Accounts & security

Version: 1.02 | Last Modified on 17/06/2026 9:12 am AEST

Manage access to Zedmed for staff and doctors. This is done by assigning specific roles to users, which gives them access to the parts of Zedmed required to perform their work.

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

Overview

Zedmed uses granular permissions called functions that give access to specific features and processes within Zedmed. These functions are grouped into roles based on employees' duties and each employee's user account is given access to one or more roles.

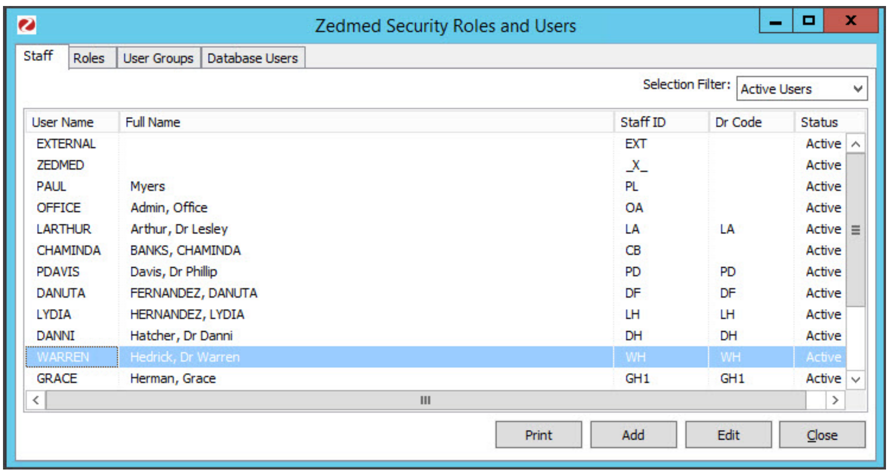
Roles make it easy to assign access. For example, if you have a new nurse, just create an account and allocate the **Nurse** role and the nurse has all the access they need.

You can change the functions that the standard roles have or create new roles. Out of the box, Zedmed has four pre-configured roles: **Administrator**, **Doctor**, **Nurse** and **Receptionist**. Each role provides access to the functions commonly used by those roles.

To access the **Security Roles and Users** screen:

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

   The **Zedmed Security Roles and User** screen will open.



Managing users and roles

This section explains how to create and modify roles and assign them to users

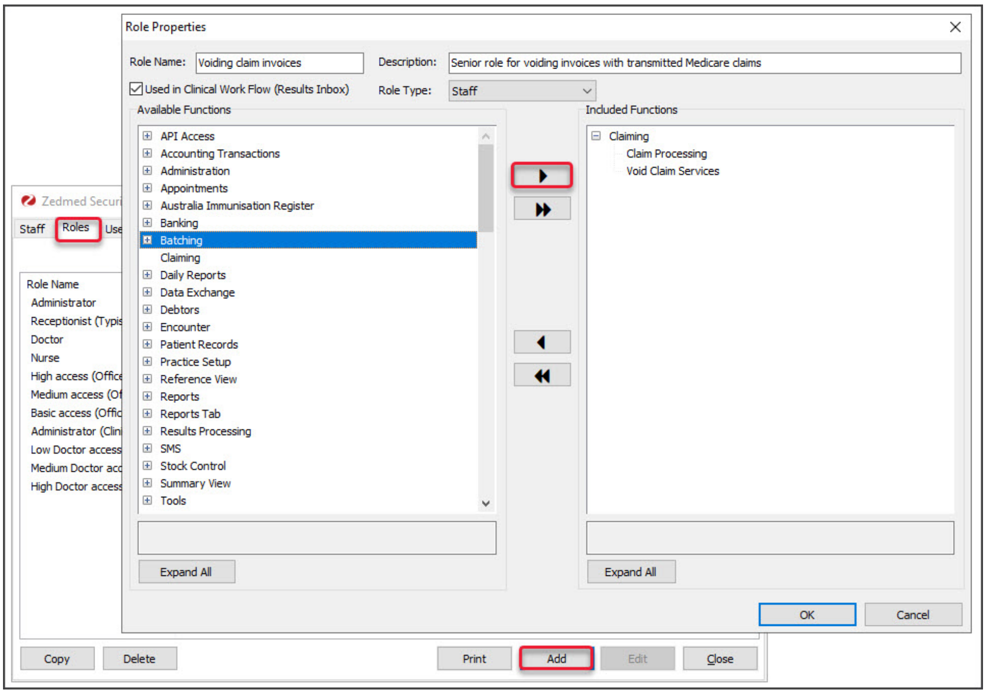
- To add a new staff member, see the Add new staff guide.
- To add a new doctor, see the Add new doctor guide.

Creating a new role

To create a new role:

1. Select the **Roles** tab.
2. Select **Add**.

   The **Role Properties** screen will open.
3. Give the new role a name and description.
4. Add the functions you want the role to have by selecting the function and clicking the arrow button.
5. Select **OK** to save the new role.

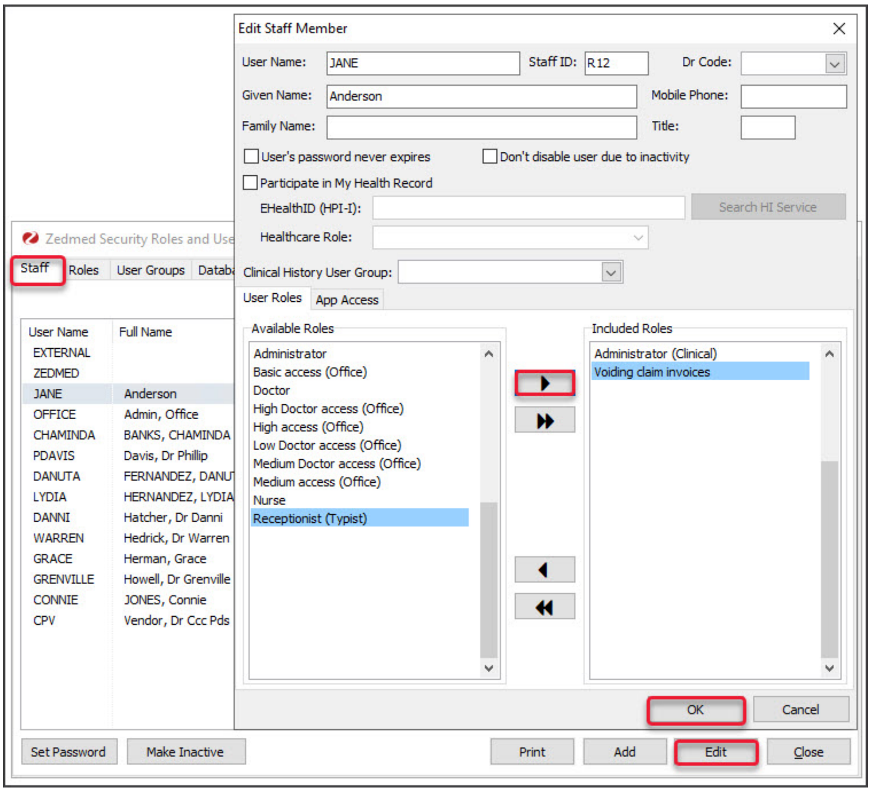


Adding roles to users

To add a role to a user:

1. Select the **Staff** tab.
2. Select the user.
3. Select **Edit**.

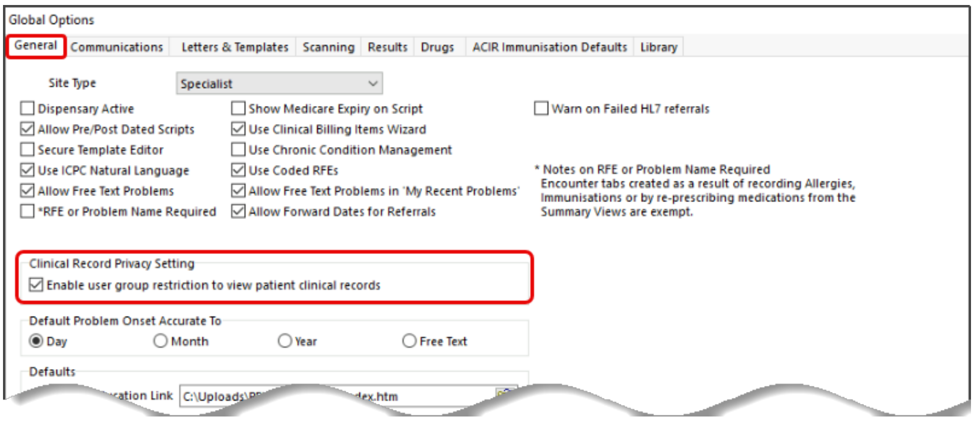
   The **Edit Staff Member** screen will open.
4. Select the role you want to allocate.
5. Select the arrow button to add it to the users.
6. Select **OK** to save the changes.



User Groups (restrict clinical note sharing)

By default, all practitioners can view each other's clinical notes and encounter history. To restrict this access, you can create **User Groups**. Once a group is set up, only the staff members added to that specific group can see each other's clinical notes.

For the User Group feature to work effectively, ensure the setting is turned on in**Clinical > Tools > Global Options**:



Below are common setup scenarios and step-by-step instructions.

> **Important**: these sharing restrictions will only apply to clinical notes added **after the group security is applied**.

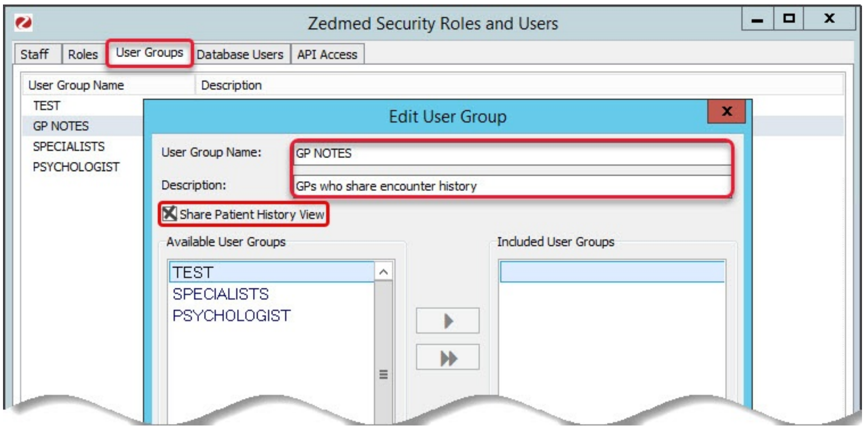
Organise user groups to control who sees clinical notes based on their role or location.

- **Example:** A "GP" group and a "Specialist" group, ensuring practitioners only see clinical notes (encounter history) within their own discipline.

- **Solution:** Create separate groups for discipline or physical clinics within your wider practice.

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

   The **Zedmed Security Roles and User** screen will open.
3. Select the **User Groups** tab.
4. Select **Add**.
5. Enter a **User Group Name** and **Description.**
6. Select **Share Patient History View.**

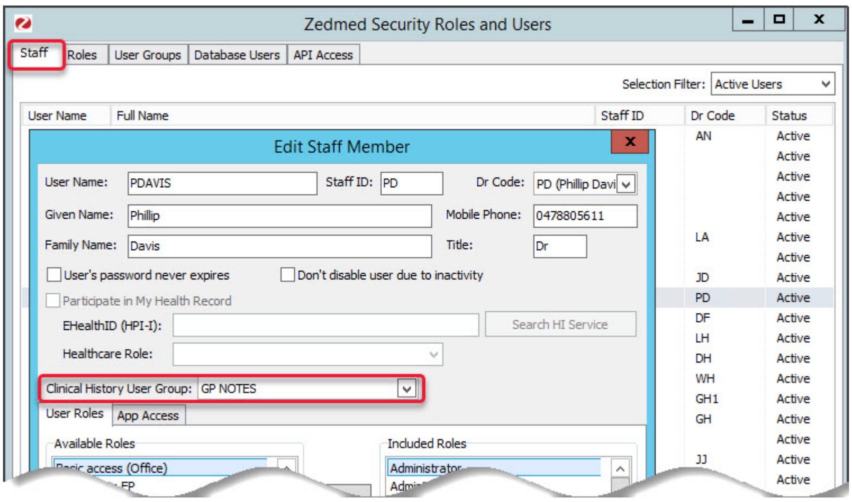


7. Select **OK** to save the group.

   Add the GP doctors to the group.

8. Select the **Staff** tab.
9. Double-click an applicable doctor to open their **Edit Staff Member** screen.
10. From the **Clinical History User Group** field, select the name of the GP group you created.
11. Repeat this for each doctor that needs access to their clinical notes to be restricted - to group members.

    Use the same steps to create a second user group.



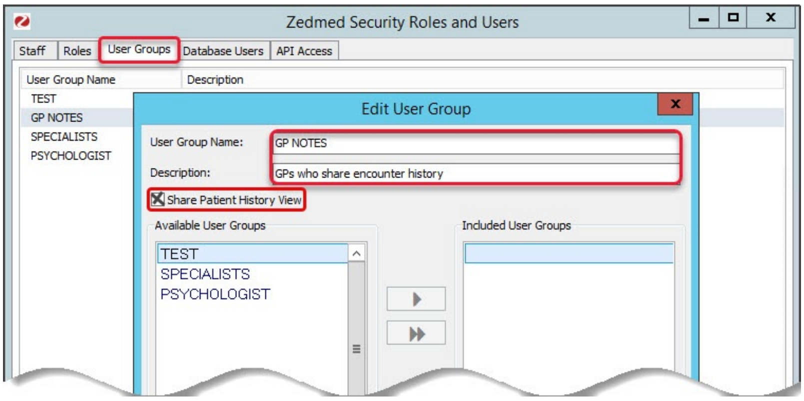
Set up one-way access so one group can view another's notes without sharing back.

- **Example:** When a Psychologist needs to see a GP's clinical notes, but GPs shouldn't see the Psychologist's notes.
- **Solution:** Create a group for the GPs and a group for the Psychologist then link the latter to the GP group. The Psychologist gets visibility, but the GPs' view remains restricted.

Create GP Group

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

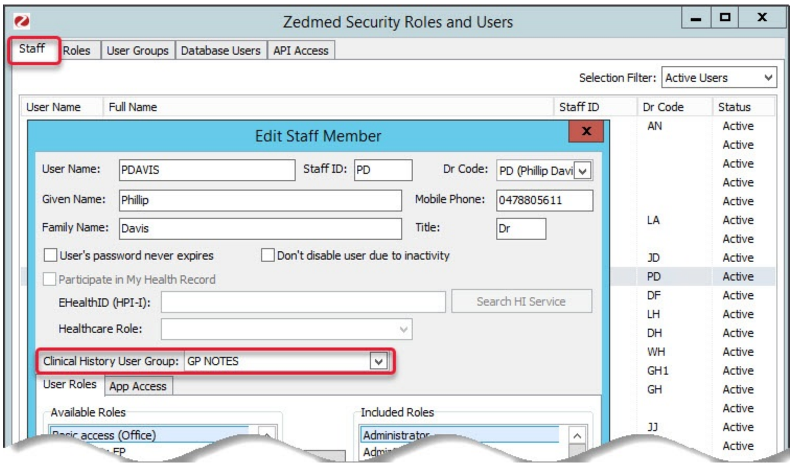
   The **Zedmed Security Roles and User** screen will open.
3. Select the **User Groups** tab.
4. Select **Add**.
5. Enter a **User Group Name** and **Description.**
6. Select **Share Patient History View**



7. Select **OK** to save the group.

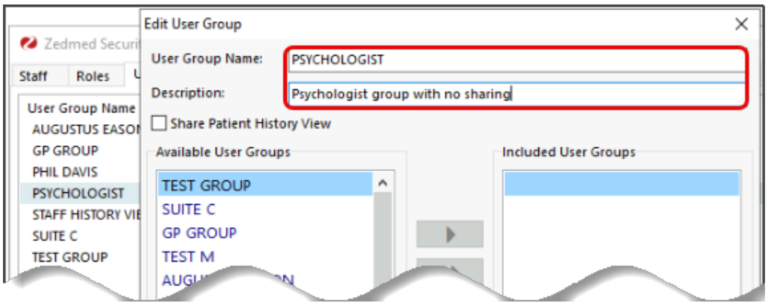
Add GP doctors to the group.

8. Select the **Staff** tab.
9. Double-click an applicable doctor to open their **Edit Staff Member** screen.
10. From the **Clinical History User Group** field, select the GP group you created.

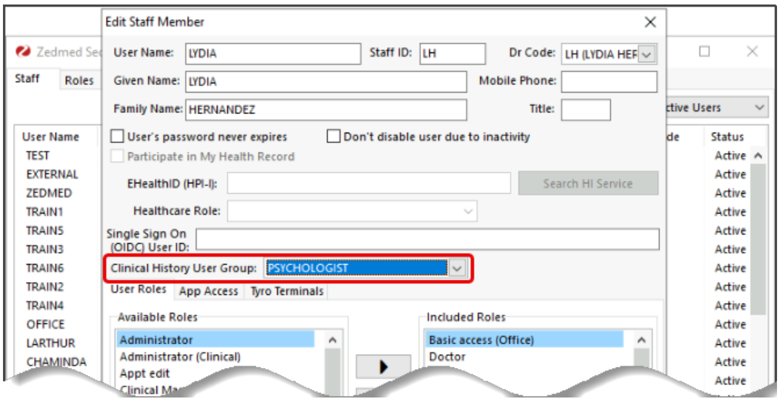


Create Psychologist Group

11. Select the **User Groups** tab.
12. Select **Add**.
13. Enter a **User Group Name** and **Description.**
14. **Do not** select the Share Patient History View.

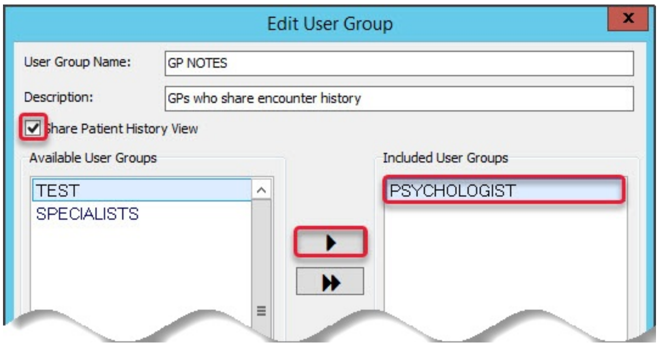


15. Select the **Staff** tab, double-click the Psychologist to open their **Edit Staff Member** screen.
16. From the **Clinical History User Group**, select the Psychologist group you created.



Add the Psychologist group to the GP group.

17. Select the **User Groups** tab.
18. Select **GP Group**
19. Select Psychologist from the **Available User Groups,** use the centre arrow to add them to the **Included User Groups.**



Restrict clinical notes between practitioners while still giving full access to administrative staff.

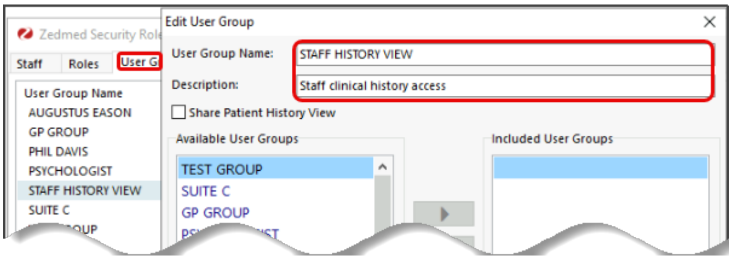
- **Example:** A clinic of psychiatrists wants to keep their notes private from each other, but they all need reception staff to be able to see them.
- **Solution:** Create an individual group for each psychiatrist and a single group for the reception staff. Then add each psychiatrist to their own group and add the reception group to each of the psychiatrists' groups.

Create a Reception group and add members

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

   The **Zedmed Security Roles and User** screen will open.

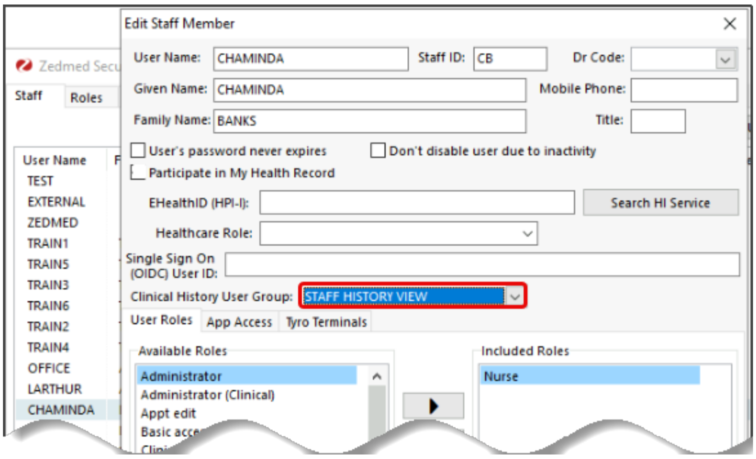
3. Select the **User Groups** tab.
4. Select **Add**.
5. Enter a **User Group Name** and **Description.**
6. **Do not** select the Share Patient History View.



7. Select **OK** to save the group.

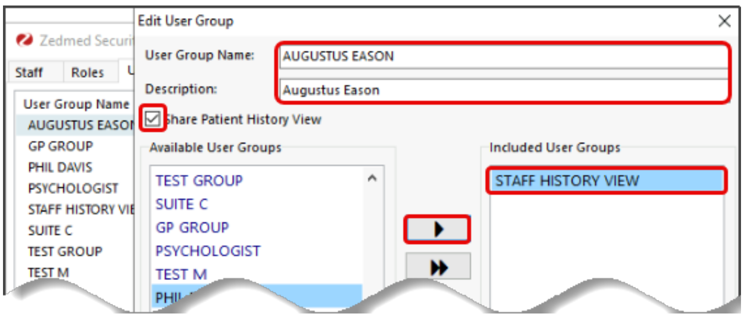
Add all reception staff to the group.

8. Select the **Staff** tab.
9. Double-click an applicable reception staff member to open their **Edit Staff Member** screen.
10. From the **Clinical History User Group** field, select the name of the group you created.
11. Repeat this step for each reception staff member.



Create Psychiatrist Groups and add reception group

12. In Security, select the **User Groups** tab.
13. Select **Add**.
14. Enter a **User Group Name** and **Description** - i.e. practitioner name.
15. Select **Share Patient History View.**
16. Select your collective reception group from the **Available User Groups,** use the centre arrow to add them to the **Included User Groups.**



17. Select **OK.**
18. Repeat this step for every Psychiatrist.

Add Psychiatrists to their own User Group

19. Select the **Staff** tab.
20. Double-click a Psychiatrist to open their **Edit Staff Member** screen.
21. From the **Clinical History User Group** field, select that Psychiatrist's group you created.
22. Repeat this step for every Psychiatrist.