

Managing Provider Accounts

- 2022-04-13 - VSee Clinic for Admins

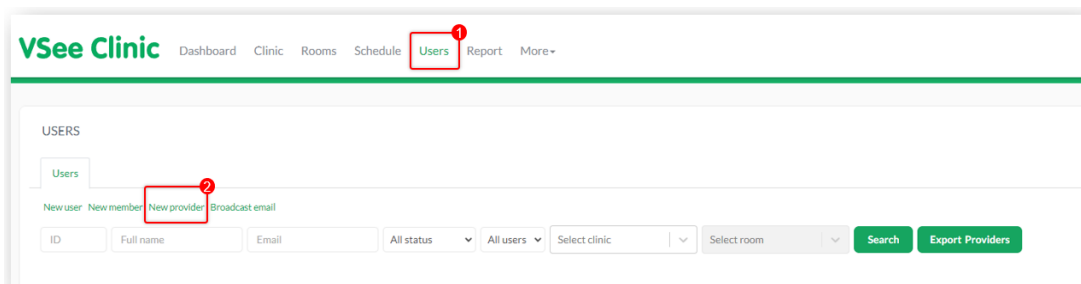
As a Clinic Admin, you have the capability to manage your providers. In this article, you will learn:

- [How to Create a Provider Account](#)
- [How to Edit or Deactivate a Provider Account](#)
- [How to Delete a Provider's Account](#)

Creating a Provider Account

Go to the Admin panel (see [guide](#)).

1. Click the **Users** tab.
2. Select **New Provider**.

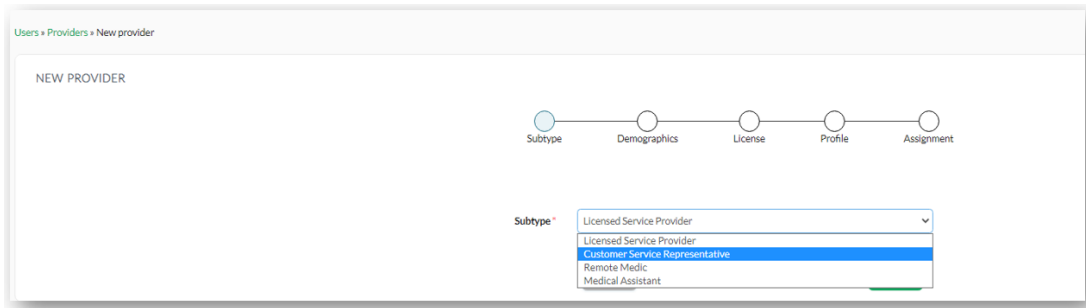


Select the user subtype of the provider you are creating. Currently, there are 4 subtypes:

- **Licensed Service Provider:** Health Practitioner who will do actual consultation with a patient or client
- **Customer Service Representative (CSR):** Could be a nurse or clinic staff who will not conduct actual consultations but will be performing front desk tasks such as tagging and scheduling and having access to patient records.
- **Remote Medic:** Could be a nurse or clinic staff who is physically present to assist the patient do the virtual visit. This is only available for clinics that are using remote medic or nurse-assisted workflow.

Note: This will only appear on the drop-down menu if your clinic has a remote medic workflow.

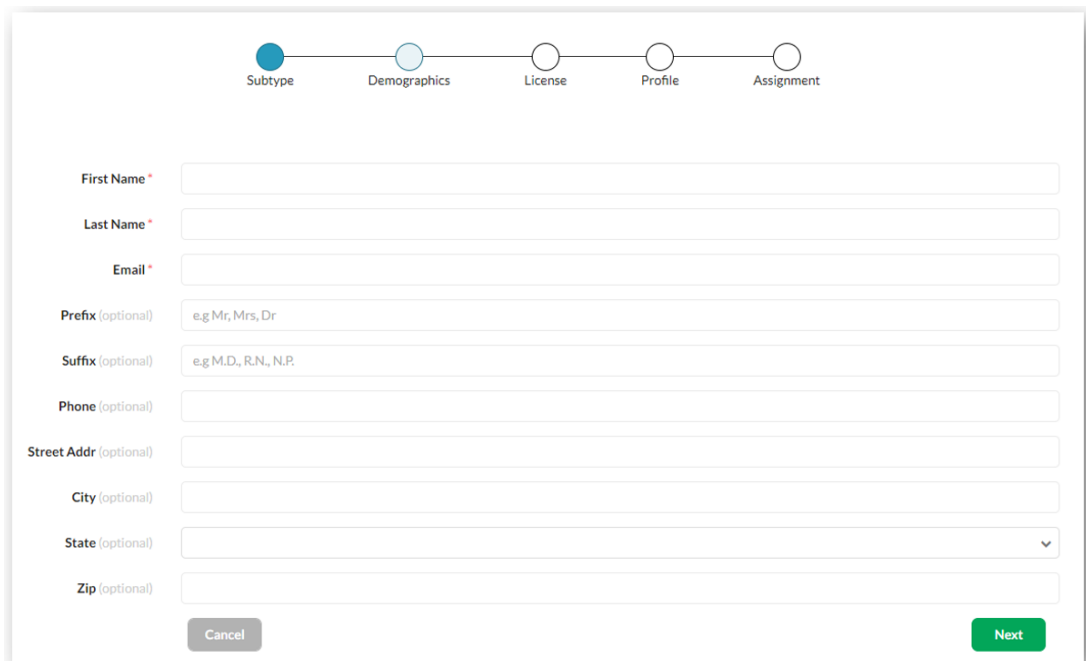
- **Medical Assistant:** Similar to the CSR, a Medical Assistant also performs front-desk and administrative tasks.



The screenshot shows the 'NEW PROVIDER' form in a web application. At the top, there is a breadcrumb trail: 'Users > Providers > New provider'. Below this, the title 'NEW PROVIDER' is displayed. A progress indicator consists of five circles connected by a line, labeled 'Subtype', 'Demographics', 'License', 'Profile', and 'Assignment'. The 'Subtype' circle is currently selected and highlighted in blue. Below the progress indicator, there is a 'Subtype' dropdown menu. The dropdown is open, showing the following options: 'Licensed Service Provider', 'Licensed Service Provider', 'Autonomous Service Representative', 'Remote Medic', and 'Medical Assistant'. The 'Autonomous Service Representative' option is currently selected and highlighted in blue.

Note: To add user roles or manage permissions of providers, please see [this guide](#).

Under **Demographics**, fill in the required fields. Note that only the First Name and Last Name fields may be displayed to patients. From hereon, you may opt to skip the optional fields and fill them out later.



The screenshot shows the 'NEW PROVIDER' form in a web application, specifically the 'Demographics' section. At the top, there is a progress indicator consisting of five circles connected by a line, labeled 'Subtype', 'Demographics', 'License', 'Profile', and 'Assignment'. The 'Demographics' circle is currently selected and highlighted in blue. Below the progress indicator, there are several input fields for demographic information. The fields are: 'First Name *', 'Last Name *', 'Email *', 'Prefix (optional)' (with a hint 'e.g Mr, Mrs, Dr'), 'Suffix (optional)' (with a hint 'e.g M.D., R.N., N.P.'), 'Phone (optional)', 'Street Addr (optional)', 'City (optional)', 'State (optional)' (with a dropdown arrow), and 'Zip (optional)'. At the bottom of the form, there are two buttons: 'Cancel' and 'Next'.

Under **Profile**, you can choose to fill out **Bio** and upload a **Picture** (i.e. headshot) of the provider. These two will be displayed on the patient landing page.

Medical School (optional)

Internship (optional)

Residency (optional)

Language (optional)

Title (optional)

Bio (optional)

Picture (optional)

Lastly under **Assignment**, you can select the rooms where you want to assign the user. You may skip this step if you haven't created the room yet. You can assign later while creating the room. Ideally, though, the room is already existing before you create a provider.

Subtype Demographics License Profile **Assignment**

Assignments (optional) By rooms

Editing and Deactivating a Provider Account

Go to the **Admin Panel** then click **Users**. Search for the provider you want to edit in the search bar then click **Edit** (pen icon) under the Action column.

USERS

Users

New user New member New provider Broadcast email

ID Full name Confirmed Provider Select clinic Select room Search Export Providers

Show 100 entries

<input type="checkbox"/>	Delete	Last login	User	Room	Action
<input type="checkbox"/>		2022-04-08 12:49:39 Signup: 2019-11-07 11:49:38 Status: Y Active	Patty Barrera ID: 472735 User name: patty@vseelab.com Email: patty@vseelab.com Vses ID: patty@vseelab.com Type: Y Provider	Marian's Clinic Code: Y marian Link: /a/marian Patty Barrera's Clinic Code: Y patty Link: /a/patty	<input checked="" type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Reset Password"/> <input type="button" value="User Role"/>

Meanwhile, to deactivate a provider, click on **Edit**;

1. Go to **Authentication Detail**.

2. Set the provider's status to **Suspended**.

3. Click **Save**.

The screenshot shows a configuration page with a breadcrumb trail: Subtype, Demographics, License, Profile, Assignment, and Authentication detail. The 'Authentication detail' step is highlighted with a red box and a '1'. Below the trail is a 'Status' dropdown menu, with 'Suspended' selected. A red box and '2' highlight the 'Status' label. There is an unchecked checkbox for 'Send reset password email'. At the bottom, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box and a '3'.

You can also change the password of the provider by choosing **Set Password** under the Action column.

The screenshot shows a table of users. The table has columns for 'Delete', 'Last login', 'User', 'Room', and 'Action'. The 'Action' column for the user 'Patty Barrera' has three options: 'Edit', 'Set password', and 'User Role'. The 'Set password' option is highlighted with a red box.

Delete	Last login	User	Room	Action
<input type="checkbox"/>	2022-04-08 12:49:29 Sign up: 2019-11-07 11:49:38 Status: Y Active	Patty Barrera ID: 472735 User name: patty@vseeab.com Email: patty@vseeab.com Vsee ID: patty@vseeab.com Type: Y Provider	Marian's Clinic Code: Y marian Link: /u/arian Patty Barrera's Clinic Code: Y patty Link: /u/patty	<input type="checkbox"/> Edit <input type="checkbox"/> Set password <input type="checkbox"/> User Role

Deleting a Provider Account

Note: When a provider is deleted, all the visit records and data associated with his/her profile will also be removed and is not retrievable.

To completely delete a provider profile, click on **Delete** under the Action column.

The screenshot shows the same 'USERS' table as above. In the 'Action' column for the user 'Patty Barrera', the 'Delete' option is now highlighted with a red box.

Delete	Last login	User	Room	Action
<input type="checkbox"/>	2022-04-08 12:49:29 Sign up: 2019-11-07 11:49:38 Status: Y Active	Patty Barrera ID: 472735 User name: patty@vseeab.com Email: patty@vseeab.com Vsee ID: patty@vseeab.com Type: Y Provider	Marian's Clinic Code: Y marian Link: /u/arian Patty Barrera's Clinic Code: Y patty Link: /u/patty	<input type="checkbox"/> Edit <input type="checkbox"/> Set password <input checked="" type="checkbox"/> Delete <input type="checkbox"/> User Role

Click on **OK** when prompted.

The screenshot shows a confirmation dialog box with the text: 'clinic.vsee.me says This record will be permanently deleted. Are you sure you want to continue?'. At the bottom, there are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red box.

Related Articles:

- [Clinic Admin: Manage Rooms](#)
- [Clinic Admin: User Roles](#)

If you have any questions, please contact us at help@vsee.com

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Tags

admin panel

create CSR

create providers

CSR

deactivate user

delete providers

edit provider

Provider

set password