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Managing Provider Accounts

- 2022-04-13 - [VSee Clinic for Admins](#)

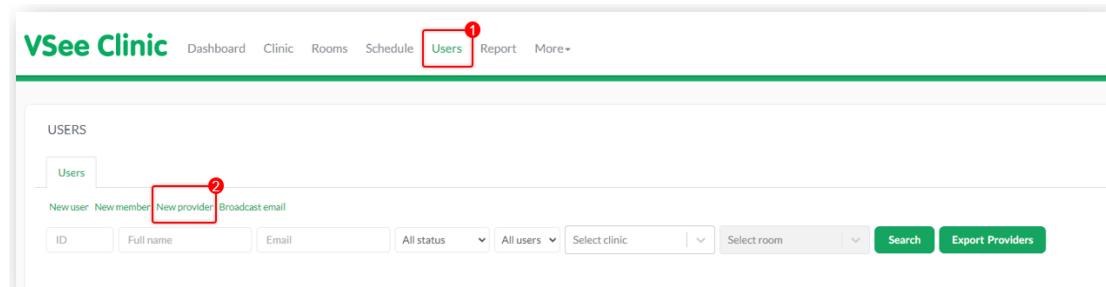
As a Clinic Admin, you have the capability to manage your providers. In this article, you will learn:

- [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**.

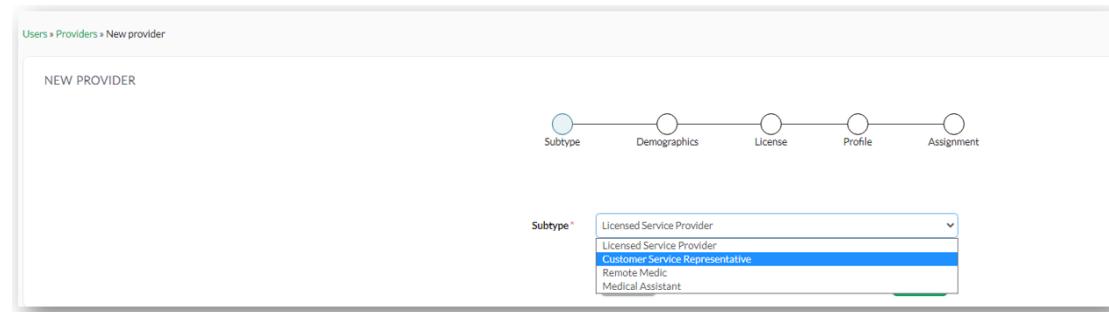


Select the user subtype of the provider you are creating. Currently, there are 4 subtypes:

- **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.



Users > Providers > New provider

NEW PROVIDER

Subtype

Demographics

License

Profile

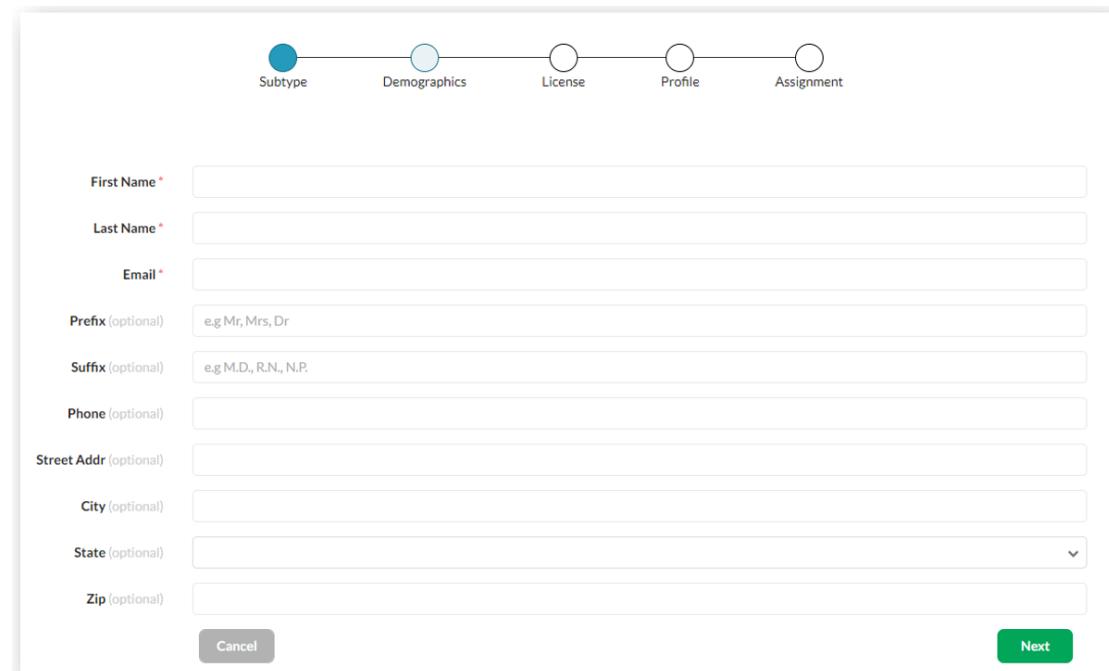
Assignment

Subtype *

- Licensed Service Provider
- Licensed Service Provider
- Customer Service Representative**
- Remote Medic
- 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.



First Name *

Last Name *

Email *

Prefix (optional)

Prefix (optional)

Suffix (optional)

Phone (optional)

Street Addr (optional)

City (optional)

State (optional)

Zip (optional)

Cancel

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)	<input type="text"/>
Internship (optional)	<input type="text"/>
Residency (optional)	<input type="text"/>
Language (optional)	<input type="text"/>
Title (optional)	e.g Family Therapist...
Bio (optional)	<input type="text"/>
Picture (optional)	<div style="border: 1px dashed #ccc; padding: 10px; text-align: center;"> <p>Drag and Drop files here</p> <p>Or Click Here to browse files</p> </div>

[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

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.

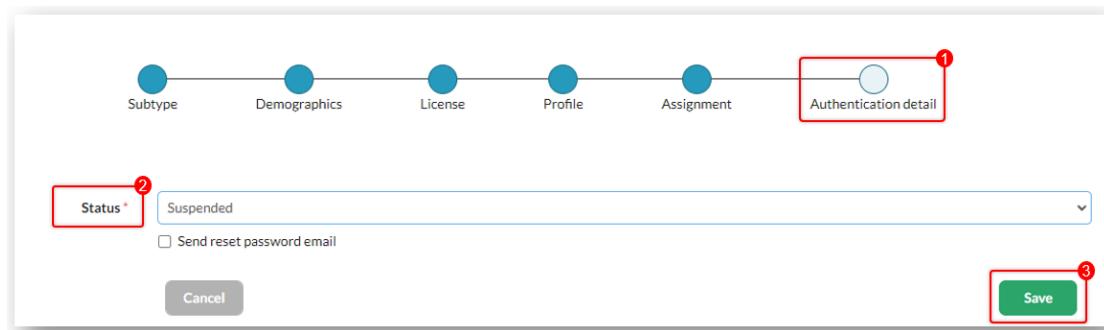
Users						
Users		Actions				
New user		New member	New provider	Broadcast email		
ID	Full name	patty@veelab.com	Confirmed	Provider	Select clinic	Select room
<input type="button" value="Search"/>	<input type="button" value="Export Providers"/>					
Show	100	entries				
<input type="checkbox"/>	Delete	Last login	User	Room	Action	
<input type="checkbox"/>		2022-04-08 12:49:29 Sign up: 2019-11-07 11:49:38 Status: Active	Patty Barrera ID: 472735 User ID: patty@veelab.com Email: patty@veelab.com Vee ID: patty@veelab.com Type: Provider	Marian's Clinic Code: T_marian Link: /user/marian	Edit Delete Set 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**.



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

USERS					
Users					
New user New member New provider Broadcast email					
ID	Full name	patty@vseelab.com	Confirmed	Provider	Select clinic
Show	100	entries			
<input type="checkbox"/>	Delete	Last login	User	Room	Action
<input type="checkbox"/>	Delete	2022-04-08 12:49:29 Signup: 2019-11-07 11:49:38 Status: Active	Patty Barrera ID: 47722 Email: patty@vseelab.com Email: patty@vseelab.com Vsee ID: patty@vseelab.com Type: Provider	Marian's Clinic Code: marian Link: /marian Patty Barrera's Clinic Code: patty Link: /v/patty	Edit Delete Set password User Role

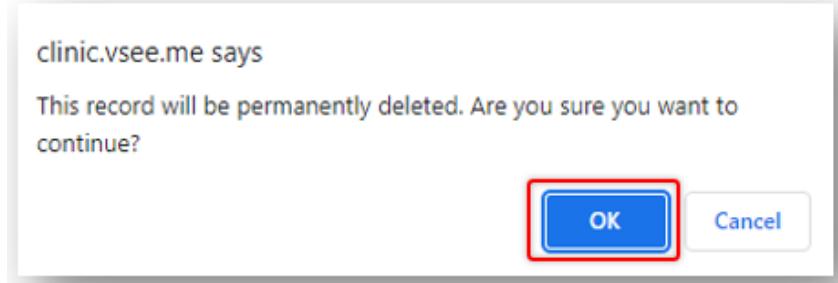
Deleting a Provider Account

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.

USERS					
Users					
New user New member New provider Broadcast email					
ID	Full name	patty@vseelab.com	Confirmed	Provider	Select clinic
Show	100	entries			
<input type="checkbox"/>	Delete	Last login	User	Room	Action
<input type="checkbox"/>	Delete	2022-04-08 12:49:29 Signup: 2019-11-07 11:49:38 Status: Active	Patty Barrera ID: 47722 Email: patty@vseelab.com Email: patty@vseelab.com Vsee ID: patty@vseelab.com Type: Provider	Marian's Clinic Code: marian Link: /marian Patty Barrera's Clinic Code: patty Link: /v/patty	Edit Delete Set password User Role

Click on **OK** when prompted.



Related Articles:

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

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

Last updated on: 13 April 2022

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