Revision Date: 1/6/2020

Standard Clinical Users
Physicians, Community Surgeons, Nurse Practitioners, Physician Assistants, Medical Assistants, Mid-Level Support Staff, Care Managers, Student Health Services Clinicians, Sports Medicine Clinicians
- Chart Review, Event Monitor, In Basket, First & Managed Access, Patient List
- Ordering (Referral, Lab and Imaging Procedures)
- Complete Assessments
- Update Patient Demographics
- View Patient Billing Information
- View Upcoming Appointments
- Schedule Quick Appointments
- Upload Documents
- Close Care Gaps and Complete Tasks
- Specimen Collection (once Trinity site is live on Beaker, Epic's Lab application)
- View Reports and Dashboards
- Complete Assessments
- Document Notes
- Close Care Gaps and Complete Tasks
- Document Care Plans
- View and Edit Care Teams
- View Surgeon Grease Board (Community Surgeons **only**)

Psych/Social Professionals
- Chart Review, Event Monitor, In Basket, First & Managed Access, Patient List
- View Assessments
- Close Care Gaps
- View Care Teams

Ancillary Clinical Users
EMTs, Post-Discharge Clinicians, Detention Center Clinicians, School Nurses
- Chart Review, Event Monitor, In Basket, First & Managed Access, Patient List
- Ordering (Referral, Lab and Imaging Procedures)
- Complete Assessments
- View Patient Billing Information
- View Upcoming Appointments
- Upload Documents
- Close Care Gaps and Complete Tasks (**excluding** Detention Center Clinicians)
- View Assessments
- View Care Teams

Post-Discharge Clinicians (see above)
- Accept Discharge Placement Requests
- Document Notes
- Document Care Plans
- View Care Plan

Continuing Care (Hospice, Home Health)
- Chart Review, Event Monitor, In Basket, First & Managed Access, Patient List
- View Assessments
- Close Care Gaps
- View Care Teams

Specimen Collectors
- Chart Review, Event Monitor, In Basket, First & Managed Access, Patient List
- Ordering (Referral, Lab and Imaging Procedures)
- View Patient Billing Information
- View Upcoming Appointments
- Specimen Collection (once Trinity site is live on Beaker, Epic's Lab application)

Requestors, Payors, Coroners
- In Basket
- Release of Information Request
- View Care Teams
- Chart Review (Coroners **only**)
- Event Monitor (Coroners **only**)
- First & Managed Access (Coroners **only**)
- Patient List (Coroners **only**)

Clerical Users
Front Desk, Referrals Coordinators
- Chart Review, Event Monitor, In Basket, First & Managed Access, Patient List
- Ordering (Referral, Lab and Imaging Procedures)
- Update Patient Demographics
- View Upcoming Appointments
- Schedule Quick Appointments
- Upload Documents
- View Dashboards
- Complete Assessments
- Document Notes
- View and Edit Care Teams

Billers, Coders
- Chart Review
- Event Monitor
- In Basket
- First & Managed Access
- Patient List

Site Coordinators
- Event Monitor, In Basket
- User Account Activation/Deactivation
- Site Verification
- New Account Requests (through Manage My Clinic)