



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](#)

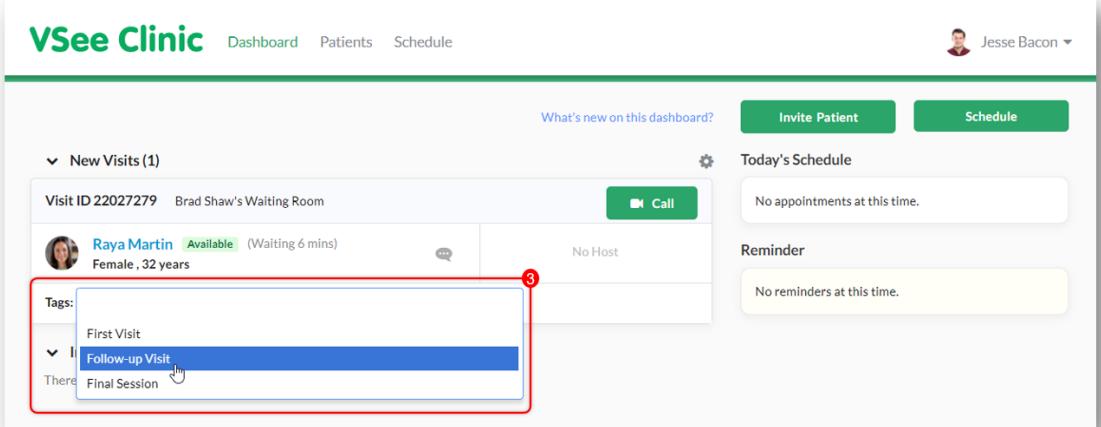
Note: This feature may not be available in your clinic. Please contact [Sales](#) or your Account Manager to enable this feature.

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.

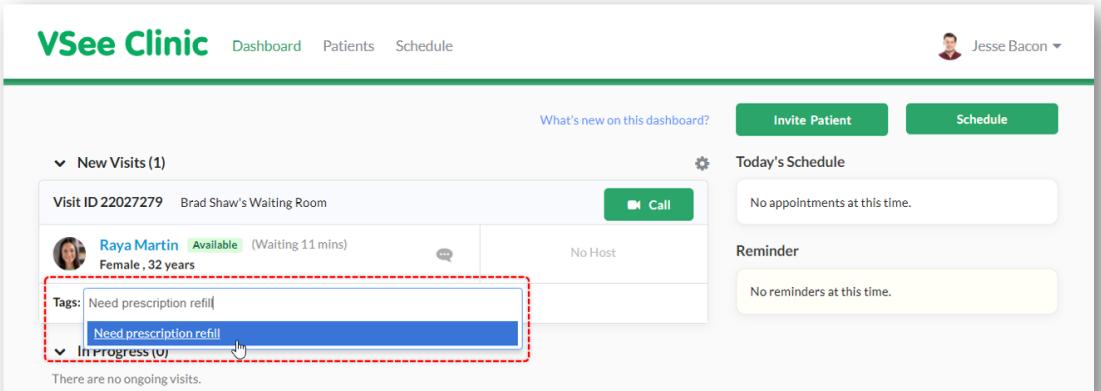
The screenshot shows the VSee Clinic dashboard. At the top, there are tabs for 'Dashboard' (which is highlighted with a red box and has a red notification badge with the number '1'), 'Patients', and 'Schedule'. On the right, there is a profile picture for 'Jesse Bacon' and a dropdown menu. Below the tabs, there are sections for 'New Visits' and 'In Progress'. The 'New Visits' section shows a visit for 'Raya Martin' (Available, Waiting 0 mins) with a 'Call' button. Below this, there is a field labeled 'Tags: Add tag...' with a red box and a red notification badge with the number '2'. The 'In Progress' section shows a message: 'There are no ongoing visits.' To the right, there are buttons for 'Invite Patient' and 'Schedule', and sections for 'Today's Schedule' (No appointments) and 'Reminder' (No reminders).

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.



The screenshot shows the VSee Clinic dashboard. In the center, there is a list of 'New Visits (1)'. The first visit is for 'Raya Martin' (Available, Waiting 6 mins). Below the patient's name is a 'Tags:' dropdown menu. A red box highlights this menu, which contains three options: 'First Visit', 'Follow-up Visit' (which is selected and highlighted in blue), and 'Final Session'. The 'Follow-up Visit' option has a small circular icon with the number '3' in the top right corner.

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.

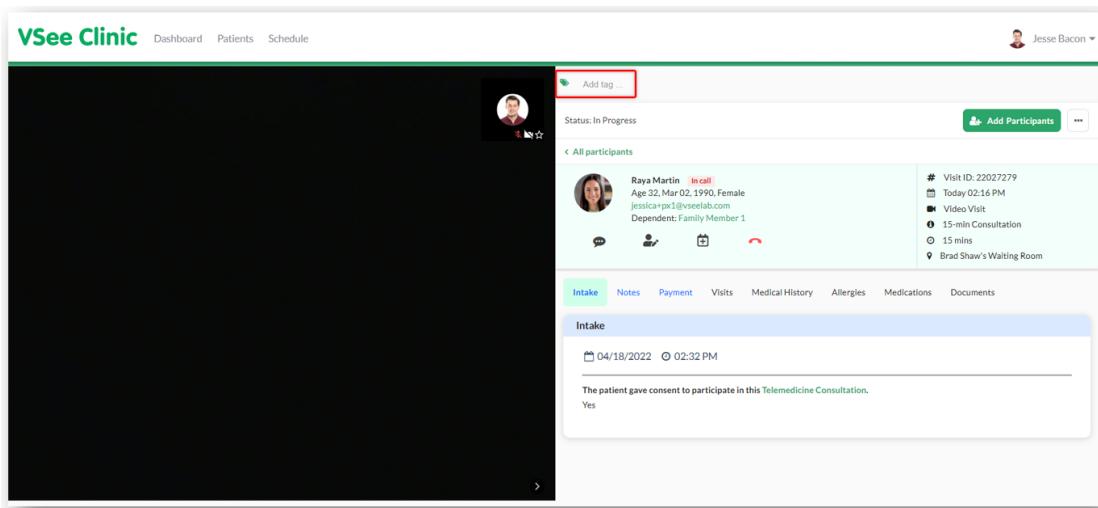


The screenshot shows the VSee Clinic dashboard. In the center, there is a list of 'New Visits (1)'. The first visit is for 'Raya Martin' (Available, Waiting 11 mins). Below the patient's name is a 'Tags:' dropdown menu. A red box highlights this menu, which contains three options: 'Need prescription refill' (which is selected and highlighted in blue), 'In progress (v)', and 'There are no ongoing visits.' A dashed red box surrounds the input field 'Need prescription refill'.

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

Tagging During the Call

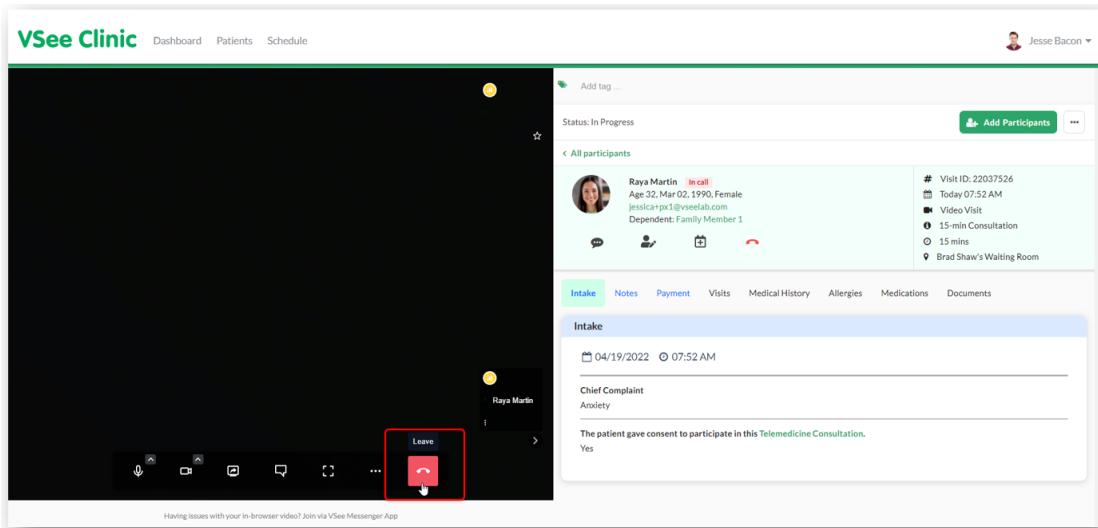
1. Call the patient from the Dashboard (see [guide](#)).
2. You should be able to see the **Add tag** field at the top of the call status. You can proceed to choose the tag from the drop-down menu that will show up when you click the field or type in the new tag that you need (see steps 3 and 4 of tagging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



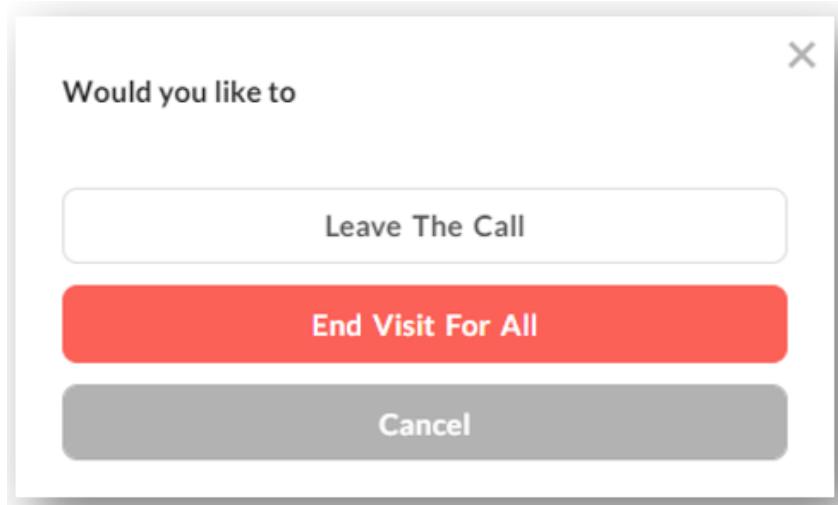
Tagging After the Call

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**.



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
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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.

The screenshot shows the VSee Clinic software interface. At the top, the logo 'VSee Clinic' is on the left, and 'Dashboard' 'Patients' 'Schedule' are on the right, along with a user profile for 'Jesse Bacon'. Below the header, a red box highlights the 'Final Session' button and the 'Refer to psychiatrist' button. The main area shows a participant list with 'Raya Martin' (Offline, Age 32, Mar 02, 1990, Female, jessica+px1@vseelab.com, Dependent: Family Member 1). To the right of the participant list are visit details: Visit ID: 22122097, Today 09:09 AM, Video Visit, 15-min Consultation, 15 mins, and Brad Shaw's Waiting Room. Below the participant list are tabs for 'Intake' (highlighted in green), 'Notes', 'Payment', 'Visits', 'Medical History', 'Allergies', 'Medications', and 'Documents'. The 'Intake' section shows a timestamp of 04/22/2022 at 09:09 AM. A note states: '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 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](#)