

Creating and Managing Users

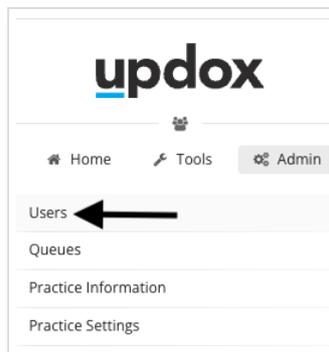


Last Modified on 01/05/2024 12:09 pm EST

Creating users for your Updox account is easy. Follow the steps outlined in this article to create practice users today.

1. To get started, gather the user information you need beforehand. You will need the user's first name, last name, and email address.

2. After you log in to your account, go to **Menu**, select **Admin**, and click on **Users**.



3. To add a new user click New at the bottom of the console. To ensure the user is not already in Updox, you can search in the filter field.



4. To create a user, enter the first name, last name, and the user's email address as the username. A user-defined or generic password can be entered. Remember to check 'Admin' if the user needs access to the administrator options.

Most fields aren't required when creating a user. First name, last name, username, and password are the only required fields.

Edit User

Update this user's information

- User Information
- Settings
- Notifications
- Assign to Location

First Name

Last Name

Username [\(requirements\)](#)

Password

Confirm Password

The password must be at least 10 characters long with at least one upper case letter, one lower case letter, and one number or special character. No more than two identical characters in a row. No leading, nor trailing spaces.

Updox Email @myupdox.com

Direct Address @direct.myupdox.com

Active Admin Messenger

Mobile Phone

User Default Fax Coversheet
-- None Selected --

[← Back](#) [Save](#)

5. Review the user's settings. Check or uncheck any boxes for the permissions for the user. If you are connected to an EHR, please set the 'EHR User ID' for importing under the User Settings. Click **Save** at the bottom of the console to save the user information.

Edit User

Update this user's information

[User Information](#)
[Settings](#)
[Notifications](#)

[Assign to Location](#)

Time Zone: Eastern
 Items to show on one page: 15

EHR User ID: -- None --
 Default provider: -- None --

Can bill patient's credit cards
 Can view billing reports
 Can view Practice items
 Can delete items
 Can edit documents
 Can send Text and Secure Text messages
 Can send "Broadcast" messages
 Can Video Chat

Send Print/Upload to: Search...

Convert Printed/Uploaded documents in: Smart B&W - Best balance of size and clarity (RECOMMENDED)

Refresh page after archiving/deleting an item?

[← Back](#)
[Save](#)

Suggesting that users bookmark or save the login page will allow for easy access. Always recommend the use of Chrome as the default browser.

6. If you need to edit an existing user, go to the **Users** section under **Admin** and click the user's name to make changes. This includes resetting the user's password or deactivating users no longer with your organization.

User Information

Manage your users.

Filter by First or Last Name

James Smith	ADMIN
Jane Smith	ADMIN
Sample User	