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## Creating Tags

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Tagging is an effective tool used by providers to attach labels or identifiers to a patient's visit. While the providers can use the free text field to create tags, the Clinic Admin can create custom labels and assign colors that providers can choose from later. In this section, you'll learn:

[How to Create Tags](#)

[How to Edit Tags](#)

[How to Delete Tags](#)

[Related Article](#)

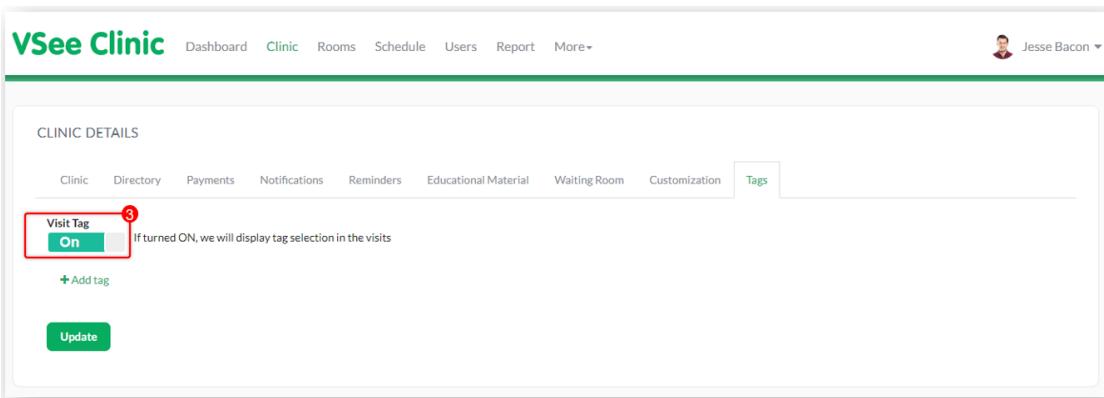
*Note: This feature may not be available in your clinic. Please contact [Sales](#) or your Account Manager to enable this feature.*

## Creating Tags

1. Go to the Admin Panel (see [guide](#)).
2. Click on the **Clinic** tab and choose **Tags**.

The screenshot shows the VSee Clinic Admin Panel. The top navigation bar has 'VSee Clinic' and 'Dashboard' on the left, and a user profile 'Jesse Bacon' on the right. Below the navigation is a sub-menu with tabs: 'Clinic' (highlighted with a red box and number 1), 'Directory', 'Payments', 'Notifications', 'Reminders', 'Educational Material', 'Waiting Room', 'Customization', and 'Tags' (highlighted with a red box and number 2). Under the 'Clinic' tab, there is a section titled 'CLINIC DETAILS'. It contains a 'Visit Tag' toggle switch that is turned 'On' (green). A tooltip for the toggle says 'If turned ON, we will display tag selection in the visits'. Below the toggle is a '+ Add tag' button and a 'Update' button.

3. Switch on the **Visit Tag** toggle.



CLINIC DETAILS

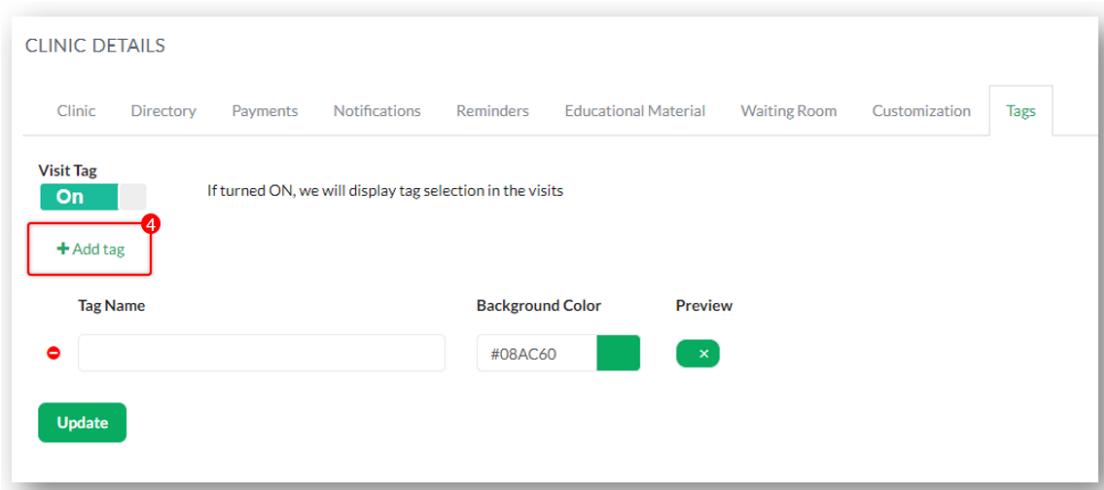
Clinic Directory Payments Notifications Reminders Educational Material Waiting Room Customization Tags

Visit Tag **On** If turned ON, we will display tag selection in the visits

+ Add tag

Update

4. Click on the **+Add tag** and a field to create the tag should show up.



CLINIC DETAILS

Clinic Directory Payments Notifications Reminders Educational Material Waiting Room Customization Tags

Visit Tag **On** If turned ON, we will display tag selection in the visits

+ Add tag

Tag Name

Background Color

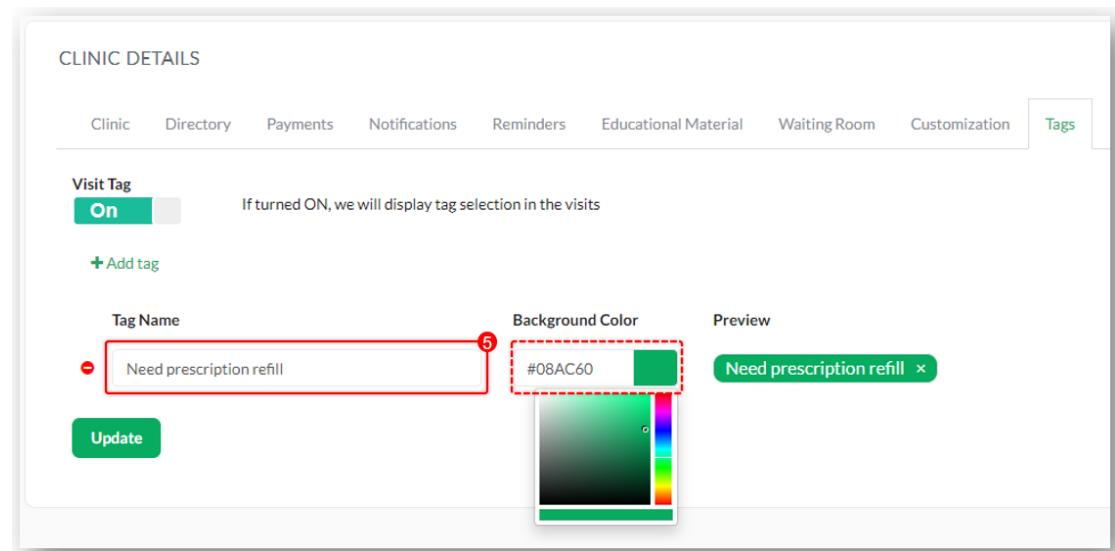
#08AC60

Preview

Update

5. Type in the tag's name on the field and press Enter on your keyboard.

*Note: By default, the background color is #08AC60 but you can choose from the color picker by clicking on the color preview.*



CLINIC DETAILS

Clinic Directory Payments Notifications Reminders Educational Material Waiting Room Customization Tags

Visit Tag **On** If turned ON, we will display tag selection in the visits

+ Add tag

Tag Name

Background Color

#08AC60

Preview

Need prescription refill

Update

6. Click **Update** when finished.

CLINIC DETAILS

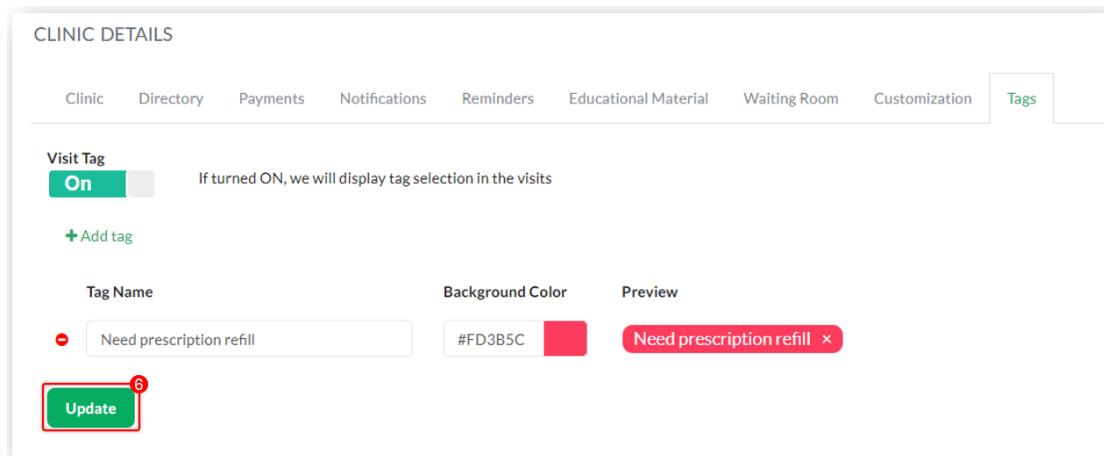
Clinic    Directory    Payments    Notifications    Reminders    Educational Material    Waiting Room    Customization    **Tags**

Visit Tag **On** If turned ON, we will display tag selection in the visits

**+ Add tag**

Tag Name	Background Color	Preview
Need prescription refill	#FD3B5C	Need prescription refill x

**Update** <sup>6</sup>



## Editing Tags

1. Follow steps 1 and 2 in the [Creating Tags](#) section.
2. Proceed to edit the tag name field and/or change background color (step 5 in [Creating Tags](#) section). Click **Update** when done.

CLINIC DETAILS

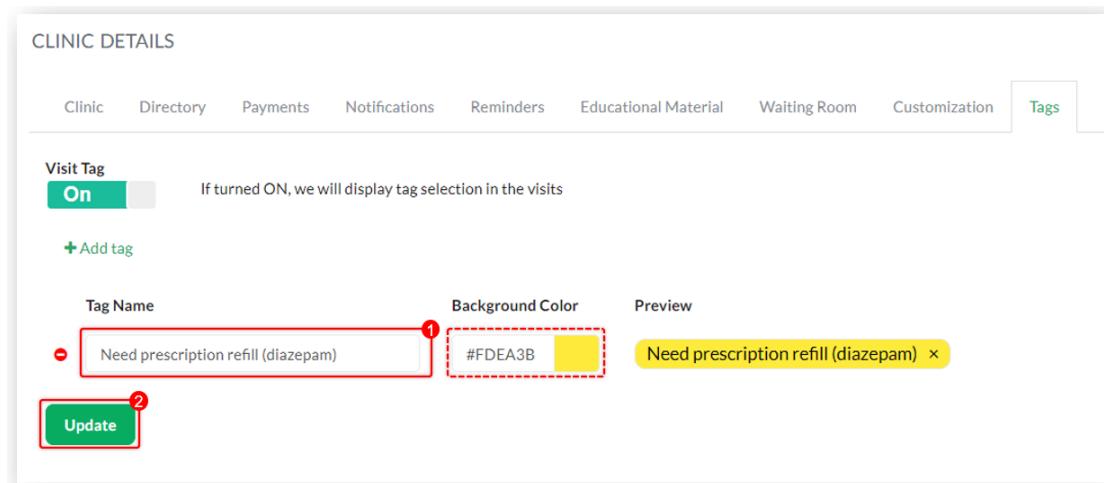
Clinic    Directory    Payments    Notifications    Reminders    Educational Material    Waiting Room    Customization    **Tags**

Visit Tag **On** If turned ON, we will display tag selection in the visits

**+ Add tag**

Tag Name	Background Color	Preview
Need prescription refill (diazepam)	#FDEA3B	Need prescription refill (diazepam) x

**Update** <sup>2</sup>



## Deleting Tags

1. Follow steps 1 and 2 in the [Creating Tags](#) section.
- Click on the red button beside the tag name.
2. Click **Update** when done.

CLINIC DETAILS

Clinic   Directory   Payments   Notifications   Reminders   Educational Material   Waiting Room   Customization   Tags

Visit Tag **On** If turned ON, we will display tag selection in the visits

**+ Add tag**

Tag Name	Background Color	Preview
Need prescription refill	#FD3B5C	Need prescription refill x

**Update**

*Note: Some characters, such as period (.), and comma (,) are considered invalid. You will receive an error notification when these are used.*

An error occurred, please refresh the page or try again later.

CLINIC DETAILS

Clinic   Directory   Payments   Notifications   Reminders   Educational Material   Waiting Room   Customization   Tags

Visit Tag **On** If turned ON, we will display tag selection in the visits

**+ Add tag**

Tag Name	Background Color	Preview
Follow-up appt.	#FDEA3B	Follow-up appt. x

**Update**

## Related Article

[CSR: Tagging](#)

Need more assistance? Send us an email at [help@vsee.com](mailto:help@vsee.com) or check out the [Help](#) section under the Profile Menu of your VSee Clinic.

This article was last updated on: 11 April 2023

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