

Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. We appreciate your patience as we continue to update all of our content. To locate the version of your software, navigate to: **Help tab > About**.

Deactivating a User Account


Last Modified on 06/26/2020 2:13 pm EDT

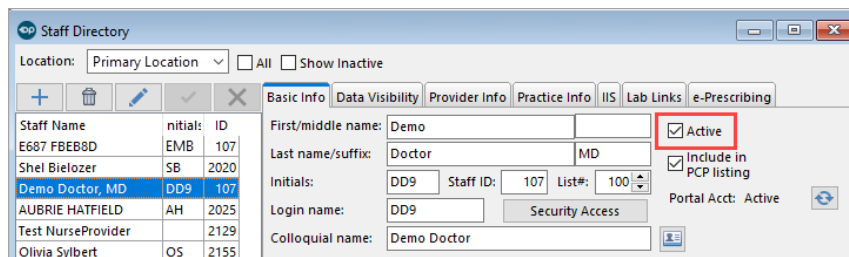
Version 20.4

Path: Practice Management tab > Staff/Providers button

Overview

User accounts are deactivated in the Staff Directory and Security Settings tables. Deactivation allows you to keep a user in the system, but make them inactive (unable to log in).

1. Navigate to the Staff Directory: **Practice Management tab > Staff/Providers button**
2. Highlight the **Staff Name** of the person you want to deactivate. If you cannot locate the user, select the **All** checkbox to display all users for the practice.
3. Click the **Edit** button .
4. Deselect the **Active** checkbox.



Staff Name	initial:	ID
E687 FBEB8D	EMB	107
Shel Bielozzer	SB	2020
Demo Doctor, MD	DD9	107
AUBRIE HATFIELD	AH	2025
Test NurseProvider		2129
Olivia Sylbert	OS	2155

Location: Primary Location All Show Inactive

Basic Info | Data Visibility | Provider Info | Practice Info | IIS | Lab Links | e-Prescribing

First/middle name: Demo Active

Last name/suffix: Doctor MD Include in PCP listing

Initials: DD9 Staff ID: 107 List#: 100

Login name: DD9 Security Access Portal Acct: Active

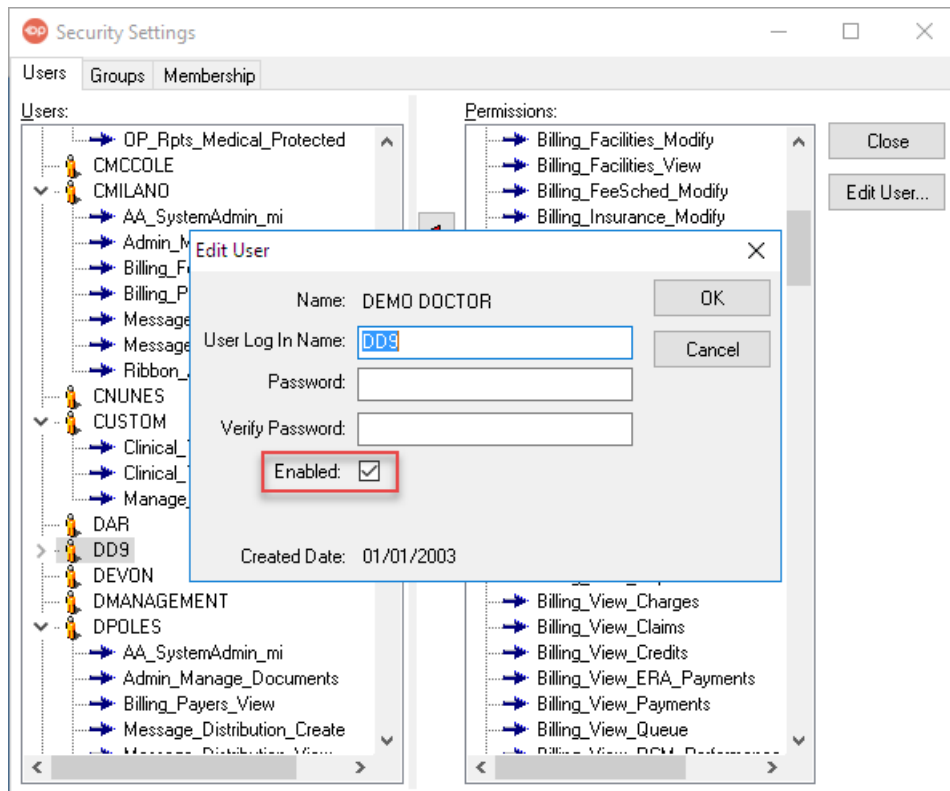
Colloquial name: Demo Doctor

5. Click the **Save** button .

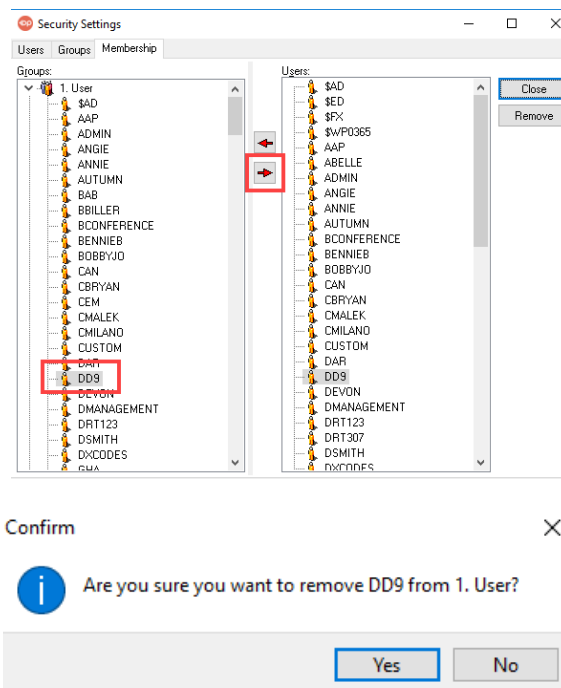


Tip: Select the **Show Inactive** checkbox to include all staff and providers who have been marked Inactive in the Staff list.

6. Click the **Security Access** button.
7. Click the **Users** tab.
8. Double-click the **User Log In** and deselect the **Enabled** checkbox.



9. Click **OK**.
10. Click the **Membership** tab.
11. In the User section, select the **Username**.
12. Click the **Red left-facing arrow** button to remove the user.



13. Click **Yes** and close the window.
14. Click the **Exit** button to close the **Staff Directory**.

Note: If strong password validation settings are enabled or the practice, a user's account is automatically disabled




(deactivated) if the user tries to log in more than the specified number of times with an incorrect password. To re-enable a user's account in this case, open the **Edit User** window and select the **Enable** checkbox.

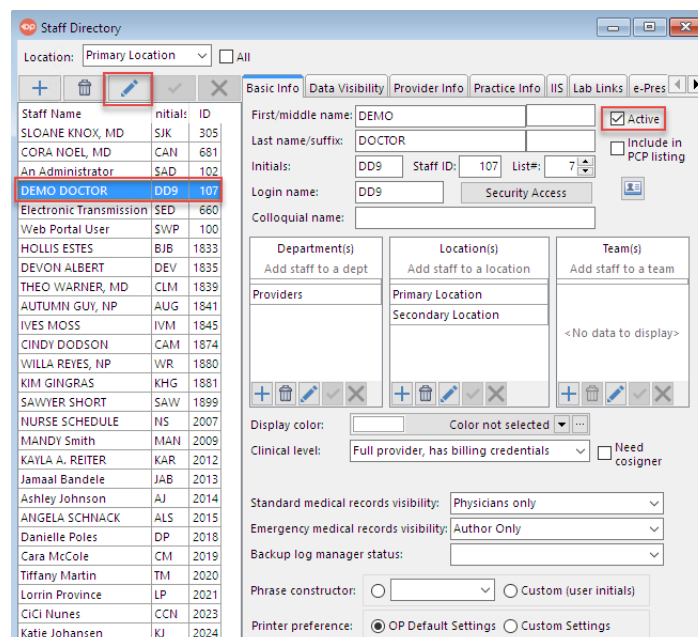
Version 20.3

Path: Practice Management tab > Staff/Providers button

Overview

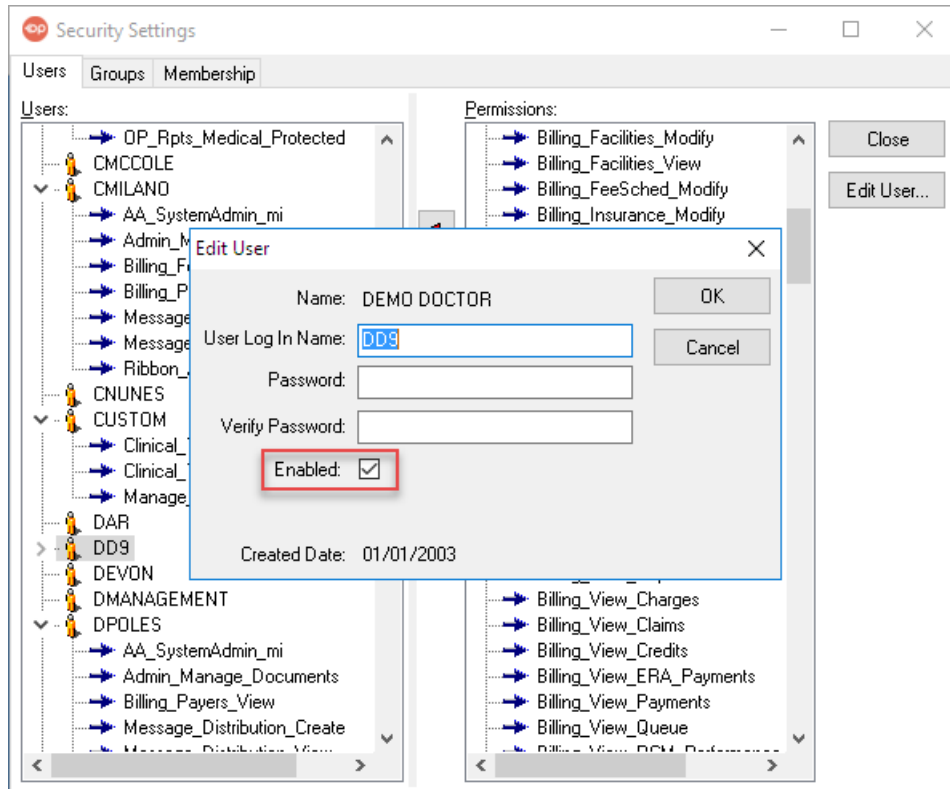
User accounts can be deactivated in the Security Settings table. Deactivation allows you to keep a user in the system, but make them inactive (unable to log in). To add or edit user accounts, navigate to the [Adding staff into Staff Directory](#) article.

1. Highlight the **username** of the person you want to deactivate in the left column
2. Click the **Edit** button  at the top of the screen.
3. Deselect the **Active** checkbox.

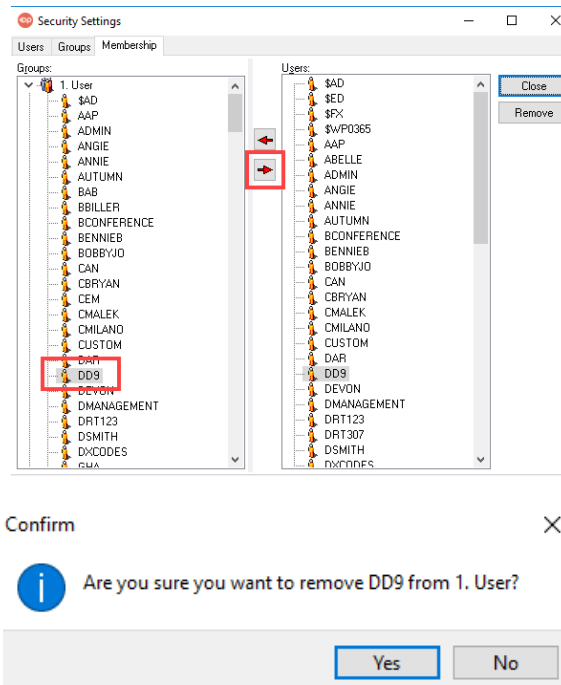


The screenshot shows the 'Staff Directory' application window. On the left, a list of staff members is displayed. The row for 'DEMO DOCTOR' with ID 'DD9-107' is highlighted. Above the list, there are icons for adding, deleting, editing, and viewing details. The 'Edit' icon (pencil) is highlighted with a red box. On the right, the 'Basic Info' tab is active, showing details for 'DEMO DOCTOR'. The 'Active' checkbox is checked and highlighted with a red box. Below the 'Active' checkbox, there are sections for 'Department(s)', 'Location(s)', and 'Team(s)'. At the bottom, there are settings for 'Display color', 'Clinical level', 'Standard medical records visibility', 'Emergency medical records visibility', 'Backup log manager status', 'Phrase constructor', and 'Printer preference'.

4. Click the **Security Access** button.
5. Click the **Users** tab.
6. Double-click the **User Log In** and deselect the **Enabled** checkbox.




7. Click the **Membership** tab.
8. Select the **Username**.
9. Click the **Red left-facing arrow** button.



10. Click the **OK** button to close the window.
11. Click the **Exit** button to close the **Staff Directory**.



Note: If strong password validation settings are enabled, a user's account is automatically disabled (deactivated) if the user tries to log in more than the specified number of times with an incorrect password. To re-enable a user's account in

 this case, open the Edit User window and select the **Enable** checkbox.