User and Group Overview

To be able to access, process, and set security in EPS, set up the following information:

- **user record**

  Create a user record for each user. This record includes the user's name, initials, employee ID number, user group, license numbers, and other information. An administrative user can also access the User Biometrics window to scan a user's fingerprint and save it as part of his or her user record. Users can then use a biometric device to identify themselves when they log into the system and start and complete various tasks.

- **user group**

  Create user groups for each type of employee (such as administrator, pharmacist, technician) so that you can add a user to a group and then define roles and security for that group. For example, if you create a technician group, you then link all of your technician user records to that group.

- **user roles**

  Link user roles to a user group. User roles determine some of the security for the system. For example, to enable a user to process call tasks, you add the corresponding call task user role to that user's user group.

- **field-level security**

  For all of the windows, menu options, tasks, and other components in EPS that do not have a user role defined on the User Role window, use field-level security to determine if users in a specific user group can view, access, or edit a component (such as a window, field, button, task). Only an administrator with the Field-Level Security user role can set up field-level security for other users.

Note: EPS is equipped with an LDAP (Lightweight Directory Access Protocol) server that communicates with your corporate LDAP server. When you add or update user and user group records on your local system, the records are saved to your corporate LDAP server. Therefore, all stores in your chain have access to a chain-wide database of user records. This shared database, however, also means that user group changes affect all stores and you should therefore limit user group security changes to your corporate system.

See Also

Add a User Record

Add a User Group

User Roles (2.5.01)

User Roles (2.5.02)

Set Up Field-Level Security

About Personal Health Information (PHI) Security

In addition to role-based security, EPS audits PHI access, both internally and in the web applications linked to EPS (the Dashboard, Audit Monitor, and Message Monitor). This setting must be enabled in the ECC (**Administration** > **Application Settings** > **Store Settings**). The system tracks the information listed below. This information is sent to the KP data warehouse to be used for reports.

Information Captured	Type of Audit	
	Internal Audit	**Web Applications Linked to EPS**
Pharmacy User Information		
Window name	•	•
Workstation used to access a window	•	•
Employee number of the user who entered the window	•	
IP address of the computer accessing the window		•
Date/time stamp indicating when the user entered the window	•	•
Employee number of the user who exited the window	•	N/A[1]
Date/time stamp indicating when the user exited the window	•	N/A[1]
Patient Information		
Geographic Region	•	•
Geographic Location	•	•
Medical Record Number (MRN)*	•	•
Rx.com ID (from the Electronic Pharmacy Record - unique across the chain)*	•	•

Patient ID (local ID from the pharmacy; unique only to that pharmacy)*	•	•
KP Rx (Rx Grouping Reference Number) If a user enters a window that displays a list of KP Rx's, EPS captures each one displayed, if applicable.	•	•
Rx Number (see KP Rx)	•	•
Tx Number (see KP Rx)	•	•

[1] There is no conclusive way to capture this

* All three of these values might not be available, but at least one must be present to capture an audit event. If the system cannot capture at least one ID, no audit event is captured.

See Also

Dashboard

Audit Monitor

Message Monitor

Add a User Group

Create user groups for each type of employee (such as administrator, pharmacist, technician) so that you can add a user to a group and then define roles and security for that group.

To add a user group:

1. Select **Administration > Group**.

2. Select **Add New** on the User Group Search window to close the search window.

3. In the **Group Name** field on the User Group window, type a name for the user group record.

   Note: You link users to the group name via the User Group option on the User window.

4. In the **Group Description** field, type a description of the user group.

5. For each role you want to remove from the user group, highlight the role in the **Selected Roles** column and select **Remove >**. To remove all of the roles, select **Remove All >>**.

   The system moves the selected role to the **Available Roles** column. To add a role back to the group, highlight the role in the **Available Roles** column and select **< Add**. To add all of the roles back to the group, select **<< Add All**.

   Note: For more information about each available role, see User Roles.

5. Select **Save**.

   The system saves the user group to your local system. In addition, the system saves the group to your corporate LDAP server so other stores in your chain can search for and select the group record.

See Also

User Overview

User Group Window

User Roles (2.5.01)

User Roles (2.5.02)

Add a New User

Create a user record for each user and link that user to a user group as indicated below.

To add a new user:

1. Select **Administration** > **User**.
2. Select **Add New User.**
3. In the **Last Name** field, type the user's last name.
4. In the **First Name** field, type the user's first name.
5. In the **Initials** field, type the user's initials.
6. Enter the user's group in the **User Group** field.

   Notes:

   - You can select to display the User Group Search window, where you can search for and select a user group.
   - The user group determines which tasks the user can perform in the system. You can create user group records on the User Group window. For more information, see Add a User Group.

7. In the **User Login Code** field, type the user's login code.

   For example, you can use the first letter of the user's first name followed by the user's last name.

8. In the **Password** field, type the user's login password.

   Note: The user's password must meet the requirements defined on the Login Security Requirements window in Application Settings.

9. In the **Confirm Password** field, retype the user's login password.

10. In the **Employee ID Number** field, type the user's company-assigned employee identification number.
11. Enter any additional information as needed.
12. Select **Save**.

    The system saves the user record to your system.

See Also

User Overview

Add User Group

Add User Biometrics

Add Custom FLS Role

Create a custom field-level security role as indicated below.

To add a new custom field-level security role:

1. Select **Administration > Custom FLS Roles**.
2. Select **Add New.**
3. In the **Custom FLS Role Name** field, type the name of the role.
4. In the **Custom FLS Role Description** field, type the description of the role.
5. If you want to copy the securities from another custom field-level security role, select the appropriate role in the **Copy Field Level Securities From** field.
6. Select **Save**.

   The system saves the field-level security record to your system.

See Also

Custom FLS Roles Window

Add User License

For each pharmacist and technician, add the license as needed.

To add a professional license to a user record:

1. Select **Administration > User**.
2. Use the **Select by Employee ID Number** field to select an existing user or select **Add New User** to add a new user record.

   For more information on adding new users, see Add User Record.
3. Select **Add License**.

   The system displays the User Licenses window.
4. Set the **State** option to the state where the user license was issued.
5. In the **License Number** field, enter the user's license number.
6. Set the **License Type** option to the type of user license: **RPh** (Registered Pharmacist) or **CPhT** (certified Pharmacy Technician).
7. Select **Save**.

   The system saves the license to the user record and displays the User window.

See Also

User Overview

Add User Biometrics

Only administrative users and non-administrative users assigned the appropriate user role are authorized to add biometrics to a user record.

To add biometrics to a user record:

1. Select **Administration > User**.
2. For an existing user, enter the user's employee ID number in the **Select by Employee ID Number** field and chose **Select**. To add a new user, select **Add New User**. For more information, see Add User Record.
   Note: To allow a non-administrative user to add a user biometric ID to another user's record, assign the **Add User Biometric ID** and **Admin Rebill** user roles from the **User Group** field on the User window.
3. Select **Biometrics**.

   The system displays the User Biometrics window.
4. Have the user place his or her finger on the biometrics device.

   The system displays a preview of the fingerprint and prompts the user to lift and reapply the same finger four additional times.
5. After the fifth time, enter your information in the **Employee ID Number**, **User Login Code**, and **Password** fields.
6. Select **OK**.

   The system displays the User window.
7. Select **Save**.

See Also

User Biometrics Window

Set Up Field-Level Security

For all of the windows, menu options, tasks, and other components in EPS that do not have a user role defined on the User Role window, use field-level security. For example, you can determine if users in a specific user group can view and select a menu option, access a window, edit or add a record, deactivate or activate a record, approve a record, or delete a record. Components you can secure include:

- fields
- drop-down lists
- table columns
- selectable options, such as checkboxes and radio buttons
- menu options and sub-menu options to disable access to an entire window
  (Securing a menu option only disables access. To set a window as display-only, you must secure every component on the window. Or you can allow access to the fields and just secure the ability to save any changes.)

Note: Only an administrator with the Field-Level Security user role can set up field-level security for other users. Because changes to user group security affects those same groups at your other stores, we recommend that you perform these security settings only on your corporate system.

To set up field-level security for a group:

1. Log into EPS with your administrative user login that has the field-level security user role.
2. Access the field, menu option, or button you want to secure.
3. With the mouse, select the component (field, menu option, button).

4. Press **CTRL** + **ALT** + **SHIFT** + right click on the component.

   The system displays the *Security Settings window*.

5. For each user group, highlight a group and use the single-arrow buttons [>] to move that one group to the security level you want or use the double-arrow buttons [>>] to move ALL of the groups to the same security level as indicated.

   - To allow users in that group to have full access (view and use/alter the component, such as using a **Save** button or altering a field entry), use the arrow buttons to move the group to the **Groups that can access component** column.
   - To allow users in that group to only view the component so they cannot alter or use that component, use the arrow buttons to move the group to the **Make components view-only** column.
   - To prevent users from seeing and using the component, use the arrow buttons to move the group to the **Hide component value** column.
     Note: You can use this security level only for text fields, drop-down lists, and columns.

6. After you move all of the groups to the security level you want, select **Save**.

User Roles

To determine which tasks you can perform and which windows, fields, or buttons you can access, you set up field-level security on some windows and user roles for other windows/tasks.

For the windows and tasks that require a user role, you must have that user role in your user group to be able to perform the corresponding tasks. If you do not have that user role, the system disables the menu option, field, or button.

Note: The system logs all changes you make to your user and group roles in the Audit Log table.

The first time you display the window when creating a new group, EPS displays all roles (Workflow and RapidFill).

The following roles control the ability to access menu options, windows, fields, and buttons in the system.

Role	Allows you to
ACS Complete	Process ACS Complete tasks The system creates an ACS Complete task when it receives a messa from the ACS device indicating that a prescription was successfully filled.
ACS Message Failed	Process the ACS exception tasks the system creates when it fails to send a prescription to the ACS device.
ACS Hold	Used by background processes to transmit prescriptions to an ACS device.
ACS Receive	Receive a response back from the ACS device The response type is either **CNTD** (counted) or **ERR** (error)
ACS Rejected	Process the ACS exception tasks the system creates when the ACS device rejects a prescription
ACS Xmit	Used for orders with one or more prescriptions that can be filled via ACS device and one or more prescriptions that must be filled manu When the user at the Fill stations selects **Next Task**, the system sen the ACS prescriptions to the ACS device.

Administrative Role	Administration menu **- Communication Settings** and **Patient Mes Queue** options
Call Insurance	Process Call Insurance tasks If you are not set up for this role and you attempt to select a Call Insurance task, the system displays the message, **Selected task is checked out or insufficient permissions**.
Call Patient	Process Call Patient tasks If you are not set up for this role and you attempt to select a Call Pa task, the system displays the message, **Selected task is checked ou insufficient permissions**.
Call Pharmacy	Process Call Pharmacy tasks If you are not set up for this role and you attempt to select a Call Pharmacy task, the system displays the message, **Selected task is checked out or insufficient permissions**.
Call Prescriber	Process Call Prescriber tasks If you are not set up for this role and you attempt to select a Call Prescriber task, the system displays the message, **Selected task is checked out or insufficient permissions**.
Central Fill Receive	Access Tools menu **-** Rx.com Store Delivery (or Central Fill) Recei option
Coordination of Benefits Review	Process Coordination of Benefits (CoB) Review tasks The system creates a CoB Review task when you receive a respons from a primary or secondary third party and you need to enter additional information to split bill the claim to the secondary or ter third party. Note: The **Requires Split Bill Review** checkbox on the Insurance F Billing window determines whether a plan requires you to enter additional information before submitting a split billed claim.
Dashboard Admin	Administration > Dashboard menu **- Detailed Dashboard** option
Data Entry	Process Data Entry tasks If you are not set up for this role, the system disables the **DE** task counter label on the Welcome window.
Downtime Third Party Exception	Access claims that are in downtime.
Data Verification	Process Data Verification tasks If you are not set up for this role, the system disables the **DV** task

	counter label on the Welcome window.
Data Verification 2	Process Data Verification 2 tasks If you are not set up for this role, the system disables the **DV2** task counter label on the Welcome window.
Escript	Process new eScript tasks The system creates a new eScript task when you receive a new prescription from a prescriber electronically. If you are not set up fc this role, the system disables the **ES** task counter label on the Welcc window.
Background Exception	Process Error Handling tasks The system creates an Error Handling task if an error occurs that prevents a prescription from moving to the next step in the Workflo process.
Central Fill Exception	Process exception tasks the system creates for Central Fill prescript
Third Party Low Pay	Process tasks generated to resolve third party low pay claims You define whether a workstation can receive Low Pay tasks with t **Low Pay** checkbox on the Workstation Configuration Workflow window.
TP Exceptions Lvl 1	Process level 1 third party exceptions Note: You define the level of third party exceptions with the **User F** drop-down list on the Third Party Exception Routing window.
TP Exceptions Lvl 2	Process level 2 third party exceptions Note: You define the level of third party exceptions with the **User F** drop-down list on the Third Party Exception Routing window.
TP Exceptions Lvl 3	Process level 3 third party exceptions Note: You define the level of third party exceptions with the **User F** drop-down list on the Third Party Exception Routing window.
TP Exceptions Lvl 4	Process level 4 third party exceptions Note: You define the level of third party exceptions with the **User F** drop-down list on the Third Party Exception Routing window.
TP Exceptions Lvl 5	Process level 5 third party exceptions Note: You define the level of third party exceptions with the **User F** drop-down list on the Third Party Exception Routing window.
Field Level	Assign security at the field, button, or tab level so you can hide, shc

Security	as read-only, or allow users to perform the corresponding task
Fill Task	Process Fill tasks in Workflow and RapidFill (using the Opticon scanner), depending on your system configuration Perform the Verify NDC Manually task. If you use Workflow and are not set up for this role, the system disa the **Fill** task counter label on the Welcome window.
Inv Mgmt - Create Orders	Access **Create Orders** from Tools > **Inventory Management** If you are not set up for this role, the system does not display the **Create Orders** option on the Inventory Management window.
Inv Mgmt - Create Ret. Adj.	Access **Create Ret/Adj** from Tools > **Inventory Management** If you are not set up for this role, the system does not display the **Create Ret/Adj** option on the Inventory Management window.
Inv Mgmt - Drug File	Access **Drug File** from Tools > **Inventory Management** If you are not set up for this role, the system does not display the **D** **File** option on the Inventory Management window.
Inv Mgmt - Reorder File	Access Drug File > search and select [*drug*] > **Reorder** If you are not set up for this role, when you select Reorder, **Insufici Access Rights** displays, preventing the user from accessing the Rec window.
Inv Mgmt - Reorder File Add	Add new drug reorder records from Inventory Management > Drug > Reorder > **Add New Reorder Record**
Inv Mgmt - Reorder File Edit	Edit existing drug reorder records on the Drug File Reorder windo
Inv Mgmt - Drug Inv Count	Access the **Drug Inventory Count** option from Tools > **Inventory Management** If you are not set up for this role, the **Drug Inventory Count** optio will not appear on the Inventory Management window.
Inv Mgmt - Drug Inv Count Edit	Edit existing inventory count records on the Inventory Managemen Inventory Count window.
Inv Mgmt - Drug Inv Count Add-Del	Add or delete inventory count records on the Inventory Manageme Inventory Count window.
Inv Mgmt - List Orders	Access the **List Orders** option from Tools > **Inventory Managem**
Inv Mgmt - List Orders Delete	Access the **To Delete** checkbox on the Inventory Management List Orders window.

Inv Mgmt - List Orders Edit	Edit existing drug orders on the Inventory Management List Orders window.
Inv Mgmt - List Ret Adj	Access the **List Ret/Adj** option from Tools > **Inventory Managem**
Inv Mgmt - List Ret Adj Edit	Edit existing returns and adjustments on the Inventory Managemen List Returns/Adjustments window.
Inv Mgmt - Reorder File Deact-Act	Activate or deactivate drug reorder records in Inventory Manageme on the Drug File Reorder window.
Inventory	Access Filecabinet > Drug menu **- Reorder** option and Tools menu **Inventory Management** option
Mail Order Approval	Process Mail Order Approval tasks, where you enter the credit card authorization number before transmitting an order to Rx.com
New MTM	Enroll patients in Medication Therapy Management programs If you are not set up for this role, the system disables the **MTM** but on the Welcome window.
Order Entry	Perform the tasks available in the Order Entry feature If you are not set up for this role, the system disables the **Order En** button on the Welcome window.
Open Call Queue	Access to complete tasks within the Open Call Queue
Patient Maintenance	Process Patient Maintenance tasks
Product Verification	Display the next available Product Verification task by scanning the transaction number in the **Tx Number** field on the Welcome windo If you are not set up for this role, the system disables the **Tx Numb** field.
Reports - Administrative	Print and edit reports on the Tools > Reports menu that are set up w report role of **Administrative** **Note**: You define the report roles for users on the ECC application.
Reports - Pharmacist	Print and edit reports on the Tools > Reports menu that are set up w report role of **Pharmacist**
Reports - Pharmacy Manager	Print and edit reports on the Tools > Reports menu that are set up w report role of **Pharmacy Manager**
Reports -	Print and edit reports on the Tools > Reports menu that are set up w

Technician	report role of **Technician**
Pharmacist Counseling	Complete Pharmacist Counseling task Tools menu **- Pharmacist Counseling** option, Pharmacist Counseli window.
Resolve Downtime Claim	Work Process Adjudication Result tasks generated to resolve downt claims submitted to the third party
System Task - Administrative	Run system tasks on the Administration > System Tasks menu that set up with a role of **Administrative**. Note: You define the system task roles for users in the ECC applica
System Task - Pharmacist	Run system tasks on the Administration > System Tasks menu that set up with a role of **Pharmacist**.
System Task - Pharmacy Manager	Run system tasks on the Administration > System Tasks menu that set up with a role of **Pharmacy Manager**.
System Task - Technician	Run system tasks on the Administration > System Tasks menu that set up with a role of **Technician**.
TP Exception Queue	Tools > Task Queues menu **- TP Exception Queue (CTRL+T)** opt
Third Party	Access Filecabinet menu **- Insurance Plan**, **Employer**, and **Worke Compensation Carrier** options Tools menu **- TP Transmit Queue** option
Will Call	Access and perform tasks available in the Will Call feature If you are not set up for this role, the system disables the **Will Call** button on the Welcome window.

See Also

User Overview

Add a User Group

User Group Window

Security Settings Window

To display the Security Settings window, press **CTRL + ALT + SHIFT +** right click on the desired field or menu option.

The following describes the fields on the Security Settings window.

Groups that can access component	Groups in this column have full access and ability to use the selected component..
Make component view-only	Groups in this column can view the selected component, but not edit or use it.
Hide component value	Groups in this column no longer see the selected component.
>	Select to move the highlighted group one column over.
>>	Select to move the entire list of groups one column over.
<	Select to the move the highlighted group back one column.
<<	Select to move the entire list of groups back one column.
Save	Select to save the security settings.
Undo Changes	Select to clear the information from the window before saving the security setting changes.
Component ID	Unique identifier for the field selected.

User Biometrics Window

To display the User Biometrics window, select **Administration > User > Biometrics**.

The following describes the fields on the User Biometrics window.

Employee Name	User's full name
Employee ID Number	User's company-assigned employee ID number
Fingerprint Preview	Displays the user's fingerprint when he or she touches the biometrics device
Employee ID Number	User's employee ID number
User Login Code	User's login code
Password	User's password

OK	Select to save the user's fingerprint to the user record.
Clear	Select to clear the information from the window before saving the user's fingerprint.

User Group Window

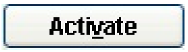
To display the User Group window, select **Administration > Group**.

Note: The system displays the User Group Search window when you initially display the User Group window.

The following describes the fields the User Group window.

Search	Select to display the User Group Search window, where you can search for an existing user group.
Group Name	Name of the user group record For example, **Pharmacist** or **Technician**.
Group Description	Description of the user group record
Selected Roles	Roles that users linked to the displayed group can perform For example, if you add the **Order Entry** role, users linked to the group can access the Order Entry window and create orders. For a list of the available user roles, see User Roles.
< Add	Select to move a highlighted role from the Available Roles column to the Selected Roles column.
<< Add All	Select to move all roles from the Available Roles column to the Selected Roles column.
Remove >	Select to move a highlighted role from the Selected Roles column to the Available Roles column.
Remove All >>	Select to move all roles from the Selected Roles column to the Available Roles column.
Available Roles	Roles that users linked to the displayed group **cannot** perform
Show Workflow Roles	Select to view the available user roles in Workflow.
Copy Field Level Securities From	Group from which you want to copy existing securities

Save	Select to save a new record or save changes to an existing record.
Undo Changes	Select to clear the information you entered and restore the fields with the last saved information.

 / 	Select to deactivate or activate the displayed record. **Note:** The system displays the **Activate** button only on records that have been previously deactivated.

See Also

User Roles

User Window

To display the User window, select **Administration** > **User**.

The following describes the fields on the User window.

Select by Employee ID Number User's employee ID number

Select — Enter the user's employee ID number and choose **Select** to display the employee's user record.

Add New User — Select to add a new user record.

Note: You must select **Add New User** before you begin entering information for the record you want to add.

Add/Edit This User Information

Last Name User's last name

First Name User's first name

Middle User's middle name

Biometrics — Select to display the Use Biometrics window, where you can save user's fingerprint to their user record.

Note: You must save the user record for the system to enable the **Biometrics** button.

Initials User's initials

Enable Logon — Select to enable the user to log into the system.

Note: The system disables the user's ability to log into the system if the maximum number of consecutive unsuccessful login attempts.

Disable Logon — Select to prevent the user from logging in to the system.

Print Barcode — Select to print a barcode containing the employee ID number of the displayed user. The system prints the barcode to your Barcode printer.

Note: If you are using the Portable Fill station in RapidFill, you must scan your employee ID barcode as the first step in the Portable Fill task.

User Group User group to which the user is assigned

Note: The user group determines which tasks the user can

	perform in the system. You can create user group records on the User Group window. For more information, see Add User Group Record.
User Login Code	Code that represents the user You use this code to log into the system.
Password	User's login password Note: The user's password must meet the requirements defined on the Login Security Requirements window in Application Settings.
Confirm Password	User's login password You must type the user's password in the **Confirm Password** field to save a user record.
NPI Number	National Provider Identifier number for the user
Employee ID Number	Unique identification number for the user

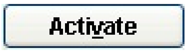
State License Numbers

State	State in which the user license is assigned
License Number	Professional license number of the user (pharmacist or technician)
Type	Indicates the type of user license number: **Rph** = pharmacist **CPhT** = certified technician
Deactivated	Date when the user license was deactivated
Edit License	Highlight an existing user license and select **Edit License** to display the User Licenses window.
Add License	Select to display the User Licenses window, where you can add a new user license.
Deactivated	Date the user record was deactivated

Save	Select to save the new record or save changes to an existing record.
Undo Changes	Select to clear the information you entered for a new record or

undo changes you made to an existing record.

Select to deactivate the displayed record.



Select to activate the displayed record.

Note: The system displays the **Activate** button only on records that have been previously deactivated.

Custom FLS Roles Window

To display the Custom FLS Roles window, select **Administration** > **Custom FLS Roles**.

Note: The system displays the Custom FLS Roles Search window when you initially display the Custom FLS Roles window.

The following describes the fields on the Custom FLS Roles window.

Search	Select to display the Custom FLS Roles Search window, where you can search for an existing custom field-level security role record.
Custom FLS Role Name	Name of the custom field-level security role record For example, **Pharmacist** or **Technician**.
Custom FLS Role Description	Description of the custom field-level security role record
Copy Field Level Securities From	Group from which you want to copy existing securities

Save	Select to save a new record or save changes to an existing record.
Undo Changes	Select to clear the information you entered and restore the fields with the last saved information.
Deactivate/ Activate	Select to deactivate or activate the displayed record. **Note:** The system displays the **Activate** button only on records that have been previously deactivated.