

Online Patient Services Post Practice Merge Checklist

In order for your Patient Services practice merge to be as seamless for your patients as possible, you need to check the following post your merge:

Re-enable your Patient Services functionality:

- You should re-enable all your usual online services from **Control Panel - Online Services**, see [Online Services Configuration](#) for details.
- Check the configurations set for:
 - **Global** - See [Online Services Global Configuration](#) for details.
 - **Appointments** - See [Configure Online Appointments](#) for details.
 - **Prescriptions** - See [Configure Online Prescriptions](#) for details.

Update Staff Groups

- Check and update where necessary the staff in the **Online Patient Messaging** staff group - See [Patient Messaging](#) for details.

Publicise

- You should continue to publicise the merge to your patients, advising that there may be a slight disruption to their online services during the merge period:
 - You should update your welcome messages, see [Adding a Welcome Message](#).
- Publicise the merge within the surgery itself.
- Publicise that patients can now register for your offered online services once more.

Troubleshooting

- After the merge, it is possible that more than one patient has used the same user name for their online services account. If this is the case, when they try to log in a 'Your account has been locked. Please contact your practice' message is displayed. The patients affected by this are listed on the report of locked patients provided to you directly after the merge.
- If a patient is trying to log in and the following message is displayed 'Access Denied. You are no longer registered with this practice', check the patient has a valid registration at the practice.

To resolve either of these issues, simply select **Reset Online Account** from the **Online Services** tab within the patients **Registration** screen and give the affected patient their new letter, see [Reset a Patient's Online Account](#) for full details.