

## Creating Tags

Jay-Ileen (Ai) - 2023-07-18 - [VSee Clinic for Admins](#)

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](#)

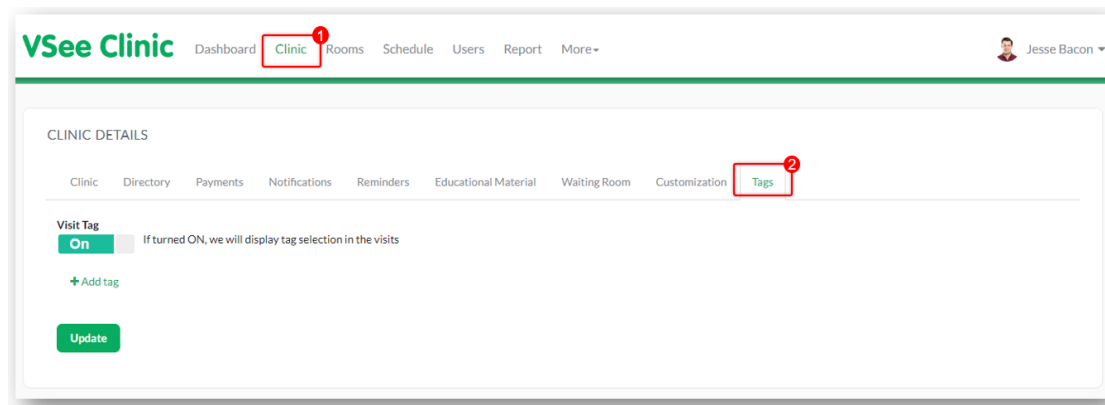
[How to Delete Tags](#)

[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**.



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

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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 Preview

-  #08AC60  

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**

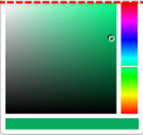
Visit Tag **On** If turned ON, we will display tag selection in the visits

+ Add tag

Tag Name Background Color Preview

-  #08AC60  

Update



Need prescription refill ×

6. Click **Update** when finished.

CLINIC DETAILS

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

+ Add tag

Tag Name	Background Color	Preview
<span>-</span> Need prescription refill	#FD3B5C	Need prescription refill ×

**Update**

## 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
<span>-</span> Need prescription refill (diazepam)	#FDEA3B	Need prescription refill (diazepam) ×

**Update**

## 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

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Customization
Tags

Visit Tag

On

If turned ON, we will display tag selection in the visits

+ Add tag

Tag Name	Background Color	Preview
<div> <div>1</div> <div>Need prescription refill</div> </div>	<div>#FD3B5C</div> <div></div>	<div>Need prescription refill</div> <div>x</div>
<div>2</div> <div>Update</div>		

*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.

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Visit Tag

On

If turned ON, we will display tag selection in the visits

+ Add tag

Tag Name	Background Color	Preview
<div> <div></div> <div>Follow-up appt.</div> </div>	<div>#FDEA3B</div> <div></div>	<div>Follow-up appt.</div> <div>x</div>
<div>Update</div>		

## 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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