

Managing Patient Accounts

- 2022-04-13 - VSee Clinic for Admins

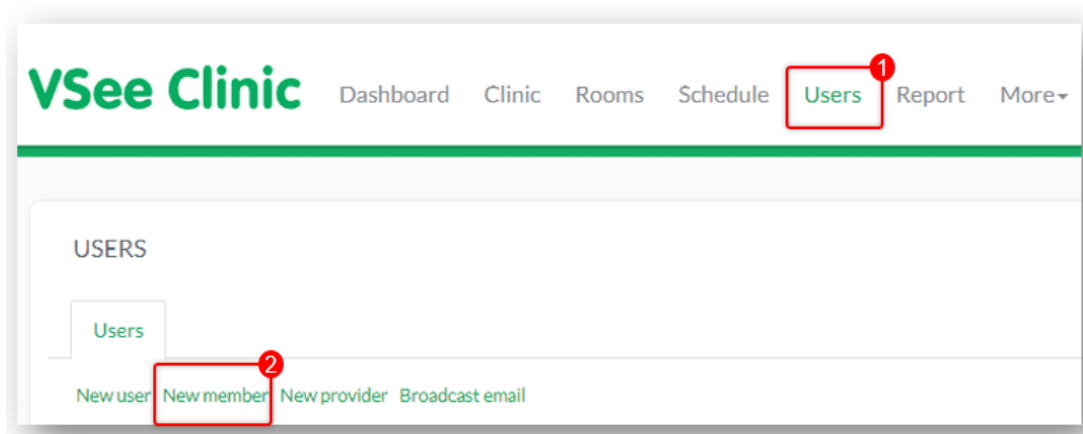
Patients can either enter as guest or create their own accounts by signing up depending on the Clinic's workflow. In this article, we will be discussing about the Clinic admin's capability to manage patients, particularly the following:

- [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 with the following fields and values:

- Clinic ***: Clinic Portal
- Rooms ***: Jessica Laynes' Clinic ✕
- User Type (optional)**: Member
- Username ***: jane.gomez@me.com
- Password (optional)**: (empty)
- Confirm Password (optional)**: (empty)
- 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 with the following fields and values:

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

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

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.

Last login	User	Room	Action
<small>(last login: null)</small> Sign up: 2022-04-08 14:23:38 Status: Active	Jane Gomez ID: 21408246 User name: jane.gomez@me.com Email: jane.gomez@me.com Vsee ID: clin/user/21408246 Type: Member	Jessica Laynes' Clinic Code: VC-jessica Link: /j/jessica	 Edit  Delete  Set password

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