

Managing Provider Accounts

- 2022-04-13 - VSee Clinic for Admins

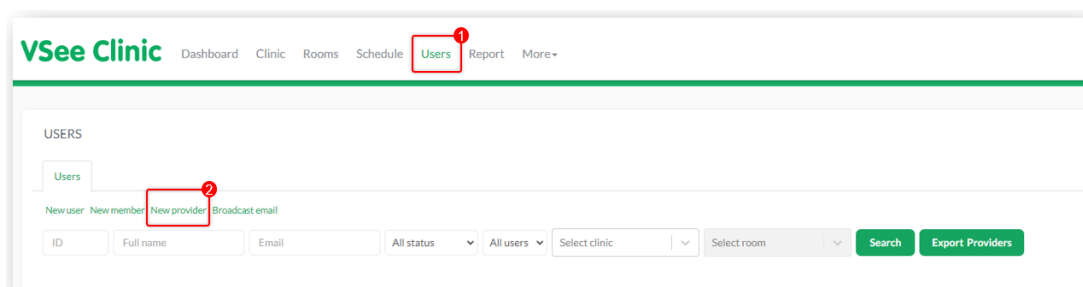
As a Clinic Admin, you have the capability to manage your providers. In this article, you will learn:

- [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**.

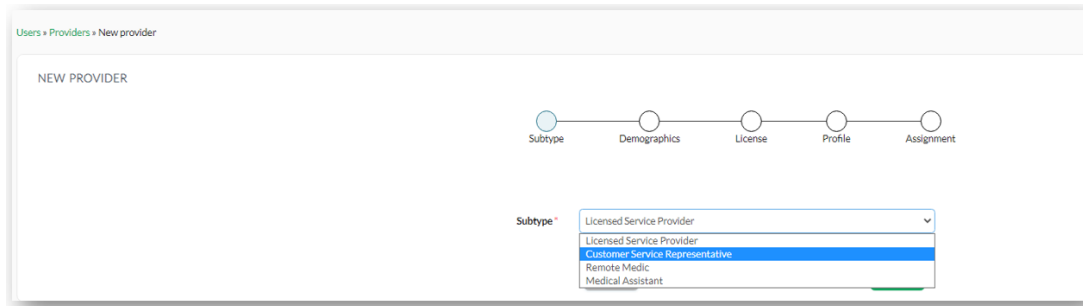


Select the user subtype of the provider you are creating. Currently, there are 4 subtypes:

- **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.

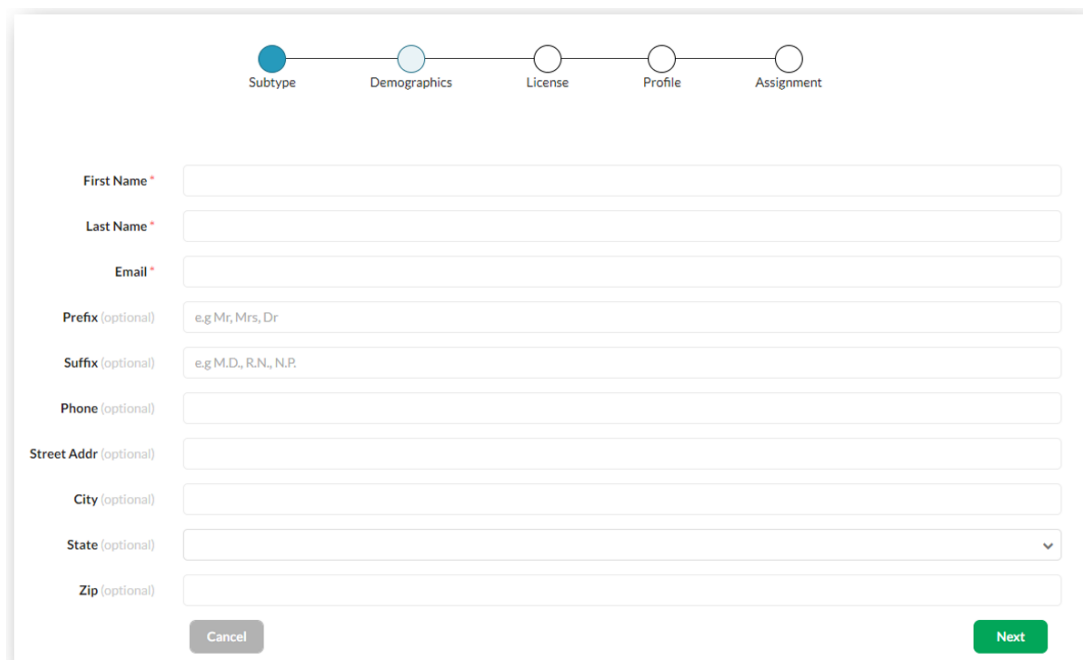
- **Medical Assistant:** Similar to the CSR, a Medical Assistant also performs front-desk and administrative tasks.



The screenshot shows the 'NEW PROVIDER' form with a progress bar at the top indicating the current step is 'Subtype'. The 'Subtype' dropdown menu is open, showing the following options: 'Licensed Service Provider', 'Licensed Service Provider', 'Autonomous Service Representative' (highlighted), 'Remote Medic', and 'Medical Assistant'.

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 with the progress bar indicating the current step is 'Demographics'. The form contains the following fields:

- First Name *** (required)
- Last Name *** (required)
- Email *** (required)
- Prefix (optional)** (e.g. Mr, Mrs, Dr)
- Suffix (optional)** (e.g. M.D., R.N., N.P.)
- Phone (optional)**
- Street Addr (optional)**
- City (optional)**
- State (optional)** (dropdown menu)
- Zip (optional)**

At the bottom of the form, there are 'Cancel' and 'Next' buttons.

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) e.g Family Therapist...

Bio (optional)

Picture (optional)

Drag and Drop files here
Or [Click Here](#) to browse files

Cancel Next

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

Cancel Save

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 patty@vseelab.com Confirmed Provider Select clinic Select room Search Export Providers

Show 100 entries

| | 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: 472755 User name: patty@vseelab.com Email: patty@vseelab.com Vseel 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 | Edit Delete Reset Password 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**.

A screenshot of a provider profile form. At the top, a horizontal navigation bar contains six steps: Subtype, Demographics, License, Profile, Assignment, and Authentication detail. The 'Authentication detail' step is highlighted with a red box and a red circle with the number 1. Below the navigation bar, there is a 'Status' dropdown menu with 'Suspended' selected; this dropdown is also highlighted with a red box and a red circle with the number 2. Below the status dropdown is a checkbox labeled 'Send reset password email'. At the bottom right of the form, there is a green 'Save' button, which is highlighted with a red box and a red circle with the number 3. A 'Cancel' button is located at the bottom left.

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

A screenshot of a 'USERS' table. The table has columns: Delete, Last login, User, Room, and Action. The first row of data shows a user named 'Patty Barrera' with a last login of '2022-04-08 12:49:29'. In the 'Action' column for this user, there are three links: 'Edit', 'Set Password', and 'User Role'. The 'Set Password' link 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@vseelab.com Email: patty@vseelab.com Vsee ID: patty@vseelab.com Type: Y Provider | Marian's Clinic Code: Y marian Link: /u/arian Patty Barrera's Clinic Code: Y patty Link: /u/patty | Edit Set Password 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.

A screenshot of the same 'USERS' table. In the 'Action' column for the user 'Patty Barrera', the 'Delete' link 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@vseelab.com Email: patty@vseelab.com Vsee ID: patty@vseelab.com Type: Y Provider | Marian's Clinic Code: Y marian Link: /u/arian Patty Barrera's Clinic Code: Y patty Link: /u/patty | Edit Set Password Delete User Role |

Click on **OK** when prompted.

A screenshot of a confirmation dialog box. The text inside reads: 'clinic.vsee.me says This record will be permanently deleted. Are you sure you want to continue?'. At the bottom of the dialog, 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