

Managing Patient Accounts

- 2022-04-13 - [VSee Clinic for Admins](#)

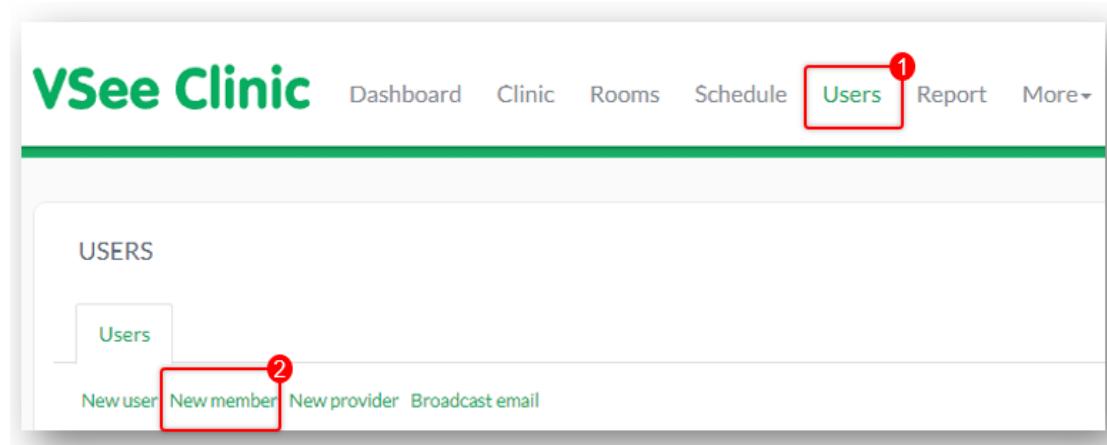
Patients can either enter as guest or create their own accounts by signing up depending on the Clinic's workflow. In this article, we will be discussing about the Clinic admin's capability to manage patients, particularly the following:

- [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 fields include:

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

A link to "Password requirements" is located in the top right corner of the form area.

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

A screenshot of a patient account creation form with optional fields:

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

At the bottom right are "Cancel" and "Create" buttons, with "Create" being highlighted with a red border.

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** 1

Login detail

Username	jane.gomez@me.com	2
Password	xxxxxxxxxxxx	
Email	jane.gomez@me.com	
Status	Suspended	

Save User Status **Cancel**

User type: Member [Edit](#)

Send Reset Password Email 3

Disable And Remove Log In Detail

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** 1

Login detail

Username	jane.gomez@me.com	2
Password	xxxxxxxxxxxx	
Email	jane.gomez@me.com	
Status	Suspended	

Save User Status 3 **Cancel**

User type: Member [Edit](#)

Send Reset Password Email

Disable And Remove Log In Detail

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** 1

Login detail

Username	jane.gomez@me.com	2
Password	xxxxxxxxxxxx	
Email	jane.gomez@me.com	
Status	Suspended	

Save User Status **Cancel**

User type: Member [Edit](#)

Send Reset Password Email

Disable And Remove Log In Detail 3

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

Last login	User	Room	Action
(Not login yet) 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: cmo+user21408246 Type: Member	Jessica Laynes' Clinic Code: vc-jessica Link: /u/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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