
MedSoft User Roles Guide

MedSoft offers five different user roles.

Please use the below guide to determine the necessary access for each of your employees.

Employee

This role has basic system access, including the below features:

<i>Admin</i>	Access to User Configuration, Insurances, and Vendors
<i>Reports</i>	User has access to Front Office reports
<i>HR</i>	User has access to Time Clock and Time Off Requests

Supervisor

This role includes the below features:

<i>Admin</i>	Access to User Configuration, Insurances, and Vendors
<i>Reports</i>	User has access to Admin and Financial reports
<i>HR</i>	User has access to Time Clock, Time Off Requests, and Time Off Approvals

Data Analyst

This role involves the same report access as a Supervisor, but does not involve the supervisory capabilities/access of the time clock.

<i>Admin</i>	Access to User Configuration, Insurances, and Vendors
<i>Reports</i>	User has access to Admin and Financial reports
<i>HR</i>	User has access to Time Clock and Time Off Requests

Admin

This role has access to all aspects and features of MedSoft.

<i>Admin</i>	Access to User, User Group, Company, and System Configuration, Charges, Employers, Insurances, and Vendors
<i>Reports</i>	User has access to all reports
<i>HR</i>	User has access to Time Clock, Time Off Approvals, Time Off Requests, and Employee Management

Billing

This role has basic system access, including the below features:

<i>Admin</i>	Access to User Configuration, Insurances, and Vendors
<i>Reports</i>	User has access to Billing and Financial reports
<i>HR</i>	User has access to Time Clock

Access on the Admin tab

	Configuration	Insurances	Vendors	Charges	Employers
Employee	User	✓	✓		
Supervisor	User	✓	✓		
Data Analyst	User	✓	✓		
Admin	User, User Group, Company, System	✓	✓	✓	✓
Billing	User	✓	✓		

Reports Access

	Front Office	Financial	Billing	Admin
Employee	✓			
Supervisor		✓		✓
Data Analyst		✓		✓
Admin	✓	✓	✓	✓
Billing		✓	✓	

Access on the HR tab

	Time Clock	Time Off Request	Time Off Approval	Employee
Employee	✓	✓		
Supervisor	✓	✓	✓	
Data Analyst	✓	✓		
Admin	✓	✓	✓	✓
Billing	✓	✓		

MedSoft Reports

MedSoft reports are sorted into four categories, outlined below.

Admin	Billing	Front Office	Financial
Transaction Totals By Therapist	Aging Summary	Productivity Detail	Payments Received
Performance	Aging Detail	No Show/Canceled Report	Payments Received Detail
Productivity Summary	Productivity Detail		
Productivity Detail			
Referrals By Doctor			
Referrals By Insurance			
New Registrations Per Month			
New Patients			
Patients By Status			
No Show/Canceled Report			
Monthly Comparison Report			