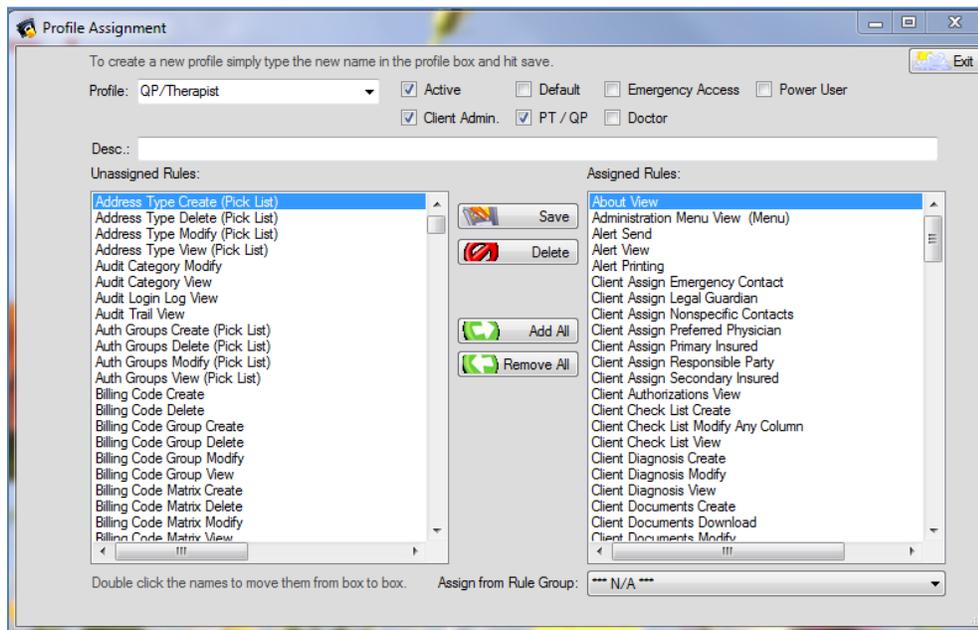


# Profile Management

## Summary:

A profile is the name we give to all the different rule sets an administrator puts together to control what level of access a user has in PIMSY. PIMSY comes with a few profiles already set up. Use these Profiles as a guide to aid in modifying them to fit your needs, or in creating your own. Each profile contains a different set of rules that allows that user to see and do different things in the system in order to complete their necessary job duties. You can assign multiple rules to a profile.



## Checkboxes:

**Active** – Making a profile inactive prevents that profile from being used in the system. If a user has that profile assigned to them, they will be unable to log into the system.

**Client Admin** – Gives the profile access to ALL client charts. If it is not checked, they will only be able to access the specific clients they are assigned to (*or that their supervisees are assigned to*).

**Default** – Sets the profile as a default when a new user is created. This can be manually changed for the user during setup.

**PT/QP (Primary Therapist/Qualified Professional)** – This setting should be checked for users that are clinicians/providers (PT=Primary Therapist, QP=Qualified Professional) of service. If it is

not checked, anyone with that profile will not show up in the provider pick list to be assigned to the client.

**Emergency Access** – When checked, this gives on-call provider access to all clients in case of an emergency (PIMSY Platinum version only). This is for one-time use only and you need to check client admin also so they can see all the clients.

**Doctor** – This setting allows the user to be attached to a chart as physician, enables access for e-Prescribing, and is used for Meaningful Use.

**Power User** - User who can ***see and do everything*** in the PIMSY system. *Be careful here.*

#### *Instructions:*

To create a new profile go to **Administration > Profile Management**. Type a new name in the **Profile** field and check the appropriate boxes. Select the rules you want to assign to that profile in the left box (**Unassigned Rules**) by double-clicking on the rule which moves it to the right box (**Assigned Rules**). For example, rules that say (Pick List) will give the ability to work in the Pick List area. To remove all rules from the Assigned Rules, click the Remove All button. Now you can easily assign rules to that profile.

To make changes to a profile, select it from the Profile dropdown box and make the necessary changes. Be sure to **Save**.

You cannot create new Rules in the Profile Management area. If you need a new rule, please contact Support ([support@pimsyemr.com](mailto:support@pimsyemr.com)) or call **877.334.8512 ext. 3**. You can also submit a ticket requesting a new rule in the PIMSY Help Desk. [Link to Help Desk?](#)

**Note:** *remember to be careful assigning **Power User** as it could be misused since it gives access to all areas of the system.*

#### *Use Case:*

ABC Therapeutic Group has hired a new Clinical Director/Therapist who starts tomorrow. Admin staff have created the new hire's login and entered all of her information into her User File in PIMSY. She is being assigned the Therapist/QP Profile. The Active box is checked as well as Client Admin, which gives her access to all the clients in the system. It also has the PT/QP box checked which will make her name available in the provider pick list to be assigned to a client as a clinician.