

## 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](mailto:help@vsee.com) or check out the [Help](#) section under the Profile Menu of your VSee Clinic.

This article was last updated on: 12 April 2023

Tags

CSR

schedule

scheduling