

## CSR: Tagging

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

The tagging functionality is one of the effective tools that a CSR can use to label a patient's status or situation after going through the initial process of their visit in the virtual "front desk" or "triage". The VSee Clinic currently has a default tag ("Ready for Physician") but this can be customized based on what you need. You can also add more tags and assign a color label.

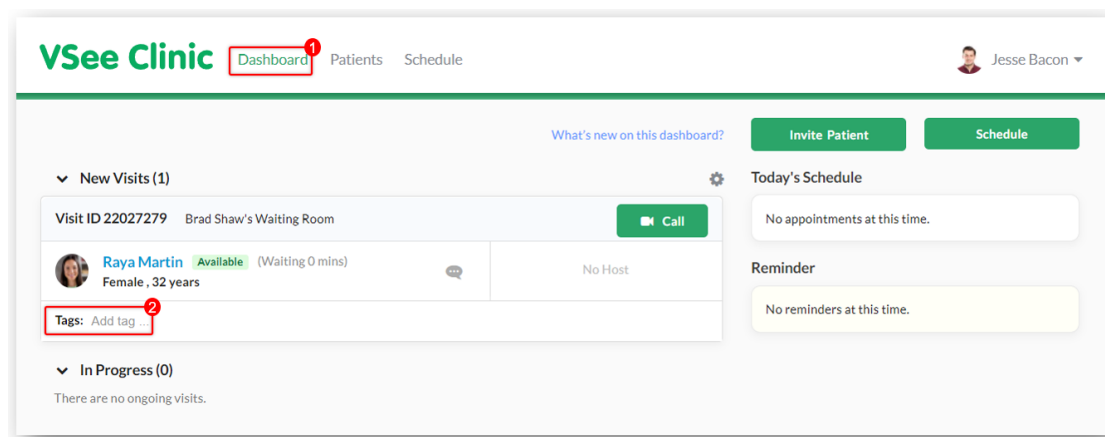
In this article, we'll be discussing how to tag during different parts of the call:

- [Before the Call \(Dashboard\)](#)
- [During the Call](#)
- [After the Call](#)
- [Related Articles](#)

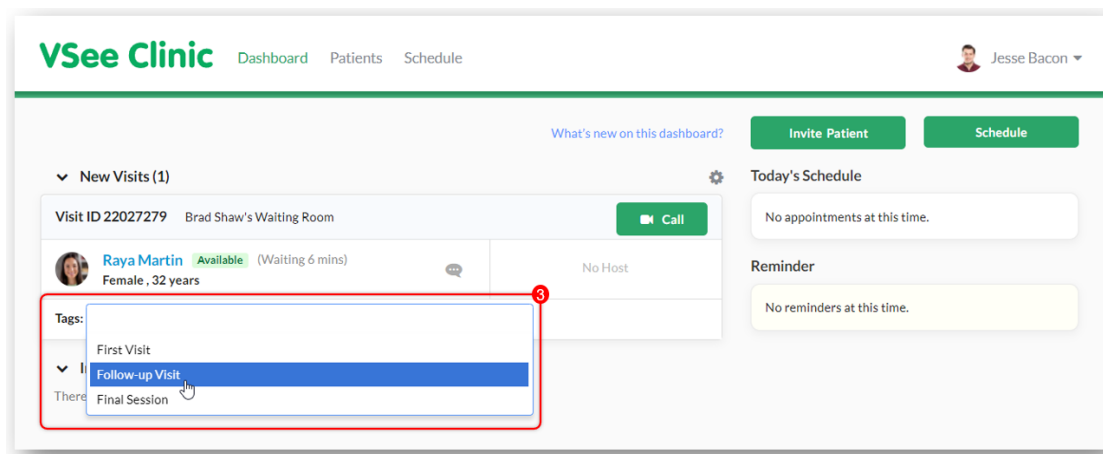
*Note: This feature may not be available in your clinic. Please contact [Sales](#) or your Account Manager to enable this feature.*

### Tagging Before the Call (Dashboard)

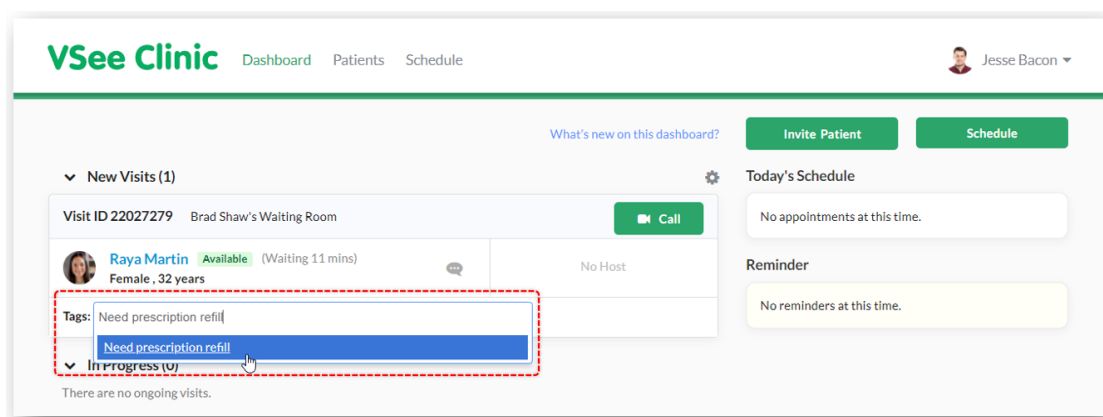
1. Log into your clinic (see [guide](#)).
2. Under the **Dashboard** tab, you should be able to see when a patient enters the Clinic and the **Add tag** field.



3. You can choose among the existing tags your Clinic admin or our team (admin@vsee.com) has created then press the **Enter** tab on your keyboard when done.



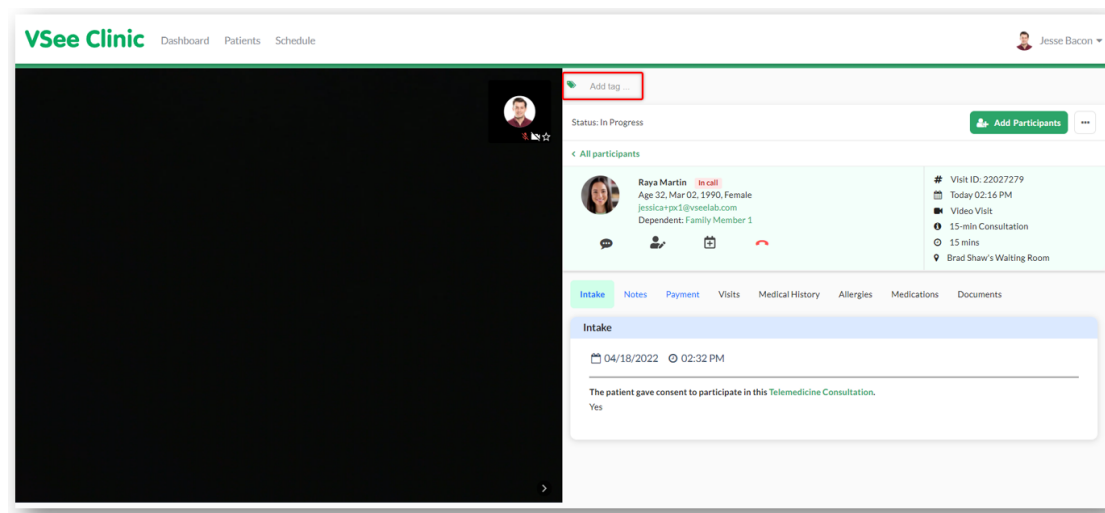
In case you wish to add a new tag, you can opt to use the free text field. Just type in the new tag on the field and press the **Enter** tab on your keyboard when done.



The provider should then be able to view your tags and determine the course of the visit.

## Tagging During the Call

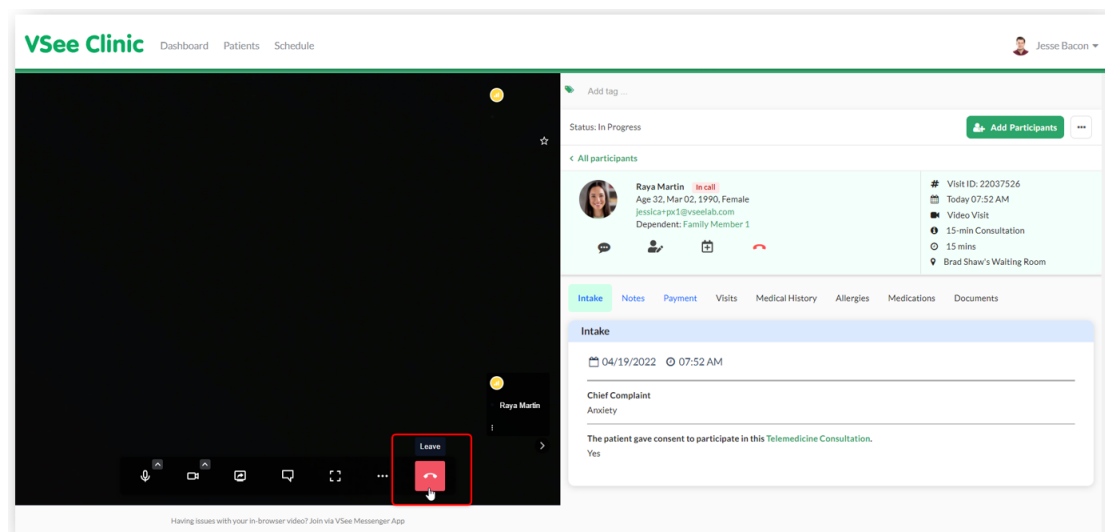
1. Call the patient from the Dashboard (see [guide](#)).
2. You should be able to see the **Add tag** field at the top of the call status. You can proceed to choose the tag from the drop-down menu that will show up when you click the field or type in the new tag that you need (see steps 3 and 4 of tagging before the call).



## Tagging After the Call

*Note: This can be done only when the provider just left the call and the patient has not checked out of the waiting room yet.*

1. Leave the call by clicking the drop call icon on the screen.



2. Choose **Leave the Call**.

Would you like to

Leave The Call


End Visit For All

Cancel

3. You should be directed to the patient's information page and find the **Add tag** field just below the logo. You can proceed to choose your tags from the drop-down menu or type in the free text field.

VSee Clinic

Dashboard Patients Schedule

 Jesse Bacon

Add tag ...

Status: In Progress


Call

Add Participants

End Visit

...

< All participants



Raya Martin

Available

Age 32, Mar 02, 1990, Female

jessica+px1@vseelab.com

Dependent: Family Member 1

Visit ID: 22037526

Today 07:52 AM

Video Visit

15-min Consultation

15 mins

Brad Shaw's Waiting Room

Intake

Notes

Payment

Visits

Medical History

Allergies

Medications

Documents

Intake

04/19/2022 07:52 AM


Chief Complaint

Anxiety

The patient gave consent to participate in this Telemedicine Consultation.

Yes


*Note: The tags made are associated with the specific visit you added them to. You can still view them even after the call.*

**VSee Clinic** Dashboard Patients Schedule  Jesse Bacon ▾

[Final Session](#) [Refer to psychiatrist](#)

Status: Completed [Call](#) [Add Participants](#) [...](#)

< All participants

 <p><b>Raya Martin</b> <span>Offline</span> Age 32, Mar 02, 1990, Female <a href="mailto:jessica+px1@vseelab.com">jessica+px1@vseelab.com</a> Dependent: Family Member 1</p> <p><a href="#">Chat</a> <a href="#">Share</a> <a href="#">Add</a></p>	<p># Visit ID: 22122097 📅 Today 09:09 AM 📺 Video Visit ⌚ 15-min Consultation ⌚ 15 mins 📍 Brad Shaw's Waiting Room</p>
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[Intake](#) [Notes](#) [Payment](#) [Visits](#) [Medical History](#) [Allergies](#) [Medications](#) [Documents](#)

**Intake**

📅 04/22/2022 ⌚ 09:09 AM

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The patient gave consent to participate in this **Telemedicine Consultation**.  
Yes

## Related Articles:

- [Creating Tags](#)
- [How to Call a Patient Using In-browser Calling](#)

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](#)