



How to...

Add a New User

1. Log in to the **Professional User Interface**



2. Select **User Administration** from either of the buttons replicated along the top or down the left hand-side of the interface.



3. Select **Create New User**



4. Complete all mandatory fields in the box marked with an asterisk *
All fields except the user phone number are required.

The **Units** are the teams that we have created for your practice. The units you select at this stage will give the user access and permission to process enquiries within these units.

5. Allocate a **User Role** to grant the appropriate level of rights to the individual.

6. Select **Create New User** to save the account.



The User will then receive an automatic activation email from a Klinik no-reply email address to set up their account.

Frequently Asked Question

Q: How do I know which User Role to select?

A: If you hover over the Information Icon, an explanation of the permissions you are granting will be displayed.



For example, a Standard User will have access and visibility of the patient cases listings, (as determined and set by a Super User) and Connect (the telephone tool), but they will not have access to the Dashboard or User Administration function.

Q: What should I do if my users job role is not listed in the drop down?

A: This list is standard across all our Klinik practices and is as concise as possible to avoid a user having to scroll and search. If possible, please use a similar job role, but if not please select **Other**.

You can of course use the Send Feedback feature if you feel that an additional job role is necessary.

A rectangular button with a dark background, a white envelope icon on the left, and the text "Send feedback" in white.

Q: A new user cannot activate their account, why is this?

A: The user will need to activate the link sent to their email account within 14 days, otherwise this will expire, and you will need to delete and then recreate the account.

Q: I need to create an account for a user who already has a Klinik account at another site, what should I do?

A: Please refer to our '**How to... Create a multi-user account**'

