User Roles Guidance

For a guide to the terminology used in this document, please see the training videos at
http://www.retis.scot.nhs.uk/training

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User Roles

Definition

A user role is a collection of individual permissions which give the user the ability to perform certain tasks within a particular service. The "abilities" for each role are shown when requesting or authorising roles.

For example, the "Extended Clerical" role would, along with many other permissions, give a user the ability to transfer patients to or from their local service, but not between all services. They have the ability to transfer patients, but not necessarily the permission to do so in all circumstances.

Requesting / Assigning

Roles are assigned for each service (e.g. Wheelchairs, Prosthetics, Orthotics) that the user is able to access.

Users can request roles for themselves, or managers/team leaders/supervisors can request them on their behalf. See page 6 for further details on the process.

Authorisation Process

Each role must be authorised electronically by a local senior manager – an "authoriser". Each "authoriser" must have attended a training course and thoroughly understand this document before they are able to do this.

Verification Process

Each role will also be checked and verified by ReTIS staff before the abilities are granted to the user. This is to ensure a consistent national approach.

Services

Services with their own Desktop Application

ReTIS desktop applications exist for the three main services that ReTIS supports
- Wheelchair Service
- Prosthetic Service
- Orthotic Service

Affiliated Services

Some further services exist that use the same desktop applications, but with different functionality or processes. These are normally included in the Wheelchair Desktop Application.
- EATS
- Tayside Wheelchair Outreach Project
- Gait Analysis / Neurobiomechanics
- Psychology
- Disabled Living Centre
- etc...

Sub Services

The Wheelchair Service is further divided into three areas ...
- Adult
- Children
- Seating

All of the above are "Services", but you should be aware that they are treated in different ways when assigning roles. The first two columns are "Services" in the web role hierarchy, each with their own individual roles, whereas the "Sub Services" are specific roles assigned within the Wheelchair Service.

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Types of User Roles

Classification Roles

To enable a user to sign in to any version of ReTIS, a "Classification" role must be assigned. Classifications are used to present the user in the appropriate lists throughout the system.

A classification is required for each service. Only one classification can be applied to each service and should be related to their primary job description.

Examples are:

- Consultant / Doctor
- Bioengineer
- Orthotist
- Prosthetist
- Occupational Therapist

- Physiotherapist
- Psychologist
- Nursing Staff
- Clerical Staff
- Technician

- Mobile Technician
- Procurement
- Stores

A classification role must be assigned before any other.

Currently, if there are affiliated services, the classification must be the same for all services sharing the same desktop application.

User Type Roles

To enable users to sign in to the desktop applications, one of the following roles must be assigned.

- Standard User Permissions (Paradox)
- Extended User Permissions (Paradox)
- Read Only User Permissions (Paradox)

"Standard" grants the normal set of permissions that 95% of users will require to use the desktop applications

"Extended" should be granted to Prosthetic clerical staff only – it allows them to progress jobs.

"Read Only" would be suitable for those that only wish to run reports, or read notes, without being able to add anything new to the system. This is typically suited to senior managers outwith the immediate service, or clinical staff from other services.

Sub Service Roles

Sub Service Roles allow packages/episodes to be assigned to a user. These are only important for Wheelchair clinical staff.

- Clinician for Adult Wheelchairs
- Clinician for Childrens Wheelchairs
- Clinician for Seating Service

One or more of the above should be assigned to all clinical staff in the Wheelchair Service.

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Web Application Roles

A classification role for any service will allow the user to sign in and search for information. To allow the user to edit or process information in the new web application, other roles are required. There are generally 3 levels for each team or area of work. These levels work on the following generic basis:

Standard:	Basic permissions to do most things.
Extended:	Permissions that required more knowledge of the system and awareness of the actions that will be generated.
Management / Team Leader:	Requires advanced knowledge of the system and the detailed implications of the action being undertaken.

The Teams / Areas are:

- Clerical
- Clinical
- Procurement
- Stores
- Van Runs
- Workshop

This results in a different combination possible for each site and service. For example, a user could be granted a Standard Clerical role for the Grampian Wheelchair service, an Extended Procurement Role for the Glasgow Prosthetic service or a Workshop Team Leader role for Tayside Orthotics. Or all of the above!

In the first stage of implementation, not all of these roles will have an effect in the web application as the appropriate modules have not been transferred, however some of them will be translated into appropriate roles and permissions for the ReTIS desktop applications. As the redevelopment progresses, the abilities of each of these roles may change and roles may be added or removed.

The clerical and clinical roles have received the most attention for managing patient records and referrals and have the most effect in the web interface.

Desktop Application & Web v1 Roles

Further roles exist for backward compatibility with the existing locally based desktop applications. These control specific permissions in the local applications such as being able to raise different types of jobs; whether the user has a diary; whether they can raise orders; or their permissions within the van planner module.

- User has a ReTIS diary
- Can Book Provisional Van Jobs
- Van Planner Standard Permissions
- Van Planner Route Authoriser
- Van Planner Patient Verifier
- Van Planner Coordinator
- Van Planner Stores Permissions
- Van Planner Store Run Coordinator
- Van Planner Management Permission

- Permission to raise any type of van job
- Permission to raise secondary jobs
- Permission to raise order for patient
- Permission to raise stock chair orders

Some of these roles may remain when the appropriate modules are included in the web application, but most will be absorbed by the standard, extended or management roles, defined above.

Special Roles

The last set of 5 roles all exist for special reasons …

- Student
- Requires Supervision

Both of these have the same effect – they require a supervisor to be specified.

A "student" could be a temporary student placement, with no clinical responsibilities, whereas the other could be a Trainee Clinical Scientist who is longer term and developing their skills as they progress by taking on increasing clinical responsibility.

Further functionality may be implemented in future to allow someone else to authorise certain tasks undertaken by students/trainees. This has yet to be decided.

- Line Manager

Assigning a line manager role has the effect of populating the user's name in the list of line managers for that service.   This could be used for their official line manager, but becomes much more useful when their supervisor is listed. It helps the ReTIS staff understand who to contact with any issues and could be used in future for other tasks.

- Authoriser

An authoriser role will only ever be granted by the ReTIS team, following attendance at a training event.

- Van Driver

This is a descriptive role, rather than a job description. If assigned, it forces the entry of a home postcode, which is currently required in the van planning module of the Wheelchair desktop application. All mobile technicians therefore need this role.

Clinical staff may also drive vans and if a scheduling module was developed, in future, based around appointments rather than jobs, this would then become important for them.

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Assigning Roles

Standard Roles

The quickest and easiest way to assign the appropriate roles to a user is by using the "Standard Roles" button. This button is only available to local authorisers.

This has been preset with typical roles for common job descriptions. Select the appropriate one. Check the abilities listed below the selected job description before confirming.

 If nothing appropriate exists, please contact the ReTIS Service Desk to have one added in the next update.

All appropriate roles will be added and authorised to the user.

Further Roles

If further roles are required, add them manually with the "Request Roles" button. If you are an authoriser, these will be automatically authorised, unless you untick the "Authorise Now" box.

Using Future Start and End Dates

By default roles start immediately they have been authorised and verified.

If you wish a role to start or end on a different date, perhaps because the user needs access or a particular role for a fixed term, or you know that will start on a specific date in the future, you can specify these dates for any role.

As an example, if a user needs stock permissions to help with stock take in March, the appropriate role can be assigned for a short period of time and will automatically disable at the end date.

If the role you wish to set dates for is already in the user's profile, you will need to remove it and re-add it with the dates specified. This is the usual scenario if you have used the "Standard Roles" button.

If you wish to disable a user's access on a particular date in the future, specify an end date for the "Classification" role, as the user requires this to be active. It is not necessary to apply an end date to every role. The user would be automatically disabled at the classification role end date.

Roles cannot be backdated.

All dates applicable to the role are shown when you click to expand the role.

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Role Abilities

The following is a table to show the abilities that each role currently has. Please read this in conjunction with the notes above.

The up-to-date abilities are shown on screen when requesting new roles. Please make sure you have the latest version of this document.

Type	Role Name	Abilities
Authoriser	Can Authorise User Access	• Can authorise user accounts.
Classification	Consultant	• Appears in the list of Consultants/Doctors.
Classification	Consultant / Doctor (Lothian)	• Appears in the list of Consultants/Doctors (Lothian).
Classification	Clinical Scientist	• Appears in the list of Clinical Scientists.
Classification	Orthotist	• Appears in the list of Orthotists.
Classification	Prosthetist	• Appears in the list of Prosthetists.
Classification	Occupational Therapist	• Appears in the list of Occupational Therapists.
Classification	Physiotherapist	• Appears in the list of Physiotherapists.
Classification	Technical Officer	• Appears in the list of Technical Officers.
Classification	Nursing Staff	• Appears in the list of Nurses.
Classification	Clerical Staff	• Appears in the list of Clerical Staff.
Classification	Technician	• Appears in the list of Technicians.
Classification	Field Service Engineer	• Appears in the list of Mobile Technicians.
Classification	Procurement	• Appears in the list of Clerical Staff (Procurement).
Classification	Stores	• Appears in the list of Stores.
Classification	ReTIS	• Appears in the list of ReTIS staff.
Classification	Unclassified User Type	• Appears in the list of Other Staff.
Classification	Regular Clinic	• Appears in the list of Scheduled Clinics.
Classification	Van Resource	• Appears as a physical van resource.
Classification	Van Area	• Appears in the list of available van areas.
Clerical	Standard Clerical Permissions	• Can update patient records. • Can process referrals. • Can raise van jobs (delivers, repairs & collects etc...) (Wheelchair affiliated services only). • Can book provisional jobs onto a van run.
Clerical	Extended Clerical Permissions	• Can update patient records. • Can remove a diagnosis from a patient. • Can merge patient records. • Can process referrals. • Can add parts to jobs. • Can raise van jobs (delivers, repairs & collects etc...) (Wheelchair affiliated services only). • Can book provisional jobs onto a van run.
Clerical	Management Clerical Permissions / Team Leader	• Can update patient records. • Can remove a diagnosis from a patient. • Can merge patient records. • Can process referrals. • Can add parts to jobs.

		• Can raise van jobs (delivers, repairs & collects etc...) (Wheelchair affiliated services only). • Can assign episodes. • Can uncomplete episodes. • Can permanently remove attachments. • Can book provisional jobs onto a van run.
Clinical	Standard Clinical Permissions	• Can update patient records. • Can process referrals. • Can screen referrals. • Can add parts to jobs.
Clinical	Extended Clinical Permissions	• Can update patient records. • Can assign clinical episodes to other staff. • Can process referrals. • Can screen referrals. • Can add parts to jobs.
Clinical	Management Clinical Permissions / Team Leader	• Can update patient records. • Can assign clinical episodes to other staff. • Can process referrals. • Can screen referrals. • Can add parts to jobs.
Diary	User has a ReTIS Diary	• Has a ReTIS Diary for appointments.
Line Manager	Directly Line Manages Someone	• Can be set as a line manager.
Procurement	Permission to raise order for patient	• Can raise orders for patients.
Procurement	Permission to raise stock chair orders	• Can access the wheelchair stock ordering screen. • Can add types to wheelchair stock reordering.
Procurement	Standard Procurement Permissions	• Can raise orders for patients. • Can raise stock orders. • Can process orders.
Procurement	Management Procurement Permissions	• Can raise orders for patients. • Can raise stock orders. • Can process orders.
Requires Supervision	Requires Supervision	• Requires supervision as a trainee for some parts of the service.
Stores	Standard Stores Permissions	• Has access to stock screen. • Can alter all aspects of stock. • Can add new suppliers.
Stores	Extended Stores Permissions	• Has access to stock screen. • Can alter all aspects of stock. • Can add new suppliers.
Stores	Management Stores Permissions	• Has access to stock screen. • Can alter all aspects of stock. • Can add new suppliers.
Student	User is a Student	• Requires supervision as a student.
Sub Service	Clinician for Adult Wheelchairs	• Adult Wheelchair packages can be assigned from the Waiting List.
Sub Service	Clinician for Childrens	• Children's Wheelchair packages can be

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	Wheelchairs	assigned from the Waiting List.
Sub Service	Clinician for Seating Service	• Seating Service packages can be assigned from the Waiting List.
User Type	Standard User Permissions (Paradox)	• Access to the desktop application. • Can add notes.
User Type	Extended User Permissions (Paradox)	• Access to the desktop application. • Can add notes. • Can progress Prosthetic jobs. • Can process wheelchairs without ordering.
User Type	Read Only User Permissions (Paradox)	• Access to the desktop application. • Can only view information.
Van Runs	Can book provisional van jobs	• Can book provisional jobs onto a van run.
Van Runs	Van Driver	• Can be assigned as a technician on a van run.
Van Runs	Van Planner Standard Permissions	• Can confirm jobs on van runs. • Can book provisional jobs onto a van run.
Van Runs	Van Planner Coordinator	• Can confirm jobs on van runs. • Can manage van runs. • Can book provisional jobs onto a van run.
Van Runs	Van Planner Route Authoriser	• Can confirm routes for van runs. • Can book provisional jobs onto a van run.
Van Runs	Van Planner Patient Verifier	• Can confirm patient availability for van runs. • Can book provisional jobs onto a van run.
Van Runs	Van Run Management Permissions	• Can confirm jobs on van runs. • Can manage van runs. • Can manage van area profiles. • Can book provisional jobs onto a van run.
Van Runs	Van Planner Stores Permissions	• Can record parts and chairs as ready for van runs.
Van Runs	Van Planner Store Run Coordinator	• Can allocate van runs to stores staff.
Workshop	Standard Workshop Permissions	• Can add parts to jobs.
Workshop	Permission to raise any type of van job	• Can raise van jobs (delivers, repairs & collects etc...) (Wheelchair affiliated services only).
Workshop	Permission to raise secondary jobs	• Can raise secondary jobs (Wheelchair affiliated services only).
Workshop	Extended Workshop Permissions	• Can add parts to jobs. • Can process jobs in progress.
Workshop	Management Workshop Permissions	• Can add parts to jobs. • Can process jobs in progress. • Can assign jobs to technicians.