

Knowledgebase > VSee Clinic for Providers > How to Charge your Patient for the Visit

How to Charge your Patient for the Visit Jay-Ileen (Ai) - 2023-04-12 - VSee Clinic for Providers

There are two ways for you to process the payment for your patient's visit:

During the Visit

After the Visit

During the Visit

To charge the patient during the visit, click on the **Payment** tab on the Visit details page.



If the patient mistakenly selected the visit option, you can edit it by clicking on **Change** next to the name of the visit option.

| /See Clinic | Dashboard Patients | Schedule | | | 👔 Sarah Mille |
|-----------------------|-----------------------------------|------------------|------------------------------|-------------|--------------------|
| 0 | | | Intake Payment Visits | | |
| | | | Payment | | |
| | | ● ☆ Sarah M | Payment Method | | |
| | | | Visa **** 4242 🖋 Change | | |
| | | | Invoice - March 29, 2023 | | |
| | Λ\Λ/ | | 45-min Consultation & Change | 15 mins | USD 50.00 🛍 |
| | | | + Add item | Discount | (optional) % |
| Ì | | | | Subtotal | USD 50.00 |
| | | | | Total | USD 50.00 |
| | Aileen White | AW | | Update Invo | sice Submit Charge |
| &° ≥° | 0 7 .: | ··· een White | | | |
| Having issues with yo | ur in-browser video? Join via VSe | ee Messenger App | - | | |

Select from the dropdown the correct visit option.

·

Then click on **Done.**

| VSee Clinic Dashboard Patients Schedule | Sarah Miller 🕶 |
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| SM % ☆ Sarah M | Payment Payment Method Visa **** 4242 & Change |
| AW | Invoice - March 29, 2023 45-min Consultation 15 mins USD 50.00 th Initial Consultation Available Consultation 15-min Consultation Discount (optional) % |
| Aileen White | 45-min Consultation Subtotal USD 50.00 Total USD 50.00 Update Invoice Submit Charge |
| Having issues with your in-browser video? Join via VSee Messenger App | |

Should there be additional services rendered during the Visit that was not fully covered by the initial Visit option chosen, you can add more items.

From the same Payment tab, click on the **+Add item** button.

| VSee Clinic Dashboard Patients | Schedule | 🕖 Sar | rah Miller 🔻 |
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| | Invoice - March 29, 2023 | | - |
| | 45-min Consultation & Chang | ge 15 mins USD 50.0 | 00 ti 00 |
| | + Add item | Discount (optional) | % |
| | | Subtotal USD 5 | 0.00 |
| Aileen White | AW | Total USD 5 | 0.00 |
| | een White | Update Invoice Submit Cha | rge |

An "Item Description" field will be added on top of the +Add Item button.

You can type in all the additional services that have been provided during the visit and the corresponding charges.

Note: Adding items can be done repetitively as long as they are unique from each other.

| VSee Clinic | Dashboard Patients | Schedule | | | 👔 Sarah Miller |
|-----------------------|------------------------------------|---------------|-------------------------------|----------------|-----------------------------|
| <i>ი</i> | | | Intake Payment Visits Payment | | |
| | | SM | Payment Method | | |
| | | | Invoice - March 29, 2023 | | |
| | Δ\Λ/ | | 45-min Consultation & Change | 15 mins | USD 50.00 🛍 |
| | | | Additional consultation | Discount | USD 10.00 X (optional) % |
| | | | | Subtotal | USD 60.00 |
| | Aileen White | AW | | Total | USD 60.00 |
| x^ x^ | | een White | | Update Invoice | e Submit Charge |
| Having issues with yo | ur in-browser video? Join via VSee | Messenger Ann | | | |

You may also add a discount under the discount field.

| VSee Clinic | Dashboard Patier | ts Schedule | | | 👔 Sarah Miller 🦷 |
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| 0 | | | Intake Payment Visits | | |
| | | SM ⊗ ☆ Sarah M | Payment Method Visa **** 4242 & Change | | |
| | | | Invoice - March 29, 2023 | | |
| | ۸۱۸ | | 45-min Consultation <i>P</i>Change | 15 mins | USD 50.00 🛍 |
| | | | Additional consultation | | USD 10.00 X |
| | | | + Add item | Discount | 2.00 % |
| | | | | Subtotal | USD 58.80 |
| | Aileen White | AW | | Total | USD 58.80 |
| \$ × | | ··· een White | | Update Invo | bice Submit Charge |
| Having issues with yo | ur in-browser video? Join via \ | See Messenger App | | | |

Click on **Update Invoice** to save the changes made.

| See Clinic | Dashboard Pa | atients Schedule | | | C | Sarah Mil |
|-----------------------|----------------------------|--------------------------|---|------------|------|------------|
| <i>)</i> | | | Intake Payment Visits | | | |
| | | SN ⊗ ☆ Sar | Payment Method visa **** 4242 & Change | | | |
| | | | Invoice - March 29, 2023 | | | |
| | Λ۱Λ | | 45-min Consultation & Change | 15 mins | U | SD 50.00 📋 |
| | | Y J | Additional consultation | | USD | 10.00 |
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| | | | | Subtotal | | USD 58.80 |
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| See Clinic | Dashboard | Patients | Schedule | | | | (| 🗿 Sar | ah Mill |
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| <i>ა</i> | | | | Pa | ake Payment Visits | | | | |
| | | | SM ⊗ ☆ Sarah M | Г | Invoice saved successfully. | | | | |
| | | | | L | Payment Method Visa **** 4242 & Change | | | | |
| | AV | V) | | | Invoice - March 29, 2023 | | | | |
| | | | | | 45-min Consultation Change | 15 mins | | USD 50.0 | 0 🛱 |
| | | | | | Additional consultation | | USD | 10.00 | × |
| | Aileen White | е | AW | | + Add item | Discount | 2 | | % |
| &^ ≥¢^ | | C) ·· | • een White | | | Subtotal | | USD 5 | 8.80 |
| | | | | | | Total | | USD 5 | 8.80 |

Now that all the payment details are added with the correct visit option, additional items, and a discount, you can now proceed to submit the charge.

| VSee Clinic Dashboar | rd Patients | Schedule | | | 👔 Sarah Miller 🗸 |
|--------------------------------------|-----------------------|-------------------|---|------------|--------------------|
| 0 | | | Intake Payment Visits Payment | | |
| | | SM ⊗ ☆ Sarah M | Payment Method Visa **** 4242 & Change | | |
| | | | Invoice - March 29, 2023 | | |
| | Λ | | 45-min Consultation & Change | 15 mins | USD 50.00 🛍 |
| | VV | | Additional consultation | | USD 10.00 ¥ |
| | | | + Add item | Discount | 2.00 % |
| | _ | | | Subtotal | USD 58.80 |
| Aileen | White | AVV een White | | Total | USD 58.80 |
| | · · · · | | | Update Inv | oice Submit Charge |
| Having issues with your in-browser v | ideo? Join via VSee I | Messenger App | | | |

Click on **Submit Charge**.

A pop-up window will appear, click on **Continue** to confirm.



You will see a confirmation that the invoice has been saved. It will also display the reference number and confirmation that the visit has been paid.

| VSee Clinic Dashboard Patients | Schedule | 👔 Sarah Miller 👻 |
|--|--|--|
| 0 | | Sarah Miller Premium Clinic |
| | SM Intake Payment Visits | |
| | Payment | |
| | Invoice saved successfully. | |
| | | |
| | Invoice created. Ref. ch_3Mr5OI4aYp0WGe9I1mfn41J4 (auth | norized) |
| | Payment Method | |
| Alle 10524 | Visa **** 4242 | |
| | Invoice - March 29, 2023 | |
| | 45-min Consultation | L5 mins USD 50.00 |
| Having issues with your in-browser video? Join via VSee Me | ssenger App | |

| VSee Clinic Dashboard Patients | Schedule | | | 👔 Sarah Miller 👻 |
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| 0 | | | | Sarah Miller Premium Clinic |
| | SM | Intake Payment Visits | | |
| | 🐒 😭 Saran M | Payment | | |
| | | Paid. | | |
| | | Ref: ch_3Mr5OI4aYp0WGe9l1mfn4 in_1Mr5ZP4aYp0WGe9laVF49vcO | | 6 |
| | | | | |
| | | Payment Method | | |
| | | Invoice - March 29, 2023 | | |
| Aileen White | AW | 45-min Consultation | 15 mins | USD 50.00 |
| | •• een White | Additional consultation | | USD 10.00 |
| Having issues with your in-browser video? Join via VSee ! | Vessenger App | | | |

After the Visit

There are times that you did not process the payment during the visit. But you will be reminded about it through the Reminders field on your Dashboard.

To charge the patient after the visit, click on the **Payment** tab on the Visit details page.

Click on **Pending Payment** of the selected visit under the Reminders field.

| VSee Clinic Dashboard Patients Schedule | 👰 Sarah Miller 👻 |
|---|--|
| Welcome Sarah! Get training resources to your VSee Clinic Premium. Start Here | × |
| ✓ Ready for Visits | Invite Patient Schedule |
| | No appointments at this time. |
| There are no patients waiting at this time. Invite Patients | Reminder Aileen White Visit #1000097774 Pending payment |
| | |
| | |
| | |
| Powered by VSee | |

You will be routed to the visit details page. You can see the status is still "pending payment" and "pending completion".

Note: It is important to mark the visit as completed so processing the payment when

there is a charge for the visit is required.

| Status: Completed | | 🚑 Add Participants |
|----------------------------------|----------|--------------------|
| Aileen White Offline | | |
| Intake Payment Visits | | |
| | | |
| Payment | | |
| Paid. | | |
| Ref. ch_3Mr5bE4aYp0WGe9I1baH8ugF | | |
| Payment Method | | |
| Visa **** 4242 | | |
| Invoice - March 29, 2023 | | |
| 45-min Consultation | 15 mins | USD 50.00 |
| | Discount | 0% |
| | Subtotal | USD 50.00 |
| | Total | USD 50.00 |

After reviewing the payment details and making the necessary changes, click on **Submit Charge.**

| Status: Pending Completion Pending Payment | | Call 🛃 Add Participants |
|--|----------|------------------------------|
| Aileen White Offline | | |
| Intake Payment Visits | | |
| | | |
| Payment | | |
| Payment Method | | |
| Visa **** 4242 🖋 Change | | |
| Invoice - March 29, 2023 | | |
| 45-min Consultation | 15 mins | USD 50.00 🛍 |
| + Add item | Discount | (optional) % |
| | Subtotal | USD 50.00 |
| | Total | USD 50.00 |
| | | Update Invoice Submit Charge |

A pop-up window will appear, click on **Continue** to confirm.

| ileen.test@gmail.co | P | 10.00 |
|---|--|--|
| • 2 | SUBMIT CHARGE | × |
| | You are about to finalize this invoice. Do you want to continue? | |
| | Cancel | Premium Clinic Continue |
| ayment | | |
| Payment Method | | |
| Vica **** 4242 & Change | | |
| Visa 4242 @ Change | | |
| Invoice - March 29, 2023 | | |
| Invoice - March 29, 2023 45-min Consultation | 15 mins | USD 50.00 📋 |
| Invoice - March 29, 2023 45-min Consultation + Add item | 15 mins Discount | USD 50.00 🛱 (optional) % |
| Invoice - March 29, 2023 45-min Consultation + Add item | 15 mins Discount Subtotal | USD 50.00 🗎 (optional) % USD 50.00 |
| Invoice - March 29, 2023 45-min Consultation + Add item | 15 mins Discount Subtotal Total | USD 50.00 着 (optional) % USD 50.00 USD 50.00 |
| Invoice - March 29, 2023 45-min Consultation + Add item | 15 mins Discount Subtotal Total | USD 50.00 t (optional) % USD 50.00 USD 50.00 USD 50.00 USD 50.00 Submit Charge |

You will see a confirmation that the visit has been paid. And the visit status is now marked as completed.

Note: If your clinic has enabled the SOAP notes feature, you also need to submit it to mark the visit completed.

| Status: Completed | | Call | Add Participants |
|---------------------------------|----------|------|------------------|
| Aileen White Offline | | | |
| Intake Payment Visits | | | |
| | | | |
| Payment | | | |
| Paid. | | | |
| Ref. ch_3Mr5bE4aYp0WGe91baH8ugF | | | |
| Payment Method | | | |
| Visa**** 4242 | | | |
| Invoice - March 29, 2023 | | | |
| 45-min Consultation | 15 mins | | USD 50.00 |
| | Discount | | 0% |
| | Subtotal | | USD 50.00 |
| | Total | | USD 50.00 |

Scope and Limitations:

The e-payment feature is only available for Premium and Enterprise customers.

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 | | | |
|----------|--|--|--|
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