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CSR: Tagging

Jay-Ileen (Ai) - 2023-07-17 - 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
- <u>After the Call</u>
- <u>Related Articles</u>

Note: This feature may not be available in your clinic. Please contact <u>Sales</u> *or your Account Manager to enable this feature.*

Tagging Before the Call (Dashboard)

1. Log into your clinic (see <u>guide</u>).

2. Under the **Dashboard** tab, you should be able to see when a patient enters the Clinic and the **Add tag** field.

| | What's new on this dashboard? | Invite Patient Schedule |
|--|-------------------------------|-------------------------------|
| ✓ New Visits (1) | 0 | Today's Schedule |
| Visit ID 22027279 Brad Shaw's Waiting Room | Call | No appointments at this time. |
| Raya Martin Available (Waiting 0 mins) Female , 32 years Pemale (Waiting 0 mins) Pemale (Waiting 0 mins) | No Host | Reminder |
| Tags: Add tag | | No reminders at this time. |

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.

| /See Clinic Dashboard Patients Schedule | | 💈 Jesse Bacon 👻 |
|---|-------------------------------|-------------------------------|
| | What's new on this dashboard? | Invite Patient Schedule |
| ✓ New Visits (1) | 0 | Today's Schedule |
| Visit ID 22027279 Brad Shaw's Waiting Room | Call | No appointments at this time. |
| Raya Martin Available (Waiting 6 mins) Female, 32 years | No Host | Reminder |
| Tags: | | No reminders at this time. |
| First Visit | | |
| Follow-up Visit There Final Session | | |
| Fillal JESSION | | |

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.

| | | What's new on this dashboard? | Invite Patient Schedule |
|--|---|-------------------------------|-------------------------------|
| ✓ New Visits (1) | | φ. | Today's Schedule |
| Visit ID 22027279 Brad Shaw's Waiting Room | | Call | No appointments at this time. |
| Raya Martin Available (Waiting 11 mins) Female, 32 years Female, 32 years Female, 32 years | Q | No Host | Reminder |
| Tags: Need prescription refil | | | No reminders at this time. |

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 dropdown 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 | # 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 | |
| O4/19/2022 O 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.

| See Clinic Dashboard Patients Schedule Final Session Refer to psychiatrist | acon 🤌 Jesse Bacon |
|--|--|
| Status: Completed | Call 🛃 Add Participants 🚥 |
| All participants Raya Martin Offline Age 32, Mar 02, 1990, Female jessica+px1@vseelab.com Dependent: Family Member 1 | # Visit ID: 22122097 [™] Today 09:09 AM M Video Visit G 15-min Consultation O 15 mins Parad Shaw's Waiting Room |
| Intake Notes Payment Visits Medical History Allergies Medications Documents | |
| Intake | |
| 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 <u>help@vsee.com</u> or check out the <u>Help</u> section under the Profile Menu of your VSee Clinic.

This article was last updated on: 12 April 2023

| Tags | | | |
|------|--|--|--|
| CSR | | | |