

## Managing Patient Accounts

- 2022-04-13 - VSee Clinic for Admins

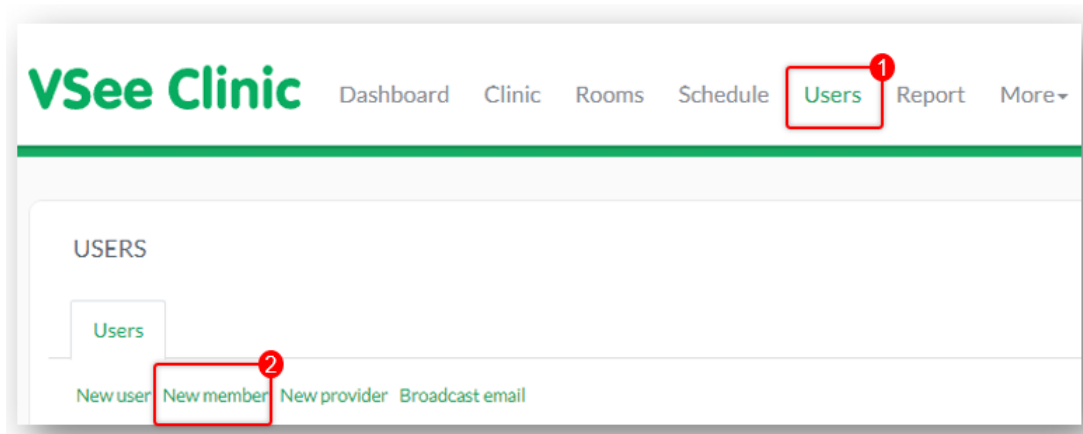
Patients can either enter as guest or create their own accounts by signing up depending on the Clinic's workflow. In this article, we will be discussing about the Clinic admin's capability to manage patients, particularly the following:

- [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.

This screenshot shows a user creation form. The fields are as follows:

- Clinic \***: Clinic Portal
- Rooms \***: Jessica Laynes' Clinic ✕
- User Type (optional)**: Member
- Username \***: jane.gomez@me.com
- Password (optional)**: [Empty field]
- Confirm Password (optional)**: [Empty field]
- First Name \***: Jane
- Last Name \***: Gomez
- Email \***: jane.gomez@me.com

A "Password requirements" icon is visible next to the password field.

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

This screenshot shows the continuation of the user creation form. The fields are as follows:

- Date of Birth (optional)**: Month, Day, Year
- Address (optional)**: [Empty field]
- City (optional)**: [Empty field]
- State (optional)**: [Empty dropdown]
- Zip (optional)**: [Empty field]
- Country (optional)**: United States
- Phone (optional)**: [Empty field]
- Primary Care Physician Name (optional)**: [Empty field]
- Primary Care Physician Phone (optional)**: [Empty field]
- Timezone (optional)**: (UTC-07:00) Pacific Time (US & Canada)

At the bottom right, there are "Cancel" and "Create" buttons. The "Create" button is highlighted with a red box.

## 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.

MEMBER DETAIL: JANE GOMEZ

Profile Rooms Management **Other** <sup>1</sup>

Login detail

Username jane.gomez@me.com  
 Password xxxxxxxxxxxxxx  
 Email jane.gomez@me.com  
 Status Suspended

**Send Reset Password Email** <sup>2</sup>  
 Disable And Remove Log In Detail

**Save User Status** Cancel

User type Member [Edit](#)

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**.

MEMBER DETAIL: JANE GOMEZ

Profile Rooms Management **Other** <sup>1</sup>

Login detail

Username jane.gomez@me.com  
 Password xxxxxxxxxxxxxx  
 Email jane.gomez@me.com  
 Status Suspended

**Send Reset Password Email**  
 Disable And Remove Log In Detail

**Save User Status** <sup>3</sup> Cancel

User type Member [Edit](#)

## 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**.

MEMBER DETAIL: JANE GOMEZ

Profile Rooms Management **Other** <sup>1</sup>

Login detail

Username jane.gomez@me.com  
 Password xxxxxxxxxxxxxx  
 Email jane.gomez@me.com  
 Status Suspended

**Send Reset Password Email**  
**Disable And Remove Log In Detail** <sup>2</sup>

**Save User Status** Cancel

User type Member [Edit](#)

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

Last login	User	Room	Action
<small>(Not login yet)</small> Sign up: 2022-04-08 14:23:38 Status: <b>Active</b>	Jane Gomez ID: 21408246 User name: jane.gomez@me.com Email: jane.gomez@me.com Vsee ID: clin/user/21408246 Type: <b>Member</b>	Jessica Laynes' Clinic Code: <b>VC-jessica</b> Link: /j/jessica	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Set password</a>

## Related Articles:

- Clinic Admin: Manage Users
- [Clinic Admin: User Roles](#)

If you have any questions, please contact us at [help@vsee.com](mailto:help@vsee.com)

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### Tags

create patient

delete patient

edit patient