

Set Up New Users



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Step 1

- From the main screen, select **Set up > Users**.
- Click **Add** to access the new user screen.

Step 2

- Add details as appropriate and click **Save**.
You'll be prompted to set up a user password, which they can then change at first log in.

Depending on the **category** selected, different fields will appear. See the table for a summary of these fields.

Key Permissions

Daily Message	Appointments
Double Book Appointments	Override On the Day appointments
Waiting Room	Accounts
Payments	Direct Billing
Send SMS reminders	Reports
Set up session	Set up fees
Banking	Cheque Details

Step 1 – Configure user permissions

- From the main Bp screen select **Setup > Users**.
- Choose the user from the list and click **Edit**.
- In the 'Edit User Details' screen, click **Set Permissions**.
- Edit permissions in the pop up as appropriate by clicking on the Permission column.
- Click **Save**.



Permissions previously set up for other users can be applied to any new or existing user. Click **Inherit** in either the user or reports set up screen to choose from a list of team members

Mandatory Fields for Providers

Provider Number	Prescriber Number (if applicable to provider type)
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Health Identifier	Ft/Pt/Locum
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Enabled Fields for Doctors

Vocationally Registered	DVA LMO
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Fields for other providers

Has appointments	Has accounts
Default account type	Default Item No
Usual location	Make notes confidential

Step 2 – Set report permissions

From the Edit user screen, click on **Setup Reports**:

- Admin/Nursing Staff:** tick as appropriate and Apply > Save
- Doctors:** tick reports as appropriate and then use the menu as illustrated at (2) to select whose reports they may see

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Set User Permissions

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Set Up User Preferences

To Access User Preferences

- Access via **Main Screen > Set Up > Preferences**.
- Select the User and Edit as appropriate.
- Click **Save & Close** When finished.

Top Tips

- The first user added to the system after go live is the only user that has permissions to assign high level access to another user.
- If the user has Own preferences set to **Add/Edit/Delete** in their set up they will be able to edit their own preferences.
- It's possible to clone another user's preferences by selecting **Clone**.

Tab	Purpose	User
General	Preference for set up	All
Letters	Word Processor documents	All
Prescribing	Set up screen prompts/functions for scripts	Practitioner
Clinical	Functions for working within consult record	Practitioner
Pathology and Imaging	Custom tests/reasons and test groups, set providers	Practitioner