

Managing Provider Accounts

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

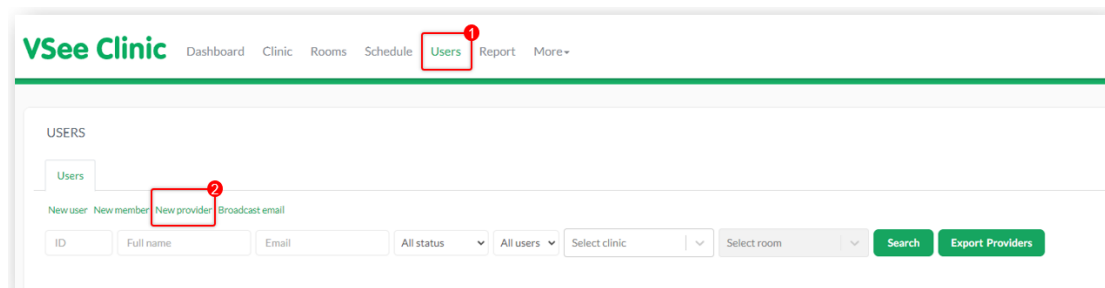
As a Clinic Admin, you have the capability to manage your providers. In this article, you will learn:

- [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**.

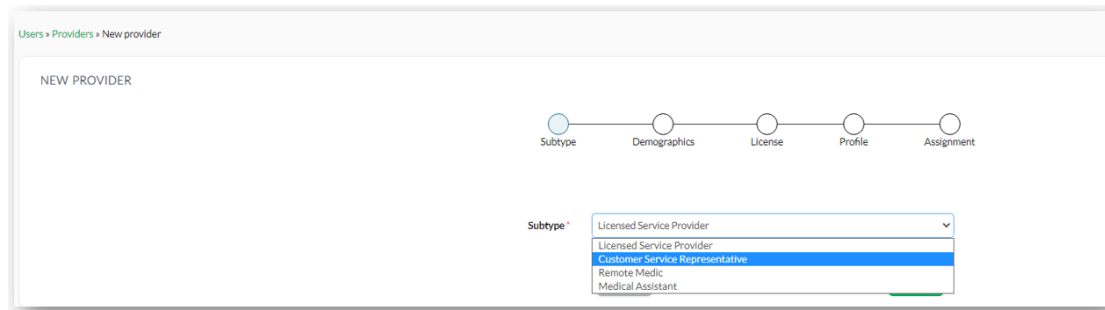


Select the user subtype of the provider you are creating. Currently, there are 4 subtypes:

- **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.

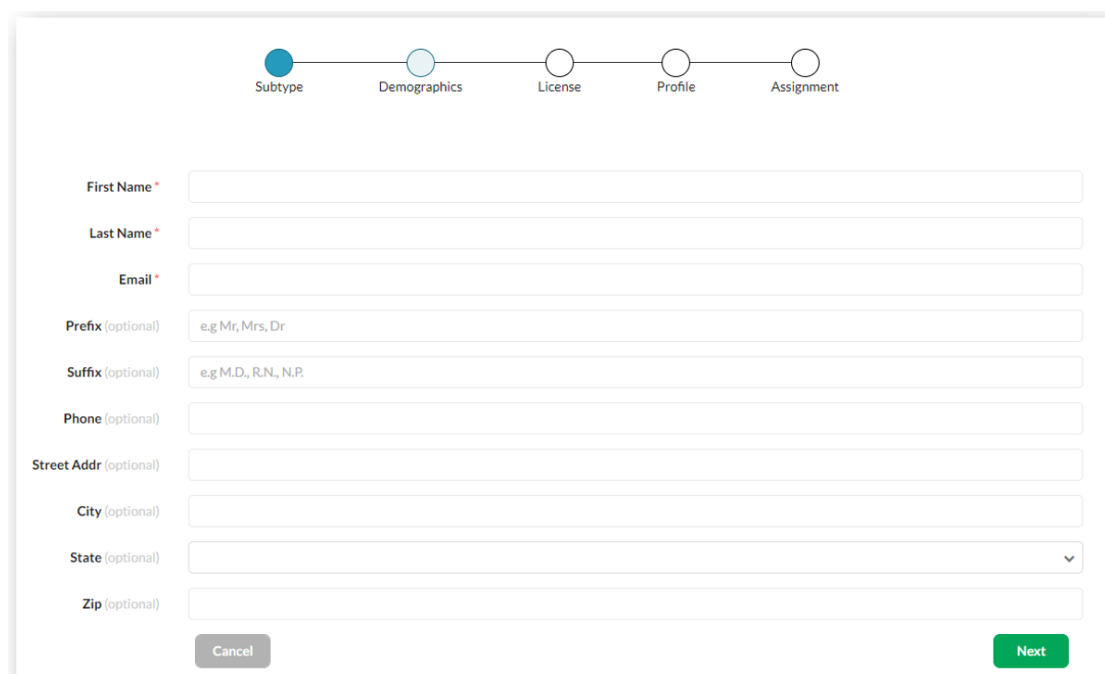
- **Medical Assistant:** Similar to the CSR, a Medical Assistant also performs front-desk and administrative tasks.



The screenshot shows the 'NEW PROVIDER' form with a progress bar at the top indicating five steps: Subtype, Demographics, License, Profile, and Assignment. The 'Subtype' step is currently active. Below the progress bar, the 'Subtype' dropdown menu is open, displaying the following options: Licensed Service Provider, Licensed Service Provider, Customized 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 'Demographics' step active. The progress bar at the top shows five steps: Subtype, Demographics, License, Profile, and Assignment. The 'Demographics' step is currently active. Below the progress bar, the form fields for demographics are displayed:

- First Name *
- Last Name *
- Email *
- 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 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)

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

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

patty@vseelab.com

Confirmed

Provider

Select clinic

Select room

Search

Export Providers

Show 100 entries

Delete

Last login

User

Room

Action

2022-04-08 12:49:29

Sign up: 2019-11-07 11:49:38

Status: Active

Patty Barrera

ID: 472735

User name: patty@vseelab.com

Email: patty@vseelab.com

Vsee ID: patty@vseelab.com

Type: Provider

Marian's Clinic

Code: T marlan

Link: /u/marlan

Patty Barrera's Clinic

Code: T patty

Link: /u/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 web form for updating a provider's status. 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 number '1'. Below this, the 'Status' dropdown menu is set to 'Suspended' and is highlighted with a red box and a red number '2'. There is an unchecked checkbox for 'Send reset password email'. At the bottom, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a red box and a red number '3'.

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

A screenshot of a 'USERS' management interface. It includes a table with columns: Delete, Last login, User, Room, and Action. The 'User' column for the first entry shows details for Patty Barrera. The 'Action' column for the same entry contains links: 'Edit', 'Delete', '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 marlan Link: /u/marlan Patty Barrera's Clinic Code: Y patty Link: /u/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.

A screenshot of the same 'USERS' management interface. In the 'Action' column of the first row, the 'Delete' 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 marlan Link: /u/marlan Patty Barrera's Clinic Code: Y patty Link: /u/patty	Edit , Delete , Set password , User Role

Click on **OK** when prompted.

A screenshot of a confirmation dialog box. The text reads: '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

Last updated on: 13 April 2022

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