

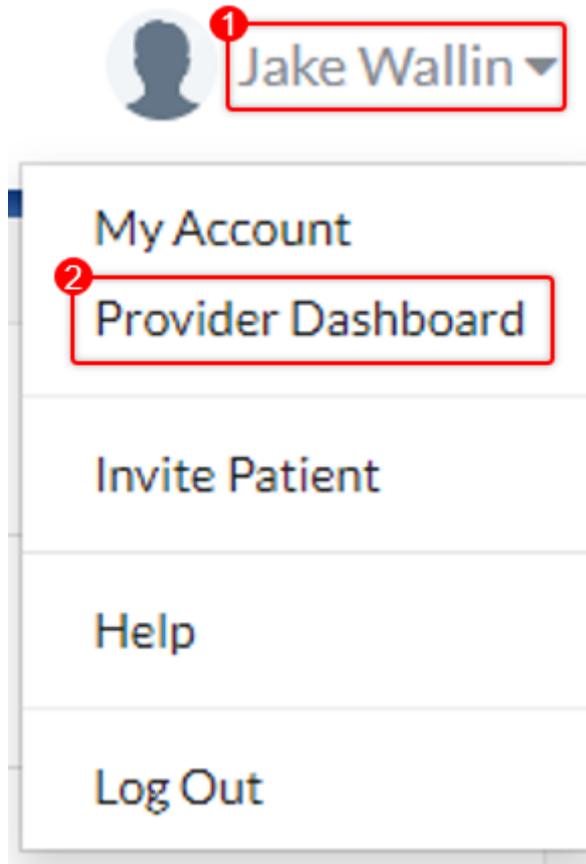
## Add User

Joel Barcillo - 2023-06-15 - Clinic Admin Guides

### How to Add a User

As a Clinic Admin, you can add users to the clinic such as new clinicians and patients who might have difficulty with creating an account from the Welch Allyn Home App. Please follow the steps below to reach the User page under the Admin Panel:

1. From the Clinic Dashboard, click on your name to open the **Profile Menu**.
2. Click on **Admin Panel**. You will see the Admin Panel view with new accessible tabs.

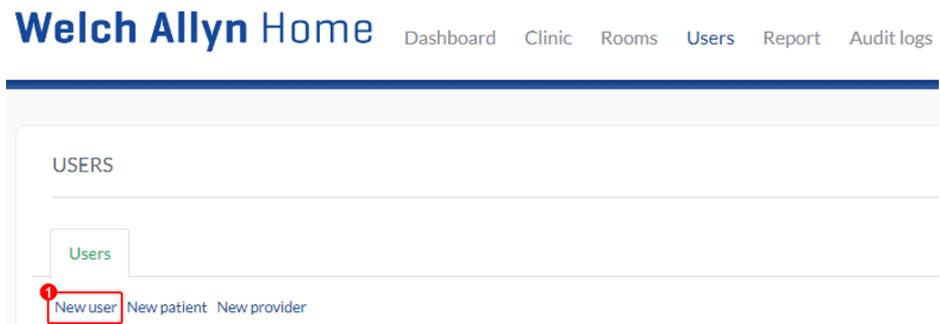


3. Click on the **Users** tab.

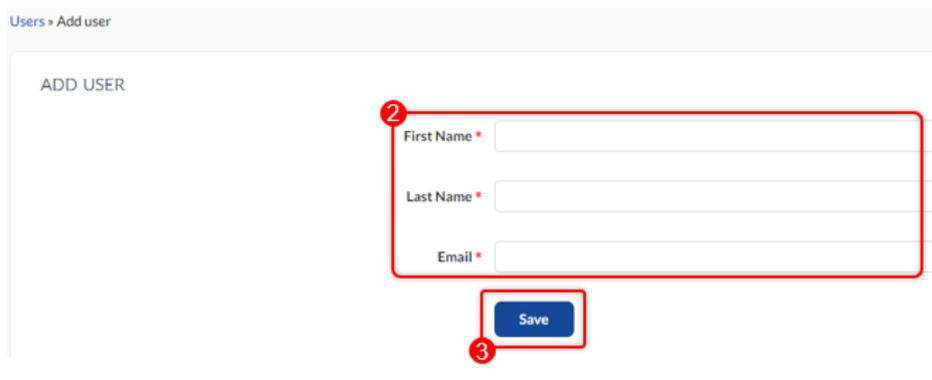
The User screen will show the different active users in the clinic. To add a particular user, please follow the steps below:

#### Add a Clinic Admin

1. Under the Users subtab, click on **New User**. The add user screen will appear.



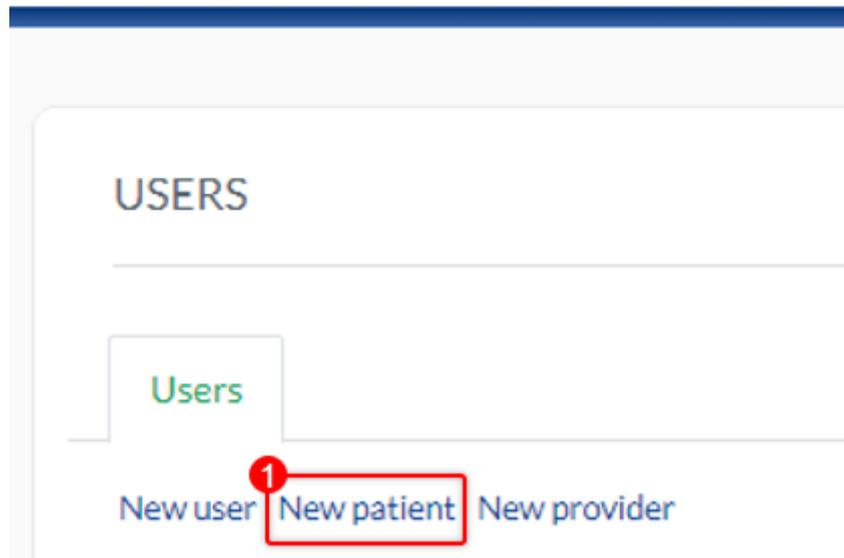
2. Fill out the fields for the First Name, Last Name, and Email. Please note that all the 3 fields are required to be filled out.
3. Click on Save once done.



#### Add a Patient

1. Under the Users subtab, click on **New Patient**. The Create a Patient screen will appear.

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2. Fill out the **required fields** marked with an asterisk (\*), and scroll down to see all fields. You may also fill-out the **optional fields** as needed.

The screenshot shows the 'CREATE A PATIENT' form in the Welch Allyn Home system. The form is highlighted with a red box, and a red circle with the number '2' is placed above it. The form contains the following fields:

- Clinic\* (Dropdown menu: Jake Wallitz Clinic (wah-jake.wal.me) x)
- Rooms\* (Dropdown menu: Select a room. This field is required.)
- User Type (optional) (Dropdown menu: Patient)
- Username\*
- Password (optional) (Password requirements icon)
- Confirm Password (optional) (Password requirements icon)
- First Name\*
- Last Name\*
- Email\*
- MRN (optional)

3. Click on **Create** once done.

Gender (optional)

Date of Birth (optional)

Address (optional)

City (optional)

State (optional)

Zip (optional)

Country (optional)

Phone (optional)

Primary Care Physician Name (optional)

Primary Care Physician Phone (optional)

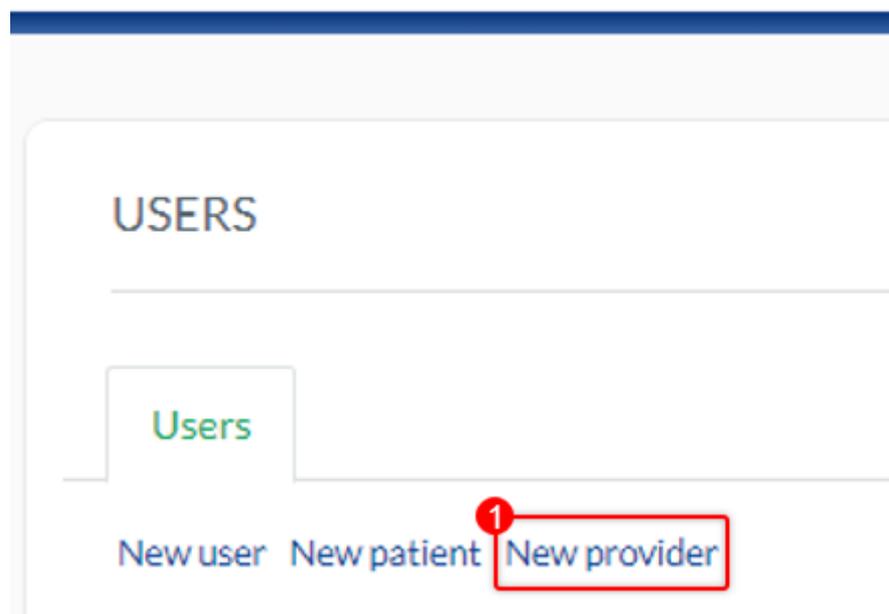
Timezone (optional)

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### Add a Clinician

1. Under the Users subtab, click on **New Provider**. The New Provider screen will appear.

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- The Subtype step will appear with the default Subtype showing as Licensed Service Provider. There is no need to change this for the current workflow. Click **Next**.

Welch Allyn Home Dashboard Clinic Rooms Users Report Audit logs

Users > Providers > New provider

NEW PROVIDER

Subtype: Licensed Service Provider

Cancel Next

- The Demographics step will appear. Fill out the **optional fields** as necessary.
- Click on **Next** once done.

Users > Providers > New provider

NEW PROVIDER

Demographics

Medical School (optional)

Internship (optional)

Residency (optional)

Language (optional)

Short Bio (optional)

Bio (optional)

Picture (optional)

Cancel Next

- The Assignment step will appear. Click on the **drop-down button** to the right-most end of the Add Rooms field and type the room where you want the clinician to be added. Note: In most cases, this will be the default room name of the clinic as set by the Clinic Admin.
- Click on **Next** once done.

Welch Allyn Home Dashboard Clinic Rooms Users Report Audit logs

Users > Providers > New provider

NEW PROVIDER

Assignment: By rooms

Jake Wallin's Clinic - URL: wah:jake.wal... Code: a152q

Cancel Next

- The License step will appear. Fill out the details as necessary. Please note that at the

moment, there is no need to modify the information under Specialties and States Serviced.

8. Click on **Save** once done.

Users > Providers > New provider

NEW PROVIDER

Subtype Demographics Profile Assignment License

NPI (optional)

Specialties (optional) Default x | v  
Specialties dataset is populated from assigned rooms.

States Licensed (optional)

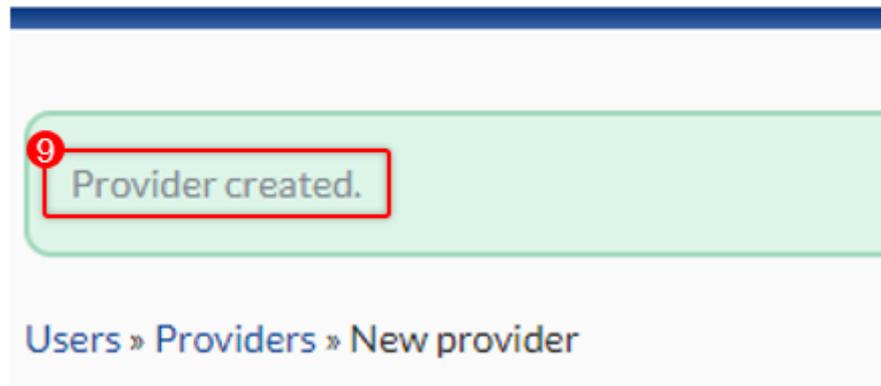
States Serviced All locations x | v

Cancel Save

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9. You will receive a confirmation message stating: "Provider Created" and you will be brought back to the Users screen.

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[Go back to the Admin Help Directory](#)