

## Add/Remove staff

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Create an account for staff to log into Zedmed with. Each account will have access to different parts of Zedmed, as defined by their role and the access they need.

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 will open at 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 in 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 the access these roles have and create your own roles. 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 password requirements are set by the practice 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 that they should use the **Utilities** tab > **Change Password** button to change their password.

		Edit S	Staff Men	nber		×
User Name:	JRICHARDS		Staff ID:	JR	Dr Code:	¥
Given Name:	Joanne				Mobile Phone:	
Family Name:	Richards				Title:	
User's pass	sword never expires	Use	er never exp	ires		
Participate	in My Health Record					
EHealthID	(HPI-I):				Sea	rch HI Service
Healthcare	Role:			~		
Clinical History	User Group:			~		
User Roles 🛛	App Access					
Available Ro	les			Included	Roles	
Administrate Administrate Doctor - No Doctor with High Doctor High access Low Doctor Medium Doc Medium acce Nurse	rr (Clinical) EP EP access (Office) (Office) access (Office) tor access (Office) ess (Office)		•	Basic acc	:ess (Office) nist (Typist)	
		~			ОК	Cancel

## Disabling an account

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

2		Zedmed Sec	urity Roles and Users		_	. 🗆
Staff Role	es User Groups Databa	se Users				
				Selection	n Filter: Active	Users
User Name	Full Name			Staff ID	Dr Code	Status
EXTERNAL ZEDMED PAUL OFFICE LARTHUR CHAMINDA PDAVIS	Myers Admin, Office Arthur, Dr Lesley A BANKS, CHAMINDA Davis, Dr Phillip			EXT _X_ PL OA LA CB PD	LA PD	Active Active Active Active Active Active Active
LYDIA DANNI WARREN GRACE	HERNANDEZ, LYDI Hatcher, Dr Danni Hedrick, Dr Warre Herman, Grace	Set Password Make Inactive Edit Add		LH DH WH GH1	LH DH WH GH1	Active Active Active Active >
			Print	Add	Edit	Close

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