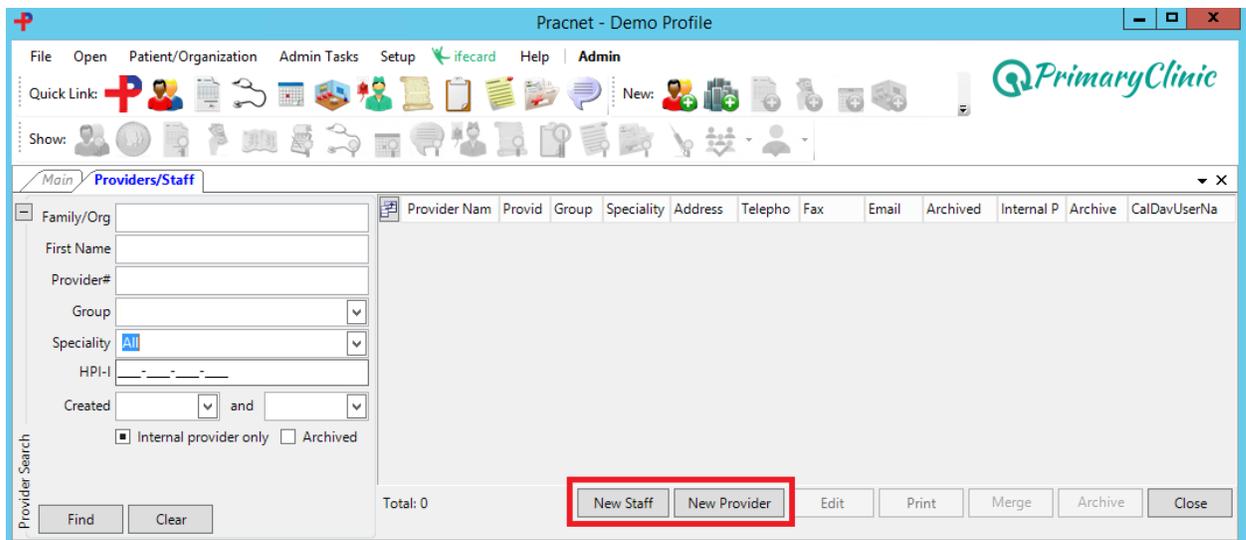


Adding a New Provider/Staff

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:

Staff Details

Title Family Name First Name Middle

Qualifications List Order B.H

Group Mobile Phone

Residential Address Email

Suburb Postcode VIC Fax

Postal Same as Residential Address Note

Postal Address Vocationally Registered Internal Provider

Suburb Postcode VIC Archived

Use this provider's LanternPay account instead of the practice's account

Bill Number:

Api Key:

Api Secret:

Provider

Business	Letterhead	FacilityId		
*				

New Provider Window:

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

Provider Details

Title Family Name First Name Middle

Prescriber# ePrescribing B.H.

Qualifications List Order Mobile Phone

Group Email

Speciality Fax

Default Item Note

Residential Address

Suburb Postcode VIC

Postal Same as Residential Address Vocationally Registered Internal Provider

Postal Address Archived

Suburb Postcode VIC

HPI-I Search

Type Code

Bank Accounts

Use	Default	Accou	Account#	BSB	MerchantID
<input type="checkbox"/>	<input type="checkbox"/>	ACB	123456987	801003	
<input type="checkbox"/>	<input type="checkbox"/>	ANZ	123456789	062902	
<input type="checkbox"/>	<input type="checkbox"/>	Prima	548868889	300682	

ReferralNet CalDav WC/TAC

Username

Password

Provider

Business	Provider#	BillingAgentId	Letterhead	Payee	FacilityId	LSPN	SC
* <input type="text"/>							

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

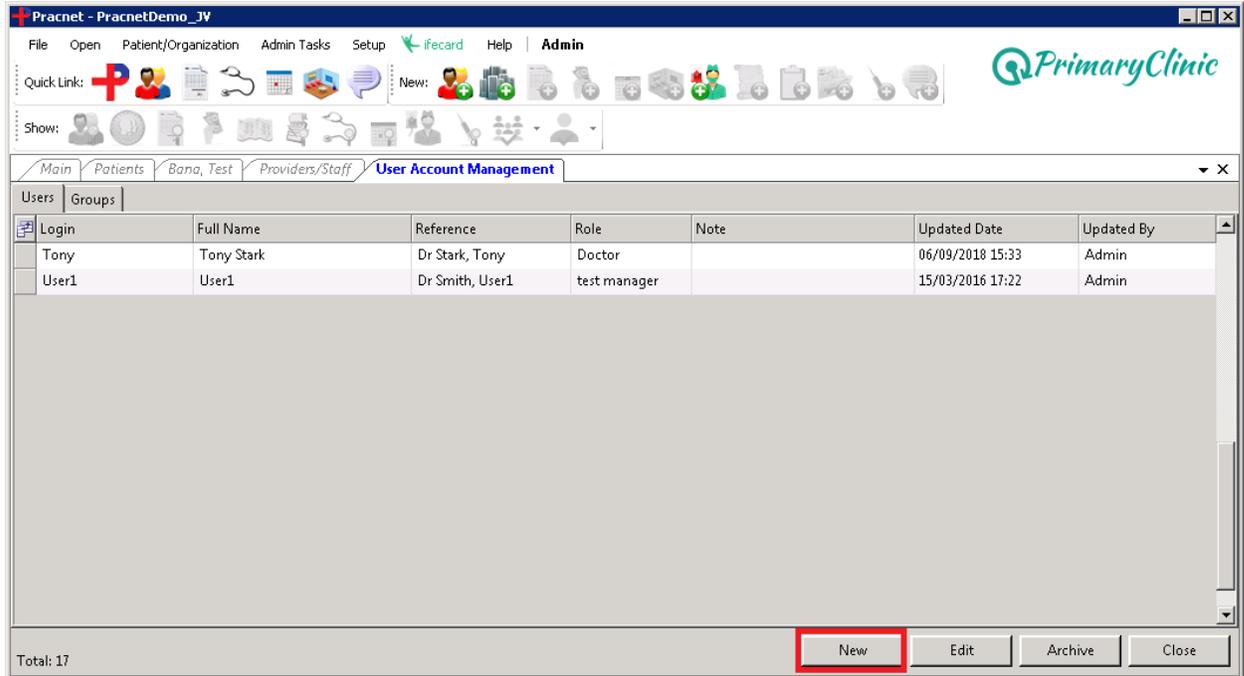
Creating a User Login

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:

- 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**

User Details

Personal Groups Accessible Patients

Domain user name [dropdown]

User name DemoUser

Password [password field] Reset

Full name Tony Stark

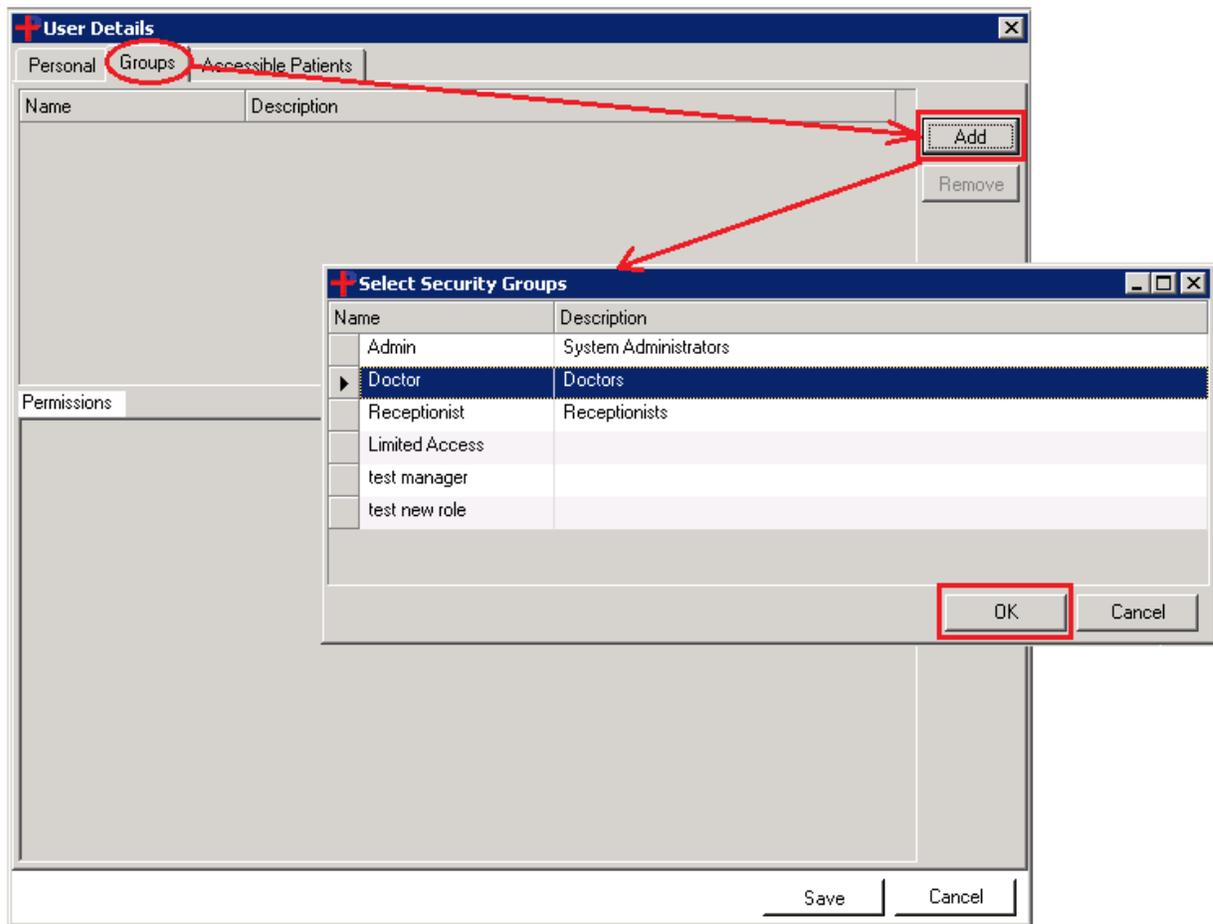
Note [text area]

Reference Dr Stark, Tony - 123456TS

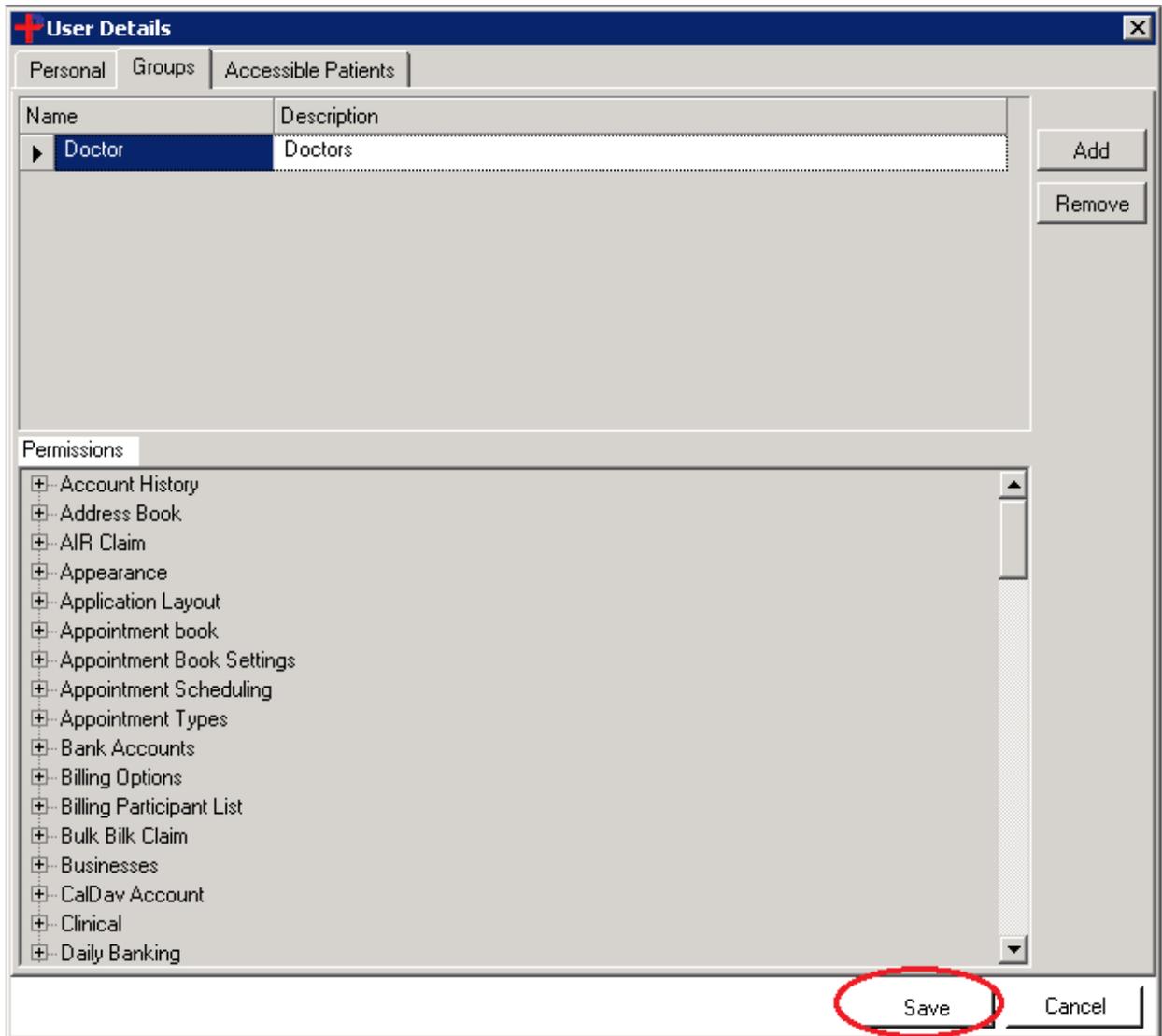
Archived

Save Cancel

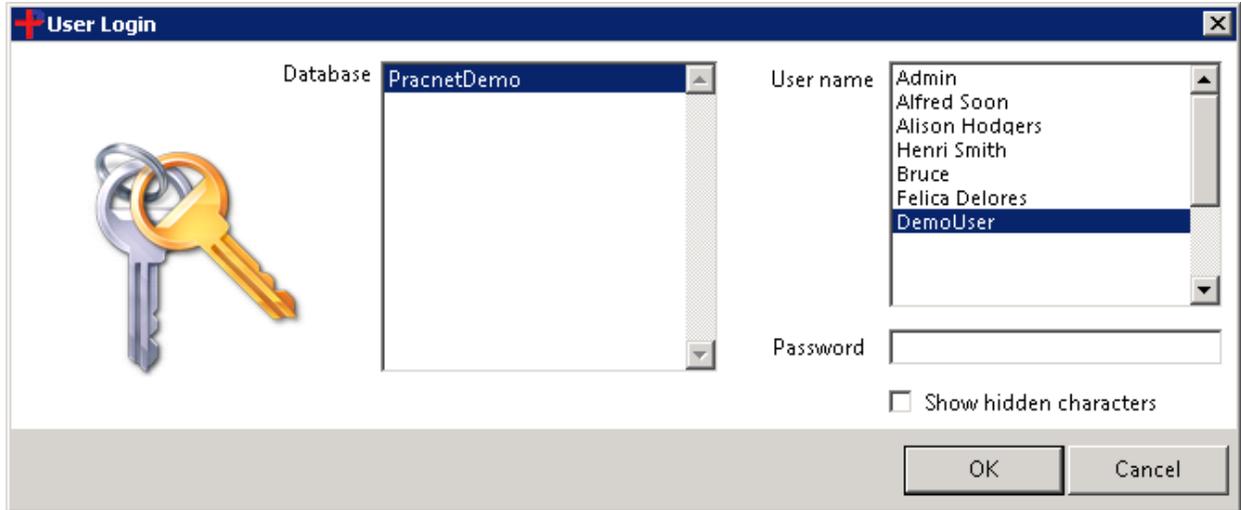
3. Assign the user to a security group by clicking on the **Groups** tab
4. Click **Add** button, select the group(s) to assign the user to, then click **OK**.



5. After assigning the user to a group(s), click **Save**, then log out of PrimaryClinic.



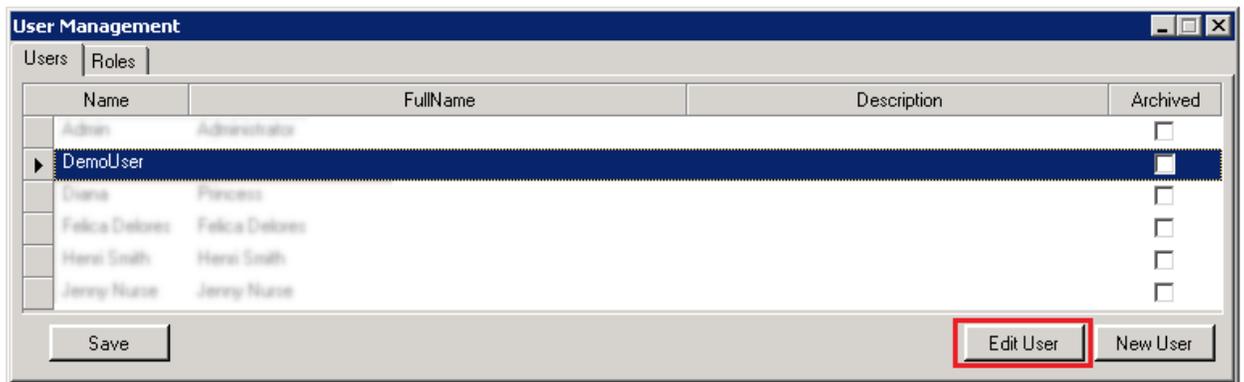
6. The new user will appear next time a user logs in to PrimaryClinic:



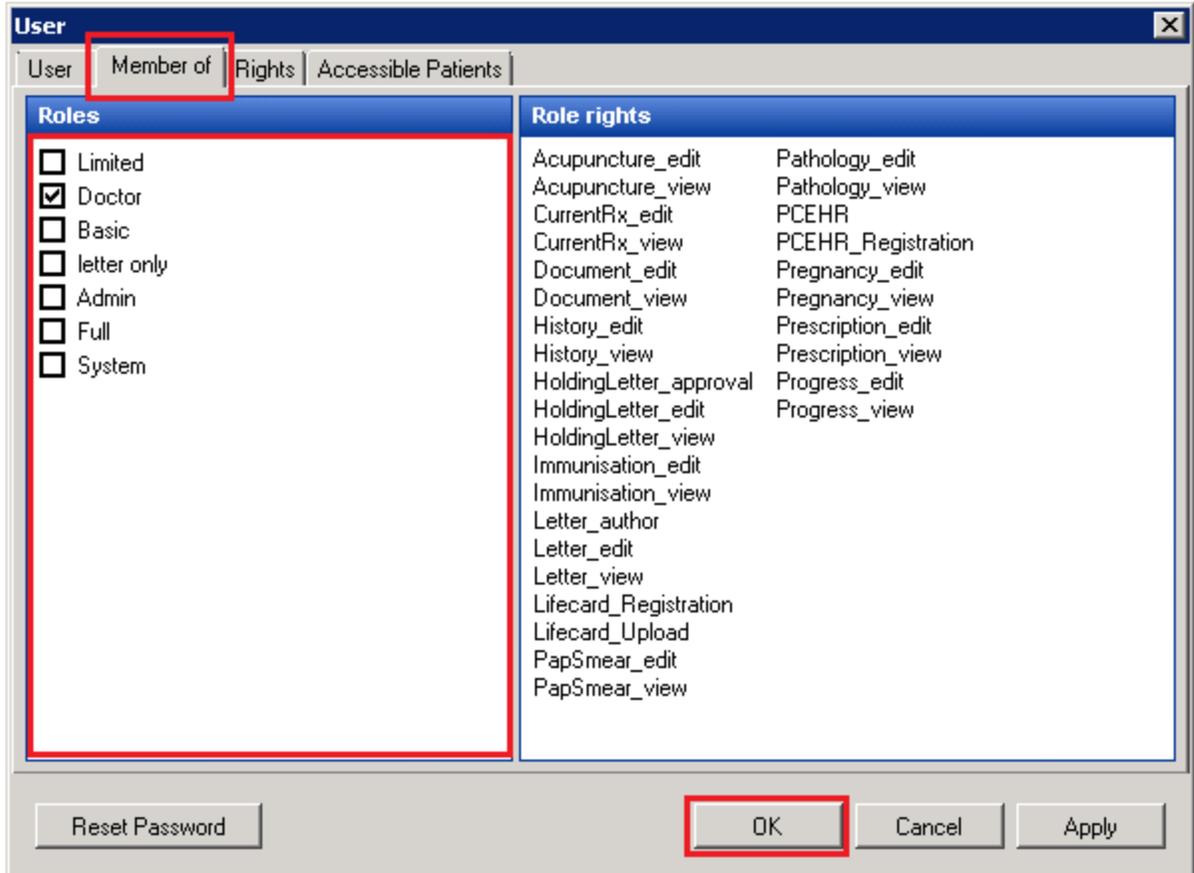
Additional steps for PrimaryClinic Medical

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

