Managing Patient Accounts

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Patients can either enter as guest or create their own accounts by signing up depending on the Clinic's workflow. In this article, we will be discussing about the Clinic admin's capability to manage patients, particularly the following:

- How to Create a Patient Account
- How to Edit or Deactivate a Patient Account
- How to Delete a Patient's Account

Creating a Patient Account

Go to the **Admin panel** (see guide).

1. Click **Users.**

2. Select **New Member**.



On the **Create a Member** section, fill out the specific room you want to assign the patient to. Required fields include the username which is similar to the email address (also a required information), and first and last names. The rest are optional.



Once all of the necessary fields are filled out, click **Create**.



Editing and Deactivating a Patient Account

Go to the **Admin Panel** then click **Users**. Search for the patient you want to edit in the search bar then click **Edit** (pen icon) under the **Action** column.

1. To send a password reset email to the patient, go to the **Other** tab.
2. Click on the **Send Reset Password Email** button.



To disable a patient account;

1. Go to the **Other** tab.

2. Choose the **Suspended** or **Pending delete** on the drop-down menu under

Status.

3. Click **Save User Status**.



Deleting a Patient's Account

Note: When a patient account is deleted, all the visit records and data associated with his/her profile will also be removed and not be retrievable.

To delete a patient's account, search for the patient you want to edit in the search bar then click **Edit** (pen icon) under the **Action** column.

1. Go to the **Other** tab.
2. Click on **Disable and Remove Log In Detail**.



Another way to delete a patient's access is to click on **Delete** under the **Action** column.



Related Articles:

- Clinic Admin: Manage Users
- Clinic Admin: User Roles

If you have any questions, please contact us at help@vsee.com

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Tags

admin panel

create member

create patient

deactivate patient

delete member

delete patient

edit member

edit patient

member account

patient account