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April 7, 2025

User Roles and Account Stages

Pixie Dental

User Roles and Account Stages

# Introduction

This document provides a comprehensive framework for user roles, permissions, and account stages within the Pixie Dental practice management system. It guides the implementation of user functionalities, ensuring alignment with both practice needs and the Pixie Dental vision of simplicity, proactivity, and AI assistance. This document contains:

* **User Roles:** Definitions and capabilities mapped to the Dental Practice Business Capability Model.
* **Account Stages:** User progression within the system lifecycle.
* **Administrative Privileges:** How administrative permissions enhance user capabilities.

Individuals may perform multiple roles, especially in solo practices. The permission system should flexibly accommodate these combined responsibilities.

# Table of Contents

[Introduction 1](#_Toc195008609)

[Table of Contents 1](#_Toc195008610)

[User Roles 2](#_Toc195008611)

[Clinical Roles 2](#_Toc195008612)

[Administrative Roles 2](#_Toc195008613)

[Specialized Roles 2](#_Toc195008614)

[Role Flexibility 2](#_Toc195008615)

[Account Stages 3](#_Toc195008616)

[Invited Users 3](#_Toc195008617)

[Pending Users 3](#_Toc195008618)

[Active Users 3](#_Toc195008619)

[Suspended Users 3](#_Toc195008620)

[Deactivated Users 3](#_Toc195008621)

[Administrative Privileges 4](#_Toc195008622)

[Capabilities: 4](#_Toc195008623)

[Practice Ownership 4](#_Toc195008624)

[Role Capabilities 5](#_Toc195008625)

[Dentist Capabilities 5](#_Toc195008626)

[Dental Hygienist Capabilities 7](#_Toc195008627)

[Dental Assistant Capabilities 9](#_Toc195008628)

[Practice Manager Capabilities 11](#_Toc195008629)

[Front Office Staff Capabilities 13](#_Toc195008630)

[Billing Coordinator Capabilities 15](#_Toc195008631)

[Lab Technician Capabilities 17](#_Toc195008632)

[IT Administrator Capabilities 18](#_Toc195008633)

# User Roles

## Clinical Roles

### Dentist

The dentist is responsible for all clinical aspects of patient care and may also engage in administrative tasks, especially in solo practices.

### Dental Hygienist

The dental hygienist focuses on preventive oral care and patient education, assisting with clinical documentation and scheduling as needed.

### Dental Assistant

The dental assistant provides clinical support to the dentist and may assist with administrative tasks such as scheduling and billing.

## Administrative Roles

### Practice Manager

The practice manager oversees the administrative operations of the practice, including staff management, financial oversight, and compliance.

### Front Office Staff

Front office staff handle patient interactions, appointment scheduling, communications, and support billing processes.

### Billing Coordinator

The billing coordinator manages all aspects of billing, insurance claims, accounts receivable, and financial reporting.

## Specialized Roles

### Lab Technician

The lab technician manages in-house dental lab operations, fabricating dental prosthetics and coordinating lab cases with the clinical team.

### IT Administrator

The IT administrator is responsible for overseeing system access, technical configurations, and support activities within the SaaS-based practice management system.

## Role Flexibility

* **Multiple Role Assignment**: Users can be assigned multiple roles to match their responsibilities.
* **Cross-Functional Duties**: Staff may perform tasks outside their primary role as needed.

# Account Stages

User accounts progress through specific stages reflecting their engagement with the platform.

## Invited Users

* **Definition**: Users invited to join the system but not yet registered.
* **Access Level**: No access until registration is completed.

## Pending Users

* **Definition**: Users who have accepted the invitation but have not completed onboarding.
* **Access Level**: Limited access to complete onboarding tasks.

## Active Users

* **Definition**: Fully registered users with role-based access.
* **Access Level**: Full access per assigned roles and permissions.

## Suspended Users

* **Definition**: Users temporarily disabled due to various reasons.
* **Access Level**: No access; can be reinstated.

## Deactivated Users

* **Definition**: Users permanently removed from the system.
* **Access Level**: No access; accounts archived.

# Administrative Privileges

Administrative privileges grant users enhanced access and management capabilities. Any role can be assigned administrative privileges based on practice needs.

**Assignment**: Eligible for all roles.

## Capabilities:

* **User Management**
  + Add, modify, deactivate user accounts.
  + Assign roles and permissions.
* **Practice Settings Management**
  + Update practice information and settings.
  + Manage locations and operating hours.
* **Financial Management**
  + Oversee subscription plans and licenses.
  + Update payment methods and access billing statements.
* **Compliance Oversight**
  + Access audit logs and system usage reports.
  + Manage data security settings.
* **System Configuration**
  + Customize system preferences and templates.
  + Integrate third-party applications and services.

## Practice Ownership

In solo or small group practices, the Dentist(s) often function as the Owner(s), requiring comprehensive access. The system should accommodate this by:

* Allowing easy assignment of combined roles (e.g., Dentist + Practice Manager + Billing Coordinator) OR
* Providing a specific "Owner" privilege set that grants broad access across clinical, financial, operational, and administrative domains, assignable on top of a base role like "Dentist".
* Ensuring Owners have access to all necessary financial reports, performance metrics, and administrative controls.

# Role Capabilities

Detailed capabilities for each role are provided to support a more complete understanding of what these roles do daily. Many of these capabilities live outside of software.

## Dentist Capabilities

### Clinical Responsibilities

* **Patient Examination**
  + Conduct comprehensive oral examinations.
  + Diagnose dental conditions and diseases.
* **Treatment Planning**
  + Develop personalized treatment plans.
  + Discuss treatment options with patients.
* **Procedural Execution**
  + Perform dental procedures (fillings, extractions, root canals, etc.).
  + Administer anesthesia and medications as required.
* **Clinical Documentation**
  + Record detailed notes on procedures and patient interactions.
  + Update patient charts and medical histories.
* **Prescription Management**
  + Prescribe medications and manage refills.
  + Ensure compliance with prescription regulations.

### Clinical Reporting

* **Generate Reports**
  + Create reports on patient outcomes and treatment effectiveness.
  + Analyze procedure success rates.
* **Monitor Clinical KPIs**
  + Track key performance indicators for clinical operations.
  + Identify areas for improvement.

### Billing and Coding

* **Review Billing Codes**
  + Verify accuracy of procedure codes.
  + Approve billing codes before claims submission.
* **Collaborate on Discrepancies**
  + Work with billing staff to resolve coding issues.
  + Provide clarification on treatments rendered.

### Compliance and Risk Management

* **Regulatory Compliance**
  + Ensure adherence to HIPAA, OSHA, and other regulations.
  + Implement infection control and safety protocols.
* **Audit Preparation**
  + Assist in preparing for compliance audits.
  + Maintain accurate clinical records.

### Administrative Support

* **Appointment Management**
  + Schedule or modify appointments as needed.
  + Assist with patient inquiries related to scheduling.
* **Staff Collaboration**
  + Coordinate with clinical and administrative staff.
  + Participate in staff meetings and training.

### Practice Development

* **Strategic Planning**
  + Participate in setting practice goals.
  + Provide input on service offerings and patient care strategies.
* **Patient Relations**
  + Build and maintain patient relationships.
  + Address patient concerns and feedback.

## Dental Hygienist Capabilities

### Preventive Care Delivery

* **Dental Cleanings**
  + Perform prophylaxis, scaling, and root planing.
  + Remove plaque, calculus, and stains.
* **Diagnostic Screenings**
  + Take and interpret dental x-rays.
  + Conduct periodontal and oral cancer screenings.
* **Sealants and Fluoride Treatments**
  + Apply dental sealants.
  + Administer fluoride treatments.

### Patient Education

* **Oral Hygiene Instruction**
  + Educate patients on brushing and flossing techniques.
  + Provide nutritional counseling related to oral health.
* **Post-Treatment Guidance**
  + Explain aftercare following procedures.
  + Advise on preventive measures.

### Clinical Documentation

* **Record Keeping**
  + Document findings and procedures.
  + Update patient charts accurately.
* **Communication with Dentist**
  + Report oral health conditions to the dentist.
  + Collaborate on treatment plans.

### Scheduling Assistance

* **Appointment Coordination**
  + Schedule follow-up visits.
  + Manage recall systems for preventive care.

### Billing Support

* **Service Coding**
  + Enter procedure codes for services rendered.
  + Assist with insurance documentation.

## Dental Assistant Capabilities

### Clinical Support

* **Procedure Assistance**
  + Prepare treatment rooms and instruments.
  + Assist dentist during procedures.
* **Instrument Sterilization**
  + Sterilize and organize dental instruments.
  + Maintain cleanliness of clinical areas.

### Patient Care

* **Patient Preparation**
  + Greet and seat patients.
  + Obtain and record vital signs.
* **Patient Education**
  + Provide pre- and post-operative instructions.
  + Answer patient questions within scope of practice.

### Clinical Documentation Assistance

* **Charting**
  + Update patient records during and after procedures.
  + Record treatment notes under supervision.

**Lab Coordination**

* **Impression Taking**
  + Take dental impressions and molds.
  + Prepare models for lab work.
* **Lab Case Management**
  + Track lab orders and deliveries.
  + Communicate with external labs.

### Administrative Assistance

* **Appointment Scheduling**
  + Assist with booking and confirming appointments.
  + Manage provider schedules as needed.
* **Inventory Management**
  + Monitor supplies and notify when reordering is needed.
  + Manage stock levels of clinical materials.

## Practice Manager Capabilities

### Operational Oversight

* **Practice Administration**
  + Oversee daily operations.
  + Implement policies and procedures.
* **Staff Coordination**
  + Facilitate communication among staff.
  + Resolve operational issues.

### Staff Management

* **Hiring and Training**
  + Recruit and onboard new staff.
  + Organize training and professional development.
* **Performance Evaluation**
  + Conduct staff reviews.
  + Address performance issues.

### Financial Management

* **Budgeting**
  + Develop and manage practice budgets.
  + Monitor expenses and revenues.
* **Vendor Relations**
  + Negotiate contracts with suppliers.
  + Manage service agreements.

### Compliance and Risk Management

* **Regulatory Compliance**
  + Ensure adherence to legal requirements.
  + Maintain necessary licenses and certifications.
* **Audit Management**
  + Prepare for and coordinate audits.
  + Implement corrective actions as needed.

### Practice Development

* **Strategic Initiatives**
  + Plan and execute growth strategies.
  + Oversee marketing and patient acquisition efforts.
* **Patient Satisfaction**
  + Monitor patient feedback.
  + Implement improvements to patient experience.

### System Administration

* **Software Management**
  + Oversee the use of practice management software.
  + Coordinate with support for technical issues.

## Front Office Staff Capabilities

### Appointment Management

* **Scheduling**
  + Book, reschedule, and cancel appointments.
  + Manage provider calendars.
* **Appointment Reminders**
  + Send reminders via phone, email, or SMS.
  + Confirm upcoming appointments.

### Patient Communication

* **Inbound Calls**
  + Answer patient inquiries.
  + Provide information on services and policies.
* **Outbound Calls**
  + Follow up on missed appointments.
  + Contact patients for recall visits.

### Patient Intake and Check-Out

* **Registration**
  + Collect and update patient information.
  + Obtain consent forms and necessary documentation.
* **Payment Processing**
  + Collect co-pays and outstanding balances.
  + Provide receipts and payment confirmations.

### Insurance Verification and Billing Support

* **Eligibility Verification**
  + Confirm patient insurance coverage.
  + Update insurance information in the system.
* **Billing Assistance**
  + Generate and provide billing statements.
  + Address basic billing inquiries.

### Administrative Support

* **Record Management**
  + Maintain organized patient files.
  + Ensure data accuracy.
* **Office Environment**
  + Keep the reception area welcoming.
  + Manage office supplies and materials.

## Billing Coordinator Capabilities

### Claims Processing

* **Insurance Submission**
  + Prepare and submit insurance claims.
  + Ensure accuracy of claim information.
* **Follow-Up**
  + Monitor claim statuses.
  + Address denied or delayed claims.

### Accounts Receivable Management

* **Patient Billing**
  + Generate patient statements.
  + Manage payment plans and collections.
* **Payment Posting**
  + Record payments from patients and insurers.
  + Reconcile accounts.

### Financial Reporting

* **Revenue Analysis**
  + Produce reports on financial performance.
  + Identify trends in billing and collections.
* **Audit Preparation**
  + Prepare financial records for audits.
  + Ensure compliance with accounting standards.

### Compliance in Billing

* **Regulatory Adherence**
  + Stay updated on billing regulations.
  + Implement changes as required.
* **Coding Accuracy**
  + Ensure correct use of CPT, CDT, and ICD codes.
  + Educate staff on coding practices.

### Coordination with Staff

* **Communication**
  + Work with clinical staff to clarify procedures.
  + Collaborate with front office on patient billing issues.

## Lab Technician Capabilities

### Dental Prosthetics Fabrication

* **Appliance Creation**
  + Fabricate crowns, bridges, dentures, and orthodontic appliances.
  + Use appropriate materials and techniques.
* **Quality Assurance**
  + Inspect finished products for defects.
  + Adjust appliances for proper fit.

### Case Management

* **Workflow Coordination**
  + Manage lab case schedules.
  + Prioritize work based on clinical needs.
* **Communication**
  + Liaise with dentists regarding specifications.
  + Provide updates on case progress.

### Equipment Maintenance

* **Equipment Care**
  + Clean and maintain lab equipment.
  + Schedule repairs and calibrations.
* **Supply Management**
  + Order materials and supplies.
  + Monitor inventory levels.

### Regulatory Compliance

* **Safety Protocols**
  + Adhere to safety guidelines.
  + Manage hazardous materials appropriately.
* **Documentation**
  + Maintain records of lab work.
  + Ensure traceability of materials and processes.

## IT Administrator Capabilities

### SYSTEM ACCESS AND PERMISSIONS

* **User Account Management**
  + Assist in provisioning and deactivating user accounts.
  + Ensure correct role assignments in coordination with practice managers.

### TECHNICAL SUPPORT AND TROUBLESHOOTING

* **User Assistance**
  + Address basic technical issues faced by staff.
  + Guide users in navigating system features and functionalities.
* **Vendor Support Coordination**
  + Report system bugs or performance issues to the SaaS provider.
  + Follow up on support tickets and ensure timely resolutions.

### INTEGRATIONS AND CONFIGURATIONS

* **Third-Party Integrations**
  + Configure and maintain integrations (e.g., imaging software).
* **System Customization**
  + Implement approved custom configurations within platform limits.
  + Manage practice-wide settings to align with operational needs.

### COMPLIANCE SUPPORT

* **Audit Preparation**
  + Assist in generating technical reports or logs needed for audits.
  + Ensure configuration settings align with compliance requirements.
* **Policy Updates**
  + Implement changes to technical policies as directed by compliance or practice management.
  + Educate staff on secure usage of the system.