



## Security Settings Quick Reference Guide

ExitCare provides security settings, including optional password-protected security. As an aid to those setting up this security system, this document presents brief information about each feature or function that can be protected, as well as a few recommendations to consider. There are three locations within ExitCare where security settings can be made:

- The Generic User Security Profile. To access it, click:  
**Help/Options | Options | Security Settings | Settings | Generic Security Profile**
- Security Groups. To access this screen, click:  
**Help/Options | Options | Security Settings | Security Groups**
- Individual user security settings. This screen is accessed by clicking:  
**Help/Options | Options | Security Settings | Users | Add button | User Rights**

In each location, a check mark in a box grants rights to that feature (described below). If not all the boxes are checked in a group, the heading for that group displays a square in its box.

By default ExitCare will automatically set up two users: the Administrator and the Generic User. The Administrator can change what the Generic User has access to. No user names or passwords are required for the Generic User. When the first user account is created, the security system is activated, and all users will then need to sign in with a login ID and password, and the generic user mode is not in use.

### Recommendations and General Information

1. If you will be assigning login IDs and passwords to several users, we highly recommend creating one or more security groups. A security group can reduce setup time by allowing you to place multiple users, all having the same security rights, in one group. Please see the *Administrator Quick Reference Guide* for instructions on creating a security group and importing users.
2. Once a "user" (other than Administrator and Generic User) is set up, all users must be provided with a User Name and Password to use the program. **AT LEAST THE FIRST USER TO BE SET UP SHOULD BE AN ADMINISTRATOR (GRANTED FULL, PERMANENT RIGHTS TO USE EVERY FEATURE AND FUNCTION).**
3. **We recommend that you change the "out of the box" Master login password that comes with the AdministratorEC login ID.** Be sure that more than one person has the master password, as we have no programmed way to access your system if it is lost. Logging in as AdministratorEC should always work provided you know the password. See the *Administrator Quick Reference Guide* for more details.
4. We recommend that you set up security, and carefully consider which users you allow to access certain sensitive areas. To facilitate this process, we have highlighted these sensitive areas below in red.
5. An alternative to individual user IDs and passwords is to set up a "Group ID." (Note: this is not the Security Group feature to set up groups with multiple individual user names.) ExitCare allows multiple simultaneous identical logins. For example, the user ID could be "ED Nurse," with a password of "12345." This makes it easier to log in for several people, but loses some aspects of maintaining an audit trail.

### Features with Built-In User-Only Rights

When users have login IDs and passwords, certain features listed below can be used by any user even when the box for that feature is unchecked. In these instances, users can employ that feature but generally only that user can see the results. Also note that some aspects of that feature may not be available at this level of user rights. Please see the ExitCare guide titled, *Features with Built-In User-Only Rights* for a list of these features.

## ExitCare Settings

Setting	Rights Granted
<b>ExitCare Settings</b>	Checking this box selects all sub-items below it
<b>Allowed to Download and Run Web Updates</b>	Download from the Internet and run ExitCare updates
<b>Answer System</b>	
<b>Allowed to Set Document Level Answers</b>	Select or create default answers for questions in specific documents so that the answers are displayed each time the document is chosen
<b>Allowed to Set Question Level Answers</b>	Select or create a default answer for a given question, regardless of the document in which the question appears
<b>Allowed to Modify Question Answers</b>	Create new questions and answers which can be added to documents; add answers to questions; edit user-created questions and answers; deactivate and reactivate answers
<b>Allowed to Modify Follow-up Times</b>	Create, deactivate, reactivate, and edit user-created follow-up times to display on the follow-up time list
<b>Database System</b>	
<b>Allowed to Access Purge System</b>	Delete selected archived records
<b>Allowed to Modify Department Names</b>	Add, edit, etc. department names in Options system
<b>Allowed to work with broadcast messages</b>	Create, send, etc. broadcast messages to users
<b>Allowed to work with facilities</b>	Hide facilities from view in Options system
<b>Allowed to Update Authorization File</b>	Update the authorization file
<b>Doctor System</b>	
<b>Allowed to Modify Attending Caregivers</b>	Add doctors to caregivers lists, edit the list of existing caregivers, and deactivate and reactivate caregivers
<b>Allowed to Modify Follow-up Caregivers</b>	Add doctors to caregivers lists, edit the list of existing caregivers, and deactivate and reactivate caregivers

<b>Document System</b>	
<b>Allowed to Activate/Deactivate Documents</b>	Deactivate and reactivate documents
<b>Allowed to Modify Document Categories</b>	Add, edit, deactivate, and reactivate document categories
<b>Allowed to Edit Documents</b>	Edit documents “on the fly” on the View Documents tab; and, edit user-created documents on the Options   Document System   Documents screen
<b>Allowed to Create New Documents</b>	Create new documents either by adding a new document, or by cloning (and then editing) an existing ExitCare document
<b>Allowed to Modify Additional Notes</b>	Create, edit, deactivate, and reactivate additional notes
<b>Allowed to Modify Shortcuts</b>	Create, edit, deactivate, and reactivate shortcuts
<b>Allowed to Set Required Documents</b>	Set, deactivate, and reactivate required documents
<b>Allowed to Work with Macros</b>	Change the name and availability of macros
<b>Faxing/Email System</b>	
<b>Allowed to Fax</b>	Fax signature page to follow-up caregiver(s)
<b>Allowed to Email</b>	Email signature page to follow-up caregiver(s); email educational documents to patient
<b>History System</b>	
<b>Allowed to use Recent Patients</b>	Use Recent Patient records in the Patient Lookup window (PLW)
<b>Allowed to Take Ownership of a Recent Patient record that is in use</b>	Can take ownership of a patient record that is being used by another user and then modify that record
<b>Allowed to use search all recent patients in the facility</b>	Use the “Search all recent patients in facility” checkbox on the Patient Lookup window
<b>Allowed to use Imports</b>	Use records available to be imported via the PLW
<b>Allowed to use search all import records</b>	Use the “Show all import records” checkbox on PLW
<b>Allowed to use Patient Archive</b>	Use the Patient Archive screen
<b>Maintenance System</b>	
<b>Allowed to Change Computer/Department/Facility Settings</b>	Access to the subcategories under Help/Options   Options   Settings and allows changing settings therein for most <sup>1</sup>
<b>Allowed Access to Security System</b>	<i>Not used and is to be removed in next update</i>
<b>Allowed to Modify Security Settings</b>	Activates Security Settings   Settings screen
<b>Allowed to Modify Security Groups</b>	Activates Security Settings   Security Groups screen
<b>Allowed to View Audit Log</b>	Activates Security Settings   Audit Log screen
<b>Allow Access to User System</b>	Activates Security Settings   Users screen and all features listed below
<b>Allowed to add new users</b>	Add new users
<b>Allowed to edit users</b>	Edit user information
<b>Allowed to deactivate users</b>	Deactivate users
<b>Allowed to reactivate users</b>	Reactivate users from <u>Deactivated Items</u> tab
<b>Allowed to import users</b>	Import lists of users
<b>Allowed to reset other users' passwords</b>	Reset users' passwords

<b>General Option System</b>	Allows user to make changes at different “Levels” within certain program options and settings, e.g., primarily on the Select Datalevel window; but could also apply elsewhere
<b>Allowed to Make Changes that Apply to ALL Facilities</b>	Apply changes to all facilities on the same database
<b>Allowed to Make Changes that Apply to Other Facilities</b>	Apply changes to one’s own facility <b>or</b> to another facility on the same database (permits the selection of one facility to which changes apply)
<b>Allowed to Make Changes that Apply to the Local Facility</b>	Apply changes to user’s own facility
<b>Allowed to Make Changes that Apply to ALL Departments</b>	Apply changes to affect all in the selected department that exists in multiple facilities
<b>Allowed to Make Changes that Apply to Other Departments</b>	Apply changes to one’s own department <b>or</b> to another department in that facility (permits selection of a department to which changes apply)
<b>Allowed to Make Changes that Apply to Local Department</b>	Apply changes to user’s own department
<b>Allowed to Change Main Printer</b>	Can change main printer on General Print Settings screen, and if granted access via another setting <sup>2</sup> , on the Settings   Workstation-Printing screen
<b>Print System</b>	Determines the availability of the print buttons on the General Print Settings screen
<b>Allowed to use “Print and Stay on this Screen”</b>	“Print and Stay on this Screen” button is active
<b>Allowed to use “Print and Return to Patient”</b>	“Print and Return to Patient” button is active
<b>Allowed to use “Print and Clear Patient”</b>	“Print and Clear Patient” button is active
<b>Allowed to use “Print and Minimize”</b>	“Print, Clear Patient and Minimize” button is active
<b>Allowed to use “Print and Logoff”</b>	“Print and Logoff” button is active
<b>Macro System</b>	
<b>Allowed to “Load Macros”</b>	Add macros from macro library into patient records
<b>Allowed to “Save Macros”</b>	After creating a macro, can save it; also, after making changes to an existing macro, using this function overwrites the old macro
<b>Allowed to “Save Macro As”</b>	After creating a macro, can save it; also, after making changes to an existing macro, using this function gives the user the option to save the macro with a name different than the original

<sup>1</sup>Access to the Workstation-Printing screen located under the Settings category also requires checking the box for Allowed to Change Main Printer, found under the General Option System group (ExitCare Settings tab); or checking the box for Allowed to Change Script Printer, found under the Prescription Print System Group (ExitMeds Settings tab).

<sup>2</sup>Allowed to Change Computer/Department/Facility Settings, located under the Maintenance System group.

## ExitMeds Settings

Setting	Rights Granted
<b>Allowed to Access "ExitMeds" Tab</b>	Provides access to the Drugs tab and all features hierarchically below this checkbox.
<b>Allowed to Access "New Script" Tab</b>	Grants access to the New Script tab located under the Drugs tab
<b>Allowed to save med as "New"</b>	Write a new prescription; assign a status of "New"
<b>Allowed to save med as "Current"</b>	Assign drug a status of "Take as previously directed"
<b>Allowed to save med as "Stop Taking"</b>	Assign drug a status of "Stop Taking"
<b>Allowed to save med as "This Visit"</b>	State that the drug was given only in the facility
<b>Allowed to save med as "Pre-Visit"</b>	Indicate that the drug was being taken before the visit to the facility; future status has not yet been determined
<b>Allowed to Save Drug Defaults</b>	Can save user-created drug defaults
<b>Allow to save at the global level</b>	Save drug defaults so all can see them
<b>Allow to save at the facility level</b>	Save drug defaults so all in facility can see them
<b>Allow to save at the global department level</b>	Save drug defaults so all in the selected department that exists in multiple facilities can see them
<b>Allow to save at the local department level</b>	Save drug defaults so all in user's department in one facility can see them
<b>Allow to save at the user level</b>	Save drug defaults so only that user can see them
<b>Allowed to Deactivate Drug Defaults</b>	Can deactivate drug defaults by right-clicking on a drug default and then selecting a level
<b>Allow to deactivate at the global level</b>	Deactivate drug default so it is removed from everyone's list
<b>Allow to deactivate at the facility level</b>	Deactivate drug default from user's facility
<b>Allow to deactivate at the global department level</b>	Deactivate drug default from user's department that spans multiple facilities
<b>Allow to deactivate at the local department level</b>	Deactivate drug default from user's department at one facility
<b>Allow to deactivate at the user level</b>	Deactivate drug default for logged-in user only
<b>Drug Summary Tab</b>	
<b>View Only Access</b> (Note if any other items in this group are checked, they will override this setting)	Generally, can only view the screen; includes access to "Check for Interactions/Allergies" button and to first two icons under "All Medications List" header <sup>3</sup>
<b>Allowed to Add/Delete Drug Info Sheets</b>	Grants access to "Add Drug Info Sheet Only" button
<b>Allowed to check "Patient stated they are not on any pre-visit drugs"</b>	Activates stated checkbox so it can be checked
<b>Allowed to modify drugs</b>	Adds usable drop down lists to most fields in the meds list; also allows Rx/OTC buttons to be used.
<b>Allowed to print drug report</b>	Permits the printing of the Input Form and Status Report
<b>Allowed to export drug report</b>	Permits exporting the Medications List on the Drug Summary page

<b>Allowed to Access "Drug History" Tab</b>	
<b>Allowed to search using all wildcards</b>	Use wildcard search character (%) in all four search fields at the same time
<b>Allowed to print drug history search</b>	Print the drug history table displayed on the Drug History page
<b>Allowed to export drug history search</b>	Export the drug history table as an Excel file or as an .HTML file
<b>Allowed to save med as "New"</b>	Activates the "New" button on the Drug History tab
<b>Allowed to save med as "Current"</b>	Activates the "Current" button on the Drug History tab
<b>Allowed to save med as "Pre-Visit"</b>	Activates the "Pre-Visit" button on the Drug History tab
<b>"Patient Medication Schedule" Tab</b>	
<b>Allowed to View</b>	Viewing but not editing the table on the Medication Schedule screen; can use the three buttons above the schedule
<b>Allowed to Edit PMS Data</b>	Editing the table on the PMS screen; must be used along with "Allowed to View" checkbox
<b>"Drug Interactions/Allergies" Tab</b>	
<b>Allowed to approve interactions/allergies</b>	Approve a prescription when drug interactions and/or allergies are displayed
<b>Prescription Print System</b>	
<b>Allowed to Print Prescriptions</b>	Print prescriptions
<b>Allowed to Print Prescriptions Only</b>	Activates the "Print Scripts Only" button <sup>4</sup>
<b>Allowed to Change Script Printer</b>	Change the prescription printer on General Print Settings screen; and if granted access at another security checkbox <sup>5</sup> , change the script printer on the Settings   Workstation-Printing screen
<b>Allowed to Change Script Forms When Printing</b>	Change script form on the General Print Settings screen
<b>Allowed to Fax Scripts</b>	Fax prescriptions to pharmacy
<b>Allowed to Email Scripts</b>	Email prescriptions to pharmacy
<b>ExitMeds Maintenance Settings</b>	
<b>Allowed to Modify Drug Database</b>	Add, edit, and remove user-added custom drugs from ExitCare's drug database
<b>Allowed to Modify Drug Directions</b>	Add, edit, deactivate, and reactivate drug directions
<b>Allowed to Modify Drug Additional Notes</b>	Add, edit, deactivate, and reactivate prescription instruction phrases (additional notes)
<b>Allowed to Modify Drug Dosages</b>	Add, edit, deactivate, and reactivate prescription dosages
<b>Allowed to Modify Drug Frequencies</b>	Add, edit, deactivate, and reactivate prescription frequencies

<b>Allowed to Modify Drug Pharmacies</b>	Add, edit, deactivate, and reactivate pharmacies; includes importing pharmacy lists
<b>Allowed to Change Prescription Page</b>	Change prescription page under Prescription System   Pick Prescription Form
<b>Allowed to Save/Edit Drug Links</b>	Make connections between drug aliases and drug names in the ExitCare database
<b>Allowed to Save/Edit Drug List</b>	Create, save, and edit custom drug lists
<b>Allow access to global tab</b>	Create, save, and edit custom drug lists at the global level
<b>Facility Tab</b>	
<b>Allow Access to facility tab</b>	Create, save, and edit custom drug lists at the facility level
<b>Allowed to change to other facilities</b>	On the Facility tab, can choose and work with other facilities when modifying drug lists
<b>Global department tab</b>	
<b>Allow access to global department tab</b>	Make changes to departments that span more than one facility when modifying drug lists
<b>Allowed to change to other departments</b>	Choose and work with departments other than one's own when modifying drug lists
<b>Department tab</b>	
<b>Allow access to the department tab</b>	Make changes to drug list at the department level
<b>Allowed to change to other facilities</b>	Choose and work with facilities other than one's own when modifying drug lists
<b>Allowed to change to other departments</b>	Choose and work with departments other than one's own when modifying drug lists
<b>Allow access to the user tab</b>	Make changes to drug list for oneself (current user)

<sup>3</sup> In addition, when no checkboxes in this group are checked, access is granted to the "Check for Interactions/Allergies" button and to the first two icons under the "All Medications List" header.

<sup>4</sup> The "Print Prescriptions" check box should also be checked if the "Print Prescriptions Only" button is to be used without requiring login from another user who has permission to print prescriptions. In addition, this checkbox will not override the ExitCare tab Print System check boxes if they are checked. If it is desired that users be allowed to print only prescriptions, the Print System check boxes must be unchecked.

<sup>5</sup> Allowed to Change Computer/Department/Facility Settings, located under the Maintenance System group.

### **Archive Settings**

<b>Setting</b>	<b>Permission Granted or Denied</b>
<b>Select Which Facilities This User Can View in the Archive</b>	View selected facilities when using the Archive screen

This document provides general guidance. If you have any questions, need more information, or to report errors, please call your ExitCare Account Manager at **800-694-6669, ext. 3**.