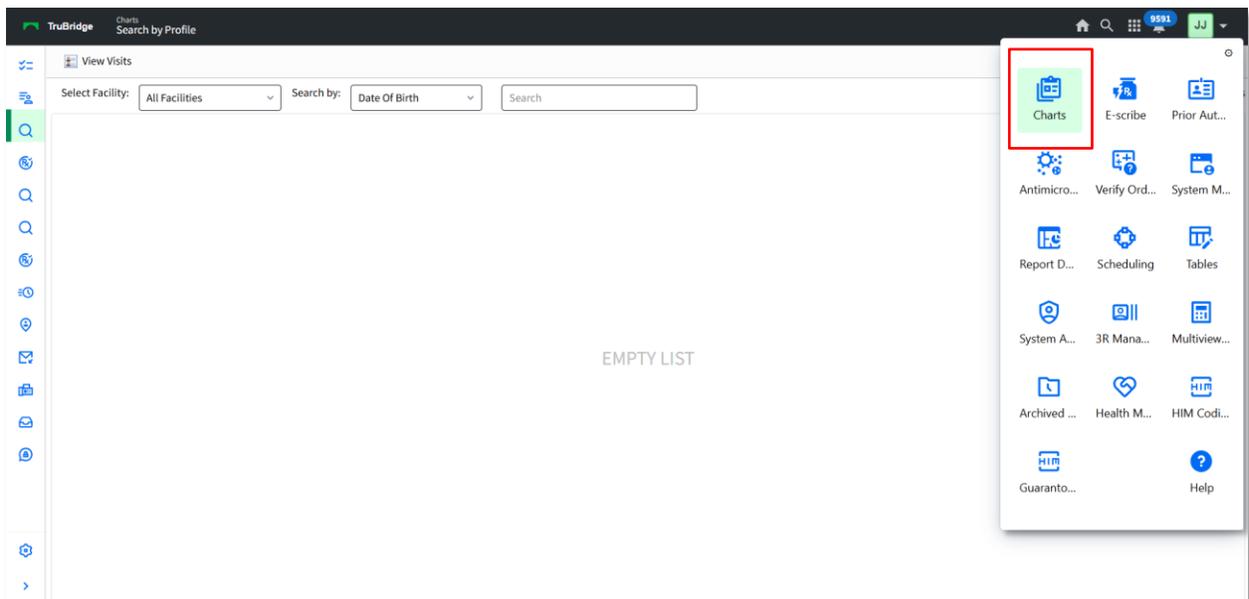


Read Only Access to Charts

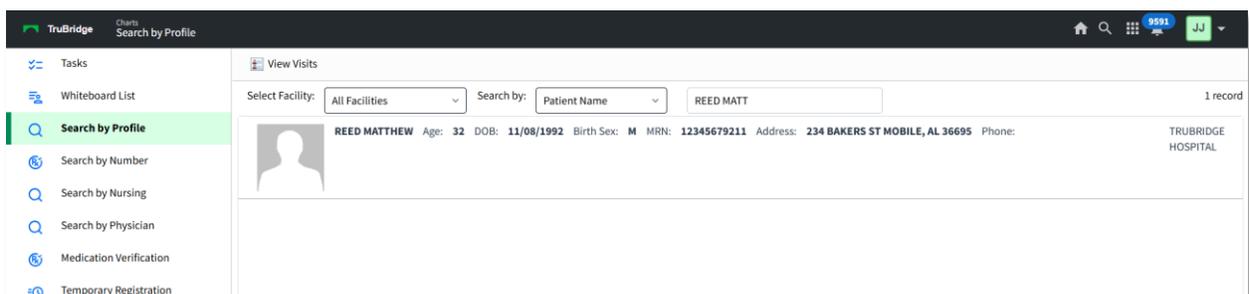
This document outlines the necessary security required to give a user read only access to patient charts. Keep in mind that this security only applies to patient accounts accessed from the Charts option via the Application Drawer. It **does not** provide read only access to patient accounts accessed from the System Menu option.

Select **Web Client > Application Drawer**

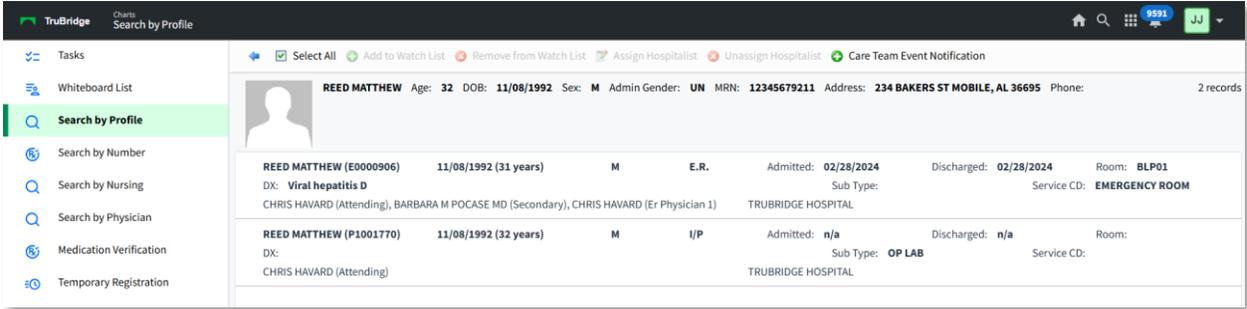


The access outlined in the document will provide the user with limited demographic and visit information available when searching patient charts. Users will only be able to Search (for patients) by Profile and View Visits for the patient. It does not allow access to the options available on the Navigation Panel within the patient's chart.

Search by Profile



View Visits



The screenshot shows the TruBridge interface for a patient's chart. The patient is REED MATTHEW, Age 32, DOB 11/08/1992, Sex M, Admin Gender UN, MRN 12345679211, Address 234 BAKERS ST MOBILE, AL 36695, Phone: (area code) 9591 JJ. The chart displays two visit records:

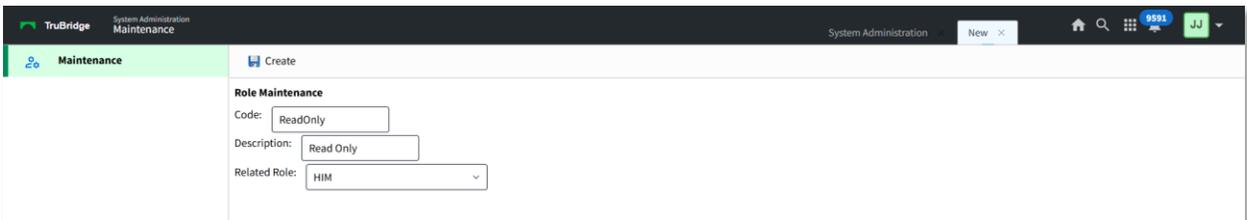
Patient ID	DOB (Age)	Sex	Admin Gender	Admitted	Discharged	Room
REED MATTHEW (E0000906)	11/08/1992 (31 years)	M	E.R.	02/28/2024	02/28/2024	BLP01
DX: Viral hepatitis D CHRIS HAVARD (Attending), BARBARA M POCASE MD (Secondary), CHRIS HAVARD (Er Physician 1) TRUBRIDGE HOSPITAL Sub Type: Service CD: EMERGENCY ROOM						
REED MATTHEW (P1001770)	11/08/1992 (32 years)	M	I/P	n/a	n/a	
DX: CHRIS HAVARD (Attending) TRUBRIDGE HOSPITAL Sub Type: OP LAB Service CD:						

Additional security may be added to give users access to the Navigation Panel options on the patient's chart; however, not all fields accessed from the patient's chart can be locked down to view only. See the Additional Access section below for more information.

Role Setup

1. Create a new Read Only Role.

Select **Web Client > Application Drawer > System Administration > Roles > New**



The screenshot shows the 'Role Maintenance' form in the TruBridge System Administration interface. The form is titled 'Role Maintenance' and has a 'Create' button. The fields are:

- Code:
- Description:
- Related Role:

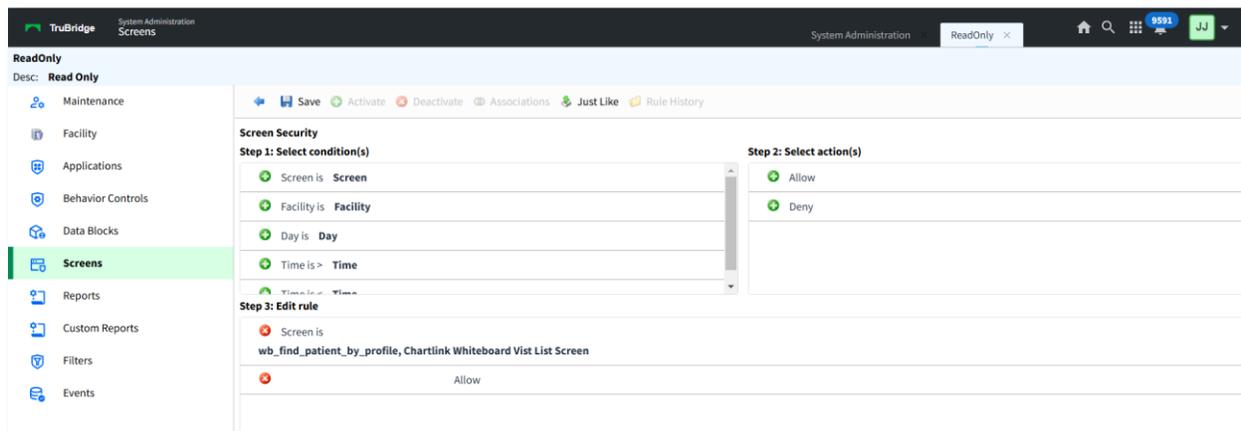
Complete the following information:

- **Code:** Enter a unique code up to 8 characters in length.
- **Description:** Enter a description for the Read Only role. (ex. Read Only)
- **Navigation Role:** Select HIM.

Select **Create**.

2. Create a screen rule for the Read Only role.

Select **Web Client > Application Drawer > System Administration > Roles > Select Read Only role > Navigation Panel > Screens > New**

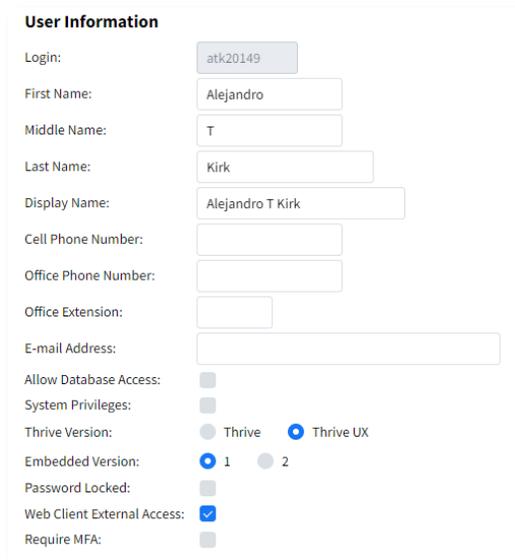


- Step 1: Select **Screen**.
- Step 2: Select **Allow**.
- Step 3: Select the bold text **Screen**, then select **Add**. Choose the screens with the launcher names listed below, then select **Insert**.
 - wb_find_patient_by_profile
 - wb_visits_list
- Select **Save**.
- Enter a **Rule Title**.
- Select **OK**.
- Select **Back Arrow**.

User Setup

1. Create an employee number in **System Administration**.
2. No security should be setup in **Web Client > Application Drawer > System Menu > Special Functions > System Management > System Security > Employee Security**.
3. Create the login in **System Administration**.

Select **Web Client > Application Drawer > System Administration > Logins > New**



The screenshot shows a 'User Information' form with the following fields and values:

- Login: atk20149
- First Name: Alejandro
- Middle Name: T
- Last Name: Kirk
- Display Name: Alejandro T Kirk
- Cell Phone Number: (empty)
- Office Phone Number: (empty)
- Office Extension: (empty)
- E-mail Address: (empty)
- Allow Database Access:
- System Privileges:
- Thrive Version: Thrive Thrive UX
- Embedded Version: 1 2
- Password Locked:
- Web Client External Access:
- Require MFA:

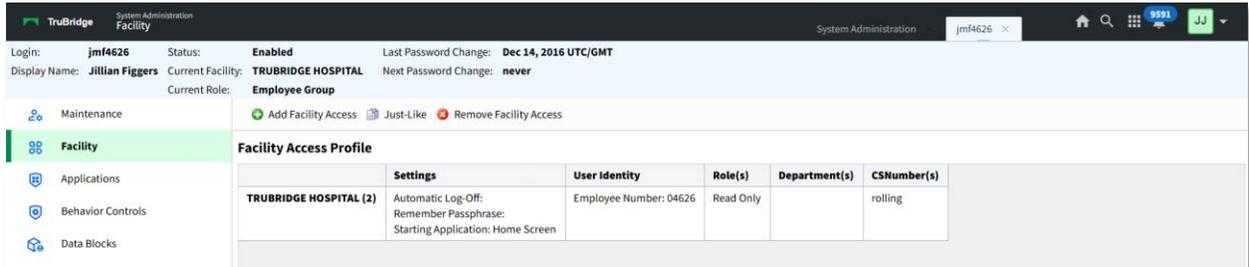
Complete the following fields:

- **Login:** Enter the user's login. This may be 3-5 characters in length. It must begin with a lower-case letter and any other letters within the login must also be lower case.
- **First Name/Middle Name/Last Name:** Enter the user's name.
- **Thrive Version:** Select either Thrive or Thrive UX. If Thrive UX is selected, the login will only be able to login using Thrive UX. If Thrive is selected, the user will have the option of choosing Thrive or Thrive UX when signing into the system.
- **Embedded Version:** Select either Embedded Version 1 or Embedded Version 2. The embedded version will determine how users will view embedded screens within Thrive UX.
- **Web Client External Access:** When selected, the user may access the EHR via the Web Client when connecting both in and out of the facility's network. Once selected, the 'Require MFA' option will become available to set for users. When 'Web Client External Access' is not selected, the user may only access the EHR via the Web client when in the facility's network; the user will not be able to access the EHR when out of network.
- **Require MFA:** When selected, a One-Time Password (OTP) is required when accessing the EHR via the Web Client when connecting out of network. When this option is not selected, an OTP is not required when accessing the EHR via the Web Client.

Select **Save**. Choose a password option then select **Update**.

4. Add Facility access to the login.

Select **Navigation Panel > Facility > Add Facility Access > Choose a Facility > OK**



Double-click the boxes under the following fields and complete the information:

- **User Identity:** Find the employee number created in Step 1 and associate it with the login.
- **Roles:** Select the Read Only role. (This must be created first using the steps listed above.)

NOTE: The *Departments* and *CSNumbers(s)* sections should remain blank.

Additional Access

Additional security may be given to allow users access to the Navigation Panel options on the patient's chart. Keep in mind that some fields accessed on these screens cannot be locked down to view only, therefore the user may be able to make changes.

It is recommended that this security be added at the user level and NOT on the Read Only role. If it is preferred to add this security to a role, then it is recommended that a separate limited access role be created.

Create a Screen Rule Allowing Access to Specific Navigation Panel Options

Select **Web Client > Application Drawer > System Administration > Logins > Select User > Navigation Panel > Screens > New**

- Step 1: Select **Screen**.
- Step 2: Select **Allow**.
- Step 3: Select the bold text **Screen**, then select **Add**. Choose the desired screens using the table below that lists the different Navigation Panel Options. Then select **Insert**.
- Select **Save**.
- Enter a **Rule Title**.
- Select **OK**.
- Select **Back Arrow**.

The following table lists the Navigation Panel options available for roles associated with the HIM Navigation Role. Each option will include the name of the Navigation Panel option, the launcher name needed for the screen rule, a description of the information that can be found on that screen as well as any items that are accessible and able to be changed.

Patient Summary	
Launcher Name:	mr_summary
Description:	Provides a summary of the coding on the account. Users will be able to see diagnosis, procedure, and DRG information coded on the account. The coding Finished and Revised date along with coder initials will also display.
Unrestricted Items:	PDF option, Coding Summary report

Diagnosis	
The Diagnosis screen provides access to the diagnoses coded on the account. Screen access cannot be given to the Diagnosis screen at this time. However, diagnoses entered on this screen may be viewed on the Coding Summary report that is accessible on the Patient Summary screen (see above).	

Procedures	
Launcher Name:	mr_procedures
Description:	Provides access to view procedures coded on the account.
Unrestricted Items:	PDF option

Edits	
Launcher Name:	mr_edit_alerts
Description:	Displays the coding edits for the account.
Unrestricted Items:	None

Chief Complaint	
Launcher Name:	patient_diagnosis_menu
Description:	Displays the chief complaint, working diagnosis and physician admit reason.
Unrestricted Items:	Physician admit reason can be manually keyed and saved.

Problem List	
Launcher Name:	problast
Description:	Displays an up-to-date problem list of current and active diagnoses.
Unrestricted Items:	None

PACS Images	
Launcher Name:	patpacs
Description:	Displays all available radiology orders with associated ImageLink images across the patient's visit.
Unrestricted Items:	None

Transcriptions	
Launcher Name:	patTranscriptions
Description:	Displays medical record and order entry transcriptions entered on the account. Transcriptions may be viewed from these screens but not edited.
Unrestricted Items:	Transcription documents can be downloaded and printed when viewed.

Clinical History	
Launcher Name:	patCH
Description:	Displays transcriptions, lab results, documentation, images and reports.
Unrestricted Items:	Documents in Clinical History can be downloaded and printed when viewed.

Reports and Attachments	
Launcher Name:	patdisc
Description:	Provides access to reports from multiple disciplines and departments.
Unrestricted Items:	Documents in Reports & Attachments can be downloaded and printed when viewed.
MAR	
Launcher Name:	marmain
Description:	Displays the patient's pharmacy profile including order detail and medication administration documentation.
Unrestricted Items:	None
Documentation	
Launcher Name:	clindoc
Description:	Displays documentation entered via ClinDoc.
Unrestricted Items:	None
Health History	
Launcher Name:	health_history_menu
Description:	Displays the patient's surgical history, procedure history, family history, medical history, social history, as well as functional and cognitive status.
Unrestricted Items:	None
Plan of Care	
Launcher Name:	planofcare
Description:	Displays care plans entered by nursing. (ex. Goals, Interventions and Documentation)
Unrestricted Items:	Can use the Resolved, Remove, Activate and Inactivate options.
Physician Query	
Launcher Name:	communication
Description:	Allows access to the Communication Selections screen. Additional security is needed for each communication option.
Physician Query - Chart Communication	
Launcher Name:	communication_communication_list
Description:	Displays requests, refill requests, and messages associated with the account.
Unrestricted Items:	None
Physician Query - Preventative List Screen	
Launcher Name:	preventative_list
Description:	Displays documentation of a preventative, or follow-up, including procedures, exams or teaching sessions that should be performed during or before the patient's next visit.
Unrestricted Items:	None
Physician Query - Secure Messaging	
Launcher Name:	secure_message_inbox2
Description:	Displays messages sent to the patient portal.
Unrestricted Items:	Unacknowledged messages may be Acknowledged.

Physician Query - Medical Records Physician Query List	
Launcher Name:	communication_document_list
Description:	Displays a list of physician queries entered on the account. To view the queries the following screen will also be needed: physician_query.
Unrestricted Items:	If access is given to view queries, they may be downloaded and printed.
Physician Query - Referral/Transition of Care	
Launcher Name:	cl_patient_referral_list
Description:	Displays previously created Referrals and Transition of Care.
Unrestricted Items:	Can change the status of the referral or transition of care to Deleted. Referrals and transition of care documents may also be printed.
Physician Query - Information Submissions	
Launcher Name:	document_queue_list
Description:	Displays documents submitted by the patient from the portal.
Unrestricted Items:	Documents submitted, but not yet imported may be Archived.

Order Chronology	
Launcher Name:	orderChronology
Description:	Displays all orders placed on a patient's account in chronological order.
Unrestricted Items:	PDF option

Demographics	
Launcher Name:	mr_cl_patient_demographics_selection
Description:	Allows access to the Patient Demographics Selection screen. Additional security is needed for each demographics option.

Demographics - Encounter	
Launcher Name:	mr_cl_patient_demographics1_edit
Description:	Displays census and clinical information that has already been entered for the patient.
Unrestricted Items:	The following fields are unrestricted and may be edited and saved: Care Level, Condition, Violent Patient, Restraints, MRSA, VRE, Isolation, Pregnant, Breast Feeding, Diabetic, Fluid Restriction, Sodium Restriction, Terminally Ill/Long Term Care, Risk for Falls, Food Dislikes, LTCH Calculation Indicator.

Demographics - Care Team	
Launcher Name:	mr_cl_patient_demographics2_edit
Description:	Displays providers and employees that are part of the patient's care team.
Unrestricted Items:	None

Demographics - Personal	
Launcher Name:	mr_cl_patient_demographics3_edit
Description:	Displays information that was gathered during the registration process.
Unrestricted Items:	The following fields are unrestricted and may be edited and saved: Patient Name, Birth Sex, Religion, Email, Ethnicity, Preferred Language, Advanced Directive, DNR, Notify in Emergency, Relation, Phone, Caregiver, Decline to Specify.

Demographics - Facesheet	
Launcher Name:	No additional security needed. This screen can be accessed with access to the Patient Demographics Selection screen.
Description:	Displays the patient's facesheet.
Unrestricted Items:	Once accessed facesheets can be downloaded and printed.

Demographics - Armbands and labels	
Launcher Name:	demographics_labels
Description:	Allows armbands and labels to be printed for the patient.

Unrestricted Items:	Armbands and labels can be printed using this option.
Demographics - Care Team Event Notifications	
Launcher Name:	care_team_event_notification
Description:	Displays a listing of added physicians the patient has requested to be notified when they are admitted, discharged or transferred from the facility.
Unrestricted Items:	Care team information displayed can be edited and saved. Care team information may also be deleted.

Medical Necessity	
Launcher Name:	coverage_existing_list
Description:	Displays any existing ABNs. To view the ABN details, access to the coverage_existing_detail screen will be needed.
Unrestricted Items:	None

Visit History	
Launcher Name:	visit_history
Description:	Allows all visits attached to the patient's to be reviewed and accessed. When a different account is accessed from Visit History, only the options given thru the user's role and/or login will be accessible.
Unrestricted Items:	PDF option

Allergies	
Launcher Name:	patAllergies
Description:	Displays the allergies listed on the patients account and profile.
Unrestricted Items:	Can use the Remove, NKA, NKDA, NKEA, and NKFA options.

Patient Immunization History	
Launcher Name:	pat_immuniz_list
Description:	Displays an electronic record of a patient's immunizations.
Unrestricted Items:	Can use the Remove option.

Charges	
Launcher Name:	charges, charge_item_lookup
Description:	Displays the charge entry screen.
Unrestricted Items:	Charges may be posted and credited. Pending charges may be removed.

Electronic Forms	
Launcher Name:	patient_eforms
Description:	Displays eforms entered on the account. Only the Title, Last Update, Created, and Status may be viewed for the eform. To show the eform access to the launch_eform_view screen must be added.
Unrestricted Items:	If access is given to launch_eform_view the user may be able to add new eforms and lock existing eforms.