

## Patient Services - Account Created with No Email Address or an Invalid Email Address

Following your migration to **Cegedim Healthcare Solutions Patient Services**, an automatic process is run to create online accounts for your patients previously registered for **EMIS Patient Access**.

An email is sent to your **Patient Access** patients notifying them of the migration to the **Patient Services** website and detailing the steps they need to take to activate their account.

Important - Patients who do not have an email address recorded or their recorded email address is invalid, cannot be notified automatically. To send the registration details for these patients, either contact the patient to verify their email address or wait for the patient to contact the practice.

## Patients with no Email Address

### **Identifying Patients**

A **Clinical Audit** is available to identify patients who have had an account created but no email address exists for them.

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Fauen	I racing	aervit	il Vorifia	ation 0(arrian 25, 02/10/2024)
	ruenuty a	13627	in venno	auon (version 23, 03/10/2024) Total Practice Parulation
		2797	20.53%	Technic Review of the Patient Earling Services
		11	0.08%	Patient Demographic Data Verified recorded In Practice (918) (NOT required in Wales)
		0	0.00%	Online patient summary verified EVER (93440) - ONLY these pts WILL have access to their summary when enabled (NOT required in Wales)
		0		Online patient summary verified EVER recorded In Practice (NOT required in Wales)
		0		Online patient summary verified EVER NOT recorded In Practice (NOT required in Wales)
		11	100.00%	Online patient summary NOT verified EVER (NOT required in Wales)
		2786	20.44%	Patient Demographic Data NOT Verified by Practice (918) (NOT required in Wales)
		0	0.00%	Online patient summary verified EVER (93440) (NOT required in Wales)
		0		Online patient summary verified EVER recorded In Practice (NOT required in Wales)
		0		Online patient summary verified EVER NOT recorded In Practice (NOT required in Wales)
		2786	20.44%	Pts registered for Patient Facing Services with NO Patient Demographic Data verified and NO Online patient summary verified (In Practice or elsewhere) (NOT required in Wales)
		0	0.00%	Pts registered for Patient Facing Services with 93440 added BEFORE 91B. (NOT required in Wales)
		2796	20.52%	Pts registered for Patient Facing Services with an email address selected in the Online Services tab
		2796	100.00%	Online Services email address verified
		0	0.00%	Online Services email address NOT verified
		1	0.01%	Pts registered for Patient Facing Services without email address selected in the Online Services tab
			15 170	
	_	1	0.05%	Pts registered for Patient Facing Services - CREATED - account has been created but NO email address is present
			0.00%	Disconsistered for Datient Earling Consister DEDICTEEDD upgename and second detun
		730	5.36%	Pts registered for Patient Facing Services - AUTIVE - account activated via confirmation email
		0	0.00%	Pts registered for Patient Facing Services - LUCKED - account is temporarily locked due to 5 unsuccessful logins

See <u>Viewing Clinical Audits</u> in the **Clinical Audit Help Centre** for details.

Training Tip - Activate the reminder to display a note in Consultation Manager, see <u>Managing Reminders</u> in the Clinical Audit Help Centre.





# Managing Patients with an Account Created and no Email Address

To complete the account creation for a patient and email the registration details:

- 1. From the **Vision 3** front screen, select **Registration** and then select the patient required.
- 2. The Registration Details screen displays, select the Online Services tab.

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Registration Details      Incomplete Details      Personal Address Registration Notes Other Ids      Family Consent Online Services      Select Online      Services      Incomplete Details      Services      Incomplete Details      Services       Services      Services      Services	
Account Status Preferred Email Address: Verify Add Preferred SMS Number:	Select to add an email address
No Selection Verify Add	
Identification	Select to add identification

- 3. Add a preferred email address for the patient, see <u>Preferred Email</u> <u>Address</u> in the **Patient Online Services Help Centre** for details.
- 4. Record that you have verified the type of identification provided by the patient, see <u>Adding Patient Identity Verification Details</u> in the **Patient Online Services Help Centre** for details.
- 5. Select Reprint Account Details.

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🔲 Incom	🗖 Incomplete Details						
Perso	Personal Address Registration Notes Other Ids						
Family	Consent	Online Services	Preferences	'''		(	
Accou	nt Status					- 11	
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Preferr	ed SMS N	lumber:					
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	Identification						
🖸 Cre	ated	C Registered	C Active	C Locked	Reprint Account Details		

6. You are offered the methods of reprint, tick **Send Registration Letter content to preferred Email address**.

Online Services
Please specify the Reprint Account Details option(s) you require.      Open Registration Letter for printing      Send Registration Letter content to preferred Email address
OK Cancel

7. Select **OK** to accept.

## Patients with an Invalid Email Address

### **Identifying Patients**

A **Vision+ Practice Report** is available to identify active patients who have an invalid email address.

1. Whilst logged into Vision 3, with no patient selected, right click

Vision+ In the Windows Notification Tray.

2. Select Practice Reports from the Practice Mode menu.

	10	Practice Reports
	-	Template Designer
	•	Download Web Files
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tice Mod		Sent SMS Messages
	88	Pseudonymised Patient
Pra	4	Settings

3. Select Practice Lists.



4. Select the Active Patients List report.

All Practice Lists
Run Date
10/10/2024 -
Search for practice lists
Accessible Information Standard
Active Patients List

5. Select **Run now**. The report screen displays with the progress bar.



6. Highlight the indicator line All active patients and select Merge

Indicator Indicator.			
	Active Patients List - Report Date 10 C	Oct 2024	× = = ×
File Home Appearance			
Print Print CSV Merge Indicator Preview Patient List	Select Merge Indicator	Highlight All active patients	) *
Patient Name     Category : Active Patients List	♥ DOB	후 Sex 후 CHI Number 후 Tulephone No 후 Mol	oile No

7. The Mailings screen displays, select the Email tab.

S	Select the E <b>mail</b> tab		
	+	Register	₹ © ⊟ X
Mailings SMS SMS Questions	Email Calculator Bulk Insert	Appearance	
Please se	elect an email template:-		
Open Select Random Patient All Select	✓ Email	No Validated Email Invalid Email Declined Filter Addresses Addresses Emails	Log
Action	Send Email	Email Filters	Email *
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8. Filter to view Invalid Email Addresses.

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Please select an email templa	late:-	V 💵	<b>L</b>		
Open Select Random Patient All Select EMAIL 1	✓ Email	No Validated Email Filter Addresses	Invalid Email Declined Addresses Emails	Log	
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The Mail Patient DOB	👻 Invite Status 🔗 Inv	vite Date 👻 Usual Surgery 👻	Telephone No 👻 Mobile No	Email Address	🕆 Addr 📥

9. A copy of the current screen view can be printed by selecting Print on

the Toolbar, or to view it first select Print Preview

10. To export the data that is currently being viewed, select **CSV File** from the **Toolbar**.

### Managing Patients with an Account Created and an Invalid Email Address

To complete the account creation for a patient and email the registration details:

1. From the **Vision 3** front screen, select **Registration** and then select the patient required.

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- 2. The **Registration Details** screen displays, select the **Address** tab.
- 3. Highlight the invalid email address under **Contacts for patient** and select **Delete**.

- 4. Select Yes to save.
- 5. Select the **Online Services** tab.

Registration Details     Incomplete Details     Personal Address Registration Notes Other Ids     Select Online     Family Consent Online Services     Services	
Account Status Preferred Email Address: Verify Add Preferred SMS Number:	Select to add an email address
No Selection  Verify Add  Identification  C Created C Registered C Active C Locked Reprint Account Details	Select to add identification

- 6. Add a preferred email address for the patient, see <u>Preferred Email</u> <u>Address</u> in the **Patient Online Services Help Centre** for details.
- 7. Record that you have verified the type of identification provided by the patient, see <u>Adding Patient Identity Verification Details</u> in the **Patient Online Services Help Centre** for details.
- 8. Select Reprint Account Details.

E. P	egistration Details			×			
	Incomplete Details						
Fa	Personal     Address     Registration     Notes     Other     Ids       Family     Consent     Online Services     Preferences						
E4	ccount Status						
F	referred Email Address:						
	en@email.com (Verified)		Verify Add				
F	referred SMS Number:						
	lo Selection		Verify Add				
			Identification				
(	Created O Registered O Active	C Locked	Reprint Account Details				

9. You are offered the methods of reprint, tick **Send Registration Letter** content to preferred Email address.



10.Select **OK** to accept.