Manage User Permissions

Last Modified on 07/14/2020 2:25 pm CDT

If you use Functional Security, you must assign permissions to each user you create. For more information about the difference between Functional Security and Provider Security, see Manage User Security.

- 1. Click the Administration menu and select Users/Monitors.
- Click the Select User/Monitor drop-down menu and select the user for which to manage permissions. You can also add a new user. For instructions, see Create Staff Accounts. Note that if you create a new user, you must re-select the user after you save before you can manage their functional permissions.
- 3. Click Permissions. The Permissions dialog box opens.

system an take effec	d then reopen the system before your t. User: Goldman, Emma	security changes wi	I
Category	Function Name	Access Level	
Calendars	Manage Sponsor Calendar	Full Access 📼	
Calendars	Manage Provider Calendar	Full Access 📼	
Calendars	Manage Child Calendar	Full Access 📼	Ξ
Calendars	Manage School District Calendar	Full Access 📼	
Children	Manage Children	Full Access 📼	
Children	Activate Children	Full Access 📼	
Children	Manage Child Tier	Full Access 📼	
Claims	Manage Claims	Full Access 📼	
Claims	Add Claims	Full Access 📼	
Claims	Edit Claims	Full Access 📼	
Claims	Process/Add/Edit Claims	Full Access 📼	
Claims	Direct Entry	Full Access 📼	
Claims	Scan	Full Access 📼	
Claims	Manage State Claim	Full Access 📼	
Claims	Claim Data Reports	Full Access 📼	Ŧ
4		•	
Set All Permis None View	Set Save	Close	

- 4. Click the Access Level drop-down menu for each permission and choose from the following:
 - Full Access: The user can review and update information in the given area.
 - View Only Access: The user can only view information in the given area. The user cannot save any changes. This access level gives the user access to any related reports and on-screen functions.
 - No Access: The user cannot see any information for the given area.
- 5. Click Save.

Mass-Changing Access Levels

You can automatically assign all functional groups to one particular access level, if needed. You can then scroll through the list of permissions and update specific functions that should not be the set to the default you select.

In the Set All Permissions section:

1. Select None, View, or Full.

	Once you ha system and take effect.	ave set up permissions you will need t then reopen the system before your User: Goldman, Emma	o save and exit the security changes w	11
- [Category	Function Name	Access Level	
	Calendars	Manage Sponsor Calendar	Full Access 📼	
	Calendars	Manage Provider Calendar	Full Access 📼	
	Calendars	Manage Child Calendar	Full Access 📼	Ξ
	Calendars	Manage School District Calendar	Full Access 📼	
	Children	Manage Children	Full Access 📼	
	Children	Activate Children	Full Access 📼	
	Children	Manage Child Tier	Full Access 📼	
	Claims	Manage Claims	Full Access 📼	
	Claims	Add Claims	Full Access 📼	
	Claims	Edit Claims	Full Access 📼	
	Claims	Process/Add/Edit Claims	Full Access 📼	
	Claims	Direct Entry	Full Access 📼	
	Claims	Scan	Full Access 📼	
	Claims	Manage State Claim	Full Access 📼	
	Claims	Claim Data Reports	Full Access 📼	Ŧ
	4		•	
	-Set All Permissio None View Full	Set Save	Close	

- 2. Click Set.
- 3. Change individual functions, as needed.
- 4. Click Save.