

Knowledgebase > VSee Clinic for Providers > Scheduling > How to Create a Visit as a Provider

How to Create a Visit as a Provider

- 2023-07-21 Scheduling
- 1. On your provider dashboard, click the **Schedule** tab from the top menu.

VSee Clinic Dashboard Patients Schedule e-Rx	👤 Sarah Miller 👻
What's new on this dashboard? Ready for Visits	Invite Patient Schedule Today's Schedule No appointments at this time.
There are no patients waiting at this time. Invite Patients	20 40 50
Powered by VSee	

Note: The calendar will display today's view and can also be viewed as a month, week, or day view.

VJee Ciiii	Dash	board Patien	ts Schedule	Health e-Ro	‹ • ·			
SCHEDULE	< >	Apr 2 – 8,	2023		Today	Month	Week Day	+ CREATE
Timezone					L			
(UTC-07:00) Pacific Time 🗸	•	2 Sun	3 Mon	4 _{Tue}	5 Wed	6 Thu	7 Fri	8 Sat
Time division	11:00 AM							^
15 🗸 Minutes	11:30 AM							
✓ Show consultations	12:00 PM							
Legend ^	12:30 PM							
 Open slot (one-one) 	1:00 PM							
Open slot (group)Confirmed (one-	1:30 PM							_
one)	2:00 PM							
Confirmed (group)In Progress	2:30 PM							
✓ Missed	3:00 PM							
Completed Canceled	3:30 PM							

2. Click the **+Create** button or click and drag on the calendar for the preferred date and time of the appointment.

3. Then select **Create New Visit.**

CHEDULE	< > A	Ap Cr	eate New it	Create Slots Set your available slots so patients can book a visit at	onth	Week Day	+ CREATE
ïmezone		Sche	e your patients to join	their convenience			
(UTC-07:00) Pacific Time 🗸						7 Fri	8 Sat
ime division	11:00 AM						· ·
15 🗸 Minutes	11:30 AM						
Show consultations	12:00 PM						
egend ^	12:30 PM						
Open slot (one-one)	1:00 PM						
Open slot (group) Confirmed (one-	1:30 PM			1:30 PM - 2:00 PM			
one)	2:00 PM			L			
Confirmed (group)	2:30 PM						
Missed	3:00 PM						
Completed	3:30 PM						

A pop-up window will appear.

Note: You can edit the Visit Name by clicking on **Edit** or you can use the default Visit name. For more information, please read: <u>How to Add a Descriptive Name When</u> <u>Creating Appointments</u>.

4. Indicate the **date** and **time** of the appointment.



5. Choose the **Visit Type**.

Note: If you belong to multiple rooms, make sure you choose the correct room from the dropdown options.

VSee Clir	Create New Visit ×	👤 Sarah Miller 👻
	Visit Name * Edit	
SCHEDULE	VSee Academy Appointment	Y + CREATE
Timezone	Time*	
(UTC-07:00) Pacific Tim	Now Later Wed 04/05/2023 01:30 PM	8 Sat
Time division	Does not repeat 🗸 🗸	
15 V Minutes	Visit Type Room *	
Show consultations	Video Phone In Person Training - code: vsee-training * v	
Legend ^	Visit Ontion *	
Open slot (one-one)Open slot (group)	Individual 15-min Consultation	
Confirmed (one-one)	Add Patient *	
In Progress	Search by name, email, phone # and more + New	
Missed	Patient will be notified automatically via email and text message	
Completed		
Canceled	MORE OPTIONS	
	+ More provider + Other guest + Reminder	
	Cancel Create Visit	

6. Select the Visit Option.

Note: You can add more visit options by clicking on the **+New** button.

VSee Clin	Create New Visit ×	Sarah Miller -
	Visit Name * Edit	
SCHEDULE	VSee Academy Appointment	CREATE
Timezone	Time *	
(UTC-07:00) Pacific Tim	Now Later Wed 04/05/2023 01:30 PM	8 Sat
Time division	Does not repeat 🗸 🗸	
15 🗸 Minutes	Visit Type Room	
Show consultations	Video Phone In Person Training - code: vsee-training * V	
Legend ^	0 Vicit Ontion *	
Open slot (one-one)	Individual 15-min Consultation	
Open slot (group)		
Confirmed (group)	Add Patient *	
In Progress	Search by name, email, phone # and more + New	
Missed	Patient will be notified automatically via email and text message	
Completed		
Canceled	MORE OPTIONS	
	+ More provider + Other guest + Reminder	
	Cancel Create Visit	

7. Search and select the patient account by clicking on it.

VSee Clin	Create New Visit ×	Sarah Miller 👻
	Visit Name * Edit	
SCHEDULE	VSee Academy Appointment	CREATE
Timezone	Time *	
(UTC-07:00) Pacific Tim	Now Later Wed 04/05/2023 01:30 PM	8 Sat
Time division	Does not repeat 🔹 🗸	
15 V Minutes	Visit Type * Room *	
Show consultations	Video Phone In Person Training - code: vsee-training * v	*
Legend ^	Visit Option *	
Open slot (group)	Individual 15-min Consultation	
Confirmed (one-one)	Add Patient *	
In Progress	amber.davis.patient@gmail.com	
Missed	Amber Davis	
Completed	01/01/1992, LOS ANGELES, CA	
Canceled	+ More nonvider + Other guest + Reminder	
	i More provider i Other Buest i Renninder	
	Cancel Create Visit	

Note: If the patient is not found, create one by clicking on **Create new patient** or click the **+New** button on the right.

VSee Clin	Create New Visit	×	👤 Sarah Miller 👻
	Visit Name *	Edit	
SCHEDULE	VSee Academy Appointment		Y + CREATE
Timezone	Time *		
(UTC-07:00) Pacific Tim	Now Later Wed 04/05/2023 01:30 PM		8 Sat
Time division	Does not repeat		^
15 🗸 Minutes	Visit Type * Room *		
Show consultations	Video Phone In Person Training - code: vsee-training	× •	
Legend ^	Visit Option !		
Open slot (one-one)	Individual 15-min Consultation	+ New	
Confirmed (one-one)			
Confirmed (group)	Add Patient *		
In Progress	amber sanders	+ New	
Missed	No patient found Create new patient	>	
Completed			
Canceled	MORE OPTIONS		
	+ More provider + Other guest + Reminder		
	Cancel	ate Visit	•

The "Create New Patient" field will appear.

A. Input at least the patient's first name, last name, and email address.

Note: It is optional to add the Phone number and Date of Birth.

You can also click on View More to add other details about the patient.

B. Click **Save**.

VSee Clin	Creat	te New Patient	×	👤 Sarah Miller 👻
		Create as Dependent		
SCHEDULE	First Name *	Last Name "		CREATE
Timezone				
(UTC-07:00) Pacific Tim	Email *			8 Sat
Time division				
15 V Minutes	Phone(optional)	Date of Birth(optional)		
Show consultations	View more			
Legend A	()	Cancel Save		`
Open slot (one-one)		B		
Open slot (group)				
Confirmed (one-one)				
Confirmed (group)				
In Progress				
Missed				
Completed				
Canceled				

		r ii os indine	Last renne		
ee Clinic Dash	board Patients Schedule				🗩 👤 Sarah Mi
		Phone(optional)	Date of Birth *		
		• (201) 555-0123			
	< > Apr 2 -	Email(optional)		Today Month	Week Day + CRE
1					
acific Tirr 👻		MRN(optional)		/ Fri	8 Sat
á.	11:00 AM				
tes	11:30 AM	Gender(optional)			
Itations	12:00 PM				
	12:30 PM	Address(optional)			
(one-one)	1:00 PM	i			
oup)	• • · · · · · · · · · · · · · · · · · ·	City(optional)			
d (one-one)	1:30 PM				
ned (group)	2:00 PM	State(optional)			
ress	2:30 PM		~		
ted	3:00 PM	Zip(optional)	i		
		1			
	3:30 PM	Primary Care Physician Nan	ne(optional)		
	4:00 PM				
	4:30 PM	Primary Care Physician Pho	ne(optional)		
	5:00 PM	• (201) 555-0123			
		Timezone(optional)			
		(UTC-07:00) Pacific Time (U	JS & Canada) 🗸 🗸		

If the patient is a Dependent, click the checkbox on **Create as Dependent.**

SCHEDULE First Name* Last Name* Timecone (UTC-07:00) Pacific Tim Email* Time division 15 v Minutes Phone(optional) Date of Birth(optional) i + CREATE 8 Sat * 4 Show consultations View more Legend ^ © Open slot (one-one) © Open slot (group)	
SCHEDULE First Name * Last Name * Timezone (UTC:07:00) Pacific Tim Email * Time division 15 Minutes Phone(optional) Date of Birth(optional) Show consultations View more Legend ^ Cancel Save Cancel Save	
Timezone (UTC:07:00) Pacific Tim Email * Time division 15 v Minutes Phone(optional) Date of Birth(optional) i * (201) 555:0123 Show consultations View more Legend ^ i Open slot (one-one) i Open slot (one-one) i Confirmed (group)	
(UTC-07:00) Pacific Tim Email* Time division Phone(optional) 15 v Minutes Phone(optional) Date of Birth(optional) Image: the state of the	
Time division 15 • Minutes Phone(optional) Date of Birth(optional) Image: Ima	
Is winutes Phone(optional) Date of Birth(optional) Image: Show consultations Image: Show consultations View more Cancel Image: Show consultations View more Image: Open slot (one-one) Image: Show consultations Image: Open slot (group) Image: Show consultations	
Show consultations View more Cancel Save Open slot (ane-one) Confirmed (group) Confirmed (group) Confirmed (group) Confirmed (group)	5
Show consultations View more Legend ^ Cancel Open slot (one-one) Open slot (group) Confirmed (group) Confirmed (group)	
Legend ^ Cancel Save Open slot (ane-one) Open slot (group) Confirmed (one-one) Open slot (group)	ľ
Open slat (one-one) Open slat (group) Confirmed (one-one) Confirmed (group)	
Open slot (group) Confirmed (one-one) Confirmed (group)	
Confirmed (one-one)	
Confirmed (group)	
🔯 in Progress	
Missed	
Completed	
Canceled	

A. You need to search and select the **Primary Account** or the parent/guardian of the patient (whose account should already be created in the clinic system).

If the primary account's name is not searchable, uncheck the Create as Dependent checkbox and create the primary account first.

B. Input at least the dependent's first name, last name, and date of birth.

Note: It is optional to add the Phone number you can also click on **View More** to add other details about the patient.

C. Click on Save.

Note: For Premium Clinics with special cases (e.g. Pediatrics), the Dependent feature can be made available. Please contact Customer support to enable the feature.

VSee Clin	Create New Patient	×	Sarah Miller 👻
	✓ Create as Dependent		
SCHEDULE	Primary Account *		Y + CREATE
Timezone	Search primary account by name or email address		
(UTC-07:00) Pacific Tim	First Name * Last Name *		8 Sat
Time division			^
15 Minutes	Phone(optional) Date of Birth *		
15 •	• (201) 555-0123		
Show consultations	View more		· · · · · · · · · · · · · · · ·
Legend ^	Cancel Save		_
Open slot (one-one)	•••••••••••••••••••••••••••••••••••••••		
Open slot (group)			
Confirmed (one-one)			
Confirmed (group)			
In Progress			
Missed			
Completed			
Canceled			

Note: For MORE OPTIONS, you can add secondary providers under **+More provider**, guests under **+Other guest**, and send reminders to the participants of the visit under **+Reminders**.

8. Click on **Create Visit** to proceed.

VSee Clin	Create New Visit ×	👤 Sarah Miller 👻
	Visit Name * Edi	it
SCHEDULE	VSee Academy Appointment	Y + CREATE
Timezone	Time *	A
(UTC-07:00) Pacific Tim	Now Later Wed 04/05/2023 01:30 PM	8 Sat
Time division	Does not repeat 🗸 🗸	
15 🗸 Minutes	Visit Type * Room *	
Show consultations	Video Phone In Person Training - code: vsee-training * v	
Legend A Open slot (one-one) Open slot (group) Confirmed (one-one) Confirmed (group) Confirmed (group) Confirmed (group)	Visit Option * (mdHvdusi) 15-min Consultation * New Add Patient * Amber Davis (amber.davis.patient@gmail.com) * * New	
Completed Canceled	Patient will be notified automatically via email and text message MORE OPTIONS + More provider + Other guest + Reminder Cancel Create Visit	

9. Check the appointment details and click on **Confirm** to complete creating the scheduled appointment.

VSee Clin	Confirm New	/ Visit	×	Sarah Miller 👻
SCHEDULE Timezone (UTC-07:00) Pacific Tim Time division 15 ~ Minutes I Show consultations Legend ^ Open slot (one-one) Open slot (group) Confirmed (group) Confirmed (group) In Progress Missed Completed Canceled	Visit Name Time Visit Type Room Visit Option Patient Provider	VISIC VSee Academy Appointment Wed, Apr 05, 2023 01:30 PM (PDT) Video Training 15-min Consultation Amber Davis Sarah Miller		Sarah Miller CREATE

The visit has been confirmed.

VSee Clinic	Dashboard		× 👂 👤 Sarah Miller 👻	
	_		New Visit Confirmed	
SCHEDULE	< > Ap	Visit Name	VSee Academy Appointment Aonth Week Day + CREATE	
Timezone		Time	Wed, Apr 05, 2023 01:30 PM (PDT)	
(UTC-07:00) Pacific Tim 🖌		Visit Type	Video / Fri 8 Sat	
Time division	11:00 AM	Visit Option	15-min Consultation	
15 V Minutes	11:30 AM	Patient	Amber Davis	
Show consultations	12:00 PM	Provider	Sarah Miller	4,
Legend A	12:30 PM	Room	Iraining	•
Open slot (one-one)	1:00 PM	Telephone:	+1.650.758.0255	
Open slot (group) Confirmed (one-one)	1:30 PM	Meeting PIN:	783096	
Confirmed (group)	2:00 PM	Guest invite link:	https://vse-	
In Progress Missed	2:30 PM		academyvsee.me/visits/join/642dd832206c42c993566a0f0ad c0ac7 @cCopy	
Completed	3:00 PM			
Canceled	3:30 PM		1 A C At Go To Visit Page	
	4:00 PM			
	4.20 014		· · · · · · · · · · · · · · · · · · ·	

Both the provider and patient will receive an email and/or SMS (if enabled) regarding the confirmed appointment.

Provider side

Dear Sarah,

A new appointment is confirmed

Date: 01:30 PM on Wed, Apr 05 2023 (PDT) Visit Type: Video

Please log into the portal 15 minutes before the scheduled time.

Go To Your Dashboard

Click here to review, edit or cancel the appointment

If you have any questions, please contact us at help@vsee.com or (650) 614-1746.

Thank you for using VSee Academy!

Patient side

Confirmation: VSee Academy Appointment Inbox ×

VSee Academy <noreply@vsee.com> @ 1:21PM (1 minute ago) ☆ ← : to me 💌 Apr Appointment with Sarah Miller at VSee... Agenda Ved Apr 5, 2023 5 When Wed Apr 5, 2023 8:30pm - 8:45pm (UTC) No earlier events Wed Who Sarah Miller* 8:30pm Appointment with Sarah Miller at Add to calendar » VSee... No later events Dear Amber Your appointment at VSee Academy is now confirmed Date: 01:30 PM on Wed, Apr 05 2023 (PDT) Visit Type: Video Please log into the portal 15 minutes before your scheduled time. Start Visit You are recommended to test your device before the visit to ensure stable call quality.

If you have any questions, please contact us at <u>help@vsee.com</u> or (650) 614-1746. Thank you for using **VSee Academy!**

Scope and Limitations

- The Scheduling feature is available only for Enterprise, Premium, and Plus clinics.
- For Premium Clinics with special cases (e.g. Pediatrics), the Dependent feature can be made available. Please contact Customer support to enable the feature.

Related Articles

- In the Call: How to Create a Follow-up Appointment for the Patient
- How to Schedule a Group Appointment from the Schedule Tab (Provider)
- Calendar Improvements
- How to Create Visit Slots

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: 05 April 2023

Tags

8 C

create a visit schedule scheduled appointment visit