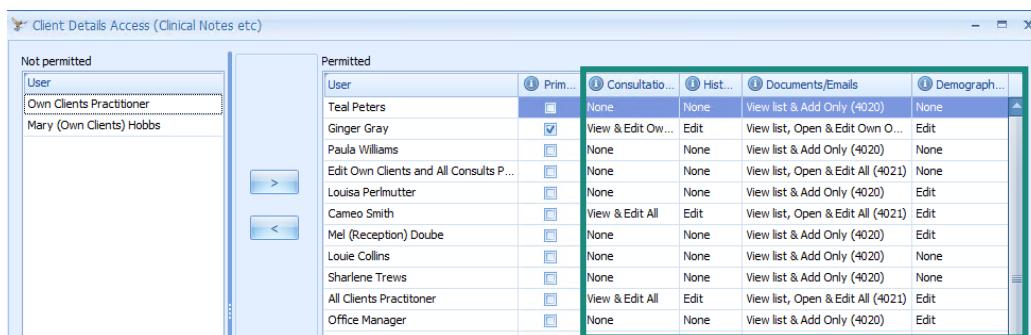


5001 - Change client practitioner

Quick reference guide – V7 SP1

What has changed?

This permission now only allows a user to change a Practitioner from the Not Permitted to Permitted list and assign them as Primary Practitioner. It no longer enables the ability to change a user's permissions to anything other than their default role permissions as all of the grid has been disabled except for the primary practitioner column.



User	Primary	Consultation	History	Documents/Emails	Demographic
Teal Peters	<input checked="" type="checkbox"/>	None	None	View list & Add Only (4020)	None
Ginger Gray	<input checked="" type="checkbox"/>	View & Edit Own	Edit	View list, Open & Edit Own O...	Edit
Paula Williams	<input type="checkbox"/>	None	None	View list & Add Only (4020)	None
Edit Own Clients and All Consults P...	<input type="checkbox"/>	None	None	View list, Open & Edit All (4021)	None
Louisa Perlmutter	<input type="checkbox"/>	None	None	View list & Add Only (4020)	Edit
Cameo Smith	<input type="checkbox"/>	View & Edit All	Edit	View list, Open & Edit All (4021)	Edit
Mel (Reception) Doubt	<input type="checkbox"/>	None	None	View list & Add Only (4020)	Edit
Louie Collins	<input type="checkbox"/>	None	None	View list & Add Only (4020)	None
Sharlene Trews	<input type="checkbox"/>	None	None	View list & Add Only (4020)	None
All Clients Practitioner	<input type="checkbox"/>	View & Edit All	Edit	View list, Open & Edit All (4021)	Edit
Office Manager	<input type="checkbox"/>	None	None	View list & Add Only (4020)	Edit

These columns
are no longer
editable.

Why has this changed?

As it had been implemented, it enabled the unintended behaviour that a user could change their own permissions and therefore access to Client information.

Managing practitioners who can only view clients assigned to them?

A user with permission 5001 will still be able to assign an "Own Client's" practitioner to a new Client as the primary practitioner. They can move the client from Not permitted to Permitted and on clicking Primary Practitioner the Practitioners default role permissions will be assigned.

If the Practitioner requires permissions other than their default role permissions then, a user with permission 5000 - Can Manage Users and Permissions assigned to them is required to make that change.

How to change Primary Practitioner

1. Select the practitioner
2. Click the move left to right arrow

The screenshot shows a software interface titled 'Client Details Access (Clinical Notes etc)'. It has two main sections: 'Not permitted' on the left and 'Permitted' on the right. In the 'Not permitted' section, there is a list of users: 'User' (highlighted with a green border), 'Own Clients Practitioner' (also highlighted with a green border), and 'Mary (Own Clients) Hobbs'. Below this list are two blue buttons: a right-pointing arrow and a left-pointing arrow. In the 'Permitted' section, there is a list of users: 'Teal Peters' (with a checked checkbox next to the 'Prim...' column), 'Ginger Gray' (with a checked checkbox), 'Paula Williams' (with an unchecked checkbox), 'Edit Own Clients and All Consults P ...' (with an unchecked checkbox), 'Louisa Perlmutter' (with an unchecked checkbox), 'Cameo Smith' (with an unchecked checkbox), 'Mel (Reception) Double' (with an unchecked checkbox), and 'Louie Collins' (with an unchecked checkbox). The 'Prim...' column contains icons representing different roles.

3. Practitioner will be moved to the Permitted section
 - a. If the Practitioner is an Own Clients practitioner, then there will initially be no rights assigned.
 - b. All other role permission types will have their rights immediately visible

The screenshot shows the same software interface as above, but now the 'Permitted' section is expanded to show detailed permissions. The 'Own Clients Practitioner' row is selected. The table includes columns for 'User', 'Prim...', 'Consultatio...', 'Hist...', 'Documents/Emails', and 'Demograph...'. The 'Prim...' column for 'Own Clients Practitioner' has a checked checkbox. The 'Consultatio...' column has 'None'. The 'Hist...' column has 'None'. The 'Documents/Emails' column has 'View list & Add Only (4020)'. The 'Demograph...' column has 'None'. The 'Office Manager' row is also visible with similar values.

4. Click Primary practitioner
 - a. The default permissions for the Own Clients Practitioner can be seen.
 - b. Any manual updates will be overridden.

The screenshot shows the 'Permitted' section with the 'Own Clients Practitioner' row selected. The table includes columns for 'User', 'Prim...', 'Consultatio...', 'Hist...', 'Documents/Emails', and 'Demograph...'. The 'Prim...' column for 'Own Clients Practitioner' has a checked checkbox. The 'Consultatio...' column has 'View & Edit Ow...'. The 'Hist...' column has 'Edit'. The 'Documents/Emails' column has 'View list, Open & Edit Own O...'. The 'Demograph...' column has 'Edit'.

How to remove a Practitioner's access

If the practitioner is no longer permitted to view the Client's information, then moving them from the Permitted to Not Permitted section will remove their access.

For more information on:

- Role definitions click [here](#)
- Client Access definitions click [here](#)