

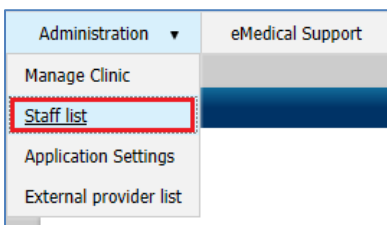
Tip Sheet: Managing Due to Expire Accounts

This tip sheet will assist you in extending the eMedical access of staff at your clinic when their account is due to expire. If the access of an eMedical staff member at your clinic is about to expire, the **Clinic Administrator(s)** at your clinic will receive an automated email 14 days before the account is due to expire.

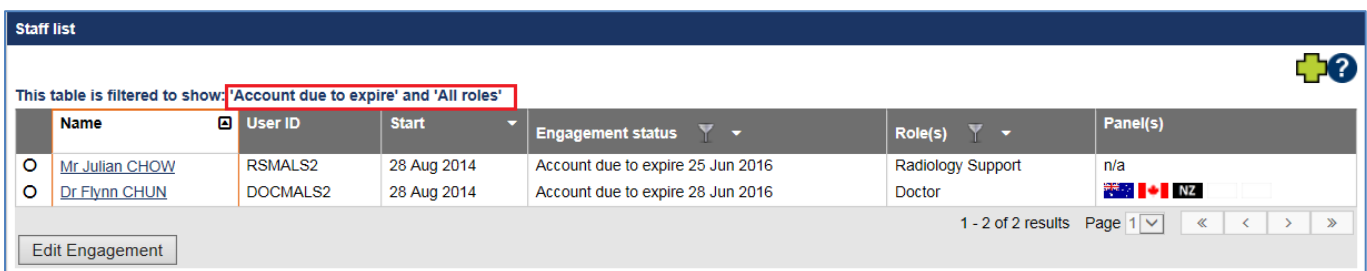
Note: Separate instructions are available in tip sheet 'Password related issues for eMedical users' (e.g. password resets and locked accounts).


Note: If the account expiry date for the relevant staff member is not extended, you and the relevant staff member will receive a reminder email 7 days and then 2 days before the expiry date.

Step 1. Select **Staff list** from the **Administration** menu in eMedical

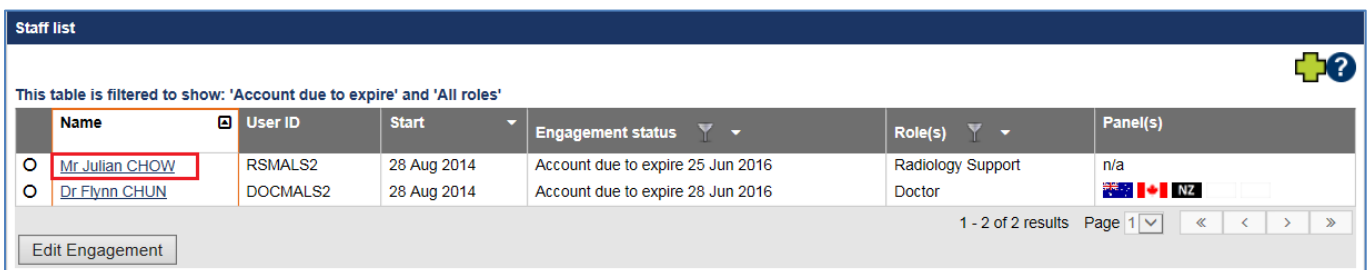


The **Staff list** will display staff members with the **Engagement status** of 'Account due to expire'.



Note: The Staff list will default to 'Account due to expire' and 'All roles'. You may use the **Engagement status** filter  to look up for staff with 'All statuses' and 'All roles'.

Step 2. Click on the person's name hyperlink



Note: Please **do not** select the radio button next to the person's name to extend the account validity.

The **Edit person** screen for that user will open with the **Account expiry date** displayed under the **Account details** section.

Edit person

Personal Details

Title * Mr

Family name * CHOW

Given name(s) * Julian

Preferred name

Gender * MALE

Date of birth * 21 Jan 1969

Languages spoken *

English

French

Professional Details

Specialty

Registration body

Account details

Account status **Account active**

User id **RSMALS2**

Account expiry date * 25 Jun 2016

[View history](#) [Allocate temporary password](#)

Leave planning

Going on leave? Yes No

Contact channels

| Delete | Contact channel | Contact details | Primary | Comments | Edit |
|--------|--------------------|--|---------|----------|------|
| | E-mail (Business) | chow@123mail.com | Yes | - | |
| | Phone (Home) | + 60 (5) 5556666 | Yes | - | |
| | Address (Business) | 5 Jalan Kerinchi, Kuala Lumpur , 82365, MALAYSIA | Yes | - | |

Clinic engagements

| Clinic | Start | Engagement status | Role(s) | Panels |
|--|-------------|-------------------|-------------------|--------|
| <input type="radio"/> CHS UAT Cambridge Hospital, Kuala Lumpur, MALAYSIA | 28 Aug 2014 | Active engagement | Radiology Support | n/a |

[Edit Engagement](#)

1 result Page 1

Step 3. Change the **Account expiry date** for this person and press the **Save** button

Note: The new date that you enter could be a maximum of 2 years from the current date. Please enter a shorter period if you know that the person will be working for your clinic for a shorter period (e.g. if they are leaving your clinic in 3 months, enter the date 3 months from now).

Account details

Account status **Account active**

User id **RSMALS2**

Account expiry date * 19 Jun 2016

[View history](#) [Allocate temporary password](#)

Leave planning

Going on leave? Yes No

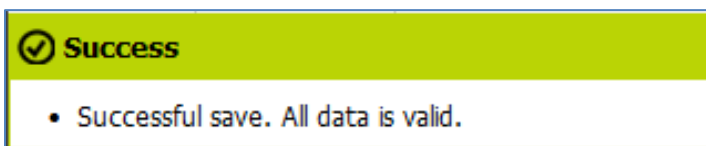
Panel country status

This Person is not known to back-end systems.

| Active country | Person ID |
|----------------|-----------|
| | |

[Cancel](#) [Save](#)

A success message is displayed.







Note: If you do not see this message, you have not successfully completed the process.

Step 4. Press the **Cancel** button to return to the **Staff list**.

What happens if a person's account is not extended?

If a person's **Account expiry date** is not changed, their account will expire and have an **Account Expired** status in the **Staff list**. The person will not be able to access eMedical.

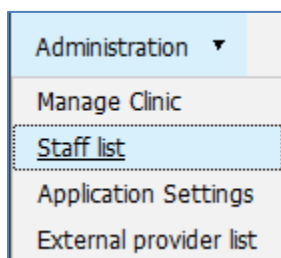
| Name ▲ | User ID | Start ▲ | Engagement status ▼ | Role(s) ▼ | Panel(s) |
|--|---------|-------------|---------------------|----------------------|--|
| <input type="radio"/> Mr Julian CHOW | e10971 | 28 Aug 2014 | Active engagement | Radiology Support | n/a |
| <input type="radio"/> Dr Flynn CHUN | e10972 | 28 Aug 2014 | Active engagement | Doctor |   NZ |
| <input type="radio"/> Ms Anne FUNG | e10974 | 28 Aug 2014 | Account Expired | Clerical (Medical) | n/a |
| <input type="radio"/> Mr Bob LI | e10970 | 13 Nov 2015 | Active engagement | Clinic Administrator | n/a |
| <input type="radio"/> Dr Rob XANG | e10973 | 18 Mar 2015 | Active engagement | Radiologist |   NZ |

1 - 5 of 5 results Page 1



Edit Engagement


If a person's account has expired, but you wish to reactivate their access because they are engaged with the clinic, then please follow the steps given below:

Step 1. Select **Staff list** from the **Administration** menu



Step 2. Click on the name hyperlink of the person who has an **Account Expired** status

| Name ▲ | User ID | Start ▲ | Engagement status ▼ | Role(s) ▼ | Panel(s) |
|--|---------|-------------|---------------------|----------------------|--|
| <input type="radio"/> Mr Julian CHOW | e10971 | 28 Aug 2014 | Active engagement | Radiology Support | n/a |
| <input type="radio"/> Dr Flynn CHUN | e10972 | 28 Aug 2014 | Active engagement | Doctor |   NZ |
| <input type="radio"/> Ms Anne FUNG | e10974 | 28 Aug 2014 | Account Expired | Clerical (Medical) | n/a |
| <input type="radio"/> Mr Bob LI | e10970 | 13 Nov 2015 | Active engagement | Clinic Administrator | n/a |

Note: You can use the **Engagement status** filter  to search for a person with the '**Account Expired**' status and are engaged with your clinic.

Note: Please **do not** select the radio button next to the person's name.

The **Edit person** screen will open with the **Account Expired** status displayed in the **Account details** section.

Edit person

Personal Details

Title * Ms

Family name * FUNG

Given name(s) * Anne

Preferred name

Gender * FEMALE

Date of birth * 01 Mar 1971

Languages spoken *

English

Professional Details

Specialty

Registration body

Account details

Account status **Account Expired**

User id e10974

Account expiry date * 10 Nov 2015

[View history](#) [Allocate temporary password](#)

Leave planning

Going on leave? Yes No

Panel country status

| Active country | Person ID |
|---|-----------|
| This Person is not known to back-end systems. | |

Contact channels

| Delete | Contact channel | Contact details | Primary | Comments | Edit |
|--------|-------------------|--------------------------------|---------|----------|------|
| | E-mail (Business) | clericalmedical@testclinic.com | Yes | - | |

Clinic engagements

| Clinic | Start | Engagement status | Role(s) | Panels |
|--|-------------|-------------------|--------------------|--------|
| <input type="radio"/> TestClinic_malaysia_MALAYSIA | 13 Nov 2015 | Active engagement | Clerical (Medical) | n/a |

1 result Page 1

[Edit Engagement](#)

Step 3. Change the **Account expiry date** and press the **Save** button

Note: The new date that you enter can be up to 2 years from the current date unless you know that the person will be working for your clinic for a shorter period (e.g. if they are leaving your clinic in 3 months, enter the date 3 months from now).

Account details

Account status Account Expired

User id e10974

Account expiry date * 14 Nov 2017

[View history](#) [Allocate temporary password](#)

Leave planning


Going on leave? Yes No

Panel country status

| Active country | Person ID |
|---|-----------|
| This Person is not known to back-end systems. | |

[Cancel](#) [Save](#)

A success message is displayed.

 **Success**

- Successful save. All data is valid.


Note: If you do not see this message then you have not successfully completed the process.

The **Account status** will change to **Account active** in the **Edit person** screen.

Account details

Account status **Account active**

User id **e10974**

Account expiry * 14 Nov 2017| × 

Account expiry date

[View history](#)

Leave planning

Going on leave? Yes No

Note: The person will be able to log in with their current password. If required, the person should use the **'Forgotten password'** self-service to set up a new password. Alternatively, you can provide them a temporary password.