

  
**Clinician Access Levels**

|  =All Clients  =Own Clients           X=No Access | Basic Access  | Basic Access + Billing  | Full Client List Access   | Administrative Access   |
|---|---|---|---|---|
| <b>CALENDAR</b>   |   |   |   |   |
| View practice calendar  |    |    |    |    |
| Create/Delete appointments  |    |    |    |    |
| Move appointments   |    |    |    |    |
| Edit appointment details  |    |    |    |    |
| Edit session fee from calendar flyout   | X   |    |    |    |
| Accept/Deny appointment requests  |    |    |    |    |
| <b>CLIENTS</b>  |   |   |   |   |
| View/Edit files   |    |    |    |    |
| Add new   |    |    |    |    |
| Delete  | X   | X   | X   |    |
| Search/Filter   |  |  |  |  |
| Archive/Activate  |  |  |  |  |
| <b>NOTES</b>  |   |   |   |   |
| View/Create progress notes  |  |  |  |  |
| <b>DOCUMENTS</b>  |   |   |   |   |
| Send intake documents   |  |  |  |  |
| View/Edit intake document templates   | X   | X   | X   |  |
| View/Edit/Delete completed intake documents   |  |  |  |  |
| Download/Upload client documents  |  |  |  |  |
| <b>BILLING</b>  |   |   |   |   |
| View/Edit client billing info (credit card/insurance details)   | X   |  |  |  |
| View client billing history   | X   |  |  |  |
| View/Edit billing documents   | X   |  |  |  |
| <b>PAYMENTS</b>   |   |   |   |   |
| Add/Edit/Delete client payments   | X   |  |  |  |
| Add/Edit/Delete insurance payments  | X   | X   | X   |  |
| Refund Stripe payments  | X   |  |  |  |
| <b>INSURANCE</b>  |   |   |   |   |
| Create/Submit claims  | X   |  |  |  |
| View payment reports  | X   | X   | X   |  |
| Retrieve coverage reports   | X   |  |  |  |