

# How do I...

## Add a new user or provider?

To add a new user or provider, you will need to open PracticeMaker with the highest level password. To do this, quit PracticeMaker then hold down the Option key (Mac) or Shift Key (Windows) and double-click on PracticeMaker Client. You will be asked to enter a password. The lowest level password is desk, you want to enter the highest level password. If you do not have the password, you will need to speak with the office manager or the doctor who bought the program. This is not the same as the Administrator password or your login password.

## Add a New User to PracticeMaker

User information is stored in the Personnel Section of the Phonebook.

Go into the Phonebook module and select Personnel.

If this person has been entered already, select his/her record. Otherwise, select new record.

The screenshot shows a software interface for adding a new user or provider. The form is divided into several sections:

- Name, title:** Fields for Name (containing "Sample") and title (containing "Contract").
- Examiner:** A checkbox labeled "Examiner".
- User:** A checkbox labeled "User".
- ID:** A text field with a note: "Only Doctors have numeric codes Others use initials".
- Type:** A dropdown menu with "Password" selected and "No user" as an option.
- Address 1:** A text field.
- Address 2:** A text field.
- Z, C, S:** A text field.
- Office:** A dropdown menu with "Office" selected, a text field containing "1 877 888 8080", and a label "Extra".
- Custom:** Two dropdown menus with "Custom" selected, each with a text field and a label "Extra".
- Fax:** A text field with a label "Extra".
- SSN:** A text field with a label "Marital Stat".
- Menn:** A text field with a dropdown arrow.
- Email:** A text field containing "name@domain.com".

On the right side, there is a section titled **Access Privileges** with four checkboxes:

- Admin
- Delete
- Inventory
- Dispense

The person will need an ID code, use his/her initials unless it is a provider<sup>1</sup>, then you should fill in the office doctor number.

If this person will be logging into the program, check USER.

If this person will be having a schedule built or be seeing patients, check EXAMINER or GROUP.

Make sure the information is filled in properly.

<sup>1</sup> Providers need to have their provider record entered before their personnel record. The office doctor number is set in the provider section.

If you checked USER, you will need to fill in the person's password so that this person can log into and use the program.

All privileges are set to NO. You will need to have administrative access and open the program with the middle or highest level password to be able to make changes.

### Add a New Provider to PracticeMaker

Provider information is stored in both the Personnel and Provider Sections of the Phonebook.

If the Provider only sees patients and does not bill the patients (ie: specialized exam room, shot nurse, etc.), then you only need to enter in the Personnel record. You can follow the steps above for **Add a New User**.

The screenshot shows the 'Add a New Provider' form in PracticeMaker. At the top, there is a toolbar with buttons for 'New', 'Dup', 'Find', 'Label', 'List', 'Del', 'Office Doc', 'Provider Numbers', 'Patients', and 'Go'. Below the toolbar is a table with columns: Sal, First Name, MI, Last Name, Title, Address as, Picklist, and Specialty. The first row is filled with 'Dr.', 'Dcmc', 'Doctor1', 'MD', and 'General Practice'. Below the table are several input fields: 'Office' (dropdown), '1-773-555-6663' (phone number), 'Extra' (checkbox), 'Custom' (dropdown), 'Fax' (input), and 'Email' (input with 'name@domain.com'). There are also three 'Address' sections (Address 1, 2, 3) with 'Pract Title', 'Address 1', 'Address 2', 'Z, C, St', and 'Notes' fields. A 'Default' checkbox is checked. On the right side, there are sections for 'Hospital Affiliations' (Facility 1, 2, 3) and 'Flagged Record' (Flag 1, 2, 3, 4) with checkboxes and a 'Print Merge' button.

If the Provider also bills for services, then you will need to enter their Provider record first.

Go into the Phonebook module and select Providers.

If this person has been entered already, select his/her record. Otherwise, select new record.

Make sure all the information is filled in correctly for that provider. Click on the button Office Doctor. Assign the next Office Doctor Number.

Go back to the main screen. If you have the insurance ID codes for this provider, click Other Numbers and fill them in accordingly.

To be able to schedule appointments for this provider, you need to now enter a personnel record for this provider. Follow the steps shown above for **Add a New User** but use the Office Doctor Number instead of initials for the ID code.