

Managing Patient Accounts

- 2022-04-13 - VSee Clinic for Admins

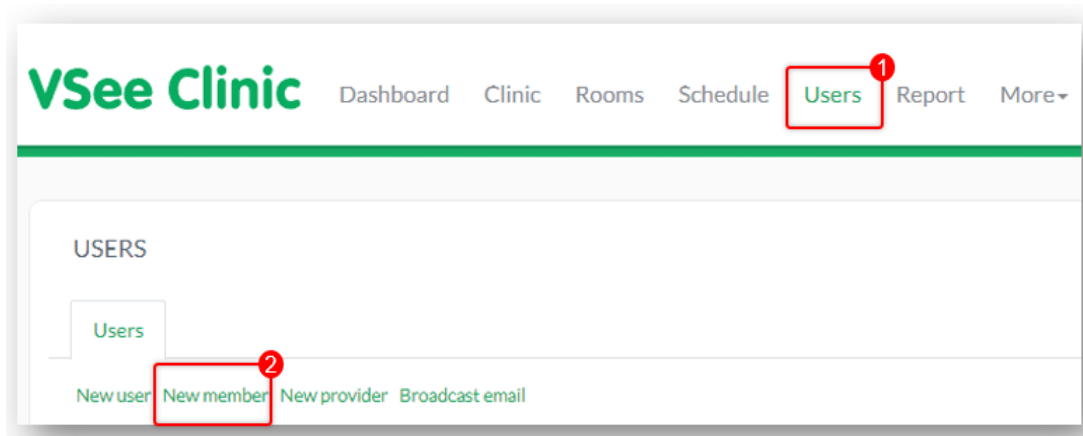
Patients can either enter as guest or create their own accounts by signing up depending on the Clinic's workflow. In this article, we will be discussing about the Clinic admin's capability to manage patients, particularly the following:

- [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.



A screenshot of a user creation form. The form is titled "Clinic" and includes the following fields: "Clinic Portal" (dropdown menu), "Rooms" (dropdown menu with "Jessica Laynes' Clinic" selected), "User Type" (optional, dropdown menu with "Member" selected), "Username" (text input with "jane.gomez@me.com"), "Password" (optional, text input with a "Password requirements" link), "Confirm Password" (optional, text input), "First Name" (text input with "Jane"), "Last Name" (text input with "Gomez"), and "Email" (text input with "jane.gomez@me.com").

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



A screenshot of the continuation of the user creation form. It includes the following fields: "Date of Birth" (optional, with "Month", "Day", and "Year" dropdowns), "Address" (optional, text input), "City" (optional, text input), "State" (optional, dropdown menu), "Zip" (optional, text input), "Country" (optional, dropdown menu with "United States" selected), "Phone" (optional, text input), "Primary Care Physician Name" (optional, text input), "Primary Care Physician Phone" (optional, text input), and "Timezone" (optional, dropdown menu with "(UTC-07:00) Pacific Time (US & Canada)" selected). At the bottom right, there are "Cancel" and "Create" buttons, with the "Create" button highlighted by 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**

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 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**

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 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**

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 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>(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

Last updated on: 13 April 2022

Tags

admin panel
create member
create patient
deactivate patient
delete member
delete patient
edit member
edit patient
member account
patient account