How to Charge your Patient for the Visit

Jay-Ileen (Ai) - 2023-04-12 - VSee Clinic for Providers

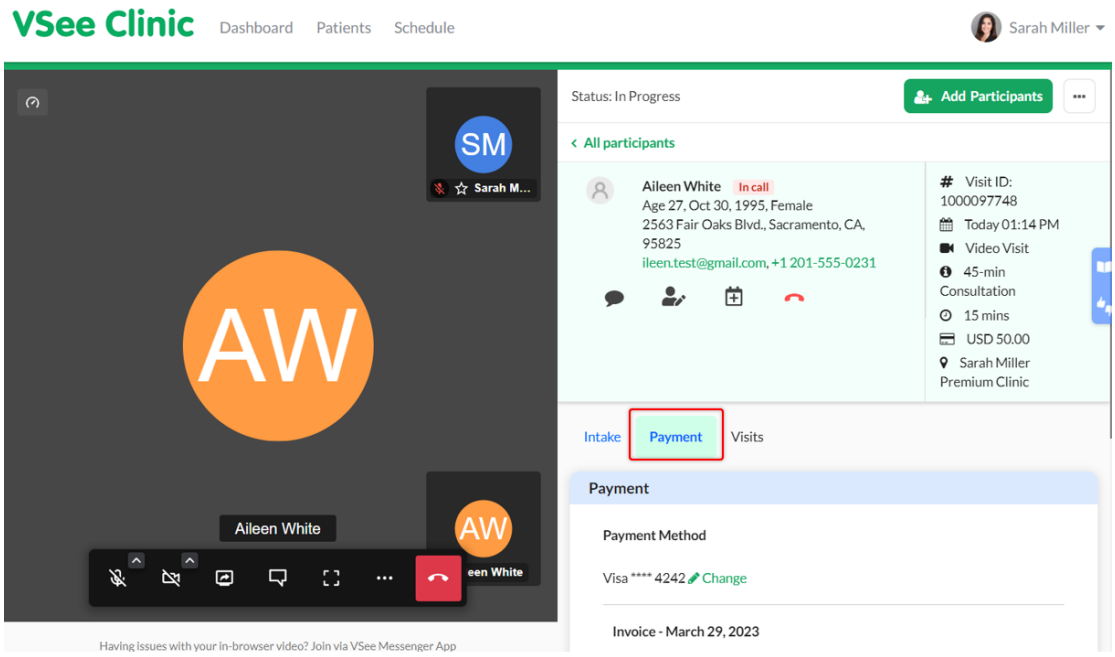
There are two ways for you to process the payment for your patient's visit:

During the Visit

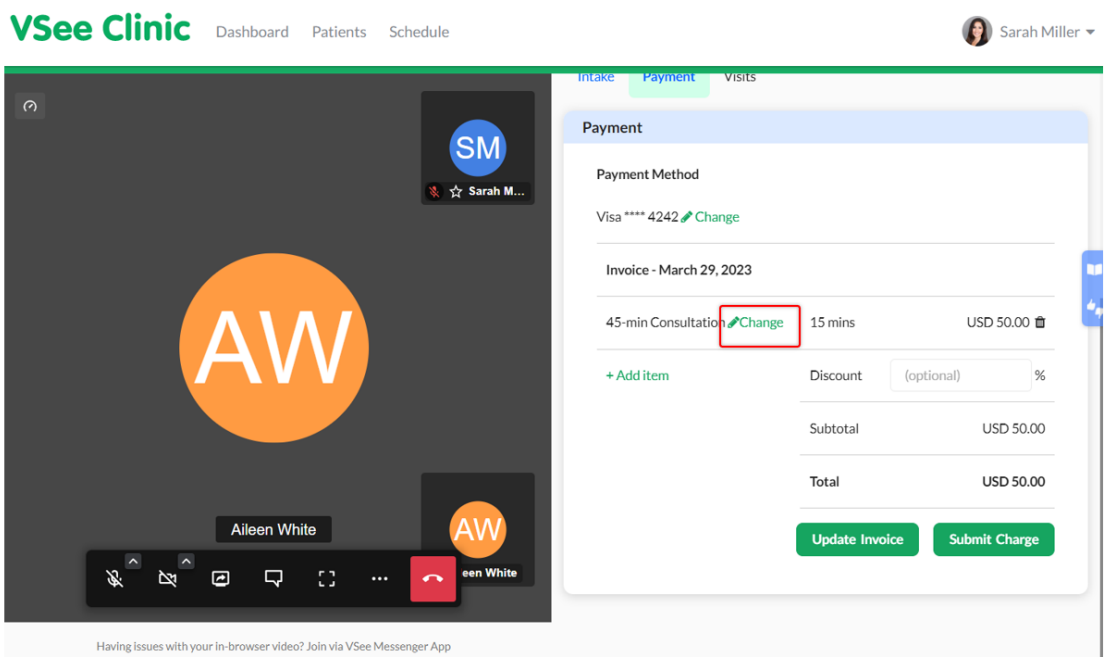
After the Visit

During the Visit

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

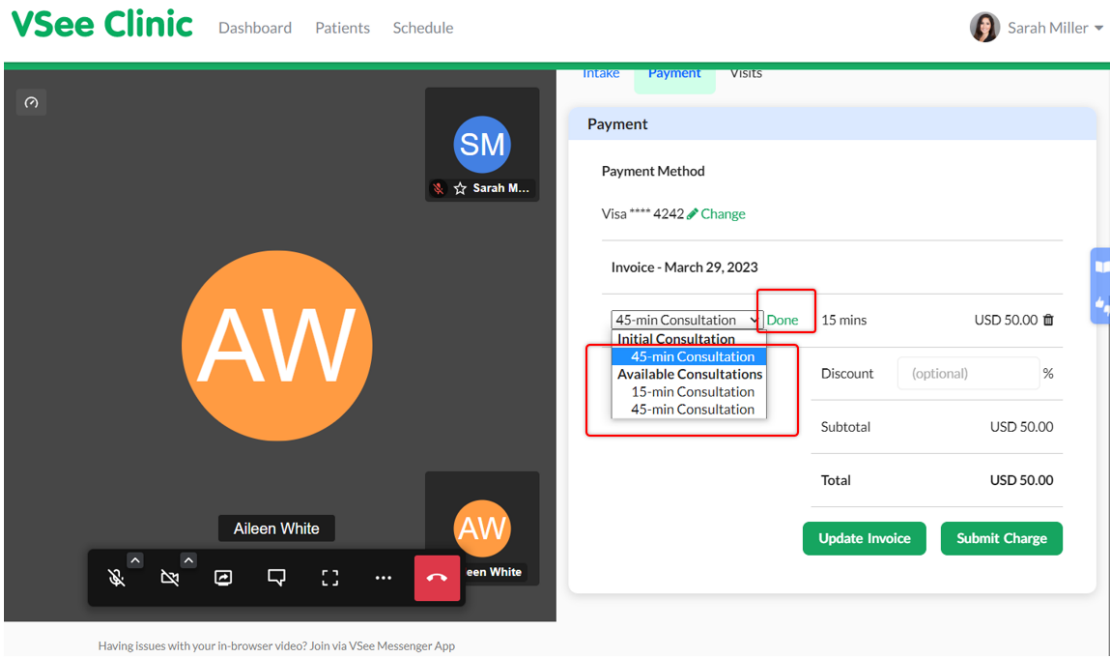


If the patient mistakenly selected the visit option, you can edit it by clicking on **Change** next to the name of the visit option.



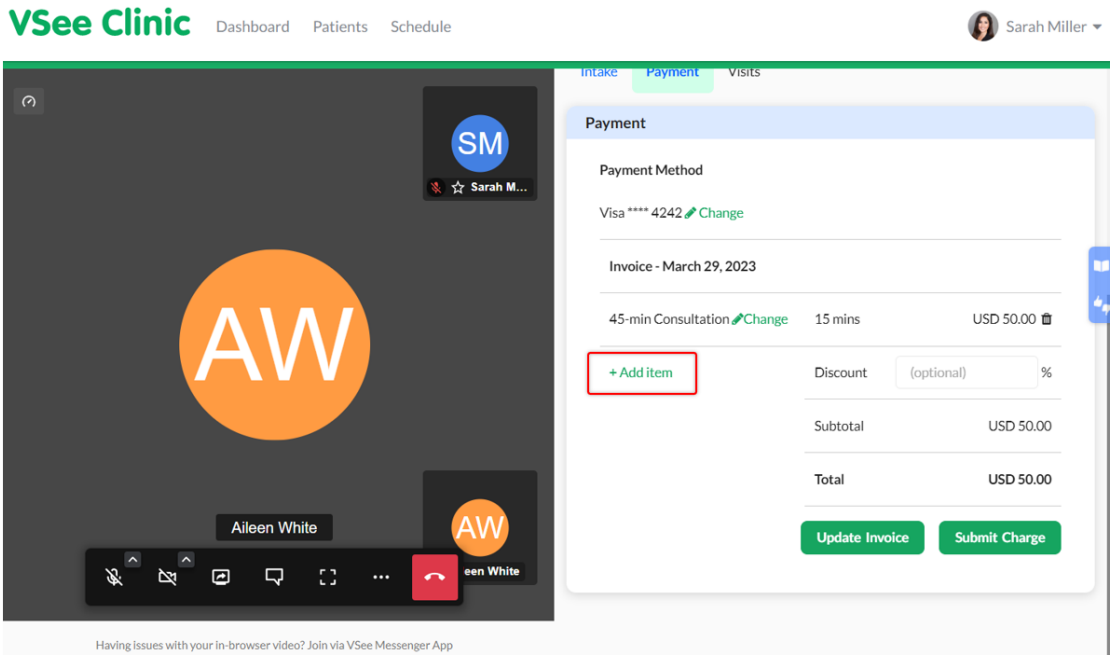
Select from the dropdown the correct visit option.

Then click on **Done.**



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.

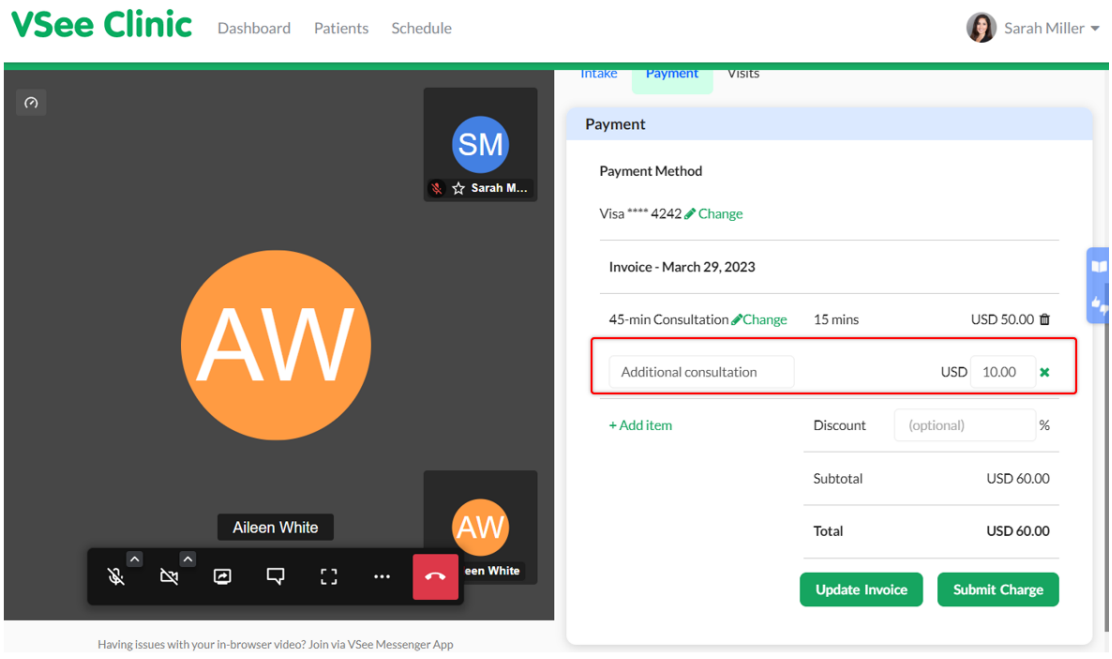
From the same Payment tab, click on the **+Add item** button.



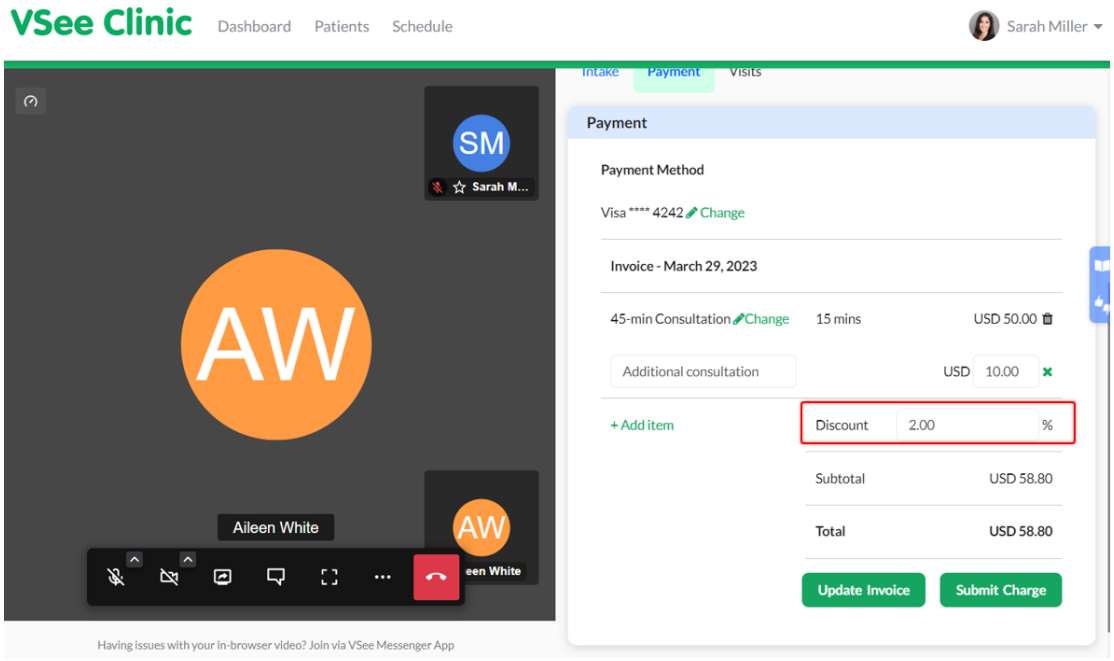
An “Item Description” field will be added on top of the +Add Item button.

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

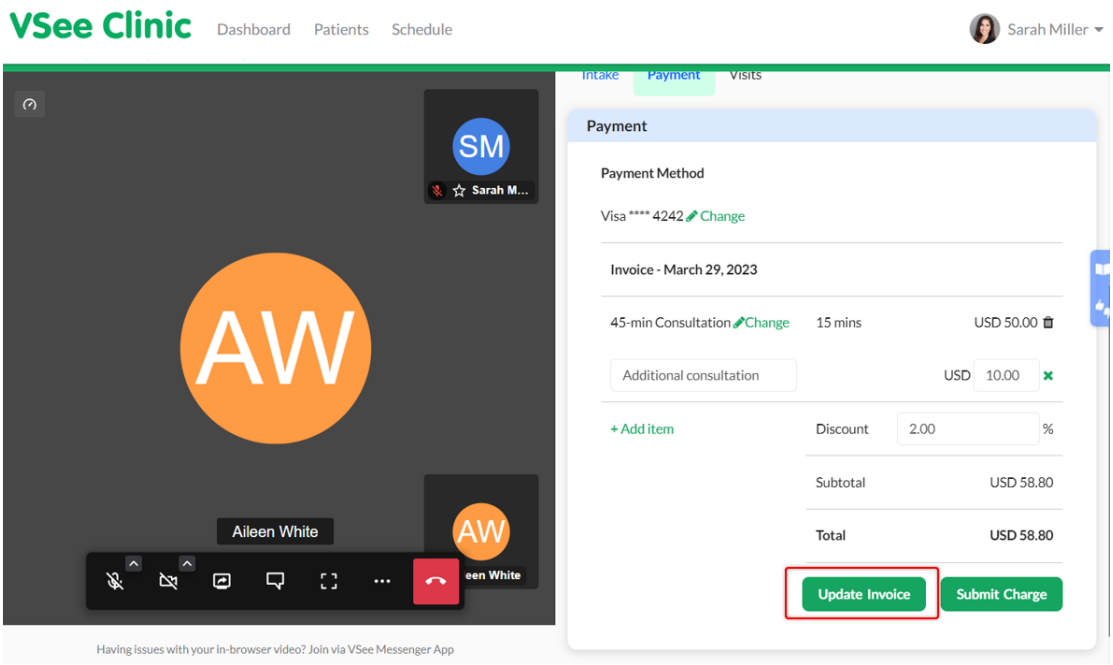
Note: Adding items can be done repetitively as long as they are unique from each other.

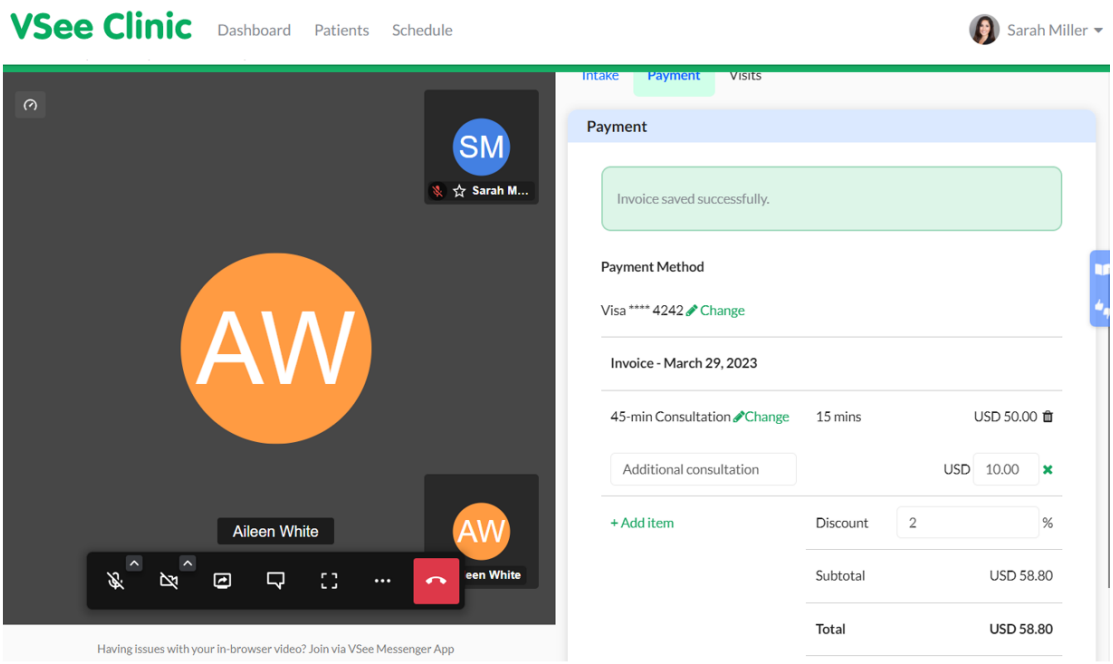


You may also add a discount under the discount field.



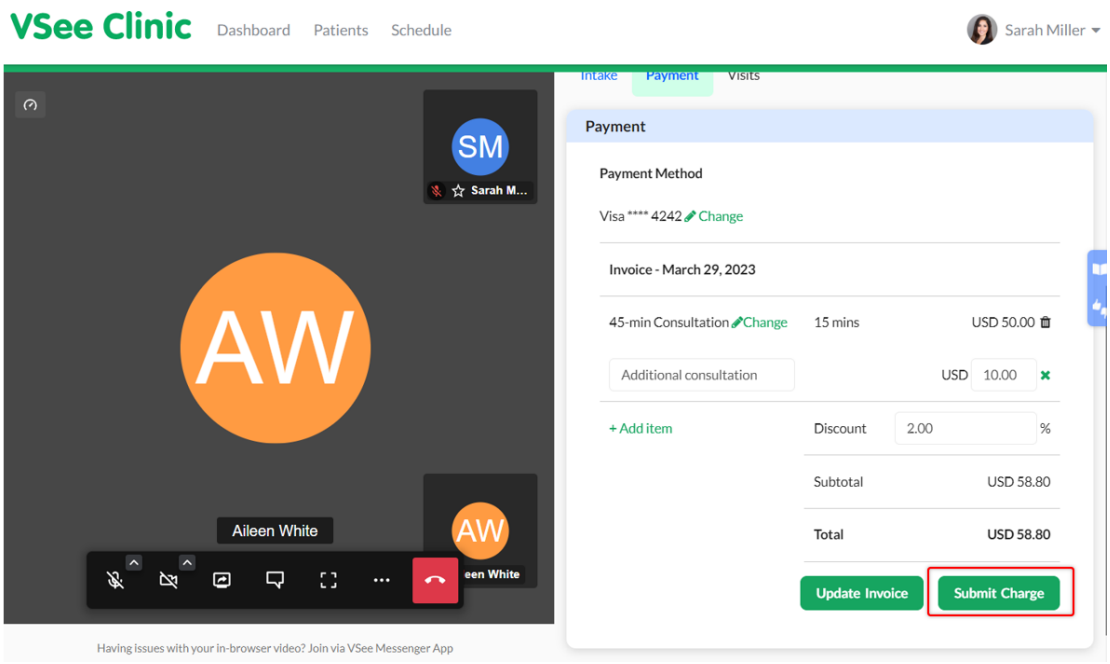
Click on **Update Invoice** to save the changes made.



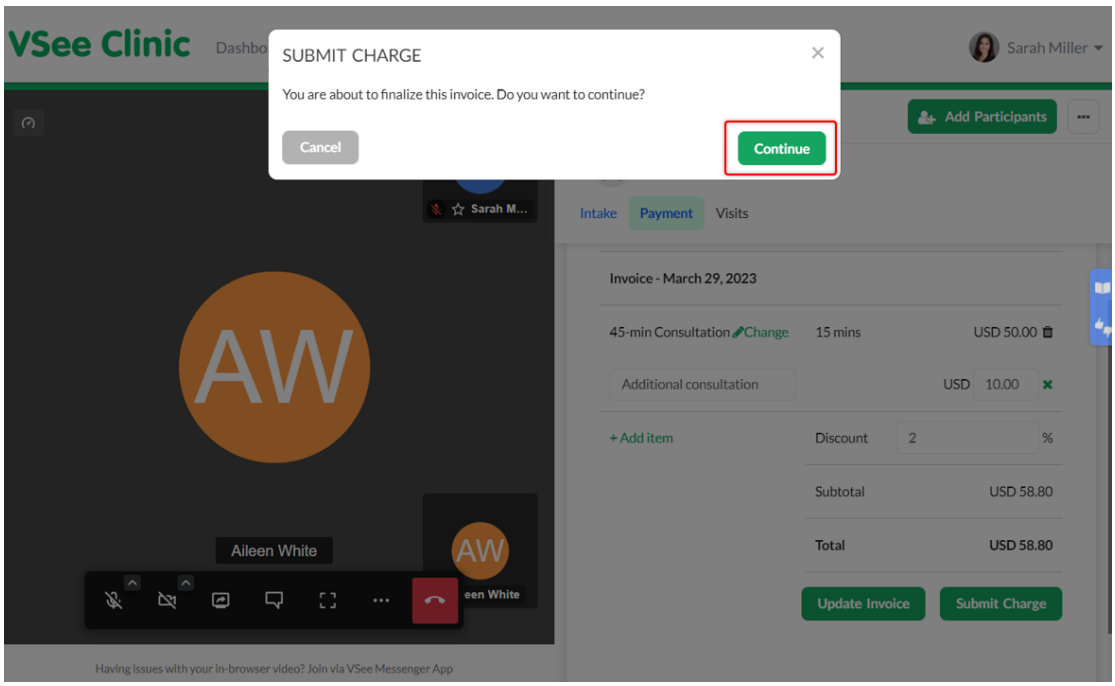


Now that all the payment details are added with the correct visit option, additional items, and a discount, you can now proceed to submit the charge.

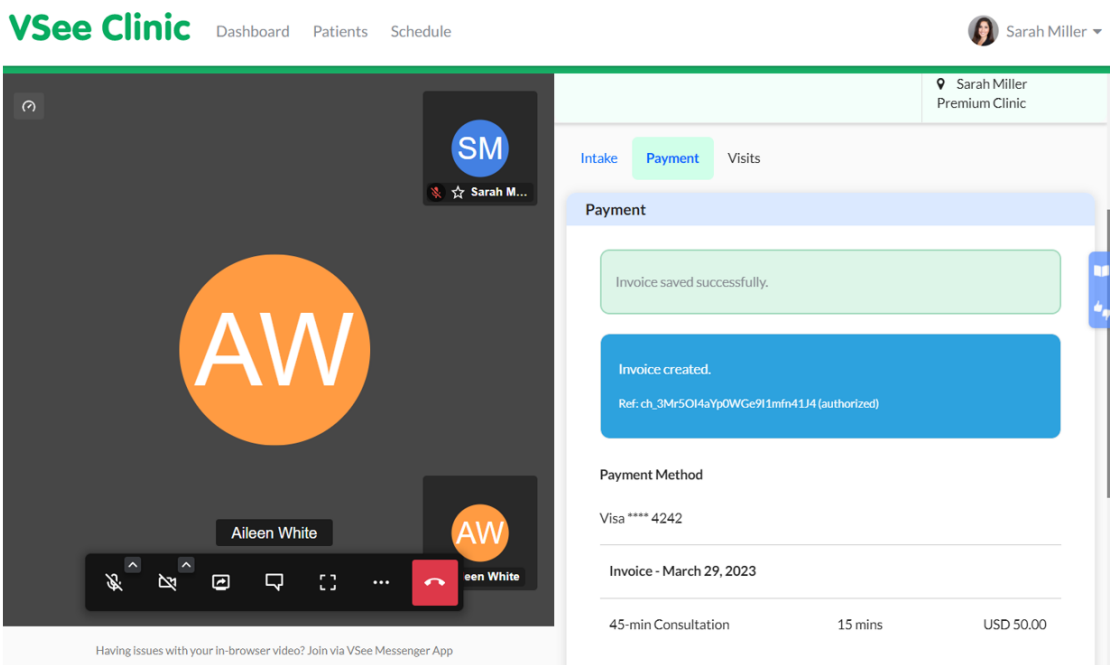
Click on **Submit Charge**.

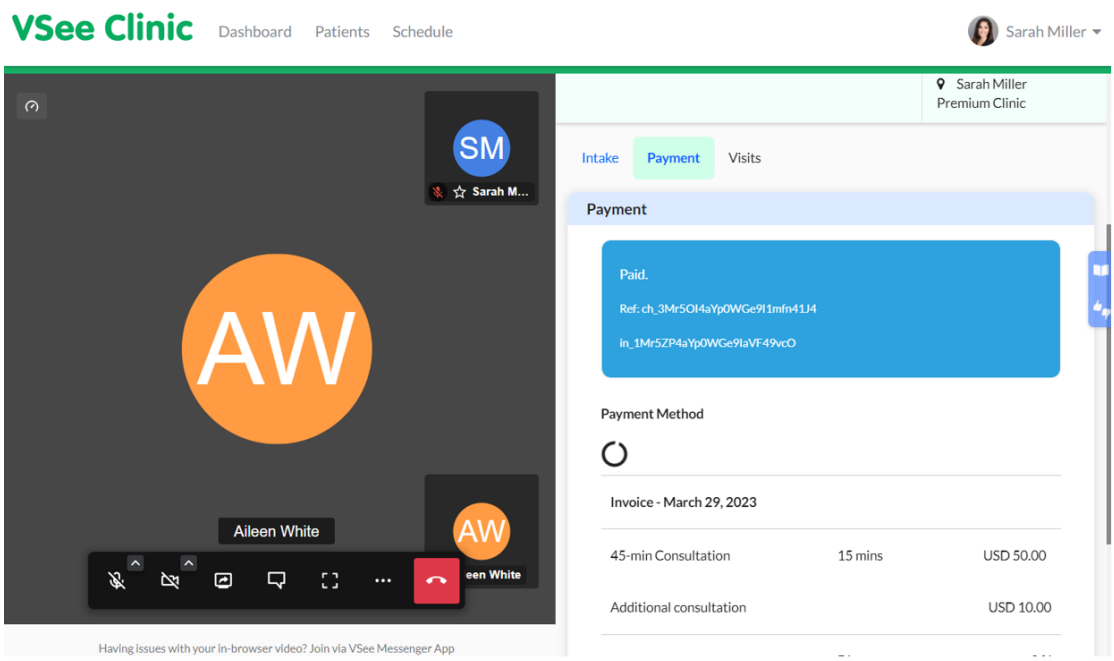


A pop-up window will appear, click on **Continue** to confirm.



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.



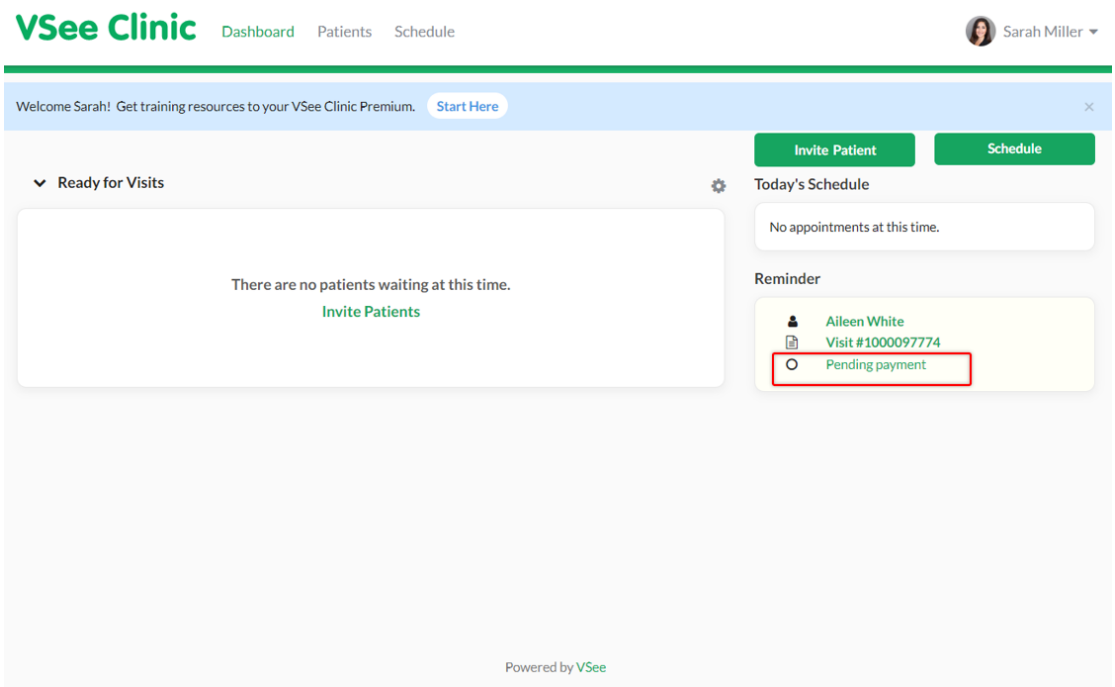


After the Visit

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.

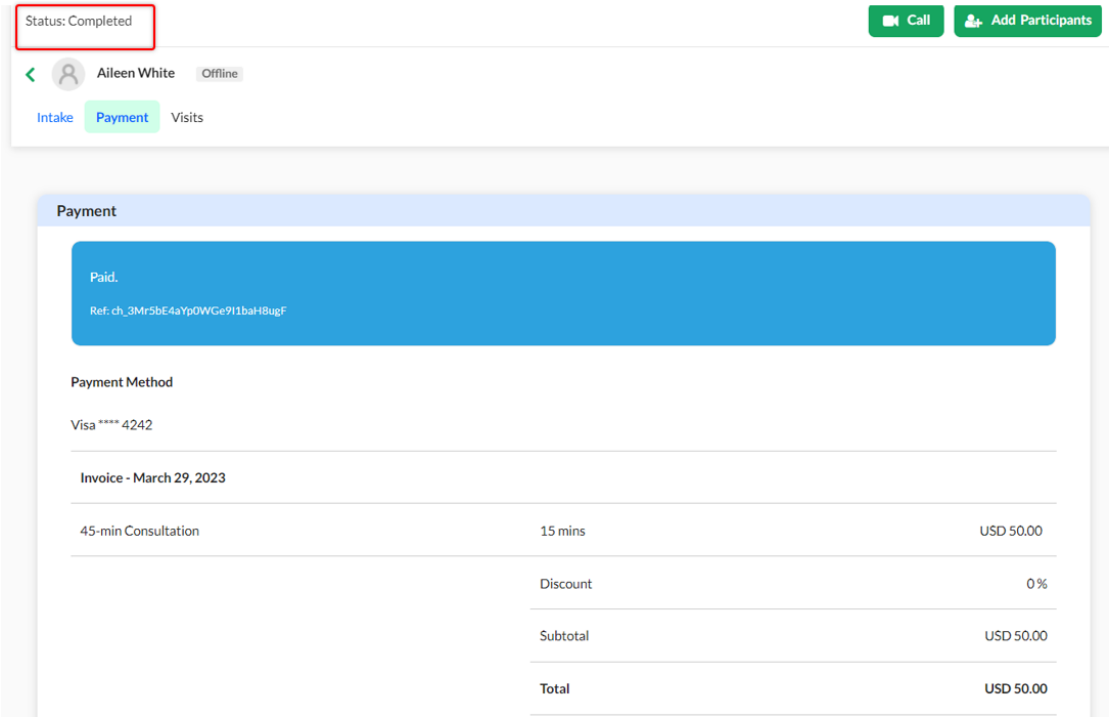
To charge the patient after the visit, click on the **Payment** tab on the Visit details page.

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

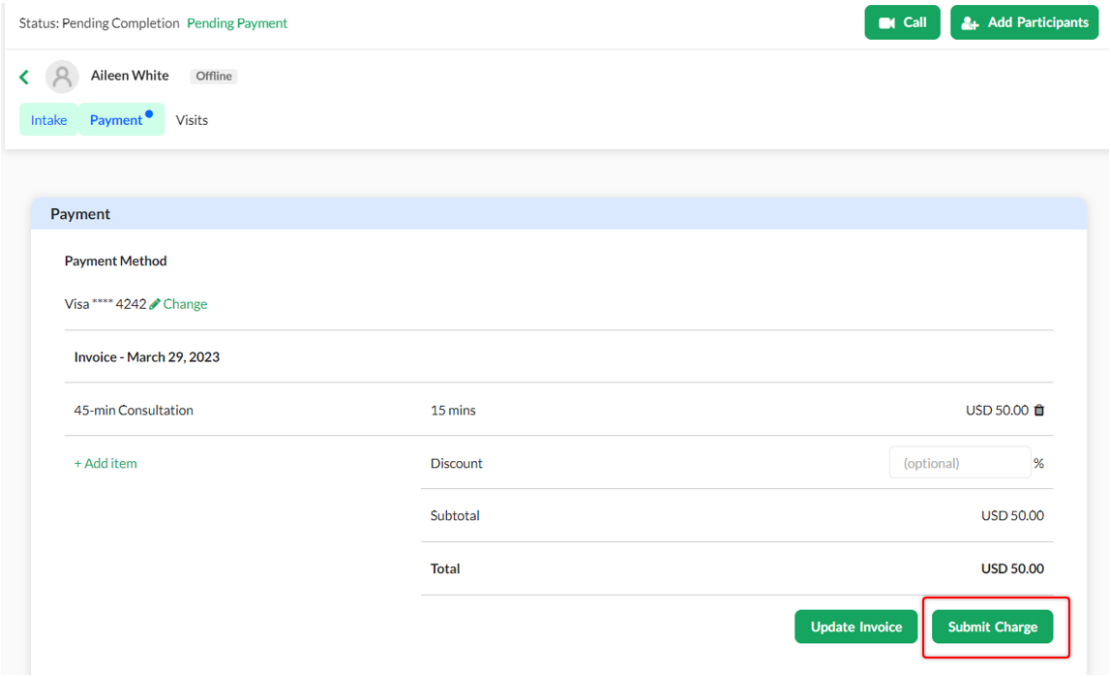


You will be routed to the visit details page. You can see the status is still "pending payment" and "pending completion".

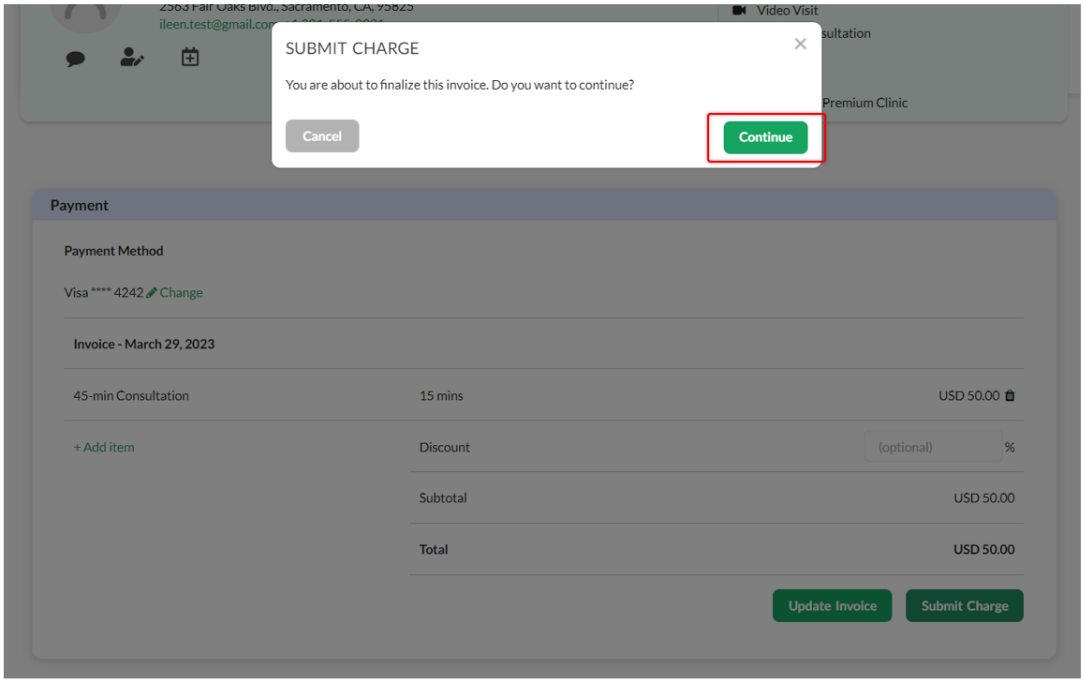
Note: It is important to mark the visit as completed so processing the payment when there is a charge for the visit is required.



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

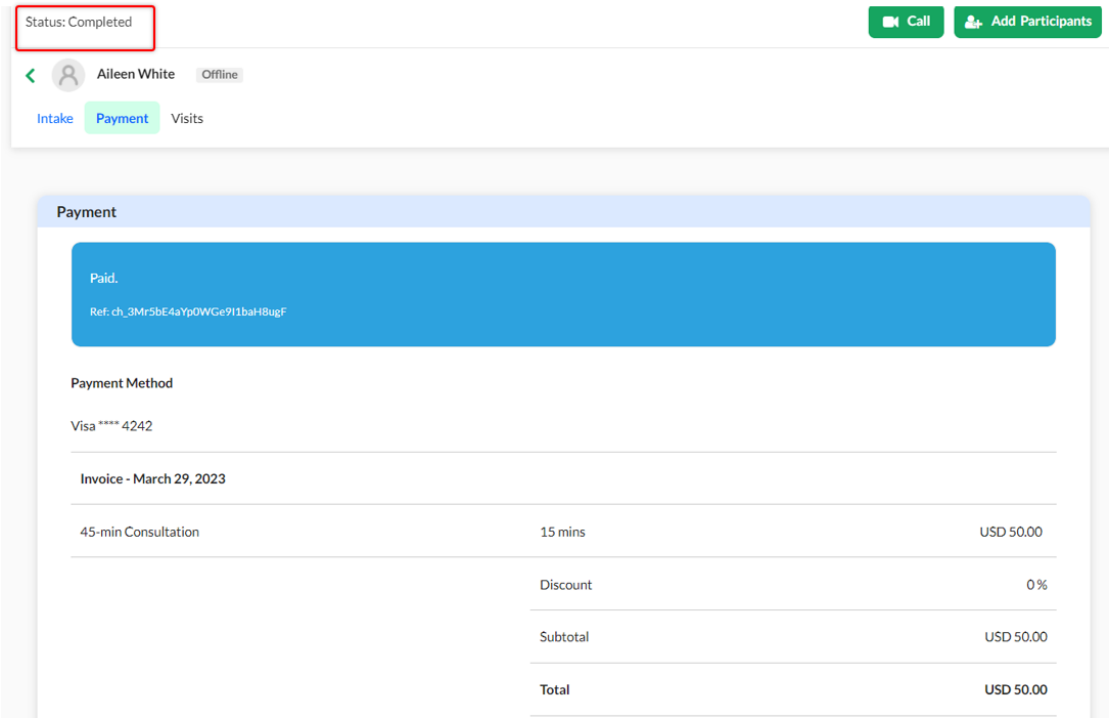


A pop-up window will appear, click on **Continue** to confirm.



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.



Scope and Limitations:

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

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.

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- Tags
- charge
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- payment