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Best Practices for Setting up Centricity Security



# Best Practices for Setting up Centricity Security

During this webinar we will review all aspects of security including controls, assignments, Security by User Group vs. Individual User as well as Security set up in the Business Reports component.

# Agenda



- Active directory authentication vs application authentication
- Set up Security Groups
- Setting security at Group level vs Individual Level
- Options within security.
  - Permissions
  - Overrides
  - Denied
- Reports for security settings
- Security in Reports Component
  - Group
  - Individual

# Active Directory (AD) Authentication vs Application Authentication



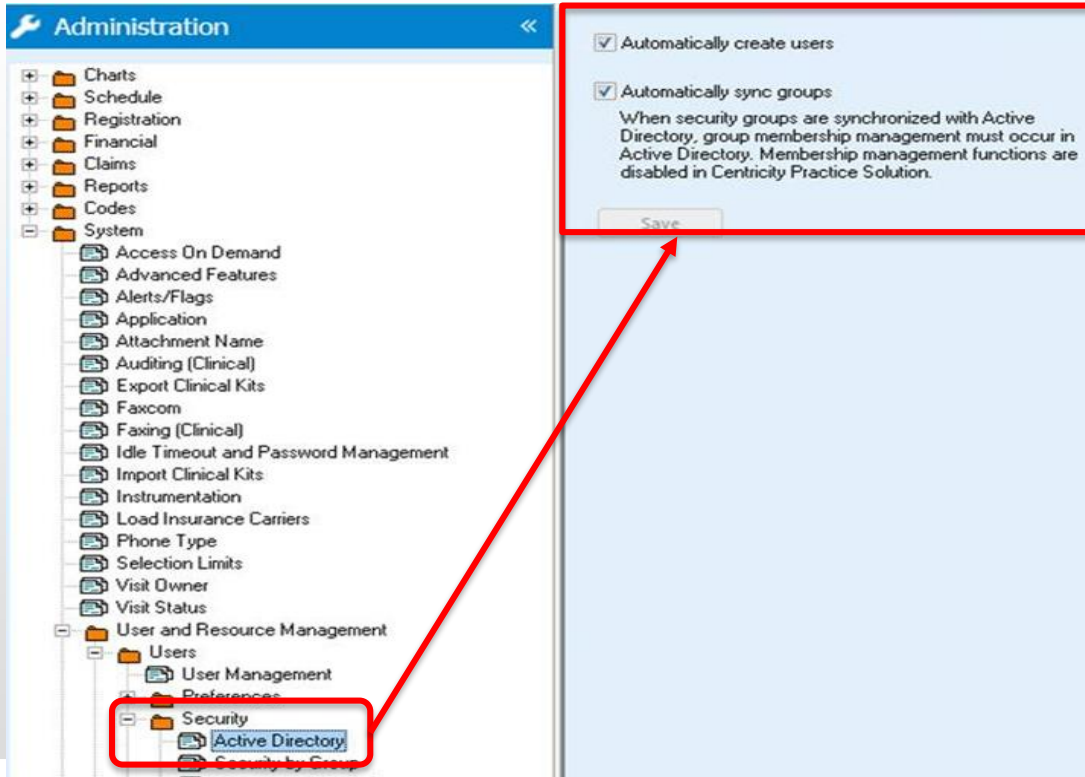
## Active Directory Authentication

- To support a secure concurrent user model, the application stores all user and resource information in Microsoft Active Directory, which manages permissions for logging onto a computer or networks.
- The application takes advantage of the Active Directory security and flexibility. Active Directory validates user information, such as passwords, against the Active Directory information rather than requiring the user to store a network password and user database password.

## Application Authentication

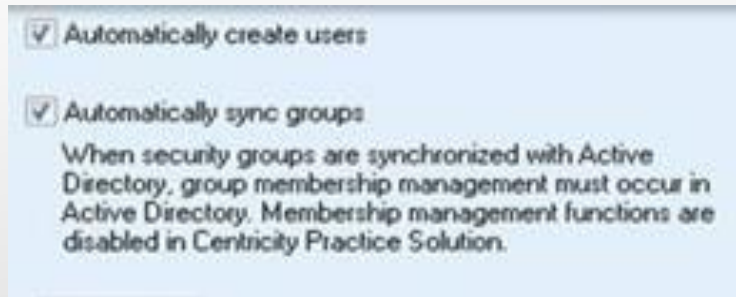
- Application authentication allows administrators to manage user accounts solely from Centricity Practice Solution, without needing to use Active Directory. User login and password information is stored in the database and allows you to:
  - Customize user password settings
  - Lock out users
  - User-initiate password changes from the Logon window
  - Force password changes for users and security groups

# Active directory authentication



- Active Directory Security set up is in Administration>System Folder>Users and Resource Management Folder>Users>Security

# Active directory authentication



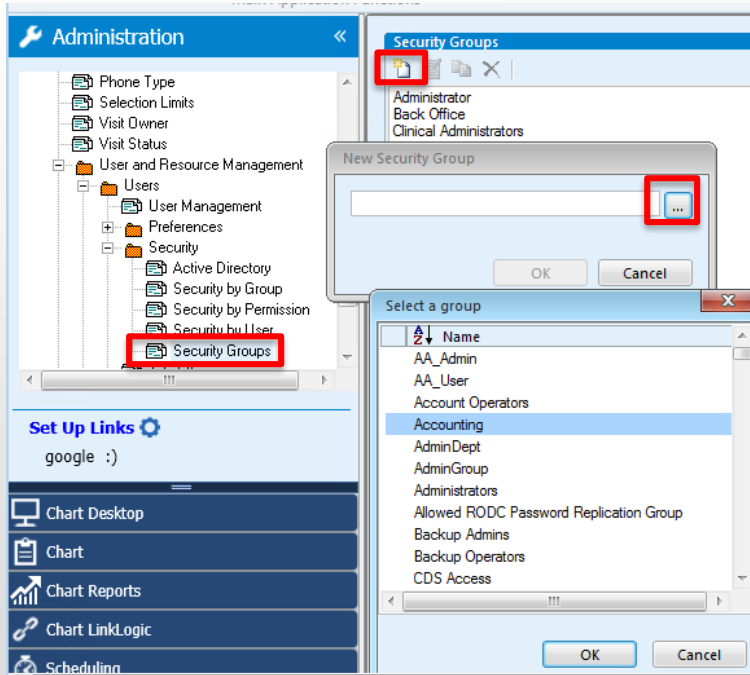
- Organization has the ability to
  - Automatically Create users
  - Automatically sync groups.



# Active directory authentication

- Users must be created in Active Directory and added to all required security groups before attempting to log into Centricity Practice Solution for automatic creation.
- If automatically sync groups option is enabled, you must create security groups in the application that identically match the names of the groups in Active Directory for successful synchronization.

# Adding AD Groups to Centricity



- The ellipsis button displays a window containing all active groups.
- Highlight the groups you wish to add to Centricity.





# Application Authentication



[healthcosystems.com](http://healthcosystems.com)

# Application Authentication



Attributes

Inactive  Schedule Templates

Billable Provider  Chart Access

First Middle \*Last Suffix  
Harry S. Winston MD

\*List Name Winston MD, Harry S.  
ID 442  
Organization  
Address 1 10288 SW 43rd Ave  
Address 2 Suite 400  
City/State/Zip Portland OR 97202  
Country USA Subdivision  
Phone 1 ( ) - [ ]  
Phone 2 (503) 233-2233 [ ] Work  
Email hwinston@yahoo.com  
Notes  
/faculty

Identification

NPI 2292299876  
DEA # DE 9865320  
Anesthesiologist License  
Additional License  
Specialty  
Specialty License  
State License ML3587241  
UPIN #

User Settings

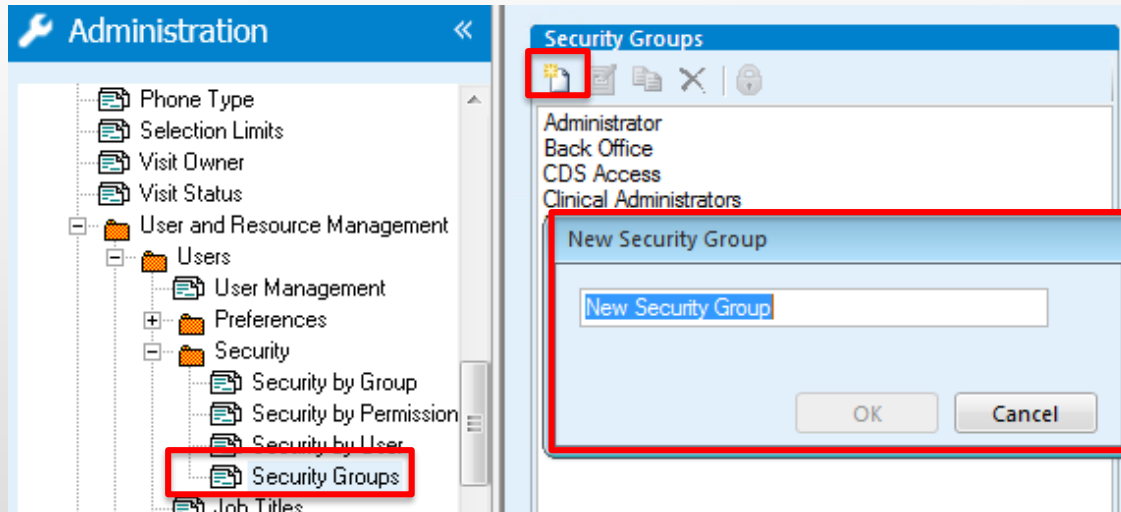
\*Login ID hwinston  
Select a user preference group Internal Medicine  
Lock User

Application Password Management

Force password change at next login  
Password \*\*\*\*\*  
Password last changed: 7/14/2016 11:47:21 AM

- Set up is managed at the user level.
- A login and a password will need to be set up manually.
  - In Administration, from the ribbon, select Application Users. Highlight and select the user. Add the information to the Basic Info tab.

# Adding Groups using Application Authentication



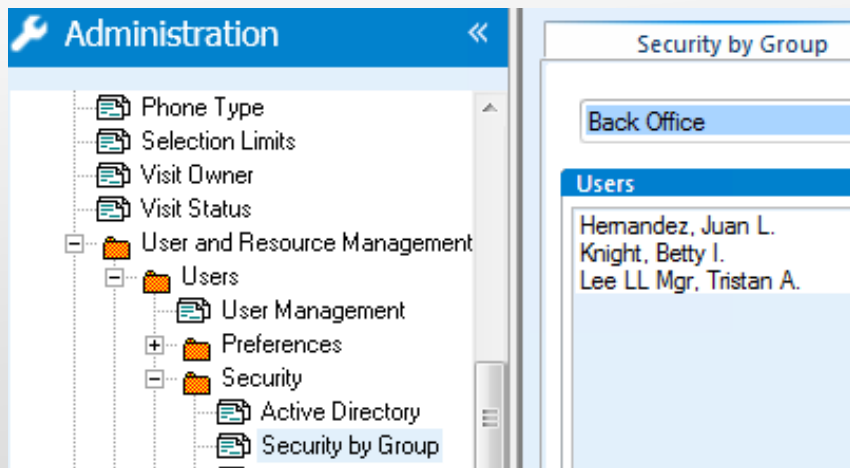
- Create a new group
- Consider job functions when creating group names
  - Front office
  - Back office
  - Billing

# Adding users to Groups



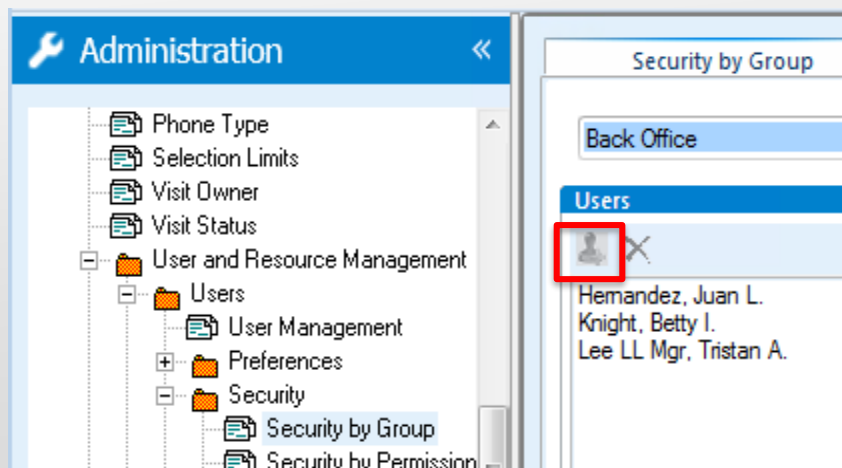
## Active Directory

- Users will automatically appear based on the group selected.



## Application

- Users must be manually added to the group.



# Group Settings vs Individual Settings



- Security groups allow you to grant or deny access rights to one or more permissions to groups of users, rather than assigning rights on an individual basis.
- Security by individual allows you to grant or deny access rights to one user at a time.

# Options Within Security

- Permissions
  - Security rights (permissions) are security settings that define the tasks an user can perform.
    - Balance Forward
    - Billing
    - Business Reports
  - If a user does not have the necessary rights to complete a task, the application displays a message explaining why.

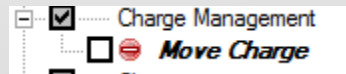
# Options Within Security

- Overrides
  - Rights granted or denied to users on the user level that override all other security settings.

- Granted.

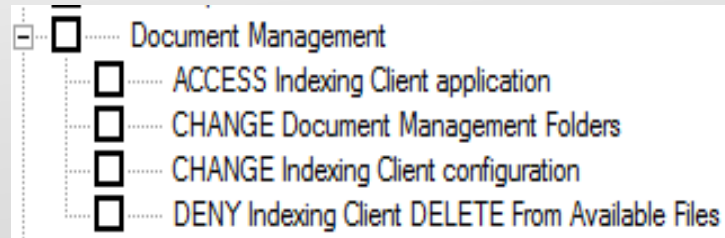


- Denied.



# Options Within Security

- Denied
  - A user does not have the necessary rights to complete a task.





# Reports for Security Setting



- **Security**

- This report lists system security parameters per component and security group.
- Enables management to quickly evaluate which security groups to assign to new and existing users based on the accessibility to components within each group.

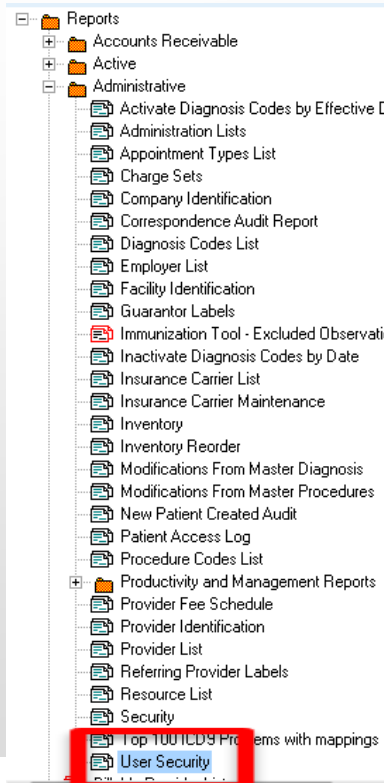
# Security



Menu / Action	User/Group Name	Allowed
<b>Accounts Receivable</b> Delete Visit - AR	Administrator	Yes
	Armstrong PA, Taylor B.	Yes
	Back Office	Yes
	Baggins, Bilbo	Yes
	Baker, Tom	Yes
	Burkhalter, Diana L	Yes
	Clinical Administrators	Yes
	Creighton, Dan	Yes
	Dannevik Dr., Jonathan	Yes
	Grover Ph.D, Jared	Yes
	Haulenbeek, Tyler	Yes
	HealthCoEmployees	Yes
	McAvoy, Kelly	Yes
	Meyer, Pamela	Yes
	Moblely MD, Jay	Yes
	Nishi, Eileen	Yes
	Ott, Michaela	Yes
	Waterhouse, Carrie	Yes
	Whitmore, Deb	Yes
	Williamson, Trista	Yes
Winston MD, Harry S.	Yes	
Void Visit - AR	Administrator	Yes
	Armstrong PA, Taylor B.	Yes
	Back Office	Yes
	Baggins, Bilbo	Yes
	Baker, Tom	Yes
	Burkhalter, Diana L	Yes
	Clinical Administrators	Yes
Creighton, Dan	Yes	



# Reports for Security Setting



- **User Security**

- This report lists security parameters per user and security group.
- Quickly evaluate which securities are assigned to a user or user group based on security rights listed for each user or user group.

# User Security



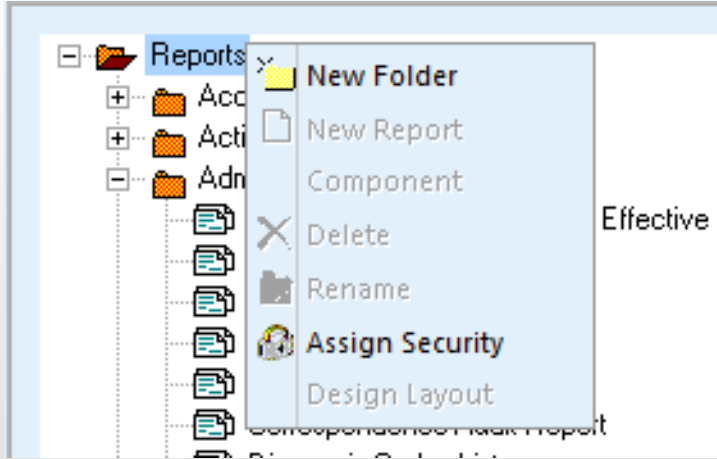
Menu / Action	Allowed
<b>Administrator</b>	
<i>Accounts Receivable</i>	
Delete Visit - AR	Yes
Void Visit - AR	Yes
<i>Administration</i>	
Administrative Security	Yes
Allocation Sets	Yes
Batches	Yes
Billing/Schedule Resources	Yes
Charge Sets	Yes
Clearinghouses	Yes
Companies	Yes
Custom Module Extensibility	Yes
Diagnoses	Yes
Employers	Yes
Facilities	Yes
Fee Schedules	Yes
Guarantors	Yes



# Setting Security for Reports Component

- Controls access to reports.
- Security can be set at folder level or at the report level

# Assigning Security for Reports



- From the Reports Component, right click on the folder or report.
- Select Assign Security
  - Note: Security for this function must be granted in security settings in Administration>Business Reports.

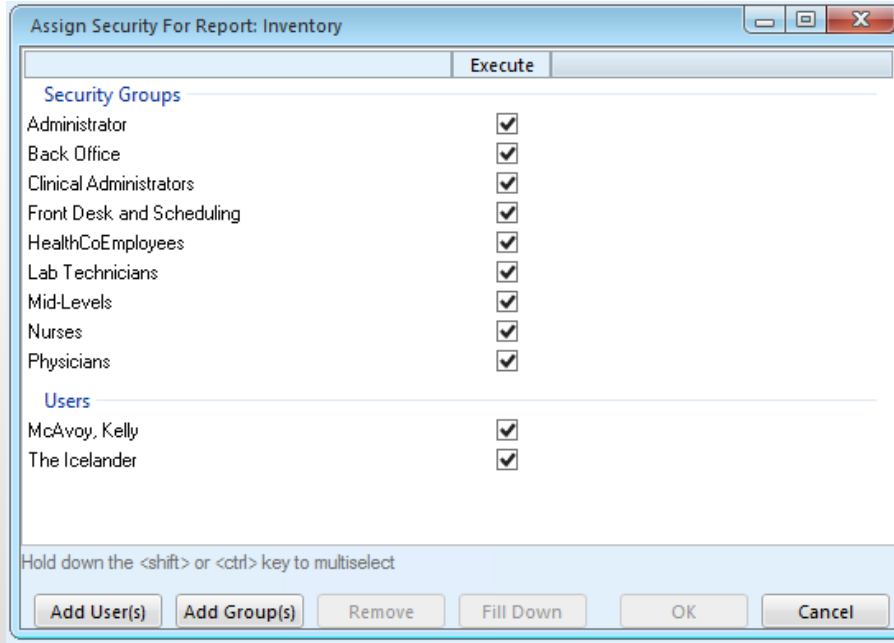
Assign Security For Folder: Reports

	Execute	Edit	Create	Delete
<b>Security Groups</b>				
Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Back Office	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Clinical Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Front Desk and Scheduling	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
HealthCoEmployees	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lab Technicians	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mid-Levels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Nurses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Physicians	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Users</b>				
McAvoy, Kelly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
The Icelandier	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Hold down the <shift> or <ctrl> key to multiselect

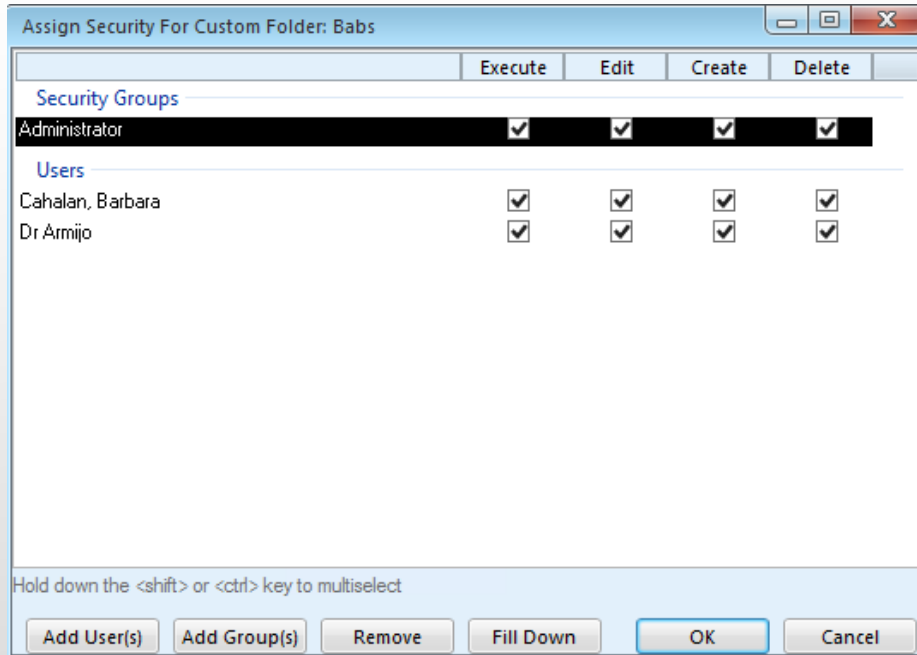
Add User(s) Add Group(s) Remove Fill Down OK Cancel

- Set security at the folder level to grant access to reports within the folder.
- Security can be added to a group or individual user.



- Security can be set at the report level





- Fill Down button is a quick method to assign security to all reports within the folder



HealthCo can assist with training

Contact: Kellie Armijo, Professional Services Manager

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kelliea@healthcosystems.com



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# Thank You.

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