Operators & Roles
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1 Operators & Roles Overview

All Optum PM and Physician EMR operators are set up with a user profile based on their responsibilities and duties in a practice. An operator's privileges in Optum PM and Physician EMR are determined by the Role(s) and Override(s) assigned to their profile:

- **Roles** determine which Optum PM and Physician EMR modules and applications an operator can access.

- **Overrides** are used to either restrict an operator's access to a certain applications and functionality, or they can be used or grant an operator additional privileges that may not be included in their role. **Example**
  
  :If an operator needs access to only one application within the **Financial** module, you could add an override to their profile to allow the user to access just a particular financial application. From the Operator & Roles application you can:
  
  - Add an operator
  - Edit an existing operator's roles/override
  - Remove an operator from your practice
  - Monitor operator activities

**Note**: View the Clinical Role Description for a detailed list of the privileges assigned to each clinical role.

1.1 Operator Activity Log

The Operators & Roles application also allows you to monitor each operator's activity.

**To view the Operator Activity Log:**

1. Click the **Administration** module. Optum PM displays the Practice tab.
2. Click the **Operators & Roles** link. Optum PM displays the Group Operators list.
3. Click the **A, L, O,** or **R** buttons to the right of the operator's name to view the following:

- **A**: generates a list of operator activity for the last seven days
- **L**: generates a list of operator activity for the last thirty days including the date and time each operator logged in and from what IP address.
- **O**: lists all operator changes.
- **R**: lists each operator's access rights for all Optum PM and Physician EMR applications or for all applications of a particular module.
2 Operator Settings

Every operator must have a user name and a password to log into Optum PM and Physician EMR. You are required to change your password every 90 days. Optum PM and Physician EMR reminds users seven days before their password expires and gives you the option of changing the password at that time. If your password expires, you can reset the password without having to log a ToDo to the Support Department. You can also change your password at any time after you begin using Optum PM and Physician EMR- even prior to being required to by the system.

The Operator Settings application is also used to store the operator's contact information. This information is used by Optum PM and Physician EMR Support to contact operator for support issues or in response to ToDos.

Note: It is important to keep the General Information section updated with your current phone number and email address.

2.1 Changing a Password

To change your password:

1. Click the Administration module. The application displays the Practice tab.
2. Click the Operator Settings link. Optum PM and Physician EMR launches the Operator Settings application.
3. In the Old Password box, enter your current password.
4. In the New Password field, enter your new password. The new password must meet the following criteria:
   • The new password must differ from your old password by at least one character.
   • The new password must consist of at least eight characters.
   • At least one of the eight characters must be a capital letter and at least one must be a number. For example: "Password5"
5. In the **Verify Password** box, re-enter your new password.

6. From the **Question** list, select a security question.

7. In the **Answer** box, enter the answer to the security question.

8. In the **Phone** and **Email** fields, enter your phone number and email address. It is important to keep this contact information up to date as it is used by Support to follow up on support issues or ToDos.

9. Click **Save**. The application redirects you to the login screen where you must log in using your new password.

### 3 Adding an Operator

**To add an operator:**

1. Click the **Administration** module. Optum PM displays the Practice tab.

2. Click the **Operators & Roles** link. Optum PM displays the Group Operators list.

3. Scroll down to the bottom of the Operators list and then click **New**. Optum PM opens the Add New Operator form in the lower frame of the screen.

4. In the **Name** section:
   a. Skip the **Title** box. (Not used for operators.)
   b. In the **First Name** box, enter the operator's first name.
   c. Skip the **Middle** name box. (Not used for operators.)
   d. In the **Last Name** box, enter the operator's last name.
e. Skip the Suffix box. (Not used for operators.)

f. In the Nickname box, enter a nickname, if applicable.

g. In the Email Address box, enter the operator’s email address. If the operator does not have an email address, they should create a free account on any email server, such as Hotmail or Google.

5. In the User section:

a. In the Login box, enter the operator’s first and last name with no space in the middle. For example: "janesmith"

b. In the Password box, enter a default password.

   **Note:** The password must be at least eight characters, contain at least one capital letter and at least one number. Example: "Password1"

c. In the Verify Password box, re-enter the password

d. The Change Password check box is selected by default to prompt the operator to reset their password.

6. In the Security section:

a. In the Question and Answer boxes, enter a security question and the answer.

b. Skip the Confirmation Number box (a confirmation number is not required).

7. In the Access section:

a. The Active field is set to Yes by default to indicate that the operator is active in the system.

b. In the Timeout box, enter the amount of time (in minutes) that the Optum PM system can be idle before the operator is automatically logged out.

   **Note:** The maximum idle time in Optum PM is 180 minutes.

c. From the Time Zone list, select the time zone in which the operator is working. Optum PM calculates the check in, take back and check out time based on the operator’s time zone setting. Additionally, the time stamp in the clinical log, progress note and the appointment list are also based on the time zone set for the operator.

   **Note:** The time zone defaults to Eastern Standard Time (EST) if no time zone is set for the operator.

d. (Optional) The Primary/Secondary IP boxes are used to designate the IP addresses (computers) from which an operator can access Optum PM. Populating these fields means that the operator can only access Optum PM from the designated IP addresses, such as the office or home.

e. (Optional) The Single Sign-On feature allows the operator to log on to Optum PM through another system using a single user ID and password. (This option is only
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available if single sing-on has been set up for your company.) If the operator will be using single sign-on:

- Enter the operator's user ID in the Single Sign-On ID box.
- Enter a name of the system the user is logging into in the Single Sign-On IDP box. For example: If the operator is accessing Optum PM through the AMA website, then enter "AMA."
- If the operator is only allowed to access Optum PM using single sign-on, select Yes in the Single Sign-On Only field. If the operator is allowed to log on to Optum PM directly, then select No.

f. In the Roles field, click the Roles button. Optum PM displays the Add Operator Role window. Select the checkbox next to each role you want to assign to the operator, then click Add.

**Note:** After an operator is added, you can override their role to allow access to particular features and applications in Optum PM. See Setting Overrides for an Operator. View the Clinical Role Description for a detailed list of the privileges assigned to each clinical role.

g. From the Group Default list, select a default group for the operator. This is the group the operator will enter when they log into Optum PM. From the default group, the operator can access any additional groups to which they are assigned.

h. From the Position list, select a position for the operator.

i. If the operator is a provider, select their name from the Provider list. This allows Optum PM to identify the operator as a provider in ToDos, messaging, etc.

j. In the Folders field, click the search button. Optum PM displays the Operator Folder Access window. Select the checkbox next to the folder(s) the operator is permitted to access and then click OK.

k. In the ToDo Queues field, click the search button. Optum PM displays the Operator Queue Access window. Select the check box next to the queue(s) the operator is permitted to access and then click OK.

8. Click Save. Optum PM adds the operator.

4 Removing an Operator

You cannot either deactivate or remove an operator to prevent them from logging in to Optum PM and Physician EMR. Deactivating makes the operator's profile inactive and prevents them from logging in to Optum PM and Physician EMR. However, you can reactivate an inactive operator at any time. Removing an operator permanently deletes their profile from Optum PM and Physician EMR.
4.1 Deactivating an Operator

Deactivating an operator prevents the operator from logging into Optum PM and Physician EMR but retains their operator profile.

To deactivate an operator:

1. Click the Administration module. Optum PM displays the Practice tab.
2. Click the Operators & Roles link. Optum PM displays the Group Operators list.
3. Click on the name of the operator you want to deactivate. Optum PM displays the operator’s profile in the lower frame of the screen.
4. In the Active field, click No.
5. Click Save. The application deactivates the operator.

Tip: You can reactivate an operator at any time by clicking Yes in the Active field.

4.2 Removing an Operator

Removing an operator permanently deletes their operator profile from Optum PM and Physician EMR.

To remove an operator:

1. Click the Administration module. Optum PM displays the Practice tab.
2. Click the Operators & Roles link. Optum PM displays the Group Operators list.
3. Select the checkbox next to the name of the operator you want to delete.
4. Scroll down to the bottom of the operators list and then click Delete. The application removes the operator from the system.

5 Overriding an Operator's Role

Overrides are used to either restrict an operator's access to a certain applications and functionality, or they can be used or grant an operator additional privileges that may not be included in their role. For example, if the operator's role doesn't allow them to access the Patient module, you could add an override that allows them access to a particular application within the Patient module.

5.1 Adding an Override

To add overrides to an operator's role:

1. Click the Administration module. Optum PM displays the Practice tab.
2. Click the Operators & Roles link. Optum PM displays the Group Operators list.
3. Click on the name of the operator for whom you want to add an override. Optum PM displays a summary of the operator's information in the lower frame of the page.
4. Click the **Override** button. The application opens the Security Override window.

5. From the **Module** list, select the Module that contains the application for which you want to set an override. For example, select the **Home** module if you want set an override for the **Cases** application. You must select a module before you can select an application.

6. From the **Application** list, select the application for which you need to set overrides. Optum PM displays the current edit level assigned to the operator for the selected application.

7. Select or deselect the **R**, **A**, **E**, **D** check boxes to set the operator's edit level for the application, then click **Add**. Refer to the Operator Edit Level Options table for a description of each option:

<table>
<thead>
<tr>
<th>OPERATOR EDIT LEVEL OPTIONS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Edit Level</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>R (Read)</td>
<td>Read only access.</td>
</tr>
<tr>
<td>A (Add)</td>
<td>Ability to edit information.</td>
</tr>
<tr>
<td>E (Edit)</td>
<td>Ability to edit information.</td>
</tr>
<tr>
<td>D (Delete)</td>
<td>Ability to delete information.</td>
</tr>
</tbody>
</table>

8. Repeat **steps 5-7** for each application override you need to set for the operator.
9. When all of the overrides are added, click **Done** to close the Security Override window.

![Security Override -- Webpage Dialog](image)

10. Click **Save** at the bottom of the operator's summary to save the changes.

### 5.2 Removing an Override

To remove an override:

1. Click the **Administration** module. Optum PM displays the Practice tab.
2. Click the **Operators & Roles** link. Optum PM displays the Group Operators list.
3. Click on the name of the operator for whom you want to remove an override. Optum PM displays a summary of the operator's information in the lower frame of the page.
4. In the **Override** section of the **Roles** box, double-click on the override you want to remove. Optum PM displays a confirmation dialog box.
5. Click **OK** to remove the override.
6. Click **Save** to save your changes.

### 6 Editing an Operator's Role

#### 6.1 Adding a Role

To add a role:

1. Click the **Administration** module. Optum PM displays the Practice tab.
2. Click the **Operators & Roles** link. Optum PM displays the Group Operators list.
3. (optional) Click the **R** button in the **Action** column next to the operator's name. Optum PM displays the operator's current rights and access levels. You can view an operator's access rights for a specific module by selecting it from the **Module** list. Close the Application Access Rights window when finished.
4. From the list of group operators, click on the name of the operator for which you want to add a role. Optum PM displays the operator's information in the lower frame of the screen. All of the roles currently assigned to the operator are listed in the Roles box.

5. In the Roles field, click the Roles button. Optum PM displays the Add Operator Role window.

   Note: View Clinical Role Descriptions for a detailed list of the privileges assigned to each clinical role.

6. Select the check box next to each role you want to assign to the operator, then click Add.

   Note: Deselecting a role checkbox removes the role from the operator's profile.

7. Click Save to update the operator's profile.

6.2 Removing a Role

To remove a role:

1. Click the Administration module. Optum PM displays the Practice tab.

2. Click the Operators & Roles link. Optum PM displays the Group Operators list.

3. (optional) Click the R button in the Action column next to the operator’s name. Optum PM displays the operator's current rights and access levels. You can view an operator’s access rights for a specific module by selecting it from the Module list. Close the Application Access Rights window when finished.

4. From the list of group operators, click on the name of the operator for whom you want to remove a role. Optum PM displays the operator's information in the lower frame of the screen.
5. In the Roles box, double-click on the role you want to remove. Optum PM and Physician EMR displays a confirmation dialog box.

6. Click OK to remove the role.

7. Click Save to update the operator’s profile.

7 Adding an Operator to a Group

Each operator is assigned a default group when their operator role is created, but you can add an operator to additional groups if needed.

To add an operator to a group:

1. Click the Administration module. Optum PM displays the Practice tab.

2. Click the Operators & Roles link. Optum PM displays the Group Operators list.

3. Scroll down to the bottom of the operator list and then click Search. Optum PM displays the Operator Search window.

4. To search for a specific operator, enter the operator’s name in the First Name and/or Last Name fields and then click Go. Optum PM displays a list of operators.

5. Select the checkbox in the Add to Group column next to the operator(s) you want to add to the group.

6. In the Role section, select the checkbox next to the role(s) you want to assign to the operator(s).

7. Click Save when finished. Optum PM adds the operators to the group.