User Roles

Various user roles are available to provide flexibility for clients in controlling employee access to features and functionality in the Payment Accelerator software. The permissions for each role are described below. These roles are assigned to individual users.

Roles Available

In order from most restrictive to least restrictive the available roles are: Reporting, Payments, Intake, Account Rep and Local Admin.

Reporting

The "Reporting" role provides the assigned user with a view into reporting but they do not have access to add/edit patients or plans or to any information on the Dashboard page. This user may change location if there are multiple locations for the client. These are the reports available in this role:

- Account on File Outsort and Summary reports
- Client Billing Detail report and Summary reports
- Collection Forecast and Collection Mix reports
- Deposit Report
- Payment Profile Detail report
- Prefunding Deposit report
- Prefunding Sweep Reconciliation
- Plan Detail Report
- Plan Summary
- Transaction Detail reports
- Transaction Summary

Payments

People given the "Payments" role do not have access to any of the information posted on the Dashboard. Users assigned this role may:

- Edit their own User Information
- Change Location if there are multiple client locations
- Take retail payments using either One-Time Payments or the Point of Sale card reader

Intake

The person assigned the “Intake” role does not have access to:

- Dashboard page information other than Delinquent Accounts
- Reports
- Treatment Plan Templates

This role does have the ability to change locations if there are multiple locations for the client. People in this role may:

- View/Add/Edit patient information
- View Announcements
- View the Resource Center
- View the Transactions - Card Expiration list
- View the Transactions – Declines and Rejects list
- Edit Payment Profiles
- Add/Edit Payment Plans for patients
- Add One-Time Transactions or Point of Sale Transactions
- Process Voids/Credits
- Print Receipts

Account Rep

The Account Rep user role is the default user role applied to each user on a client account. People in this role may change location if there are multiple locations for a client. They are able to do all of the task listed for both the Intake and Reporting roles. In addition they may:

- View All information on the Dashboard page
- View/Edit Statements
- Use the Data Exchange tab functionality to Import/Export
- Transactions – Declines & Rejects list – Resubmit
- Transactions – Unapplied Transactions list
- Edit Charge master
- Submit “Buy-Outs”

Local Admin

The Local Admin is the role with the widest permissions. People assigned this role may do all of the tasks listed for the Account Rep and in addition may:

- Add/Edit/Delete Announcements
- Add/Edit/Delete document in the Resource Center
- Add/edit/delete/reset users