Users

Tools >> List Editor >> System >> User

Defining Users

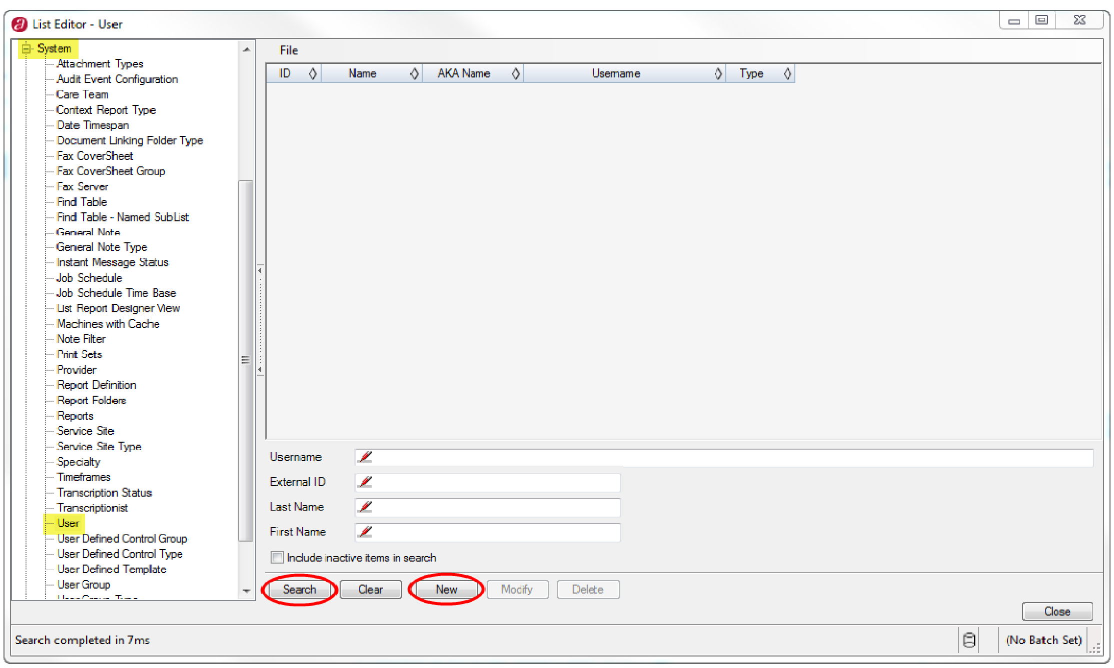
Define all users who will require access to the application. All users must have been predefined in the Active Server Directory for the network. Aprima will be set up as a user in your system; this is to enable Aprima access if you ever need support.

A User definition includes:

- Demographics
- Settings
- Batch Security (This tab does not appear until the user has been saved.)
- Messaging (This tab does not appear until the user has been saved.)
- Outlook Update

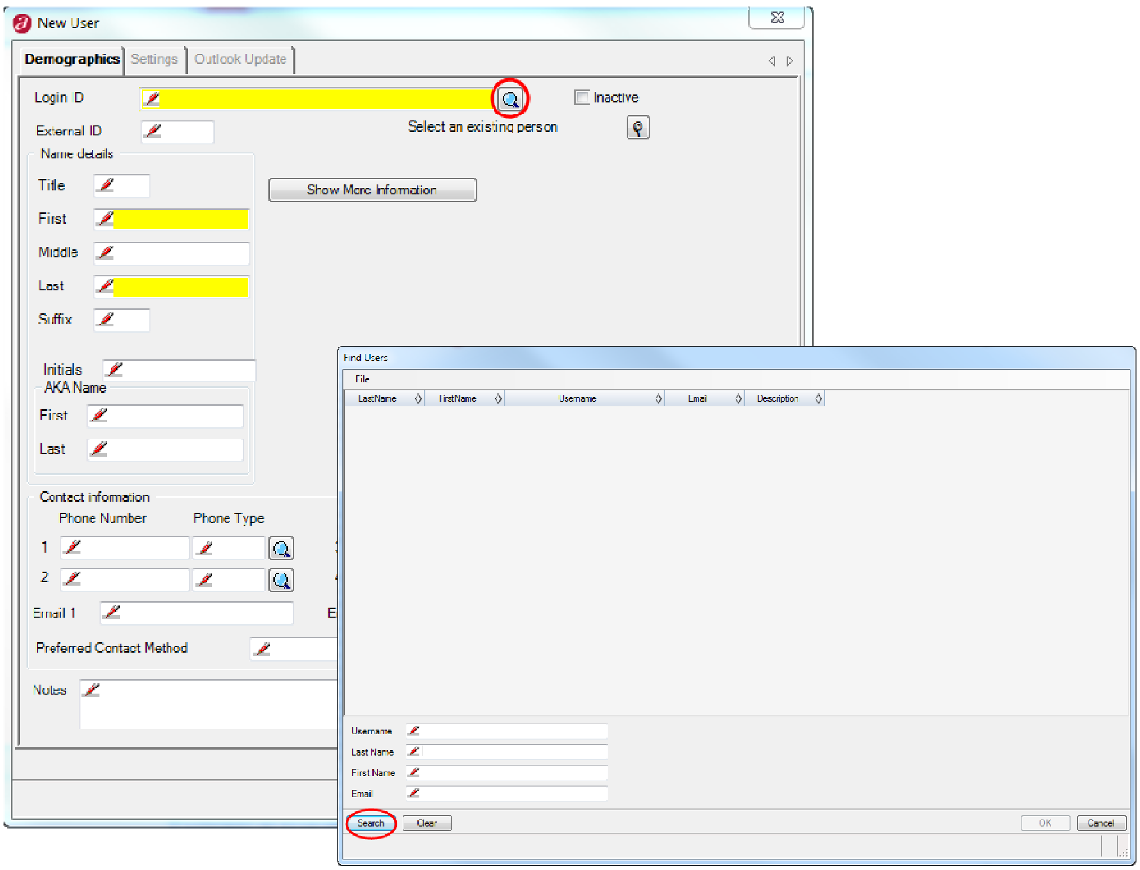
To define a user, from the List Editor, click “System,” then click “User.” Click “Search” to see a list of all users currently in the database. Be sure the user you wish to create, doesn’t already exist in the database.

Click “New” to set up a new user.

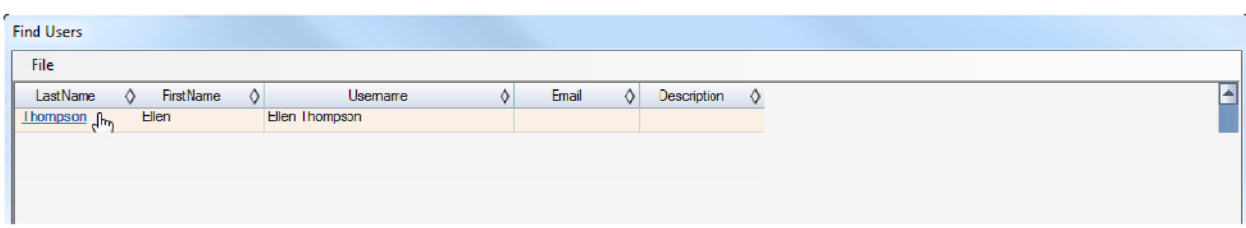


Revised 06/26/2012

The Demographics tab will open by default. All highlighted fields are required. This screen cannot be saved until all required fields are populated. Click the magnifying glass icon to search for and select the Login ID. This is the user name as defined in the Active Server Directory or other user authentication scheme.



Chose the user you wish to add to Aprima by clicking on the blue hyperlink.



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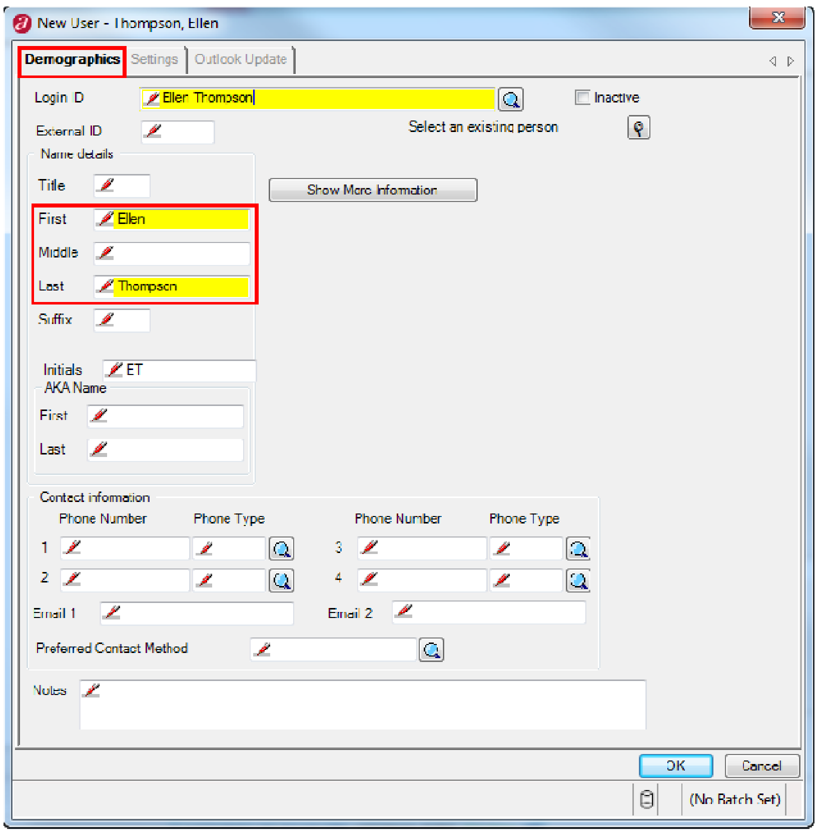
The First Name and Last Name fields are limited to 50 characters each. If the person's first or last name is more than 50 characters, the name is truncated. The 50 character truncated name will appear on all windows, documents, and reports that use the person's name.



The remaining fields on the Demographics tab are optional. You may populate them if, if desired.

It is recommended that you do not delete users from Aprima or from your Active Directory once they have been used. If a user is no longer with your practice, or does not require access to Aprima select the "Inactive" checkbox.

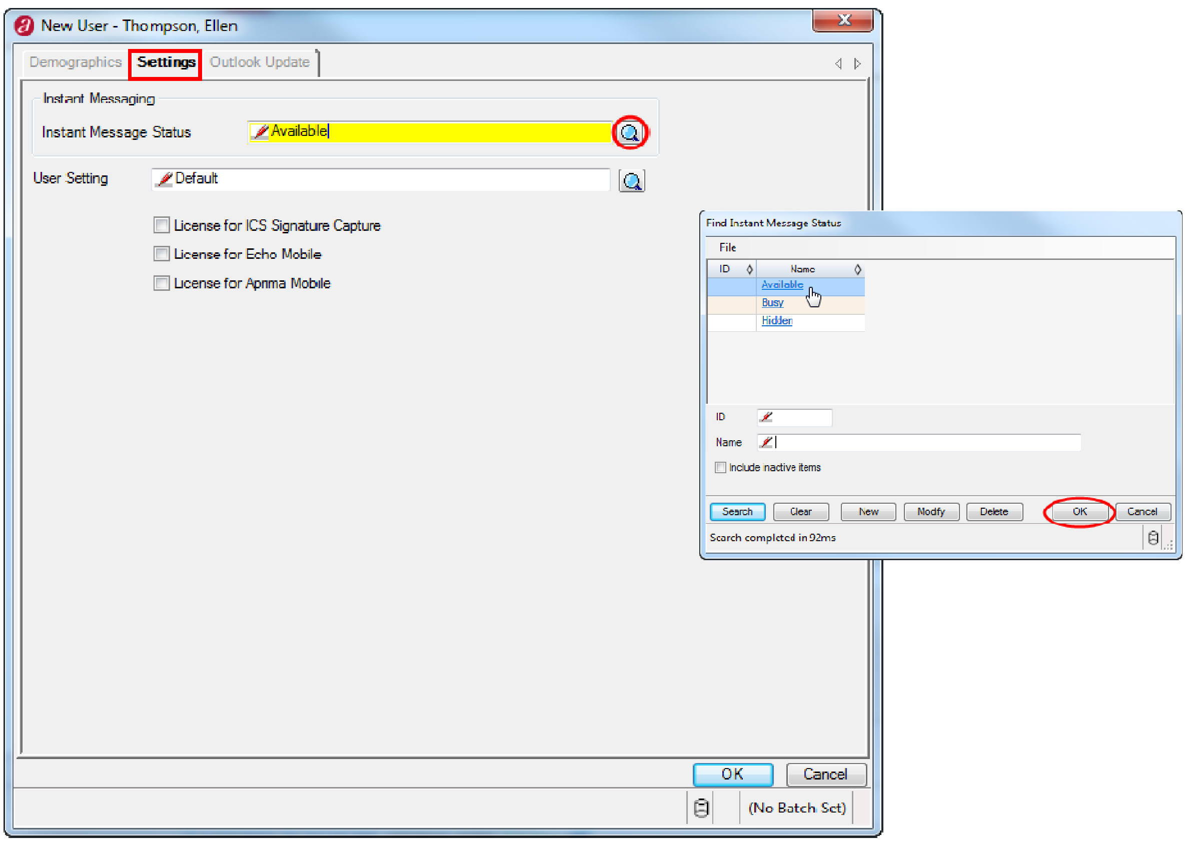
Click the Settings tab to enter custom settings for the user.

In the Instant Messaging area, select the desired default Instant Message Status. The available Instant Message Statuses are: Hidden, Available and Busy.

All users have the default instant message status “Hidden,” when the application is initially installed. (***Note***: This default instant message status is the status given each time the user logs into the application. This default status setting is not changed by selecting another status from the Instant Message chat window while using the application.)

In the User Setting field, select the desired user settings definition. Default is the recommended setting.

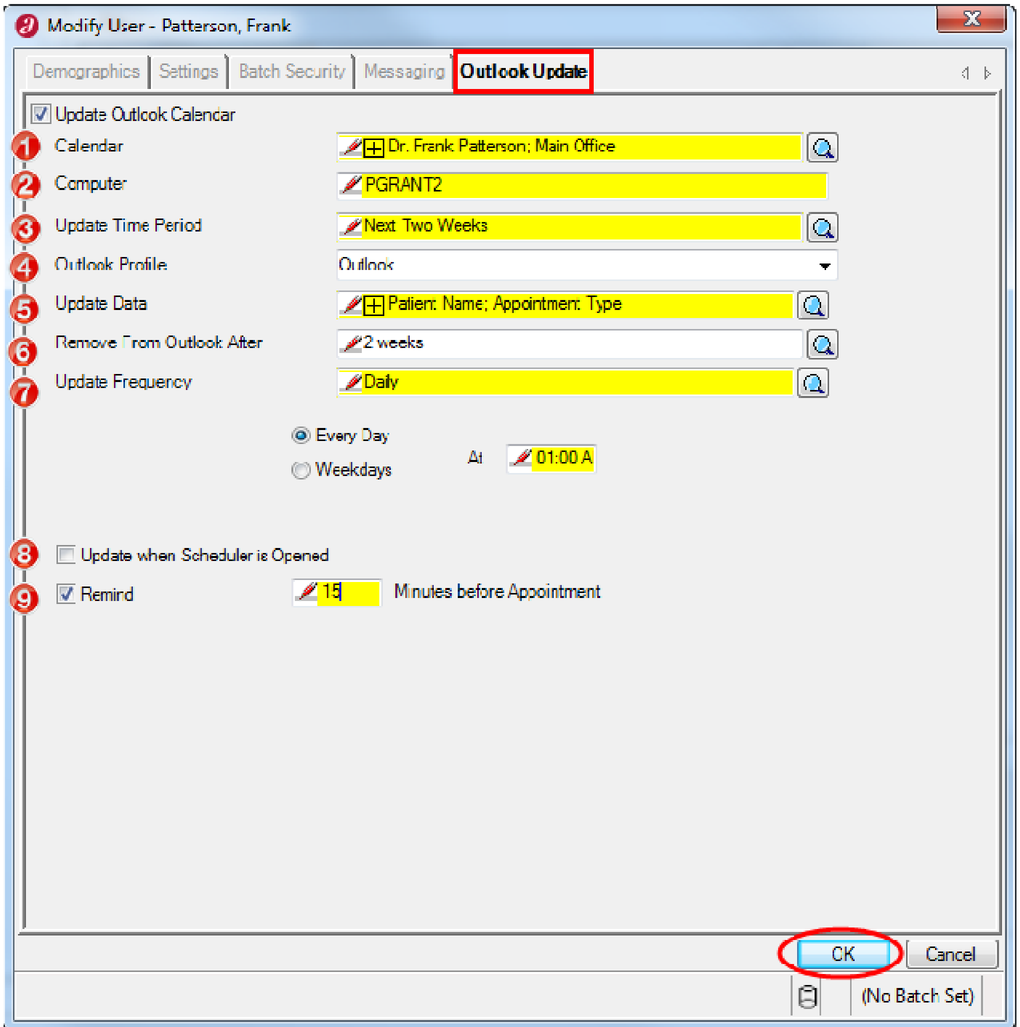
If you are using the optional signature capture add-in application for document generation, select the License for ICS Signature Capture checkbox for each user who will either create formatting models for predefined forms or signature capture or generate documents from those formatting models.



Revised 06/26/2012

You can copy appointments from a calendar in the application to a calendar in Microsoft Outlook®, and from there it can be sent to any handheld device (smart phone, PDA, etc.) that supports or can display Outlook records. This enables physicians, physician assistants, nurse practitioners, nurses, and other users to access information about their schedules remotely. Users can only view appointment information; they cannot change appointment information or create new appointments on their handheld device. To configure Outlook settings, select the Outlook Update tab, then select the Update Outlook Calendar checkbox.

1. Select the Calendar or calendars that you want to copy. Calendars must be set up in Aprima before they are available to choose from on the Outlook Tab.
2. The Computer field displays the name of the computer you are using. If desired, you may enter the name of another computer on which the Outlook calendar resides.
3. Select the Update Time Period. Appointments within this time period will be copied to Outlook.
4. Select the Outlook Profile to which the appointments are to be copied. This defaults to the default Outlook profile on the selected computer.
5. If desired, use the Update Data field to identify the information from the application calendar to be copied to the Outlook calendar. The date and time of appointments are always copied.
6. If you wish to remove old appointments from the Outlook calendar to conserve space, enter the time period after which appointments should be removed in the Remove From Outlook After field.
7. In the Update Frequency field:
    a. Select the frequency at which you want to copy appointments to the Outlook calendar.
    b. If needed, enter the additional frequency information.
8. Select the Update When Scheduler is Opened checkbox if you want the appointment data copied any time you open the selected calendar in the Scheduler window.
9. If you want to use the Outlook reminder functionality for the appointments:
    a. Select the Remind checkbox.
    b. Enter the number of Minutes Before Appointment that you want to be reminded.



Click “Ok” to save your new user. After the user has been saved, the Batch Security and Messaging tabs will be available for configuration.

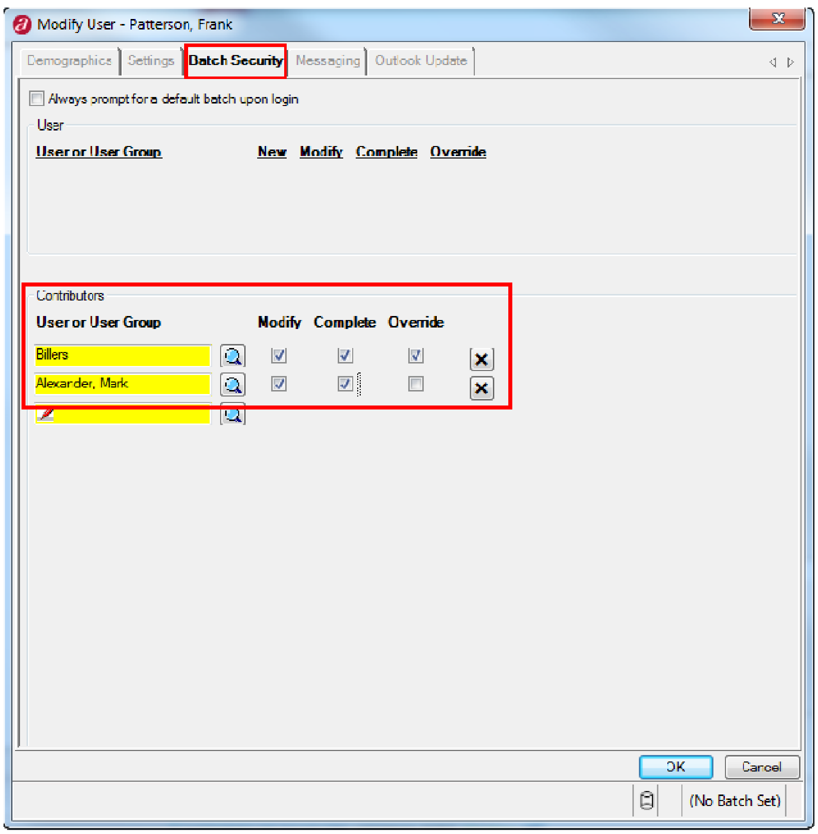
From the list of users, in the List Editor, select the user you just created. Click “Modify.”

Click the Batch Security Tab.

Select the “Always Prompt for a Default Batch upon Login” checkbox if the user is to be prompted for default batch. Leave the checkbox deselected if the user is not be prompted.

In the Contributors section, use the Find icon to search for and select the user and/or group who may contribute or modify superbill charges and payments to this owning user's batches. Select the checkboxes for the batch security that you want to assign to this user.

- Modify: Add, move, change, or delete transactions in an open batch.
- Complete: Lock down all transactions in the batch prior to daily close of the batch's posting date.
- Override: Allows users to override the Complete status of the batch and change its status back to open.



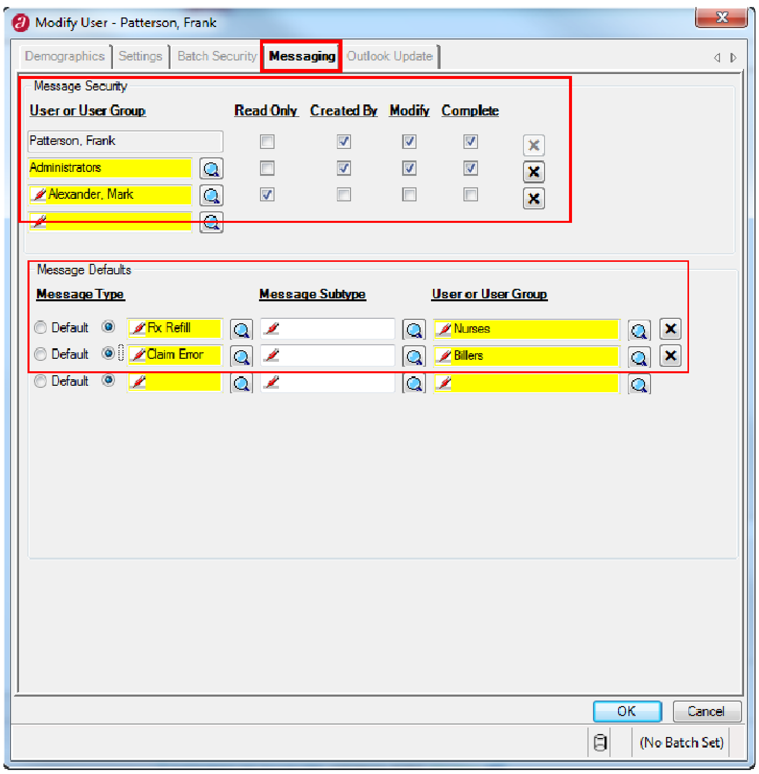
Select the Messaging tab.
In the Message Security area, select the User or User Group to have access to this user's messages. ***Note***: *A user has access to all the messages that they send, regardless of the access granted by the recipient.*

Select the checkbox or checkboxes for the access to be granted:

- Read only: The user or user group is allowed to read messages received by the selected user, but cannot modify or complete them.
- Created by: The user or user group is allowed access to messages created by the selected user.
- Modify: The user or user group is allowed to read and modify the selected user's messages, but cannot complete them.
- Complete: The user or user group is allowed to complete the selected user's messages.

In the Message Defaults area, define the default recipients for specific types of messages created by the user:

- Select the default Message Type.
- Select a default Message Subtype, if appropriate.
- Select a default User or User Group as the recipient of the user's messages.



Click "Ok" to save your new user