Add/Remove staff

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Create an account for staff to log in to Zedmed. Each account will have access to different parts of Zedmed, based on their role and required access.

For Zedmed Cloud customers, Zedmed manages user accounts and accepts requests via the cloud user request forms.

Creating an account

To create a staff member's account:

1. Go to Zedmed's **Utilities** tab.
2. Select **Security**.

   The **Zedmed Security Roles and User** screen opens on the **Staff** tab.
3. Select **Add**.

   This will open the **Edit Staff Member** screen.
4. In the **User Name** field, enter the name the staff member will log in.

   Use the practice's naming convention with no spaces.
5. For **Staff ID,** enter the ID using the practice's format.
6. Enter the staff member's **Given Name** and **Family Name** into the fields provided.
7. From the **User Roles** tab, select the applicable role, then select the single arrow to move the role to the **Included Roles** pane.

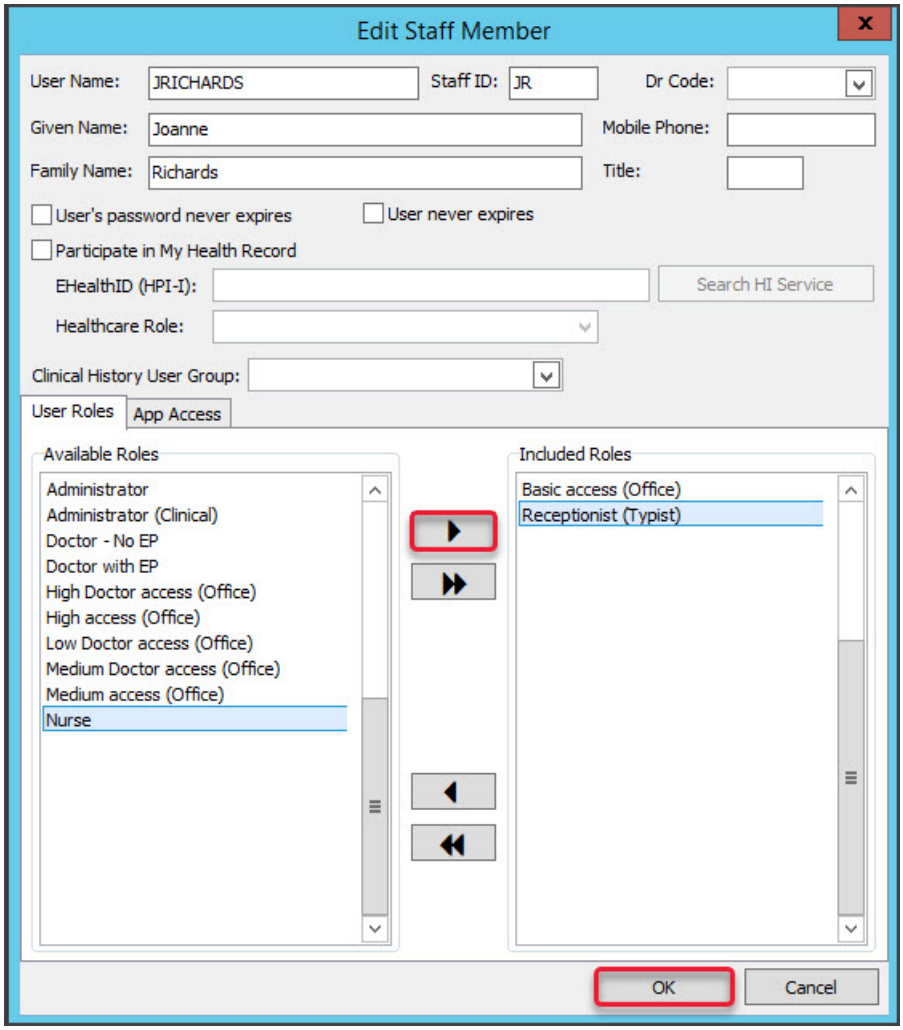
   Zedmed comes with 4 roles configured with the recommended access: Administrator, Receptionist, Doctor and Nurse. You can modify these roles' access and create your own. You can also open the role in the **Zedmed Security Roles and User > Roles** tab to view the specific functions given to each role.

   To learn more, see the Accounts and Security article.
8. Select **OK** to close.

   The **Set Password** screen will open.

   For on-prem practices, the practice sets the password requirements in Practice Details.
9. Enter and confirm the password.
10. Select **OK** to save and close.
11. You can now provide the staff member with their login information.

    Advise the staff member to use the **Utilities** tab > **Change Password** button to change their password.



Disabling an account

You cannot delete an account. Instead, you right-click it and select **Make Inactive**.

