



Setting Up Your Practice

SETTING UP PRACTICE	
A. Set Up Sites	
1. At the home page, select the tab labeled Sites .	
2. Click Add New to create a site for your organization. You can then enter a name, description and a site code.	
3. Edit or Remove a site by clicking the applicable link.	
B. Enter Your Staff as Users	
1. At the home page, select the tab labeled Users .	
2. Click on Add New to add your staff members as needed.	
3. Assign the appropriate role or roles (Administrator, Physician, Nurse, Non-Clinical Staff or a custom role) to each M3 Clinician user and click the Create button.	
C. Establish Roles for Staff	
1. Click on the Role Management tab to access that portion of the website. The default roles are Administrator, Physician, Nurse and Non-Clinical Staff. Each role has different permissions into what data can be added, viewed or deleted.	
2. You can create a custom roll by clicking the Add New button. Enter the name you desire for the new roll and check the box for each permission you wish to grant to users assigned to that role.	
3. Once you have created a role you can review the permissions by clicking the View button. You can also Add Staff and View Staff for each role.	