Multi-Chart – Ability to create charting for several days at a time.

Medication Administration Recording: Ability to chart on medications and Services (must have 5 access to use 4)

Segregated Services: Ability to chart on restricted services

Medication Error Recording: Ability to create a medication error record

Manage Medication Error Reports: Ability to add follow-up and resolution notes and run Medication Error Report by Employee

eMAR – Ability to run an EMAR Report

Prevent All Clients/location eMAR Request: restricts the user to running for only the client they are current charting on.

Medication Services: ability to run this report.

Medical Charting (old)

See User Guide: Medical Charting and Reporting

<input checked="" type="checkbox"/>	Medical Charting
<input type="checkbox"/>	Blood Pressure Record
<input type="checkbox"/>	Blood Sugar
<input checked="" type="checkbox"/>	Sleep Record
<input checked="" type="checkbox"/>	Seizure
<input type="checkbox"/>	Bowel Movement
<input type="checkbox"/>	Void/ Intake

1. Blood Pressure Record – **do not use**, Create a Medical Service and Schedule

2. Blood Sugar – **do not use**, Create a Medical Service and Schedule

3. **Sleep Record** – Many Customers like this one – but you can create a medical service and schedule on the MAR

4. **Seizure** – chart on seizures

5. Bowel Movement – **do not use**, create a Medical Service and Schedule

6. Void/Intake - **do not use**, create a Medical Service and Schedule

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Appointments and Event Reminders

See Appointments section in the Knowledge Base.

<input checked="" type="checkbox"/>	Appointments
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Check to grant access to add/maintain Appointment Calendars

Client Reports

See User Guides for examples

<input checked="" type="checkbox"/>	Client Reports
<input checked="" type="checkbox"/>	Admin Reports
<input checked="" type="checkbox"/>	Medication Reports
<input checked="" type="checkbox"/>	Progress Reports
<input checked="" type="checkbox"/>	Employee Reports

Users have full access to all reports in each section checked. We suggest limiting this to administrators only.

PCA Reports

See User Guide: EHR – Programs and Services

<input checked="" type="checkbox"/>	PCA Reports
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Time can be recorded and reported on Services Provided Page

Progress Notes

See Progress Notes section in the Knowledge Base.

<input checked="" type="checkbox"/>	Progress Notes
<input checked="" type="checkbox"/>	Read Only Notes
<input checked="" type="checkbox"/>	Create Progress Notes
<input checked="" type="checkbox"/>	Progress Notes Report
<input checked="" type="checkbox"/>	Billable Notes Report
<input checked="" type="checkbox"/>	Verify Read
<input type="checkbox"/>	Can Change Written Date/Time
<input checked="" type="checkbox"/>	Default Type 1
<input checked="" type="checkbox"/>	Default Type 2
<input type="checkbox"/>	Default Type 3
<input type="checkbox"/>	Default Type 4
<input type="checkbox"/>	Default Type 5

Read Only Notes – user can only show existing notes, and mark as read.

Create Progress Notes – user can add notes, show notes, mark notes as read and add follow up notes

Progress Notes Report – user can run a Notes Report

Billable Notes Report – can generate .csv for billing

Verify Read – user can run a list that shows who verified that they read a note

Can Change Written Date/Time – user can change the system time that defaults to record when a note was saved.

Default Types 1-5: When note types are created they may be also designated as default types. User Roles can be assigned different default types based on their role. Example – Direct Care default type is General Note, Nursing default is Health Note.

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Mental Health Services

See Mental Health Services section in the Knowledge Base.

<input checked="" type="checkbox"/>	MHS Practitioner
<input checked="" type="checkbox"/>	MHS Billing
<input checked="" type="checkbox"/>	FA, LOCUS, ITP
<input checked="" type="checkbox"/>	Entry
<input checked="" type="checkbox"/>	Approval
<input checked="" type="checkbox"/>	Delete

MHS Practitioner: User can create MHS Progress Notes
MHS Billing - approve MHS Reports and create billing lists
FA, LOCUS, ITP Functional Analysis, LOCUS and Individual Treatment Plans)

- Entry** – User can enter
- Approval**- can approve
- Delete** – can delete

Human Resource Manager

See Human Resource Master section in the Knowledge Base.

<input checked="" type="checkbox"/>	Human Resource Manager	HR Search – gives user the ability to maintain existing records
<input checked="" type="checkbox"/>	HR Search	Basic HR information – gives user the ability to add new records and modify basic information including: PASSWORDS
<input checked="" type="checkbox"/>	Basic HR Information	Location Assignment – gives user the ability to grant and remove access to locations
<input checked="" type="checkbox"/>	Location Assignment	User Role Assignment – gives user the ability to change a user role
<input checked="" type="checkbox"/>	User Role Assignment	Certification Assignment – gives user the ability to update certification information
<input checked="" type="checkbox"/>	Certification Assignment	Contact and Address Information – give user the ability to add phone numbers, email and external information
<input checked="" type="checkbox"/>	Contact And Address Information	Personal Information – gives user the ability to manage
<input checked="" type="checkbox"/>	Personal Information	HR Event – gives user the ability to add Events – (incidents, and mile stones) and run an event report
<input checked="" type="checkbox"/>	HR Event	View Staff Attachments – user can see existing attachments
<input checked="" type="checkbox"/>	View Staff Attachments	Manage Staff Attachments – user can add and remove attachments
<input checked="" type="checkbox"/>	Manage Staff Attachments	Password Reset -user can change a password for an existing user.
<input checked="" type="checkbox"/>	Password Reset	Levels
<input checked="" type="checkbox"/>	Level 1	Allow limited access to a user so they can change passwords, add HR Events, grant or revoke location permissions etc.
<input checked="" type="checkbox"/>	Level 2	Level :
<input checked="" type="checkbox"/>	Level 3	1 user can't manage information for any other user
<input checked="" type="checkbox"/>	Level 4	

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	<p>2 user can manage info for level 1 Users as permitted</p> <p>3 user can manage info for level 1 & 2 as permitted</p> <p>4 user can manage info for level 1,2,3,4 as permitted</p> <p>For Limited Access: Grant the User Role</p> <ol style="list-style-type: none"> Select HR Search the area(s) the user should be able to access. permission Level
--	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Human Resource Scheduler – Schedule Staff

See Schedule Staff section of Knowledge Base.

<input checked="" type="checkbox"/> Human Resource Scheduler	Schedule Staff
--------------------------------------------------------------	----------------

Employee Log On History

<input checked="" type="checkbox"/> Employee Log on History	View IP addresses used by staff to log into the system
-------------------------------------------------------------	--------------------------------------------------------

Create Shifts and Classes

See Schedule Staff and Schedule Clients sections of Knowledge Base based on your goal.

<input checked="" type="checkbox"/> Shift/ Class/ HG Manager	Ability to create shifts
--------------------------------------------------------------	--------------------------

Ticket System

<input checked="" type="checkbox"/> Bug Report	Ability to send an idea or report a problem to Adaptive
------------------------------------------------	---------------------------------------------------------

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Administrative

See Administrator section in Knowledge Base – and contact Adaptive to confirm changes.

<input checked="" type="checkbox"/>	Administrative
<input checked="" type="checkbox"/>	Dashboard
<input checked="" type="checkbox"/>	Client Report Writer Manage and Run
<input checked="" type="checkbox"/>	Client Report Writer Run
<input checked="" type="checkbox"/>	Client Roster
<input checked="" type="checkbox"/>	Client/Medical Professional Report
<input checked="" type="checkbox"/>	Client/Case Manager Report
<input checked="" type="checkbox"/>	Staff Roster
<input checked="" type="checkbox"/>	Company ID Numbers
<input checked="" type="checkbox"/>	Company Preference
<input checked="" type="checkbox"/>	Company Services
<input checked="" type="checkbox"/>	HR Training
<input checked="" type="checkbox"/>	HR Meeting
<input checked="" type="checkbox"/>	Payroll Reports
<input checked="" type="checkbox"/>	Event Calender Admin
<input checked="" type="checkbox"/>	Manage Locations
<input checked="" type="checkbox"/>	Company Configurations
<input checked="" type="checkbox"/>	MAR Configuration
<input checked="" type="checkbox"/>	Remove Records
<input checked="" type="checkbox"/>	Late Charting Reminder Schedule
<input checked="" type="checkbox"/>	Transfer Clients/Remove LCRs
<input checked="" type="checkbox"/>	Check Out/In

1. **Dashboard** – access to administrative lists of information
 - a. Client Report Writer Manage and Run– Create and Run new reports
 - b. Client Report Writer Run – Run reports only
 - c. Client Roster – Produce a report of all Active and Inactive Client Records
 - d. Client/Medical Professional Report- Produce a report of all medical professionals assigned to all clients (active and inactive)
 - e. Client/Case Manager Report – Produce a report of all Case Managers assigned to all clients (active and inactive)
 - f. Staff Roster – Produce a report of all staff active and inactive.
2. **Company ID Numbers** – ID numbers for companies and payers. Required to submit Claims via EDI
4. **Company Preferences** – HR information and general
5. **Company Services** – Library of generic services which can be copied to client libraries
6. **HR Training** – create training classes and record attendance
7. **HR Meeting** – unused
8. **Payroll Reports** – unused
9. **Event Calendar Admin** – Manage Events
10. **Manage Locations** – Ability to manage location options
11. **Company Configuration** – Company level configuration tables
12. **MAR Configuration** – MAR options
13. **Remove Records** – ability to remove incorrect charting
14. **Late Charting Reminder Schedule** – enter times when charting should be checked.
15. **Transfer Clients/Remove LCRs** – ability to transfer a clients from one location to another and to unwanted Late Charting Reminders
16. **Check Out/In Clients**
 - Master Schedule: the user can maintain a client’s master schedule.
 - Maintain Daily Schedule: user can record absences, late arrivals, and early departures.

Both types of users can run “Today’s Schedule” Report

Schedule Clients

See Schedule Clients section in Knowledge Base.

<input checked="" type="checkbox"/>	Schedule Clients
<input checked="" type="checkbox"/>	Master Schedule
<input checked="" type="checkbox"/>	Maintain Daily Schedule

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