# TotalABA Student Level Security Details & Setup

Summary

TotalABA supports restricted user access for appointments, students and their related records. In order to utilize this security in your practice, you should complete setup guide at the end of this document. If you have any questions or concerns, please contact support@inviscidsoftware.com.

Workflow

You must first complete setup guide (below) and submit it to Inviscid Software before the described security will work in your practice.

1. Open the student record and navigate to the Assigned Therapists on that student.
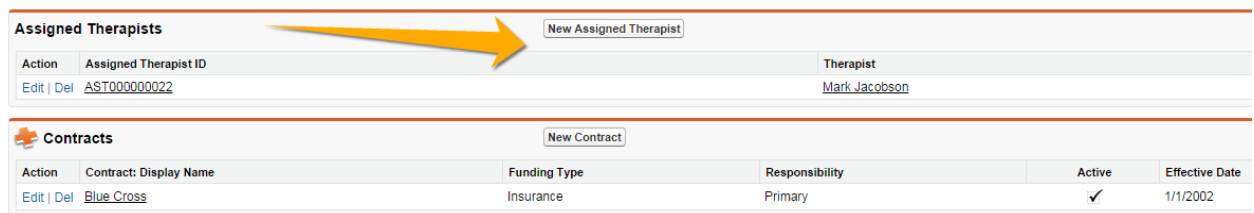
2. Add any users that should be able to access the student as assigned therapists via the **New Assigned Therapist** button.
3. You are now done for that student! Any users that are listed as an assigned therapist for that student can access the student record, appointments for that student and any other related records (e.g. sessions).

Details

The users in your practice that have been setup for restricted access (see the setup guide section) will only be able to access records as follows.

Students

Access to students will be based on if the user is set as an **assigned therapist**.   If the user is an assigned therapist then they can access the student record and all record types for that student as listed below. Note that you can customize if the user is able to access these record types at all along with the level of access they have (read, create, edit, delete).

- Appointments for that student
- Assessments
- Authorizations
- Contracts

- Diagnoses
- Sessions
- Treatment Plans

Student and Staff Member Locations

Your practice may also elect to control access to students based on the staff member and locations. When this enabled, if the staff member locations for a specific user match the student's locations, then the user will have access to the student and the related records in the same way they would if they were the assigned therapist. Note that the assigned therapist is always able to access the student regardless of the staff member and student locations.

Appointments

If an appointment is for a student, then all assigned therapists for that student will be able to access the appointment.

Additionally, if a user is the **assigned to** or an **additional attendee** on the appointment, then they will also be able to access the appointment. Finally, if they can access the appointment then they will also be able to access expense tracking and time tracking records for that appointment, assuming you have given them access to these record types in the first place.

Other

If a user is allowed to create a record (e.g. student, session, appointment, etc.), then they will be able to access that record regardless of if they are an assigned therapist on the student record or an attendee on the appointment. That is because they are the "owner" of that record. If they should no longer be able to access that record, make sure that they are no longer an assigned therapist on the student or an attendee on the appointment. Then click on the [Change] link next to the Owner field on that record and set it to the appropriate user in your practice (e.g. yourself).

If a user is made inactive and then reactivated at later date, they will need to be re-assigned to any applicable students in order to access those records again. This means that if they are still listed as an assigned therapist, that assigned therapist record should be deleted and re-created. You can also contact us to perform a security refresh if needed.

Users will be able to access all records for types that are not listed as restricted above. This is because they are not associated to a student or an appointment. Furthermore, they are required in order for the application to work correctly.

Reports

A report is available called Assigned Therapists (TotalABA Reports folder) that allows you to see the assigned therapists for each student along with any students that do not have at least one assigned therapist. If you require any additional reports, please let us know by contacting us at support@inviscidsoftware.com.

Setup Guide

You must provide the information below in order for Inviscid Software to setup the security in your practice. Also, it is important to understand that only the users that are setup for restricted access will be locked out of students, appointments and the related records as defined above. All other users will still be able to access all records in TotalABA unless you have previously requested custom security.

For each set of users (e.g. therapists, office staff, etc), please complete the **Record Type Access** and **User** information. Furthermore, you must determine if you want to utilize the staff member and student location level of access. Also, please feel free to start working on setting up the appropriate assigned therapists for each student and the staff member/student locations if you will be using this feature.

Record Type Access

For each of these record types, indicate the level of restricted access for the users. Note that you must have view access in order to have create, edit or delete access. Also, you must have edit access in order to have delete access.

	View	Create	Edit	Delete
Appointments				
Assessments				
Assigned Therapists				
Authorizations				
Contracts				
Diagnoses				
Expense Tracking				
Lessons				
Sessions				
Students				
Time Tracking				
Treatment Plans				

Users

Please list all users that the record type access should apply to. You can also simply state something like "existing therapists" or "existing office staff" if you already have users in that security group.

Inviscid
TotalABA Clinical Software