

Updox User Creation

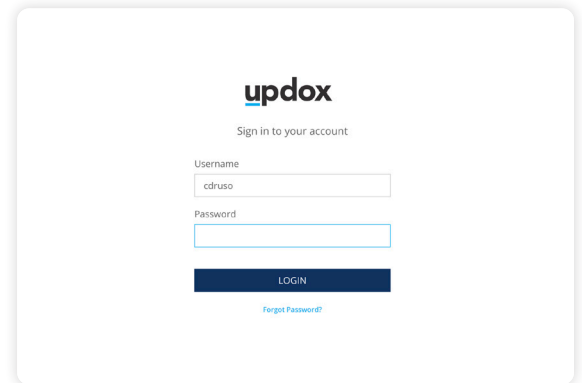
A quick guide to help
get you started.

How to create users in Updox

A quick guide to get your practice users created today.

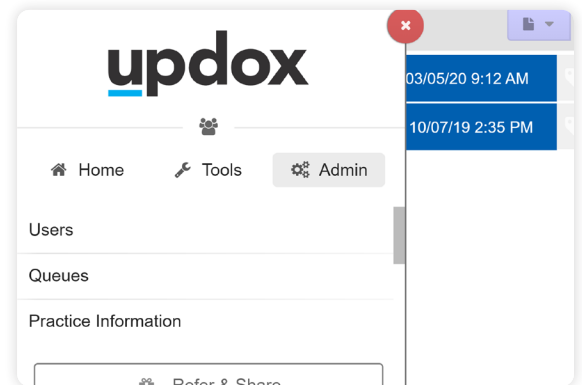
Gather user information

- 1 Be prepared with the user(s) first name, last name and email address. Log into Updox with your user name and password.



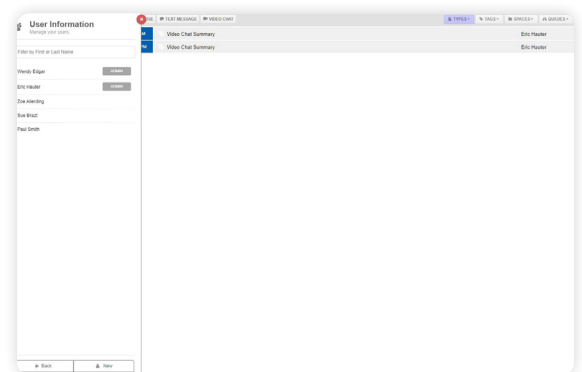
Locate user console

- 2 Choose 'Menu' then click on 'Admin'. Once you click on 'Users', the user console will open.



Select new user

- 3 The 'New' button located at the bottom of the console will allow you to add a new user. To ensure the user is not already in Updox, you can search using the filter field.



Did you know?



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

Updox User Creation

A quick guide to get your practice users created today.

Create the user information

4

Add the user's first name and last name, and enter 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 administrator options.

Review user settings

5

If connected to an EMR, please set the 'EHR User ID' for importing under the User Settings. Uncheck any product access to limit the user's permissions if needed.

Click save

6

It's important to always remember to click 'Save' at the bottom of the console to save the user information.

Did you know?



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

Updox User Creation

A quick guide to get your practice users created today.

Editing existing user information

To edit an existing user, click on the user's name to make changes.

7

This includes resetting the user's password, or deactivating users no longer with your organization.

