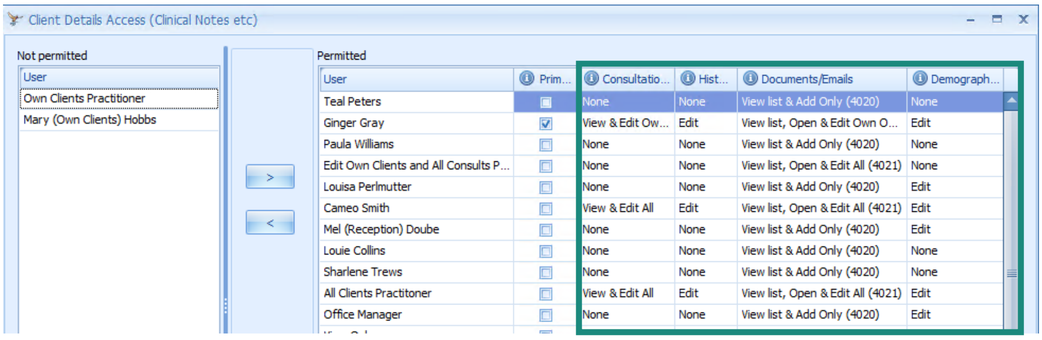
5001 - Change client practitioner

Quick reference guide – V7 SP1

What has changed?

This permission now only allows a user to change a Practitioner from the Not Permitted to Permitted list and assign them as Primary Practitioner. It no longer enables the ability to change a user's permissions to anything other than their default role permissions as all of the grid has been disabled except for the primary practitioner column.



These columns are no longer editable.

Why has this changed?

As it had been implemented, it enabled the unintended behaviour that a user could change their own permissions and therefore access to Client information.

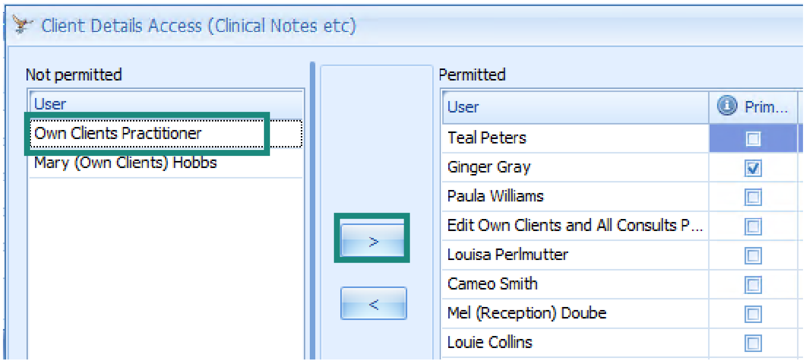
Managing practitioners who can only view clients assigned to them?

A user with permission 5001 will still be able to assign an "Own Client's" practitioner to a new Client as the primary practitioner. They can move the client from Not permitted to Permitted and on clicking Primary Practitioner the Practitioners default role permissions will be assigned.

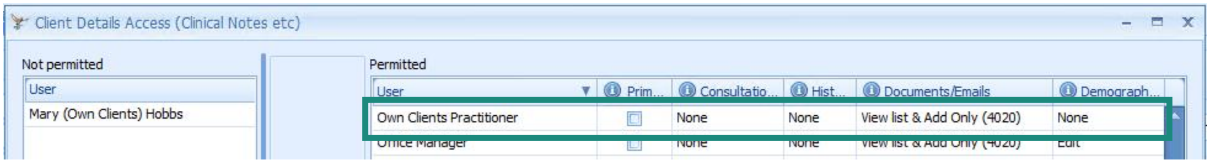
If the Practitioner requires permissions other than their default role permissions then, a user with permission 5000 - Can Manage Users and Permissions assigned to them is required to make that change.

How to change Primary Practitioner

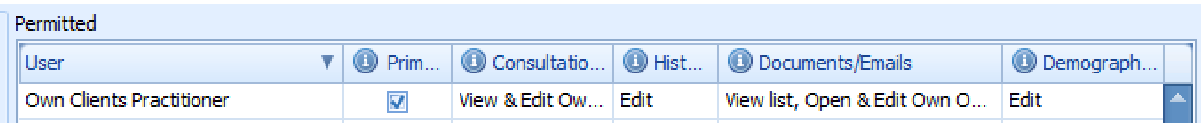
1. Select the practitioner
2. Click the move left to right arrow



3. Practitioner will be moved to the Permitted section
   a. If the Practitioner is an Own Clients practitioner, then there will initially be no rights assigned.
   b. All other role permission types will have their rights immediately visible



4. Click Primary practitioner
   a. The default permissions for the Own Clients Practitioner can be seen.
   b. Any manual updates will be overridden.



How to remove a Practitioner's access

If the practitioner is no longer permitted to view the Client's information, then moving them from the Permitted to Not Permitted section will remove their access.

For more information on:

- Role definitions click here
- Client Access definitions click here