# Adding a New Provider/Staff

A new user record can be created for either a "Provider" or a "Staff". A Provider will generally be a doctor, specialist or allied health professional and a Staff will be a reception, admin user or a nurse. Setting up a user as a provider will have an associated appointment book.

1. Login to PrimaryClinic as **Admin**

2. From the **Main Menu,** select **Setup** > **Providers/Staff**

3. On the bottom **Right-Hand** side select either **New Staff** or **New Provider**
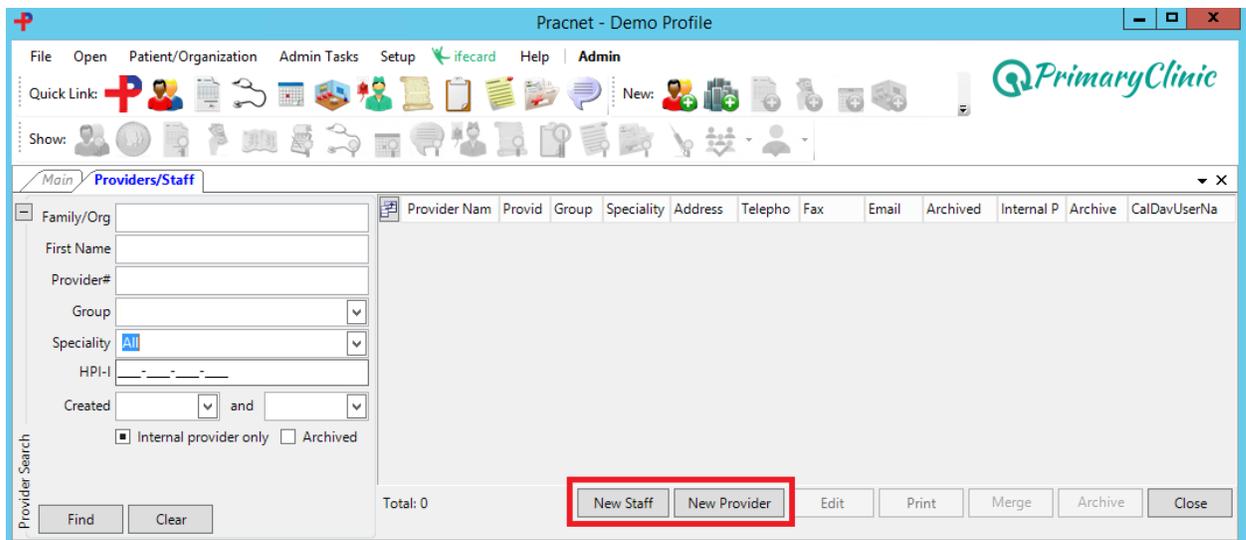
4. Enter the details in the corresponding screens.

   New Staff Window:

New Provider Window:

When creating a new provider, please remember to enter the **Provider Number**

5. Once all relevant information has been filled, click the **Save** button to complete the creation of the new provider/staff.

Creating a User Login

After a record of the new provider/staff has been created, a login can be setup for the new user. If PrimaryClinic Medical is installed with PC Practice, this login will apply to both.

Note: A login may not be necessary when the newly created provider won't need to login to PC Practice. This is usually the case when PC Practice is linked to a 3rd party clinical software and the provider record is only used for billing.

To create a **PrimaryClinic Practice** login:

1. Go to menu **Setup** > **User Account Management,** then click **New**
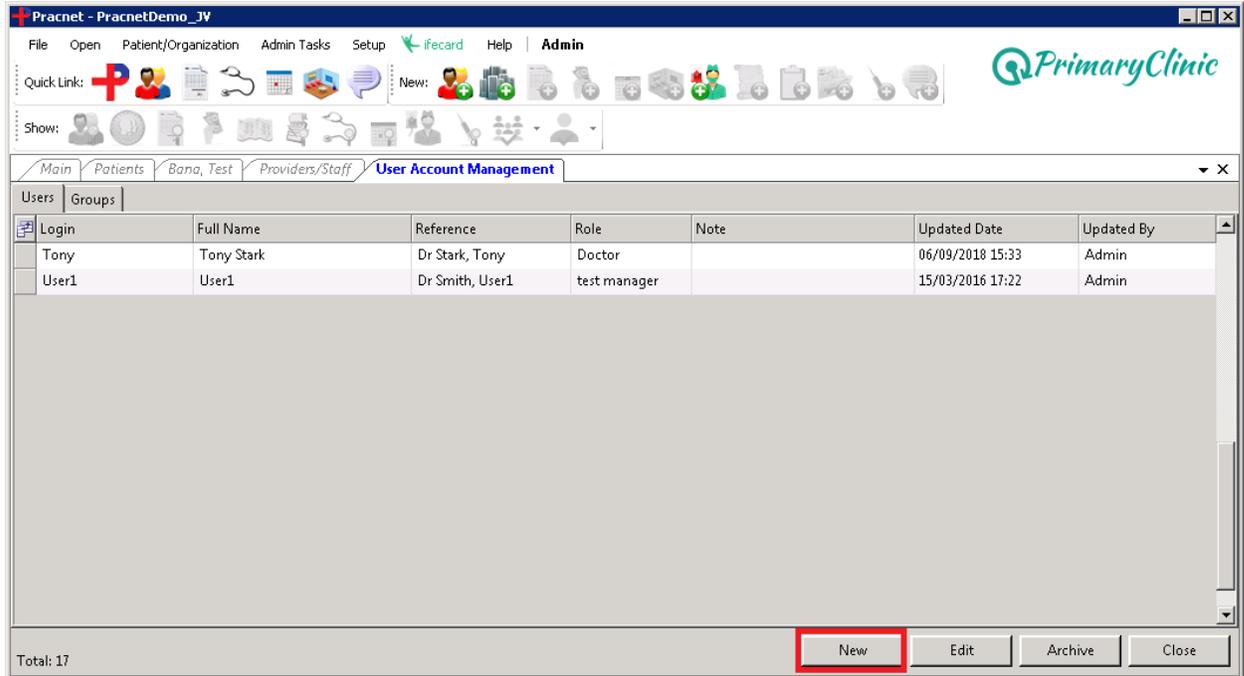
2. In the **User Details** screen, click **Personal** tab and assign a **User name** (this can be the user's initials and can be different from the user's real name), a **password** (optional), and the **Reference** (this will be the name of the provider/staff created in step 3), then click **Save**
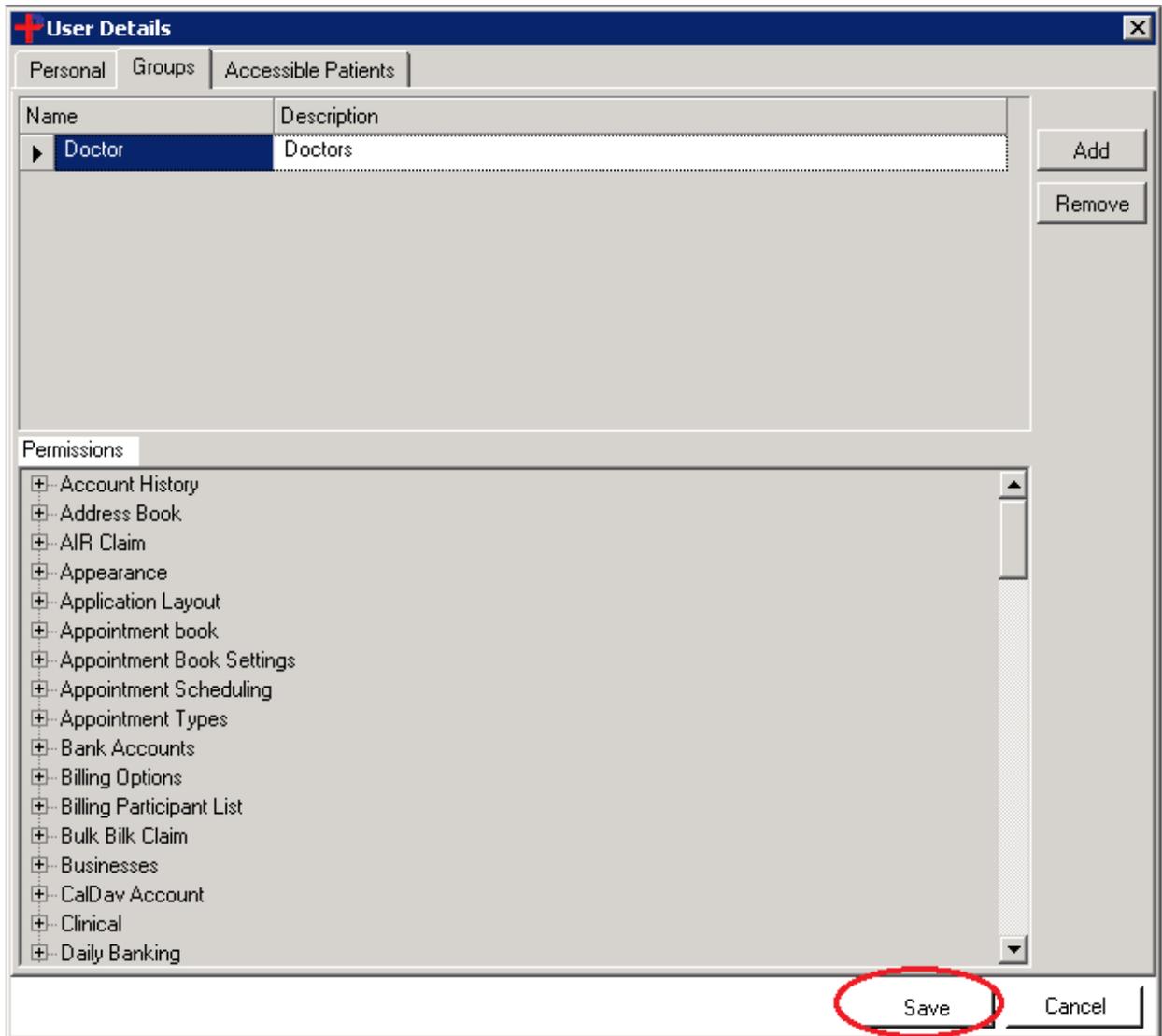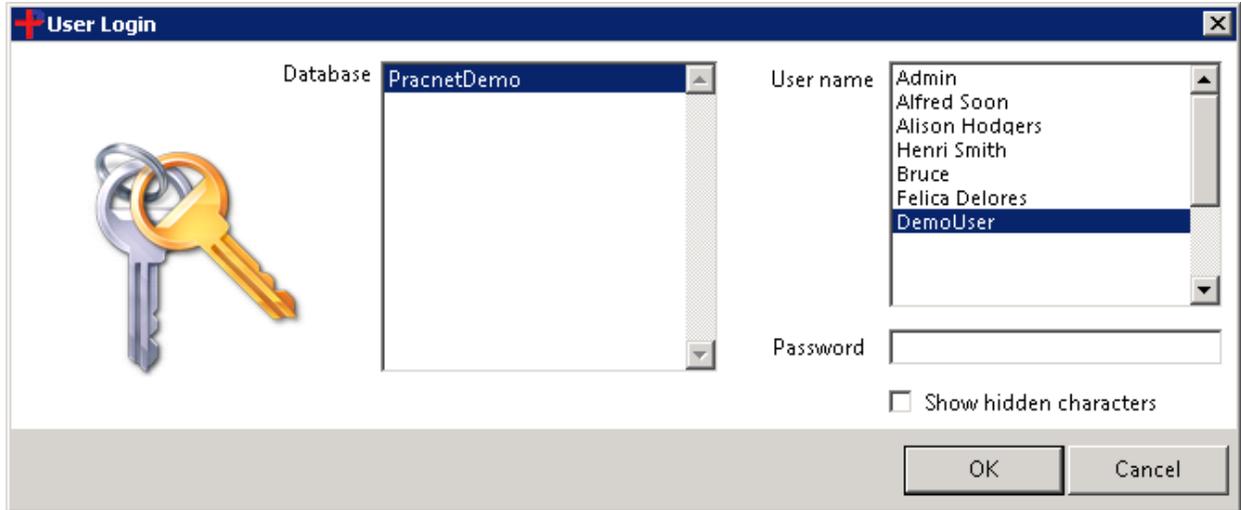
3. Assign the user to a security group by clicking on the **Groups** tab

4. Click **Add** button, select the group(s) to assign the user to, then click **OK**.
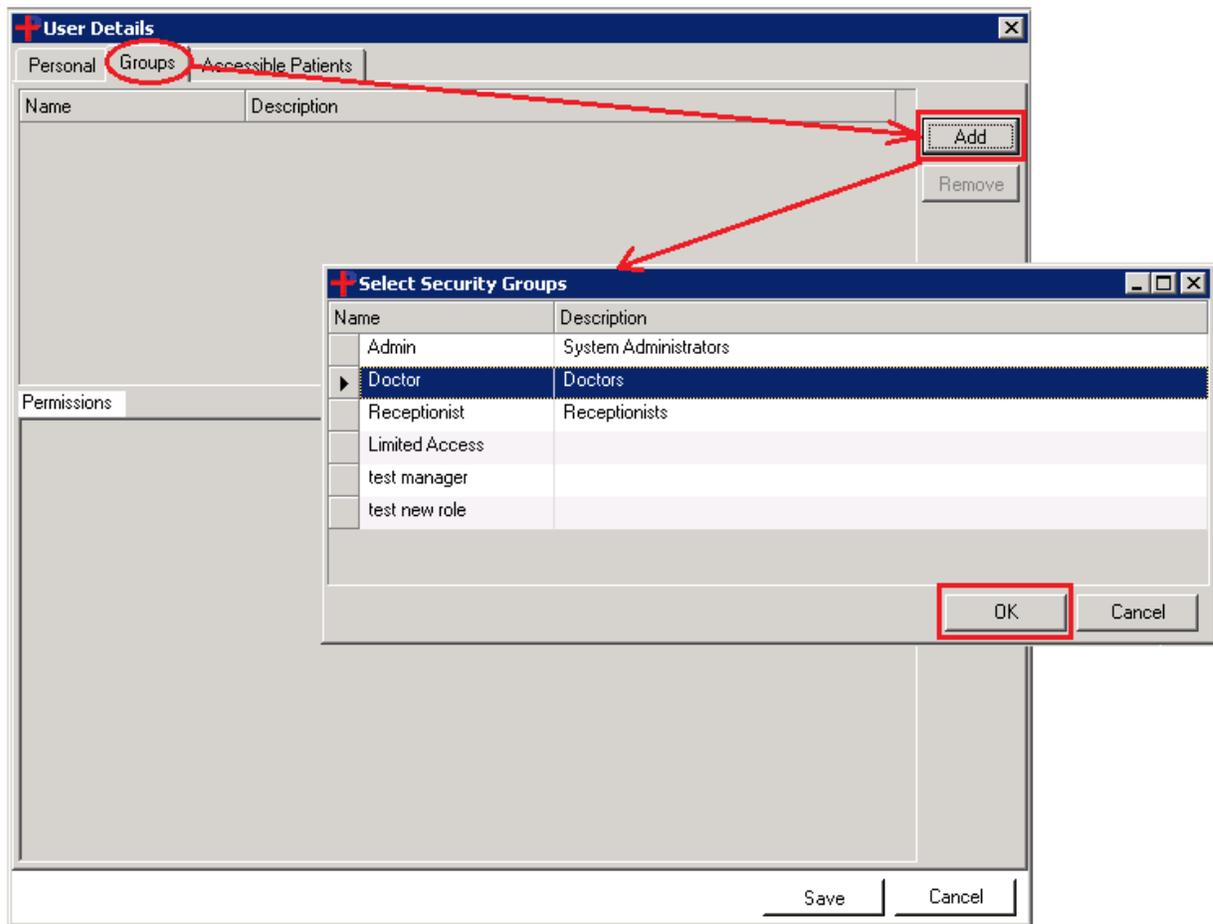
5. After assigning the user to a group(s), click **Save**, then log out of PrimaryClinic.

6. The new user will appear next time a user logs in to PrimaryClinic:

Additional steps for PrimaryClinic Medical

If PrimaryClinic **Medical** is installed with PrimaryClinic **Practice**, the newly created login needs to be assigned to a security group:

1. login to PrimaryClinic **Medical** as **Admin** and go to menu **Users** > **User Management**

2. Select the user from the list and click **Edit User**
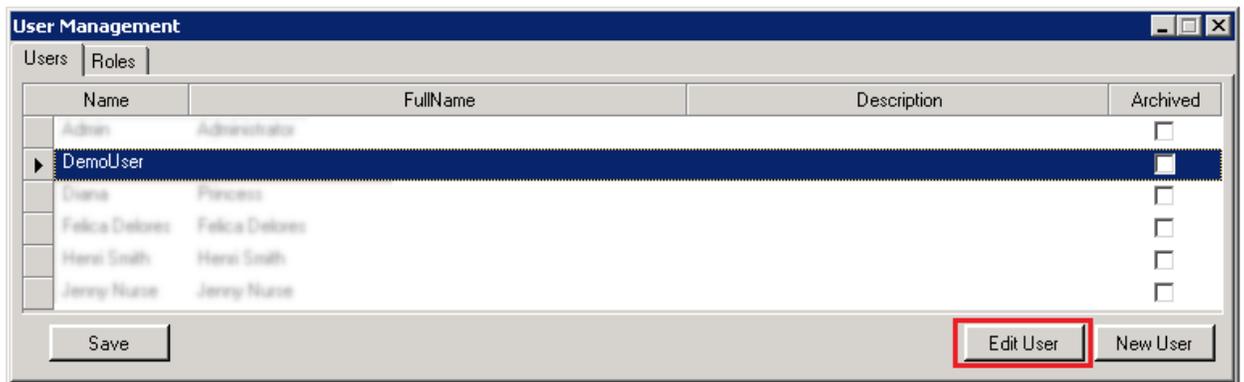
3. Select the **Member of** tab and tick all the roles you want the new user to have (this will determine the access level of the user) then click **OK.**
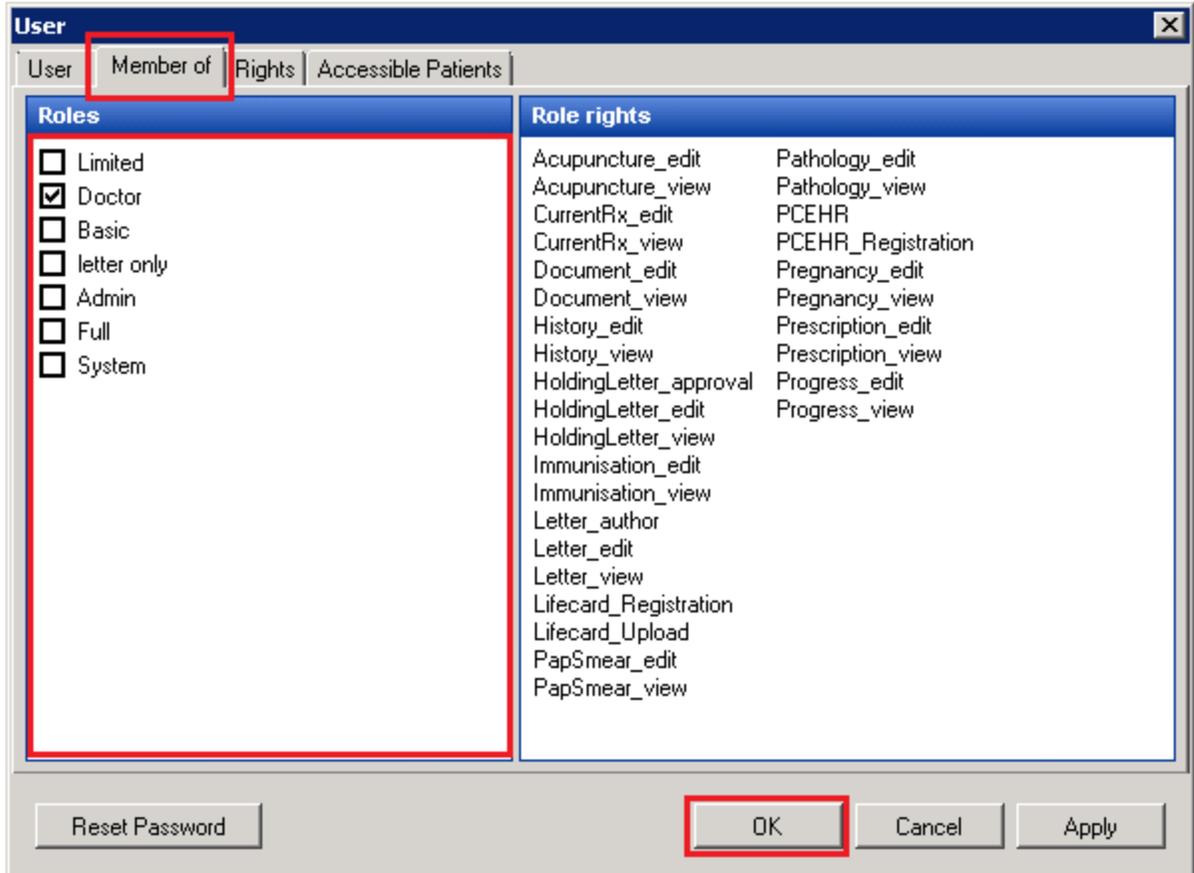
4. The new user login is now ready to be used next time you start PC Medical