

YOUR QUERY:

We are very interested to learn more about the information you would require in order to set up prescribers on your system to enable them to place orders?

OUR RESPONSE:

The following example assumes that the Kent prescribers will require PIN authorisation from their allocated budgets;

The following data is from the test system (and is made up data – no personal details have been used):

1. Susan Smith is an Occupational Therapist who works within Kent and can perform assessments and purchase items from the catalogue using PIN approval.
2. John Brown is a Team Leader (Supervisor) within Kent who can approve Jane’s purchases where their order value exceeds a threshold.

Thus, to set-up these users the following Steps need to be considered:

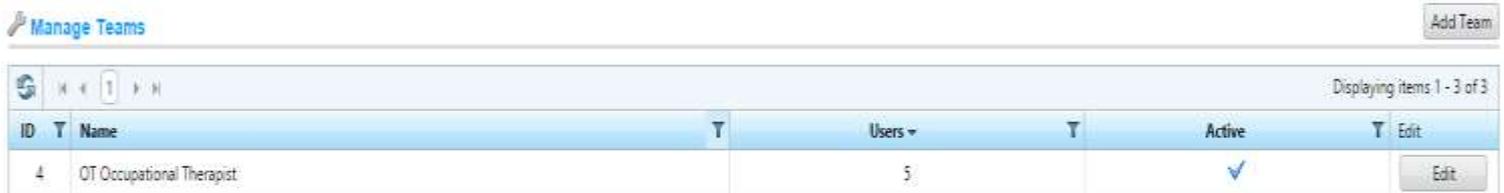


- **Step 1: A prescriber is associated with a Local Authority (area/district)**, thus the first step is to ensure the correct Local Authority (area/district)’s have been created. See the following (here you can see we have 6 users already assigned to Kent);



ID	Name	Local Authority	Users	Active	Edit
22	Kent	Kent	6	✓	Edit

- **Step 2: Prescribers must be assigned to a TEAM**, each TEAM must be defined;



ID	Name	Users	Active	Edit
4	OT Occupational Therapist	5	✓	Edit

- **Step 3: The system uses Role Based Access and security**, thus an OT (Occupational Therapist) may be a PIN Authoriser (i.e. they can perform assessments, create new service uses (people CRM records) and purchase items on behalf of the service users), however secondary approval may be required for purchase of items above a certain ceiling. Thus the following set-up option will enable PIN (Prescriber) Roles to be defined as PIN Authorisation (i.e. can purchase items) and Approve (i.e. may approve purchases by their team members);

 **Configure - PIN Authorization**



The screenshot shows the 'Configure - PIN Authorization' interface with the 'Security' tab selected. It features two sections for role selection:

- PIN Authorization Roles:** A list of roles with checkboxes. 'Centra OT' and 'Centra OT Supervisor' are checked and highlighted in yellow.
- Approver Roles:** A list of roles with checkboxes. 'Centra OT Supervisor' is checked and highlighted in yellow.

- **Step 4: The Users are set-up and assigned roles (i.e. John and Susan);**

<input type="checkbox"/>	Id	Email	Name	Customer roles
<input type="checkbox"/>	171108	centraotsupervisor@gmail.com	John Brown	Registered, Centra OT Supervisor
<input type="checkbox"/>	171099	centraot1@local.com	Susan Smith	Registered, Centra OT

E.g. Susan Smith is to be set-up as a Centra OT role

Customer Info	Customer Roles	Orders	Addresses	Curren
<ul style="list-style-type: none"><input type="checkbox"/> Administrators<input type="checkbox"/> Centra Admin<input type="checkbox"/> Centra Content Manager<input type="checkbox"/> Centra CRM<input type="checkbox"/> Centra Finance<input type="checkbox"/> Centra Order Processing<input checked="" type="checkbox"/> Centra OT<input type="checkbox"/> Centra OT Supervisor<input type="checkbox"/> Centra Product Management<input type="checkbox"/> Centra User Manager<input type="checkbox"/> Forum Moderators<input type="checkbox"/> Guests<input checked="" type="checkbox"/> Registered<input type="checkbox"/> Vendors				

Define if they are an approver:

The screenshot displays a user management interface for a user named Susan Smith. The interface is divided into two main sections: Contact Details and Account Levels.

Contact Details:

- Email Address: susan01@local.com
- Mobile Number: 000000000
- Work Number: 000000000
- Fax Number: (empty)

Account Levels:

- Team: OT Occupational Therapist
- Authority: Kent
- Total Budget: £ 500,000,000
- Budget Used: £ 448.13
- Approval Level: £ 1,000,000
- Maximum Order Value: £ 3,500,000
- Start Date: 01/06/2015
- Expiry Date: 04/10/2015

At the bottom of the Contact Details section, there is an "Update Contact Details" button.

The interface also shows a navigation bar with tabs for Customer Info, Customer Roles, Orders, Addresses, Current shopping cart, Current wishlist, Activity Log, Place order (responsive), PIN Authorization, Direct Debits, and Hub ID. The "PIN Authorization" tab is currently selected.

Below the navigation bar, the "Account Details" section is visible, showing the user's status as "Active" and a "Clear Account" button. The "PIN Statistics" section shows usage of 20, with a "Reset PIN Usage" button. The "Account Locks" section shows a table with columns for ID, Created, and Lock Code, and a message stating "The user does not have any account locks."

Contact Details are required (email, mobile, work number)

Account Levels are set:

- Team – which Team is the person assigned to e.g. OT Occupational Therapist?
- Authority – i.e. from Step 1 above.
- Total Budget – i.e. how much contract budget is available

- Budget Used: - i.e. How much of the budget has been spent via the catalogue (read only calculated field)
- Approval Level: - i.e. what value can this user purchase via PIN approval
- Maximum Order Value: - i.e. what is the absolute limit that this person can order through one transaction.
- Start/Expiry Date: Budgets and approval can be limited by dates

Here John Brown is set-up as an Approver for the OT Occupational Therapist Team in Kent:

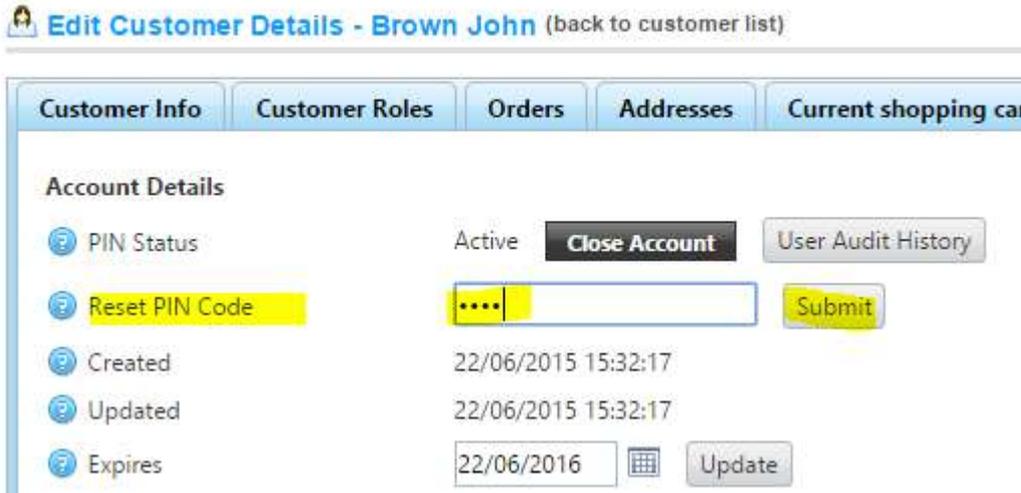
 [Edit Customer Details - Brown John](#) (back to customer list)

Customer Info	Customer Roles	Orders	Addresses	C
<input type="checkbox"/> Administrators <input type="checkbox"/> Centra Admin <input type="checkbox"/> Centra Content Manager <input type="checkbox"/> Centra CRM <input type="checkbox"/> Centra Finance <input type="checkbox"/> Centra Order Processing <input type="checkbox"/> Centra OT <input checked="" type="checkbox"/> Centra OT Supervisor				

 [Edit Customer Details - Brown John](#) (back to customer list)

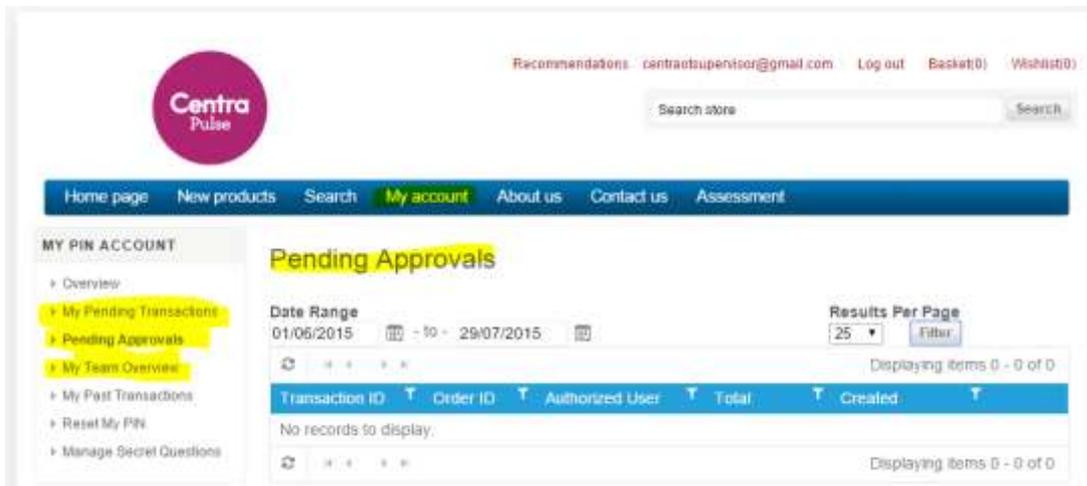
Customer Info	Customer Roles	Orders	Addresses	Current shopping ca
Account Details				
PIN Status	Active	Close Account	User Audit History	
Reset PIN Code	<input type="text"/>	Submit		
Created	22/06/2015 15:32:17			
Updated	22/06/2015 15:32:17			
Expires	<input type="text" value="22/06/2016"/>		Update	
Is Approver	<input checked="" type="checkbox"/>			
Account Levels				
Team	<input type="text" value="OT Occupational Therapist"/>			
Authority	<input type="text" value="Kent"/>			

- **Step 5: A PIN number can now be set for the Prescriber user;**



Note: There are a number of security options that can be specified to control when a PIN must be changed/expire etc.

- **Step 6:** When the Prescriber user (e.g. a supervisor in this example) logs onto the catalogue they can view their **PIN Account** to get a summary of spend, vie pending transactions that require approval, see what their team have ordered etc.;



E.g. My PIN Account summary

MY PIN ACCOUNT

- Overview
- My Pending Transactions
- Pending Approvals
- My Team Overview
- My Past Transactions
- Reset My PIN
- Manage Secret Questions

My PIN Account Overview

Account Details

Status	Active
Created	22/06/2015
Updated	22/06/2015
Expires	22/06/2016
PIN Usages	0
Max PIN Usage	9999

Account Levels

Team	OT Occupational Therapist
Authority	Kent
Total Budget	£500,000.00
Total Spent	£0.00
Available Budget	£500,000.00
Approval Level	£1,000.00
Maximum Order Value	£50,000.00
Expires	22/06/2016

Contact Details

Manage your contact details preferences.

E.g. My Team Overview running totals



Recommendations: [centraotsupervisor@gmail.com](#) [Log out](#) [Basket\(0\)](#) [Wishlist\(0\)](#)

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My Team Overview: OT Occupational Therapist

[Back to Account Overview](#)

Member	Status	Transactions	Pending	Total Budget	Approval Level	Budget Spent	Total Spent
CentraOT1@gmail.com	Active	0	0	£500,000.00	£10.00	£0.00	£0.00
Susan Smith	Active	21	0	£500,000.00	£1,000.00	£449.15	£449.15
Lewis Pearce	Active	9	1	£500,000.00	£1,000.00	£61.92	£61.92
John Brown	Active	0	0	£500,000.00	£1,000.00	£0.00	£0.00
CentraOTSupervisor@gmail.com	Active	0	0	£500,000.00	£10.00	£0.00	£0.00

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- Step 7: (optional) Suspending Prescriber access:** Prescriber User Access is automatically suspended by the system if they forget their PIN code (i.e. exceed retries), alternatively an administrator can temporarily (or permanently suspend access to the system by applying an Account Lock e.g. if the person has left Kent then you may wish to lock their account with a FLAG of “good Leaver”. Here are some sample lock codes;

 [Manage Account Locks](#)

System Lock Codes

ID	Lock Code	Description	
1	ExceededRetries	The account exceeded the PIN code entry retries	<input type="button" value="Edit"/>

User Defined Lock Codes

ID	Lock Code	Description	
0	Active	The account is currently active with no locks	<input type="button" value="Edit"/>
2	Fraud Activity	This lock is for fraud activities that have been identified.	<input type="button" value="Edit"/>
3	Good Leaver	Prescriber has left the organisation or changed role and thus access is revoked	<input type="button" value="Edit"/>