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.

See [Viewing Clinical Audits](#) in the **Clinical Audit Help Centre** for details.

Training Tip - Activate the reminder to display a note in **Consultation Manager**, see [Managing Reminders](#) 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.
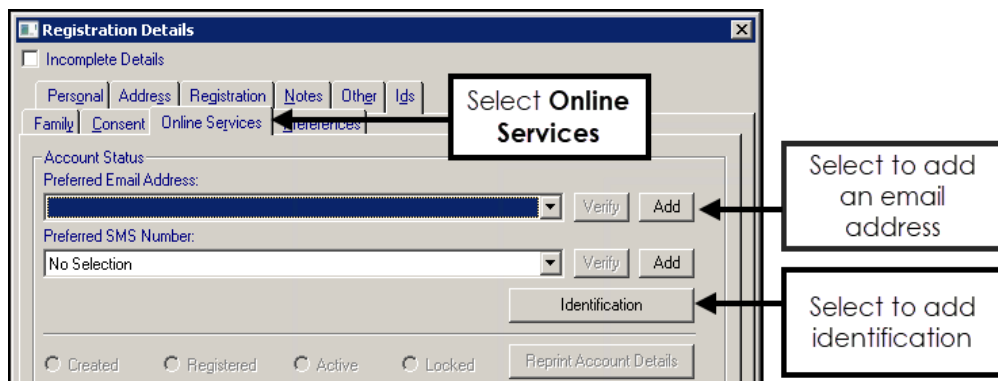
3. Add a preferred email address for the patient, see Preferred Email Address in the **Patient Online Services Help Centre** for details.

4. Record that you have verified the type of identification provided by the patient, see Adding Patient Identity Verification Details in the **Patient Online Services Help Centre** for details.

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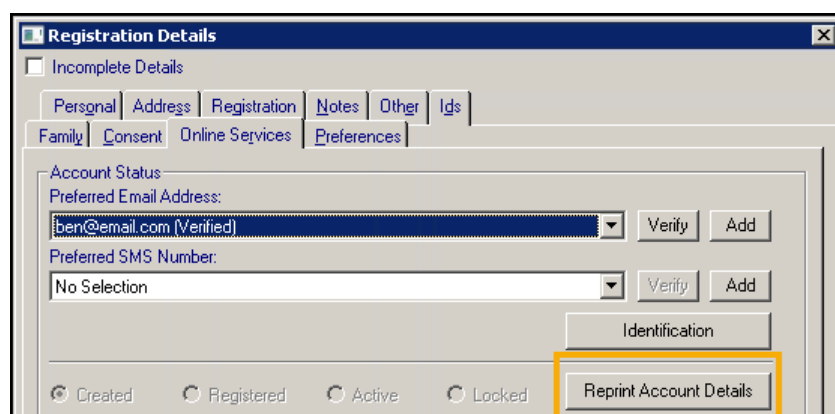
6. You are offered the methods of reprint, tick **Send Registration Letter content to preferred Email address**.
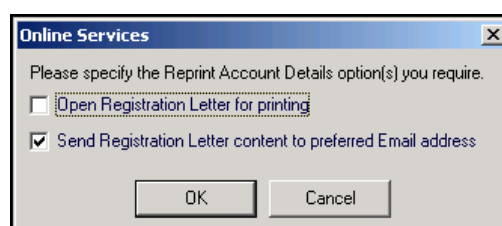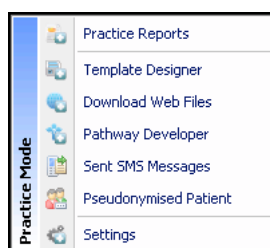

7. Select **OK** to accept.
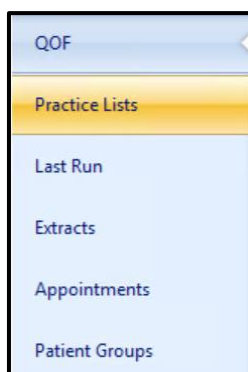
Patients with an Invalid Email Address

Identifying Patients

A **Vision+ Practice Report** is available to identify active patients who have an invalid email address.
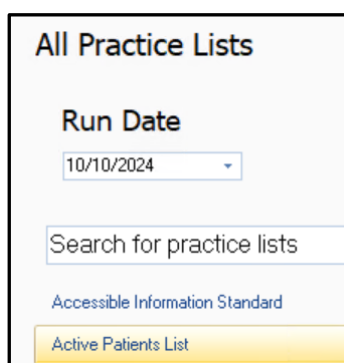
1. Whilst logged into **Vision 3**, with no patient selected, right click

   Vision+ in the Windows Notification Tray.

2. Select **Practice Reports** from the **Practice Mode** menu.
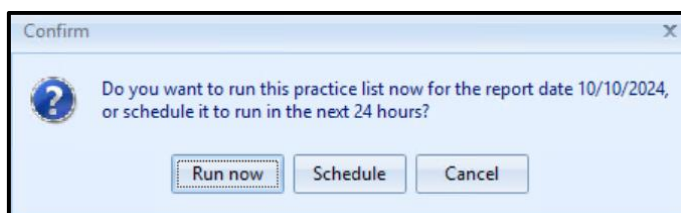
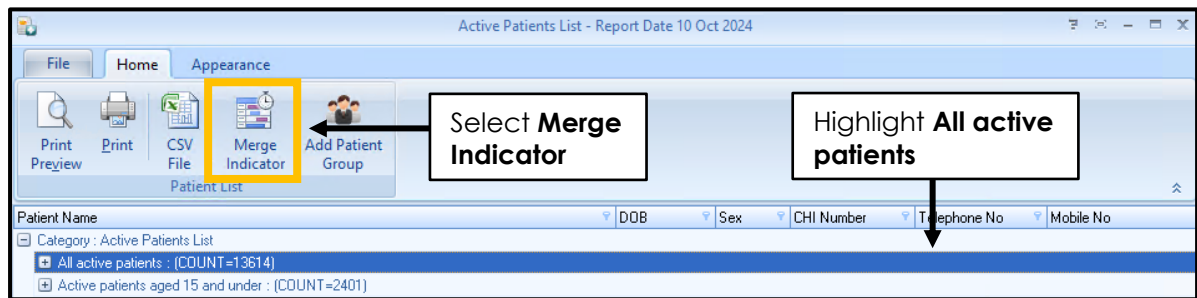

3. Select **Practice Lists**.
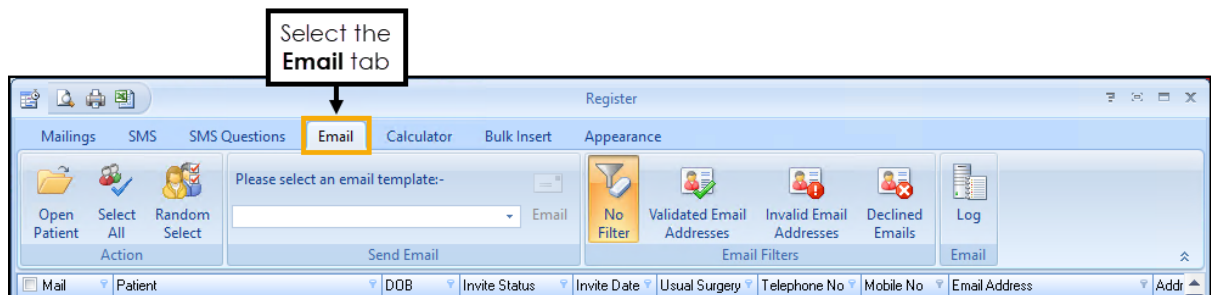

4. Select the **Active Patients List** report.

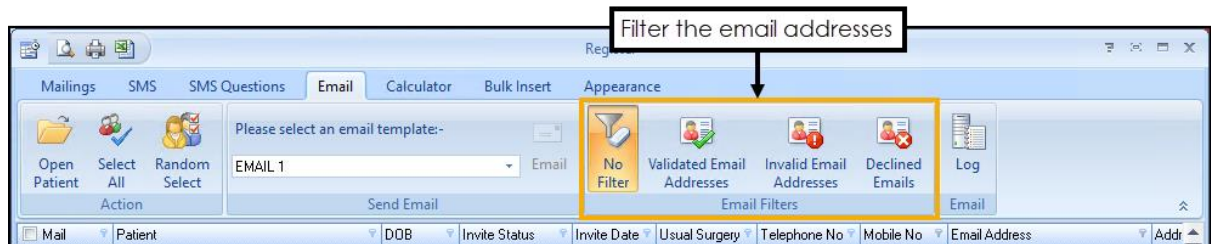5. Select **Run now**. The report screen displays with the progress bar.

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

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

8. Filter to view **Invalid Email Addresses**.

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.

2. The **Registration Details** screen displays, select the **Address** tab.

3. Highlight the invalid email address under **Contacts for patient** and select **Delete**.
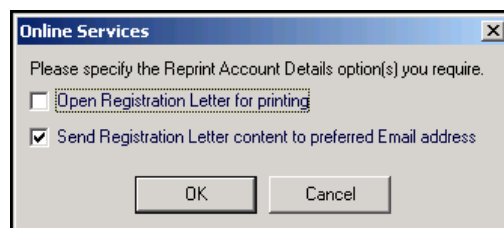
4. Select **Yes** to save.

5. Select the **Online Services** tab.
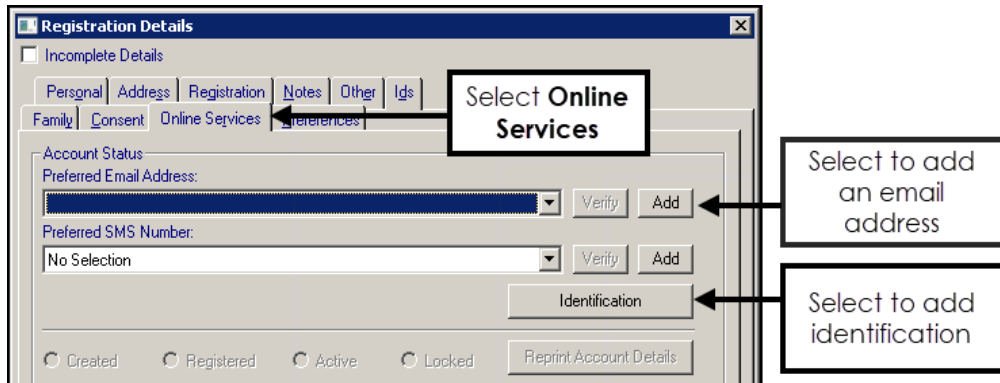
6. Add a preferred email address for the patient, see Preferred Email Address in the **Patient Online Services Help Centre** for details.

7. Record that you have verified the type of identification provided by the patient, see Adding Patient Identity Verification Details in the **Patient Online Services Help Centre** for details.

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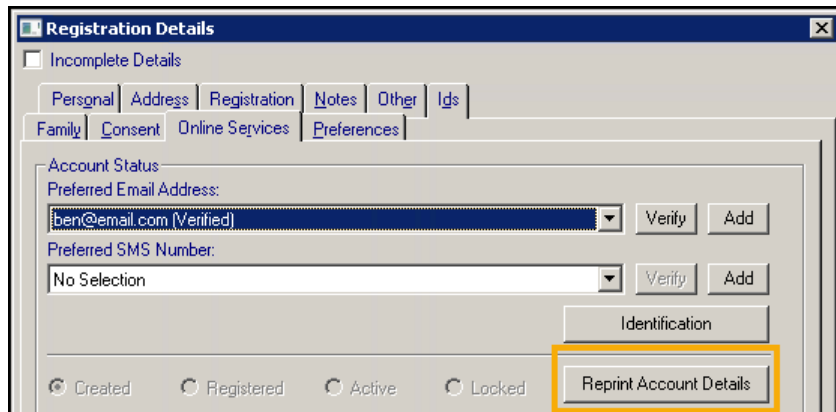
9. You are offered the methods of reprint, tick **Send Registration Letter content to preferred Email address**.

10. Select **OK** to accept.