Clinic Administration

1 Clinic Administration

This Quick Reference Guide is designed to assist Clinic Administrators with tasks that they perform in eMedical. Remember each clinic must have 2 clinic administrators' per site.

1.1 Maintaining contact channels for your clinic

Your clinic's contact details in eMedical must be recorded under '**Contact channels'**.

Note: You must advise the Department of Immigration and Border Protection (DIBP) or Immigration New Zealand (INZ) or Immigration, Refugees and Citizenship Canada (IRCC) or the U.S. Department of State (DOS) before changing the physical location of your clinic in eMedical.

Note: You will not be able to delete a mandatory **Primary contact** channel (e.g. **Address (Business)** until a replacement **Primar**y **contact** channel has been added.

To add additional contact channels:

1. Select **Administration** > **Manage Clinic.**
2. Click on ✚ under **Contact channels.**

The **Add/Edit Contact channel** window will display.

3. Select the type of contact information that you wish to add (e.g. **E-mail (Business)**) from the **Channel type** drop down list.
4. Enter a valid email address.
5. Click **Yes** if you want this to be the **Primary contact**.

Note: The **Primary contact** will default to **Yes** if this is the first contact channel of this type that you are adding.

6. Click **Ok.**

The **Manage clinic** screen displays.

Perform the above steps to add additional **Contact channels** for your clinic.

7. Click **Save.**

Note: A green success message will display at the top of the screen confirming that the changes have been saved.

To edit an existing Contact channel:

1. Click the pencil icon to the right of the contact channel that you wish to edit.

   The relevant contact channel data entry screen displays.
2. Make changes to all the required fields.
3. Click **Ok.**

The **Manage clinic** screen displays.

4. Click **Save.**

To delete a contact channel:

1. Click the trashcan icon to the left of the contact channel that you wish to delete.

A warning message will display.

2. Click **OK.**
3. Click **Save.**

Note: A green success message will display at the top of the screen confirming that the changes have been saved.

1.2 Add/create a new staff member in eMedical.

To add a new staff member to your clinic in eMedical:

1. Select **Administration > Staff list.**
2. Click on ✚

The **Add new person** window displays.

3. Enter the person's **eMedical User ID (if known)** or **Date of birth**.

Note: You cannot add a person until you have searched to ensure that the person that you want to add is not already in the system. This is to avoid creating multiple records for the same person.

Note: After searching using **Date of birth**, if there are existing record(s), those will be listed under the **Existing person search results** heading. The **Select existing** and **Create new person** buttons will display.

a) If the person that you want to add to your clinic is listed, then select the person and click **Select existing** to open the **Edit person** screen and follow the steps below to engage the person with your clinic.

b) If the person is not listed, then click **Create new person** and follow the steps given below.

If the staff member that you want to add does not exist in eMedical then the **Create new person** button displays.

4. Click **Create new person.**

The **Add new person** screen displays.

5. Enter the staff member's **Personal Details.**

Note: Fields marked with a red asterisk * are mandatory. The minimum data entry for any person is: **Title**, **Family name**, **Given Name(s)**, **Gender**, **Date of birth** and **Languages spoken**.

6. Enter the staff member's **Professional Details** if desired.

7. Click to add contact information for the staff member under **Contact channels.**

Note: The process here is the same as outlined in section 1.1 above.

Note: Each user must have at least a primary **E-mail (Business) or E-mail (Personal)** recorded in eMedical.

You now need to engage the person with your clinic via the **Clinic engagements** section.

8. Click **Add new engagement.**

The **Manage Clinic Engagement** screen displays.

9. Click the **sign** under **Assigned roles**.

The **Role details** window displays.

10. Select the appropriate role from the **Role** drop down list.

Note: For a person with the role(s) of **Doctor** Panel Physician or **Radiologist**, a message will display advising that the person must not examine clients until they have been panelled by the relevant government agency (i.e. DIBP/INZ/IRCC/DOS) as they will not be able to grade and submit a case in eMedical. DIBP/ INZ/IRCC/DOS will be advised by email automatically when you add the above role(s) in eMedical.

Note: The **Effective To** date should be recorded ONLY if the staff member will be working at your clinic for a limited period.

11. Click **Ok.**

The **Manage Clinic Engagement** screen displays.

Perform the steps 9 to 11 as given above to add additional role(s).

12. Click **Ok.**

13. Click **Save.**

A message will display that the staff member has been added successfully.

14. Click **Cancel** to return to the **Staff list**.

Note: The user will be added to the **Staff list** with **Account Activation Pending** displayed under the **Engagement status** column.

1.3 Extending eMedical Account expiry

The eMedical account for each user is valid for 2 years. You will receive an automated email 14 days before an account for a staff member is due to expire.

You **must** extend the **Account expiry date** to prevent the staff member from losing their eMedical access.

If the **Account expiry date** is not extended, you and the relevant staff member will receive reminder emails 7 days and then 2 days before the expiry date.

To display staff in your clinic whose account is due to expire:

1. Select **Administration > Staff list.**

The **Staff list** with the **Engagement status** of '**Account due to expire'** will display the names of staff member(s) whose accounts are due to expire.

Note: The **Staff list** will default **Account due to expire** and '**All roles**'. You may use the **Engagement status** menu to look up for other statuses.

If the staff member still requires access:

2. Click on the name hyperlink of the staff member in the list.

The **Edit person** screen displays.

3. Edit the **Account expiry date** for this person.

4. Click **Save.**

Note: The new date that you enter can be a maximum of 2 years from the current date. Please enter a shorter period if you know that the user will be working for your clinic for a shorter period. (e.g. if they are leaving your clinic in 3 months, enter a date 3 months from now).

The **Edit Person** screen will now display the user's **Account status** as **Account active**.

> **Note:** A green success message will display at the top of the screen confirming that the changes have been saved.

5. Click **Cancel** to return to the **Staff list.**

> **Note:** As a clinic administrator please ensure that your **Staff list** is up to date and remove a staff member's engagement and access where appropriate as outlined in the section below.

1.4 Ceasing engagement of a staff member

1. Select **Administration > Staff list.**

Click on the name of the staff member you wish to disengage from your clinic.The **Edit person** screen displays.

1. In the **Clinic engagements** section, select the radio button next to your clinic.
2. Click **Edit Engagement.**

The **Manage Clinic Engagement** screen displays.

> In the **End** field enter the date on which that staff member is to be disengaged. **Note:** The **End** date can be todays or a future date.

3. Click **Ok**.

The **Edit person** screen displays.

If staff is not engaged with any other clinic then:

4. Select a future date in the **Account expiry date** field.
5. Click **Save.**

> **Note:** A green success message will display at the top of the screen confirming that the changes have been saved.

Once the **End** date has been reached, the staff member's engagement with your clinic will be ended and their eMedical account will expire on the date that you recorded in step 5 given above.

1.5 Managing user access

If a user has been locked out:

> **Note:** The user may wait 60 minutes for their account to unlock automatically, at which time they may attempt to log in again.

1. Select **Administration > Staff list.**
2. Click on the name of the staff member with '**Account locked out**' status.

> **Note:** To look up suspended accounts at your clinic, use the **Engagement status** menu and select **Currently engaged staff** > **Account locked out**.

The **Edit person** screen displays.

3. Click **Unlock access**.

An Information message will display and the staff member will receive an email with a link to reset their password.

> **Note**: The user's status will continue to display as '**Account locked out**' until the user resets their password.

If a user has been unable to reset their password (e.g. have forgotten answers to their security questions):

1. Select **Administration > Staff list.**
2. Click on the name of the staff member with the '**Active Engagement**' or '**Account locked out**' status.

The **Edit person** screen displays.

3. Click **Allocate temporary password**.

The **Allocate temporary password** screen displays.

4. Select the check box and record a password in the **New password** and **Confirm new password** fields.

> **Note:** The password must be a minimum of 9 characters. It must consist of at least one character from following four groups:
>
> - Lower case letters (a – z)
>
> - Upper case letters (A – Z)
>
> - Digits (0 – 9)
>
> - Punctuation and special characters ~ ` ! @ # $ % ^ & * ( ) _ + = - { } \ , . ? /

5. Click **Save.**

A success message will display. The staff member will receive an email advising that a temporary password has been set up and they need to contact their clinic administrator to receive the password.

Note: Allocating a temporary password for a 'locked out' account will automatically unlock it and the account status will display as '**Account active**'.

If user has been suspended:

1. Select **Administration > Staff list.**
2. Click on the name of the staff member with '**Account Suspended**' status.

Note: To look up for all suspended accounts at your clinic, use the **Engagement status** menu and select **Currently engaged staff > Account Suspended**.

The **Edit person** screen displays.

3. Click **Re-activate.**

The **Change to active** screen displays.

4. Select **Reason for change**.
5. Enter **Further details**.
6. **Click Ok.**

The **Account status** will change to **Account active** in **Edit person** screen.

7. Click **Save.**

Note: A green success messages will display at the top of the screen confirming that the changes have been saved.

If a staff member has not received the account activation email:

8. Select **Administration > Staff list.**
9. Click on the name of the staff member with '**Account Activation Pending**' status.
10. **The Edit person** screen displays.

Note: You can use the **Engagement status** menu and select **Currently engaged staff > Account Activation Pending** to search for staff member(s) pending account activation at your clinic.

11. Click **Resend account activation email.**

An information message is displayed stating that an account activation email has been sent to that staff member.

Note: Staff members should check the spam / junk folder of their mailbox if they are unable to locate the email from noreply@homeaffairs.gov.au.