CSR: Scheduling

Jay-Ileen (Ai) - 2023-04-12 - VSee Clinic for Providers

Similar to providers and clinic admins, a CSR also has the capacity to schedule on behalf of the provider as long as he/she is assigned to that provider's waiting room. On this article, we'll be exploring:

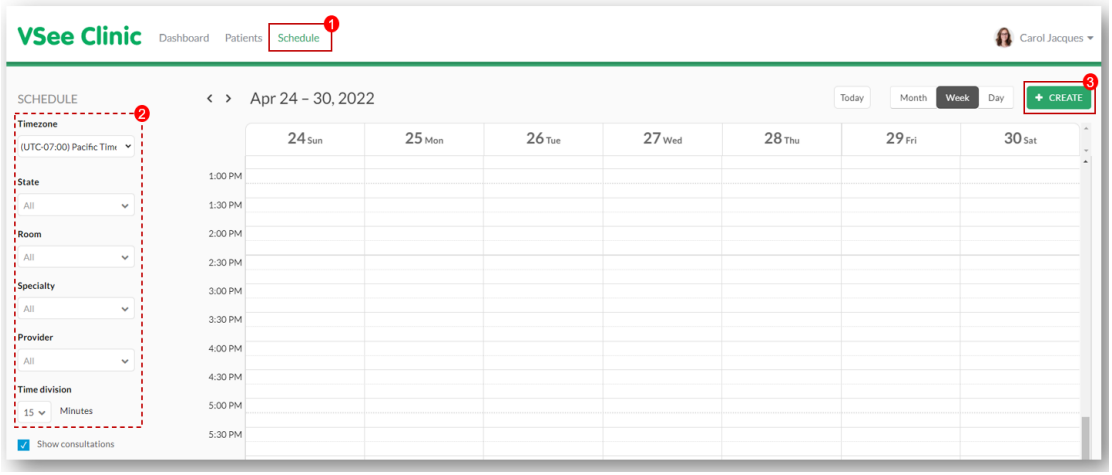
- How to Open Appointment Slots
- How to Create a Scheduled Appointment
- Related Articles

Opening Appointment Slots

1. Log into your clinic (see guide). Click on the **Schedule** tab.

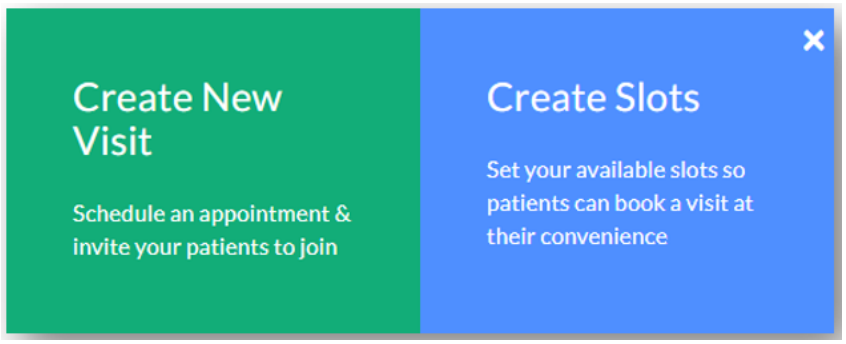
2. You can filter the calendar by state, room, specialty and/or provider if you have a multi-provider. You may also edit the time division.

3. If these are not necessary or applicable to you, you may proceed to click on **Create**.

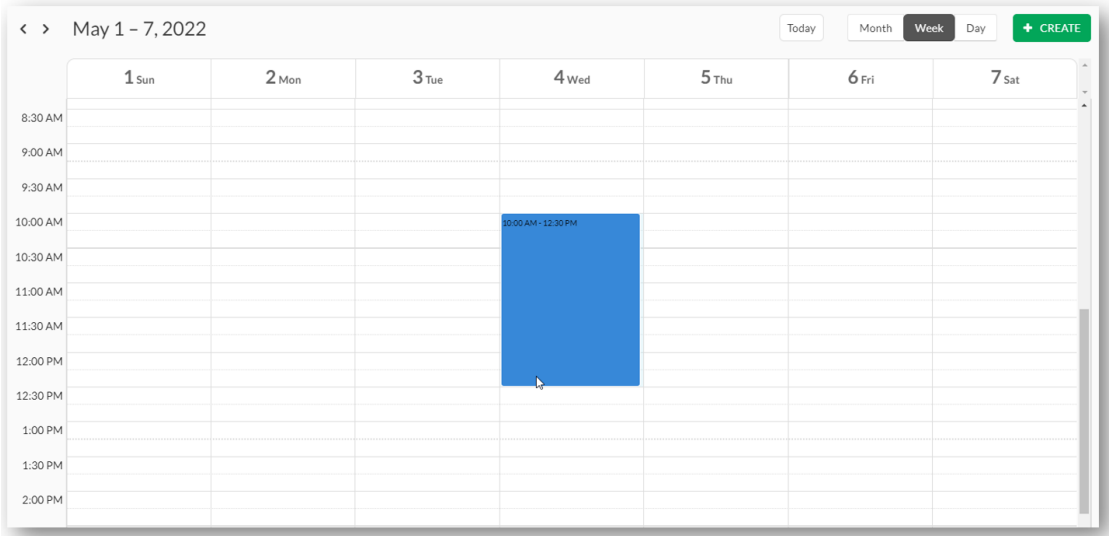


To create an appointment slot, you can:

a) Click the green **+ Create** button and choose **Create Slots**;

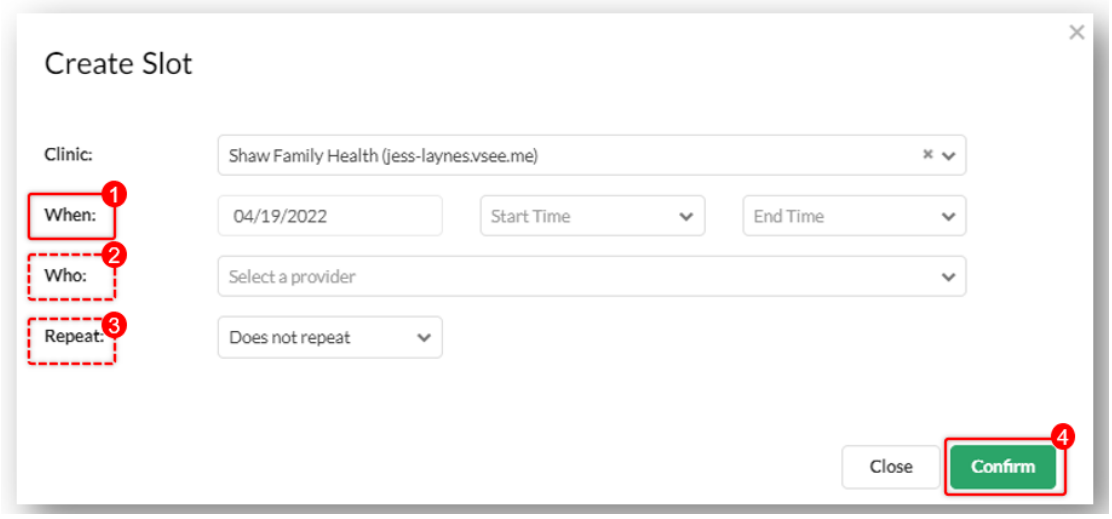


b) Another way is to click and drag the specific time on the calendar then choose **Create Slots**.



Specify the time slots and whose calendar you are setting the schedule for (if you have a multi-provider clinic). You can also choose which visit type— one to one or group (*Note: Group appointment may not be available in your clinic. If you need this, please contact Sales)*.

You can also opt to repeat the schedule daily, weekly, every weekday etc. Click **Confirm** when done. These slots will now be visible to the patients when they book their appointments.

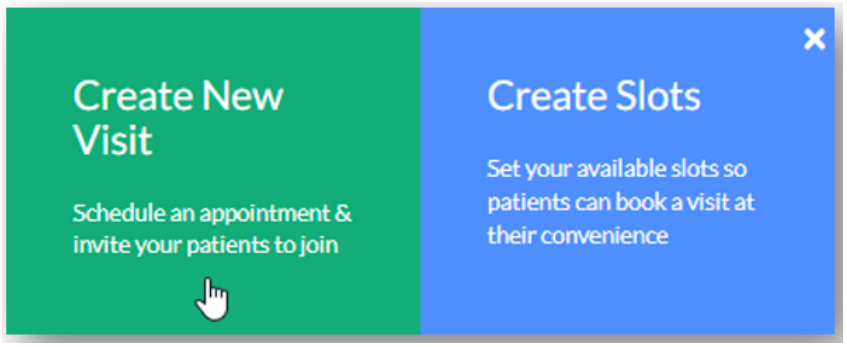


Creating a New Visit (Scheduled Appointment)

1. Follow steps 1 and 2 in **Opening Appointment Slots**.

2. To create an appointment with a particular patient:

a) Click the green **+ Create** button and choose **Create New Visit**.

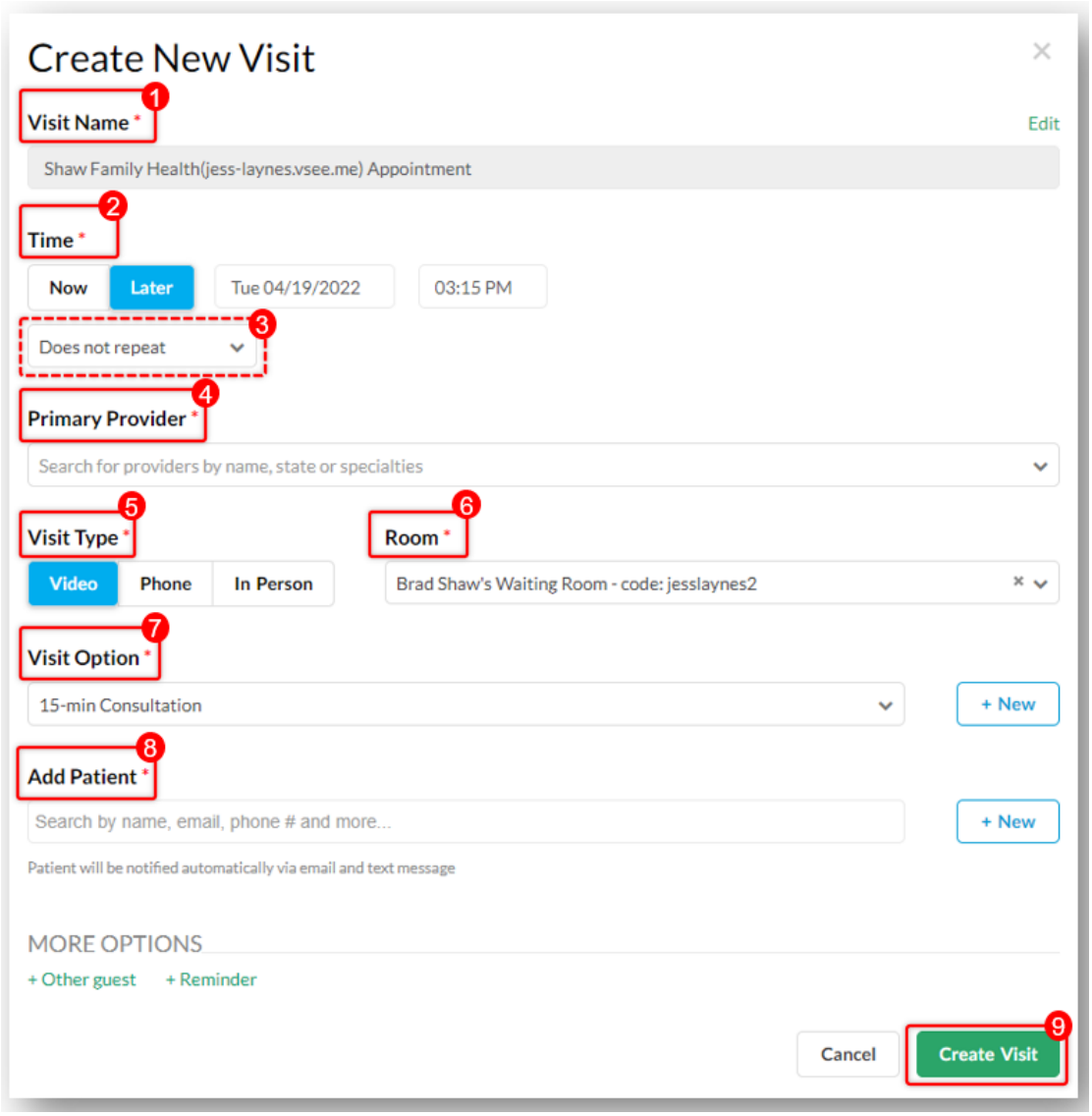


b) Another way is to click and drag on particular time slots (as with creating new slots) and choose

Create New Visit when the options pop up.

Fill out the required fields starting with the **Visit Name** which is already filled out by default but could be changed by clicking the **Edit** link on the right corner of the field. Afterwards, proceed to choose the time and change frequency if necessary.

Next, choose the **Primary Provider** if it's a (multi-provider clinic), **Visit Type, Room, Visit Option, and Patient**. After filling out all necessary fields, click on the **Confirm** button.



Related Articles:

- eScheduling > Visit Slots and Patient Scheduling
- Scheduling through the Admin Panel

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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