

Creating Tags

Jay-Ileen (Ai) - 2023-07-17 - 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](#)

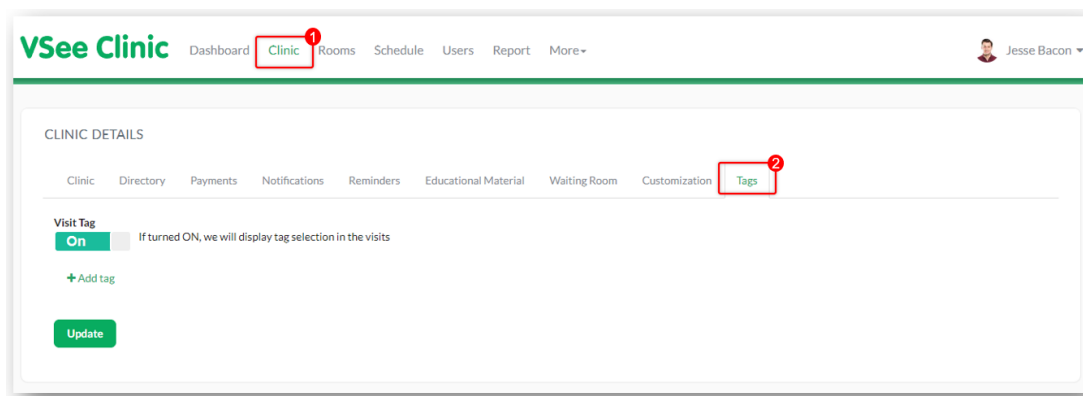
[How to Delete Tags](#)

[Related Article](#)

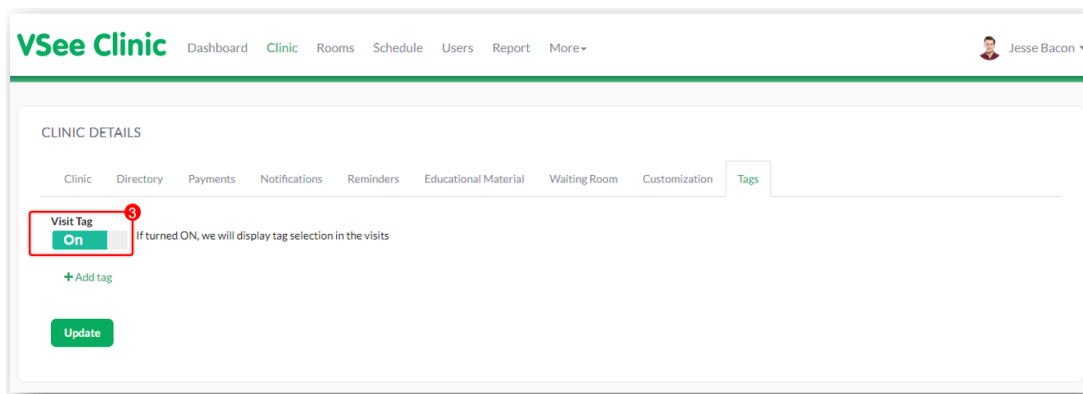
Note: This feature may not be available in your clinic. Please contact [Sales](#) or your Account Manager to enable this feature.

Creating Tags

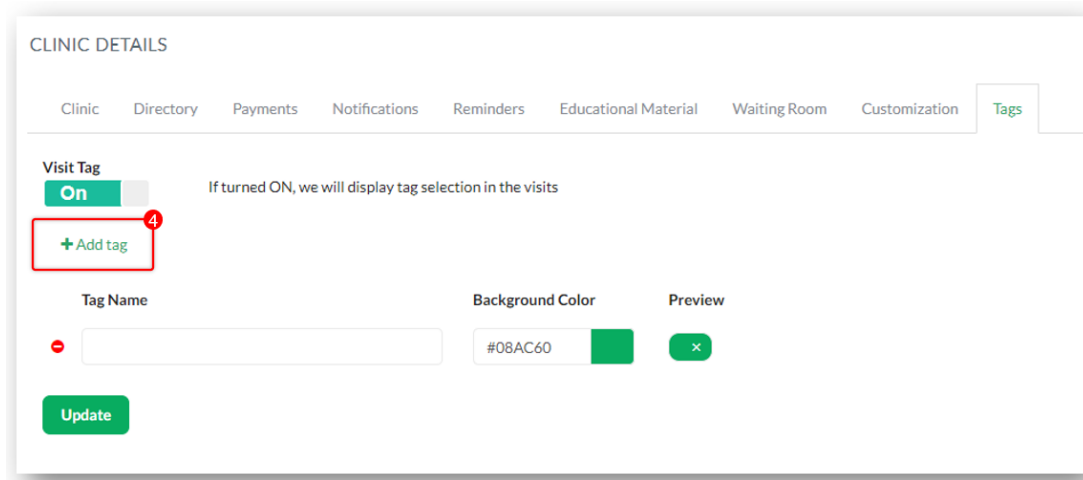
1. Go to the Admin Panel (see [guide](#)).
2. Click on the **Clinic** tab and choose **Tags**.



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

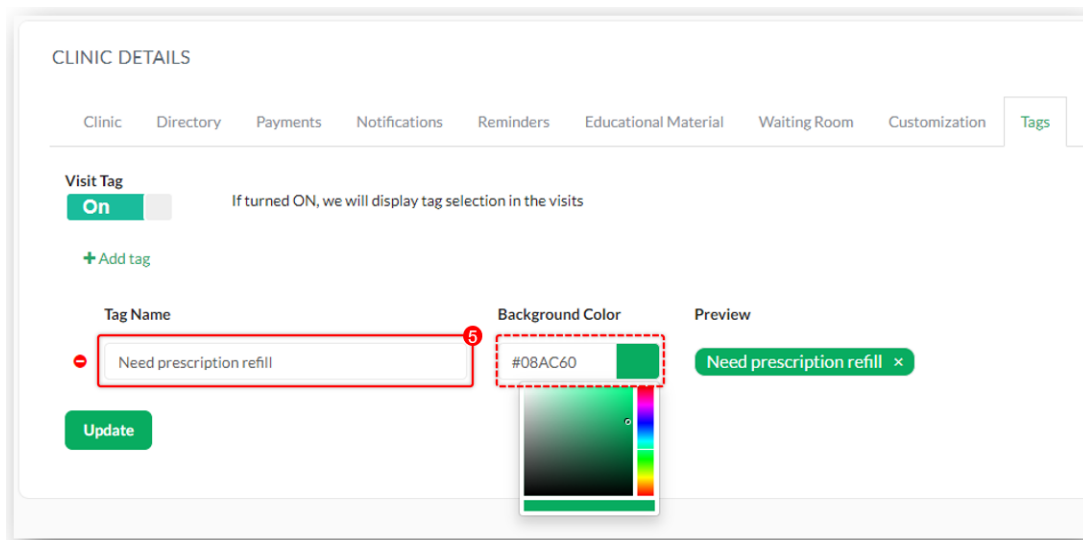


4. Click on the **+Add tag** and a field to create the tag should show up.



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.



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
<input type="text" value="Need prescription refill"/>	<input type="text" value="#FD3B5C"/>	Need prescription refill ×

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
<input type="text" value="Need prescription refill (diazepam)"/>	<input type="text" value="#FDEA3B"/>	Need prescription refill (diazepam) ×

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
<input type="text" value="Need prescription refill"/>	<input type="text" value="#FD3B5C"/>	Need prescription refill ×
<input type="button" value="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
<input type="text" value="Follow-up appt."/>	<input type="text" value="#FDEA3B"/>	Follow-up appt. ×
<input type="button" value="Update"/>		

Related Article

[CSR: Tagging](#)

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

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