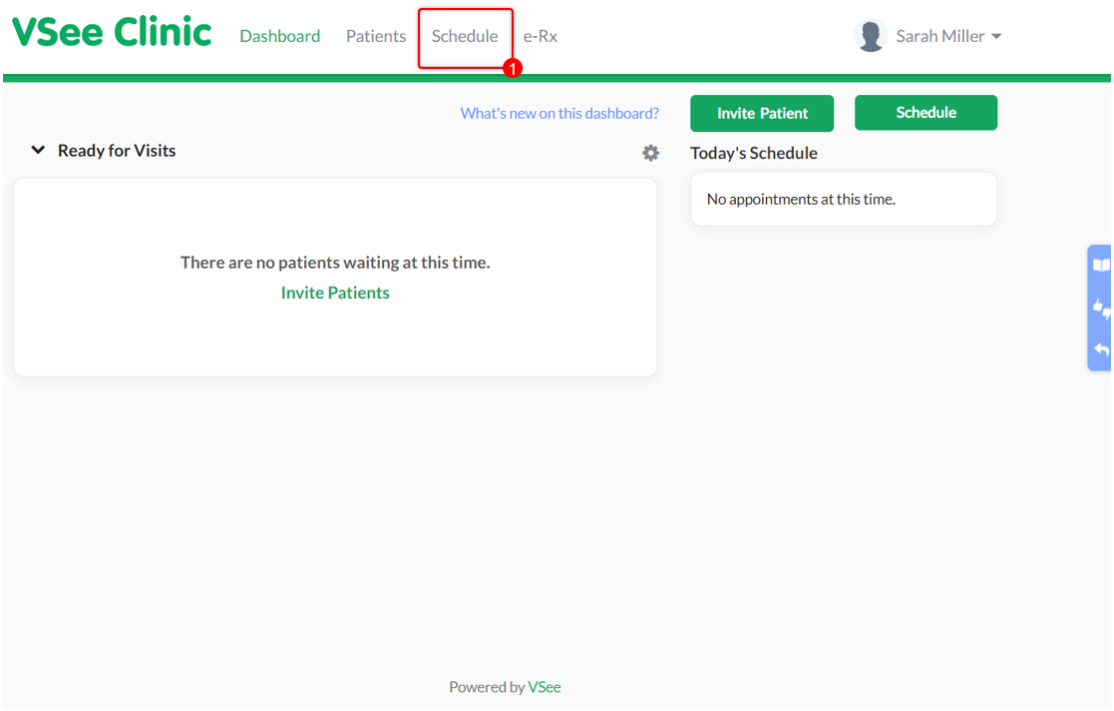
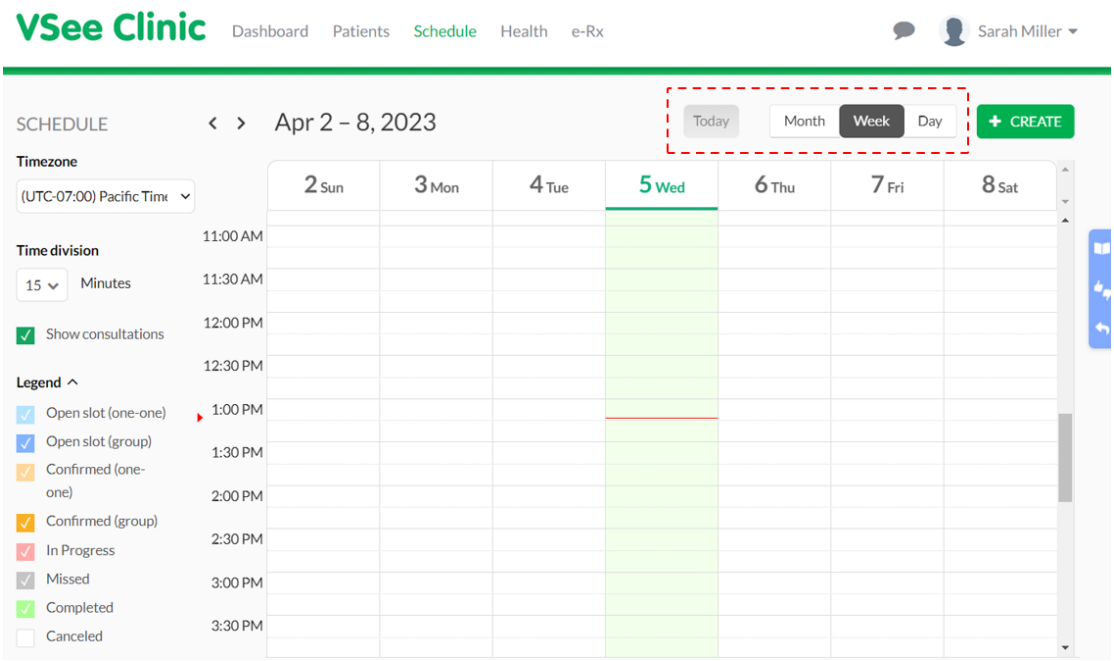
How to Create a Visit as a Provider

- 2023-07-21 - Scheduling

1. On your provider dashboard, click the **Schedule** tab from the top menu.

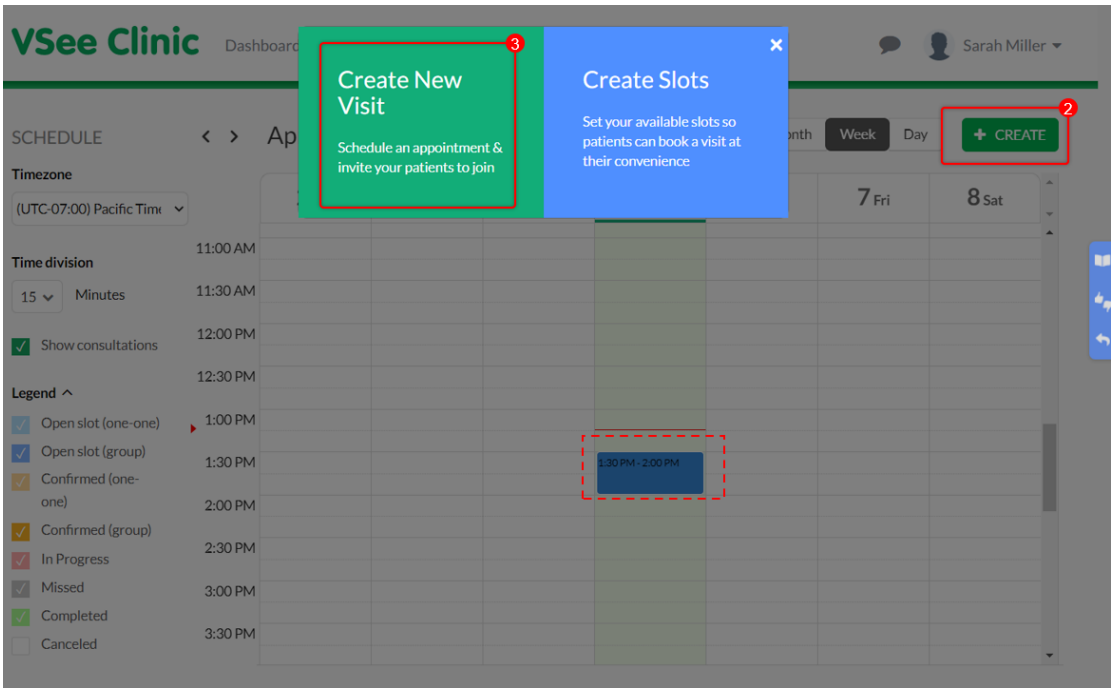


Note: The calendar will display today's view and can also be viewed as a month, week, or day view.



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

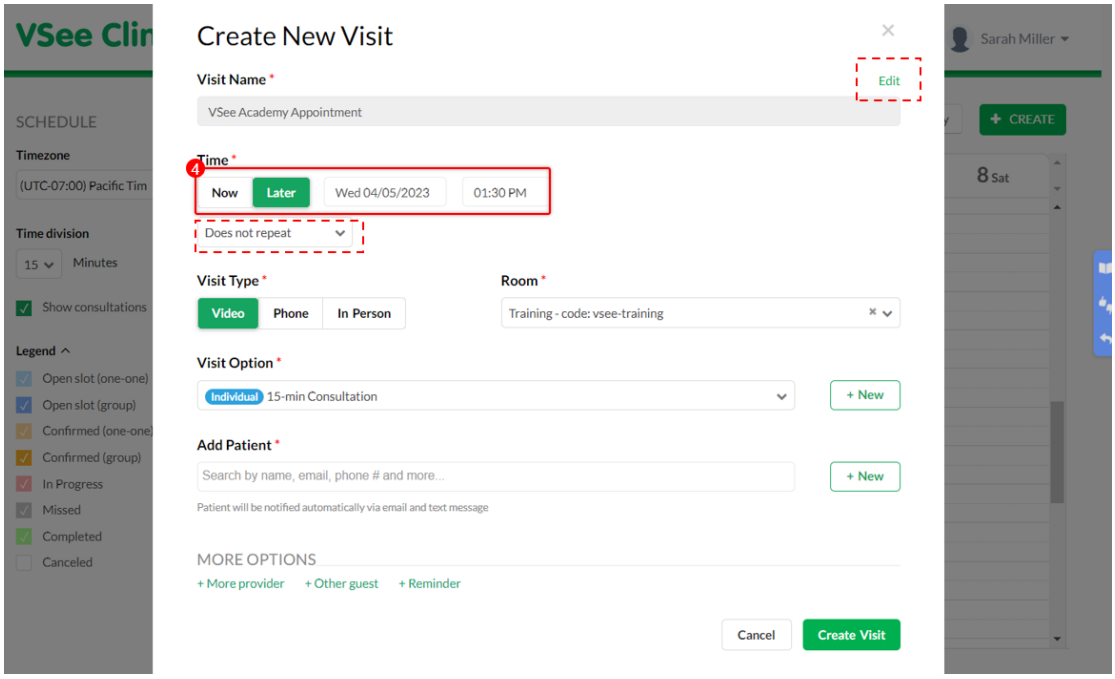
3. Then select **Create New Visit.**



A pop-up window will appear.

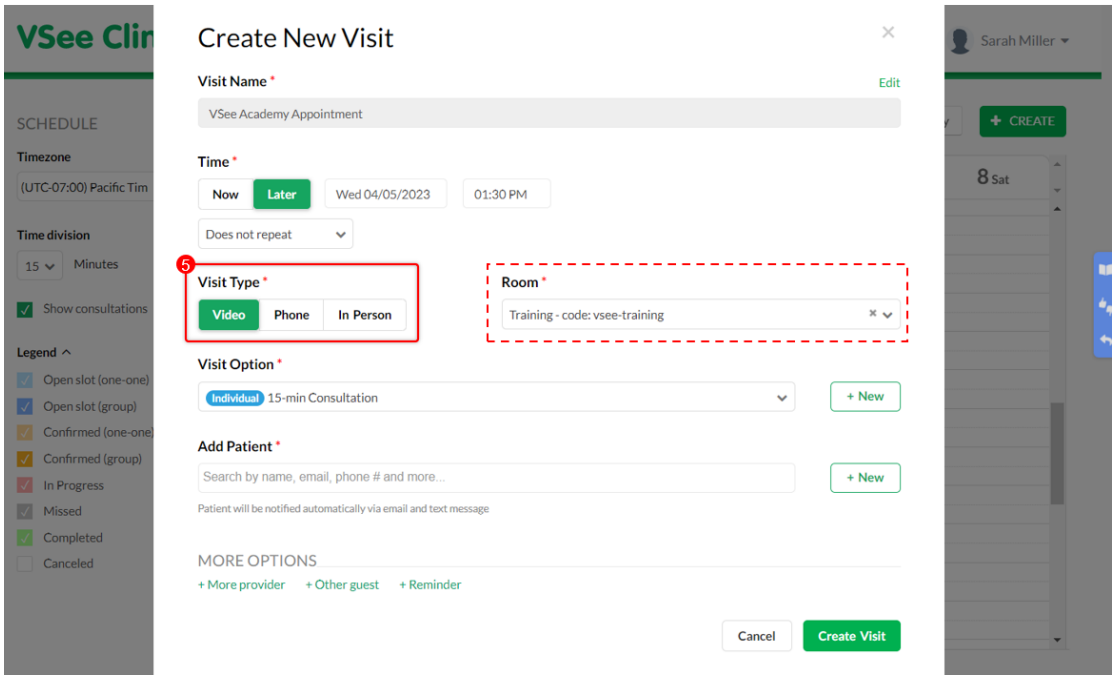
Note: You can edit the Visit Name by clicking on ***Edit*** *or you can use the default Visit name. For more information, please read: How to Add a Descriptive Name When Creating Appointments.*

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



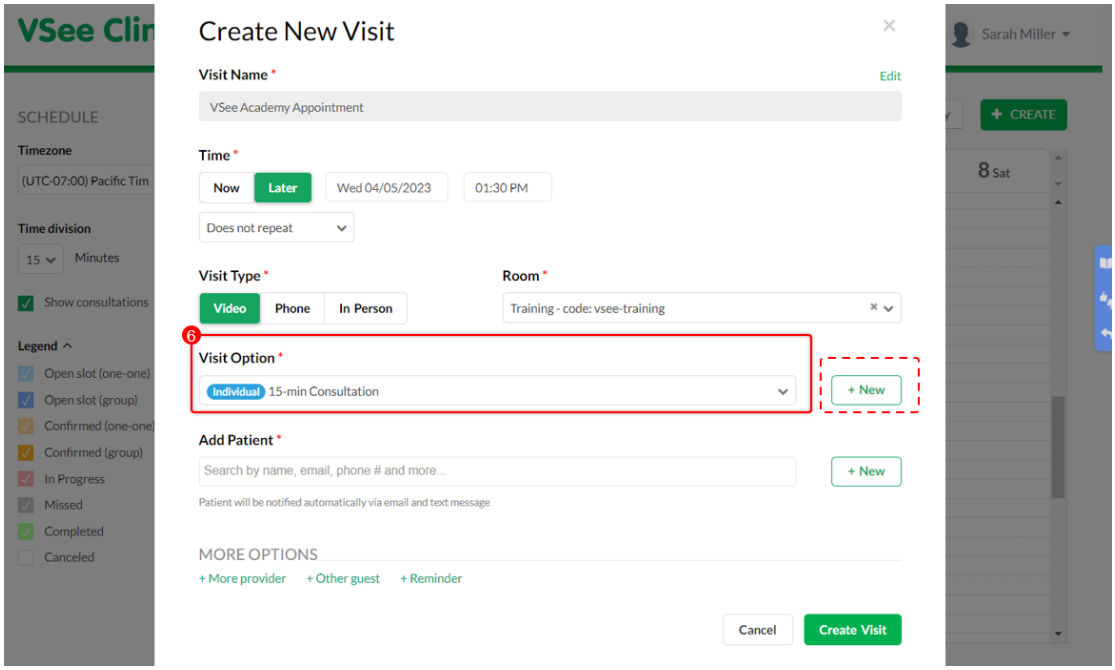
5. Choose the **Visit Type**.

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

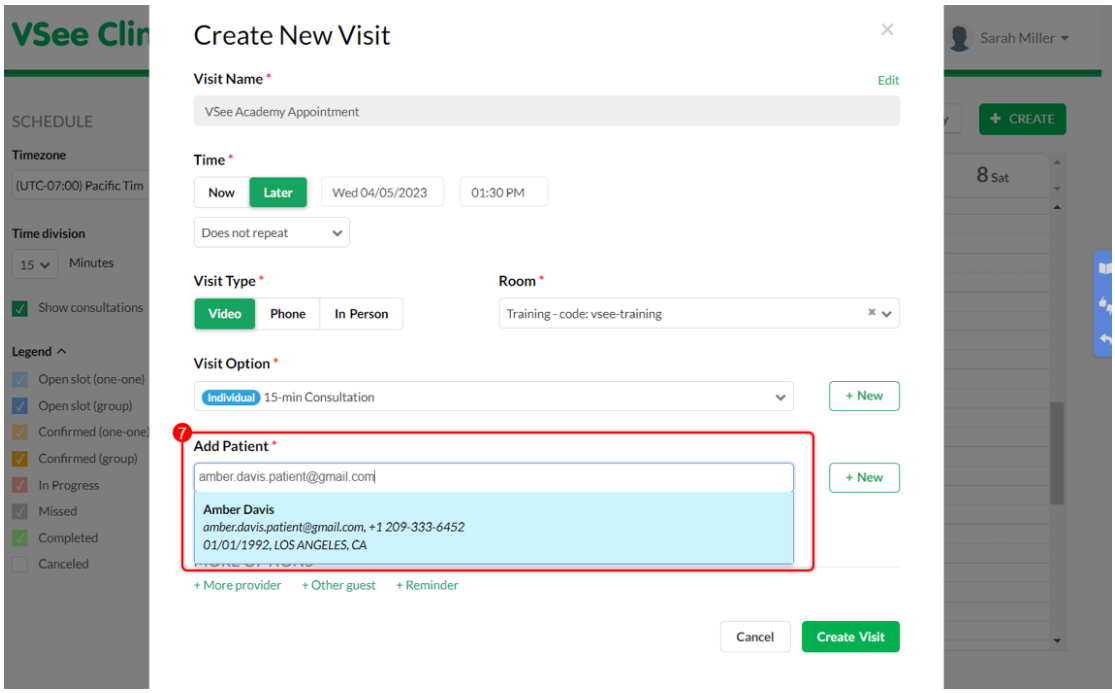


6. Select the **Visit Option**.

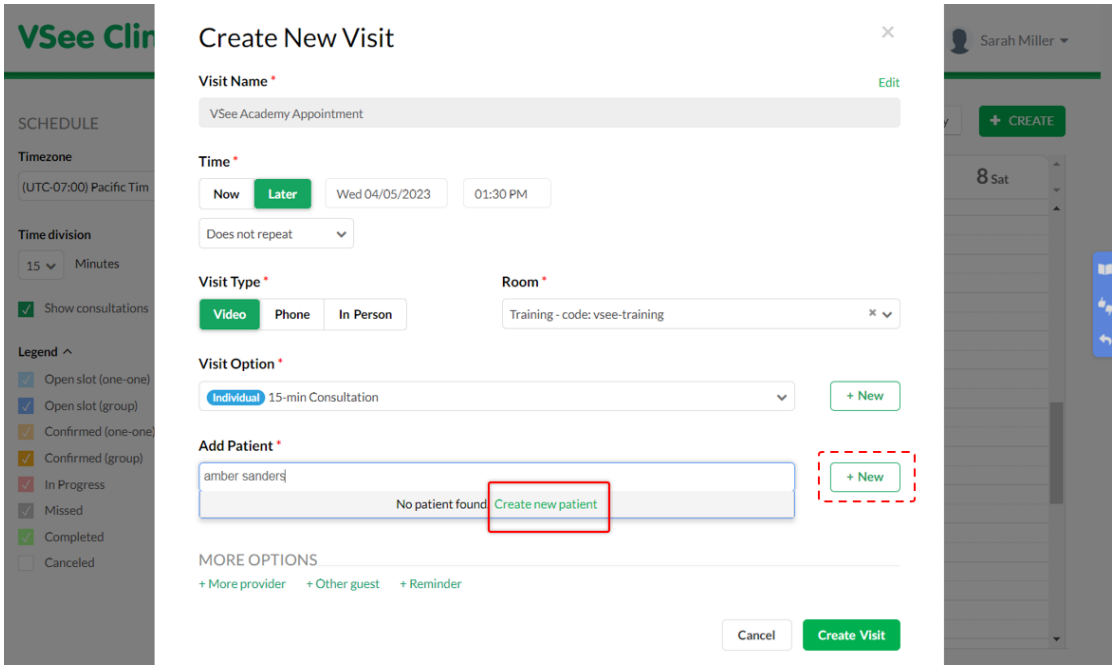
*Note: You can add more visit options by clicking on the **+New** button.*



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



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



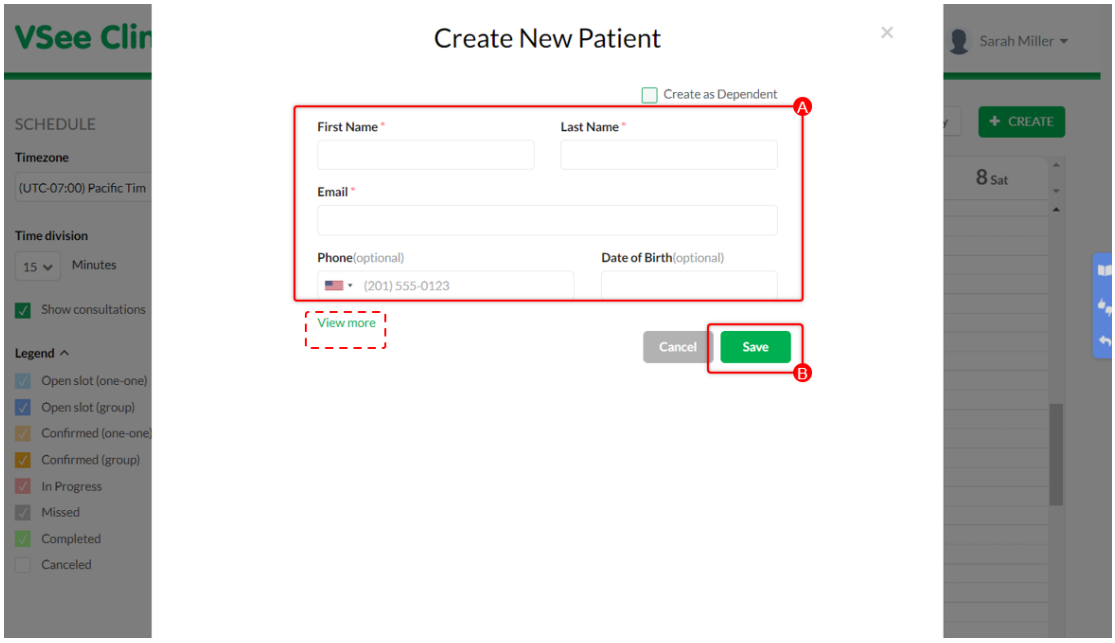
The "Create New Patient" field will appear.

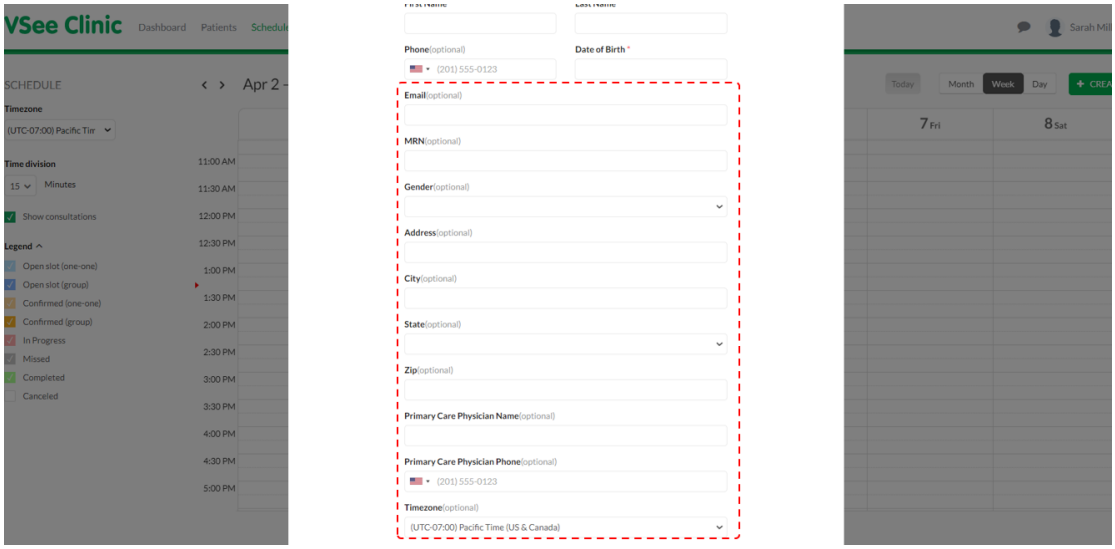
A. Input at least the patient's first name, last name, and email address.

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

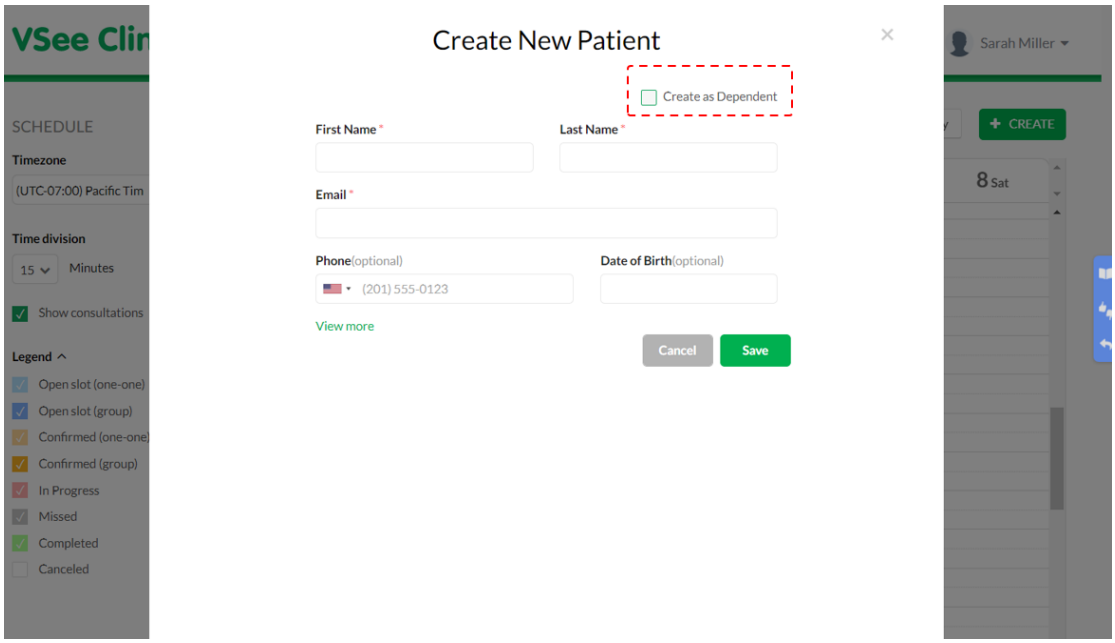
You can also click on ***View More*** *to add other details about the patient.*

B. Click **Save**.





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



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).

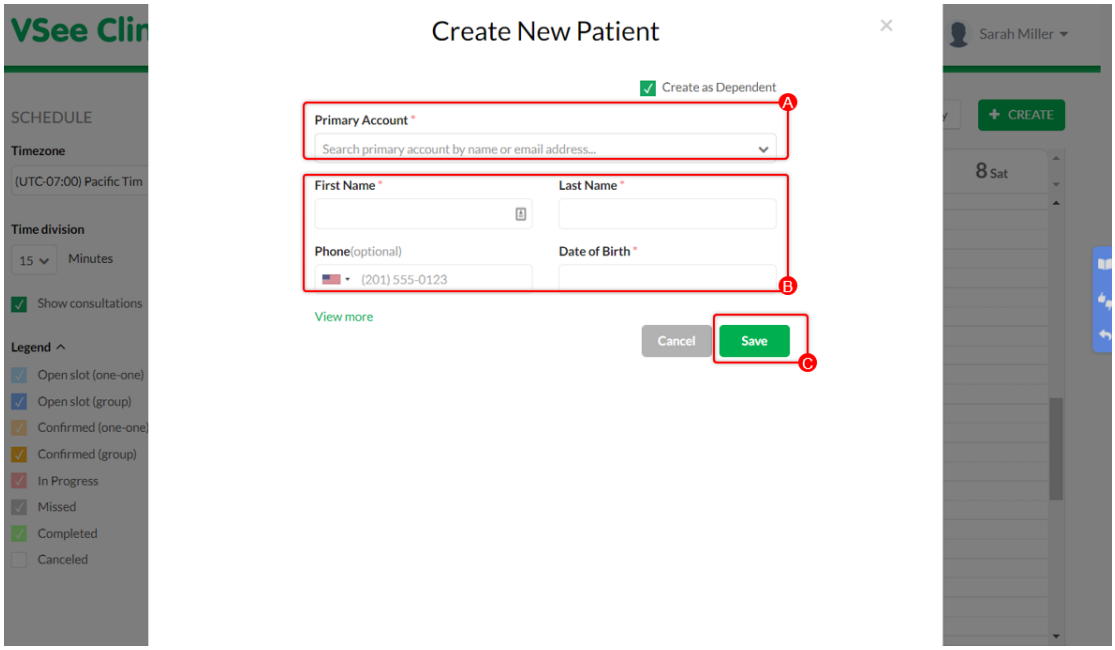
If the primary account's name is not searchable, uncheck the Create as Dependent checkbox and create the primary account first.

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.*

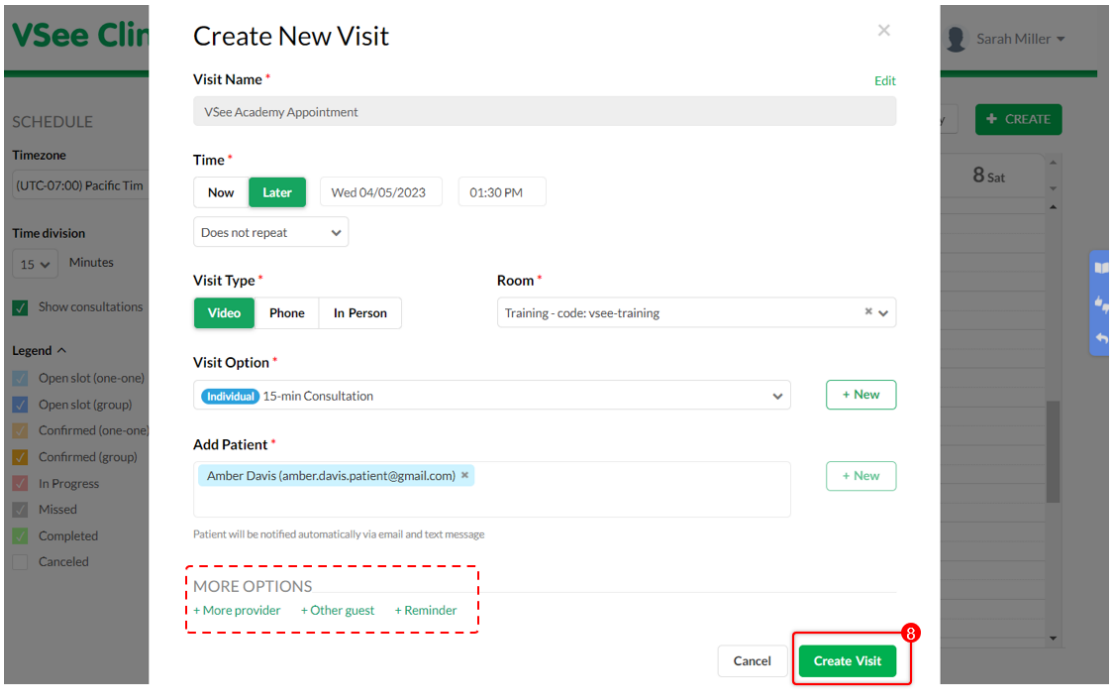
C. Click on **Save.**

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.

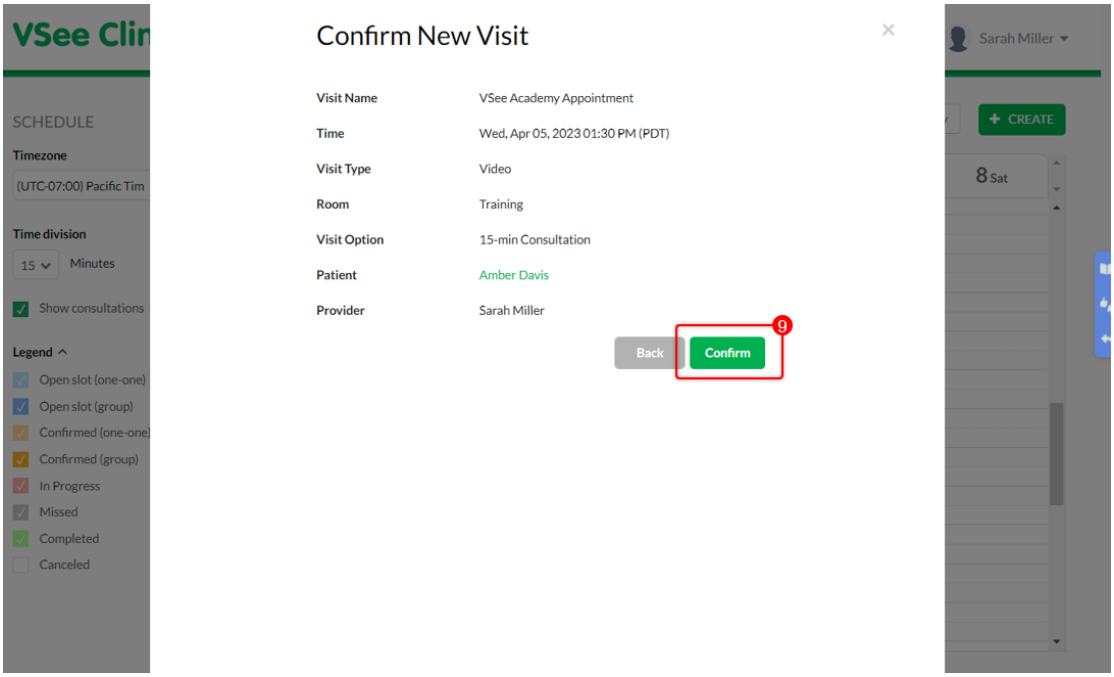


Note: For MORE OPTIONS, you can add secondary providers under ***+More provider****, guests under* ***+Other guest****, and send reminders to the participants of the visit under* ***+Reminders****.*

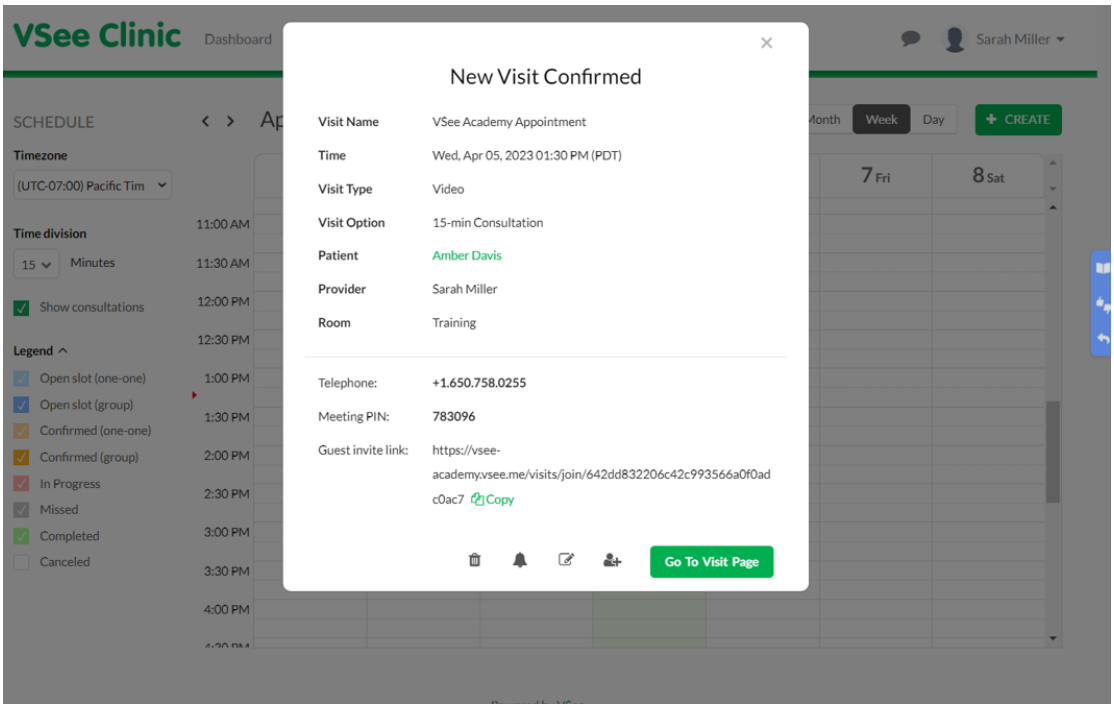
8. Click on **Create Visit** to proceed.



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

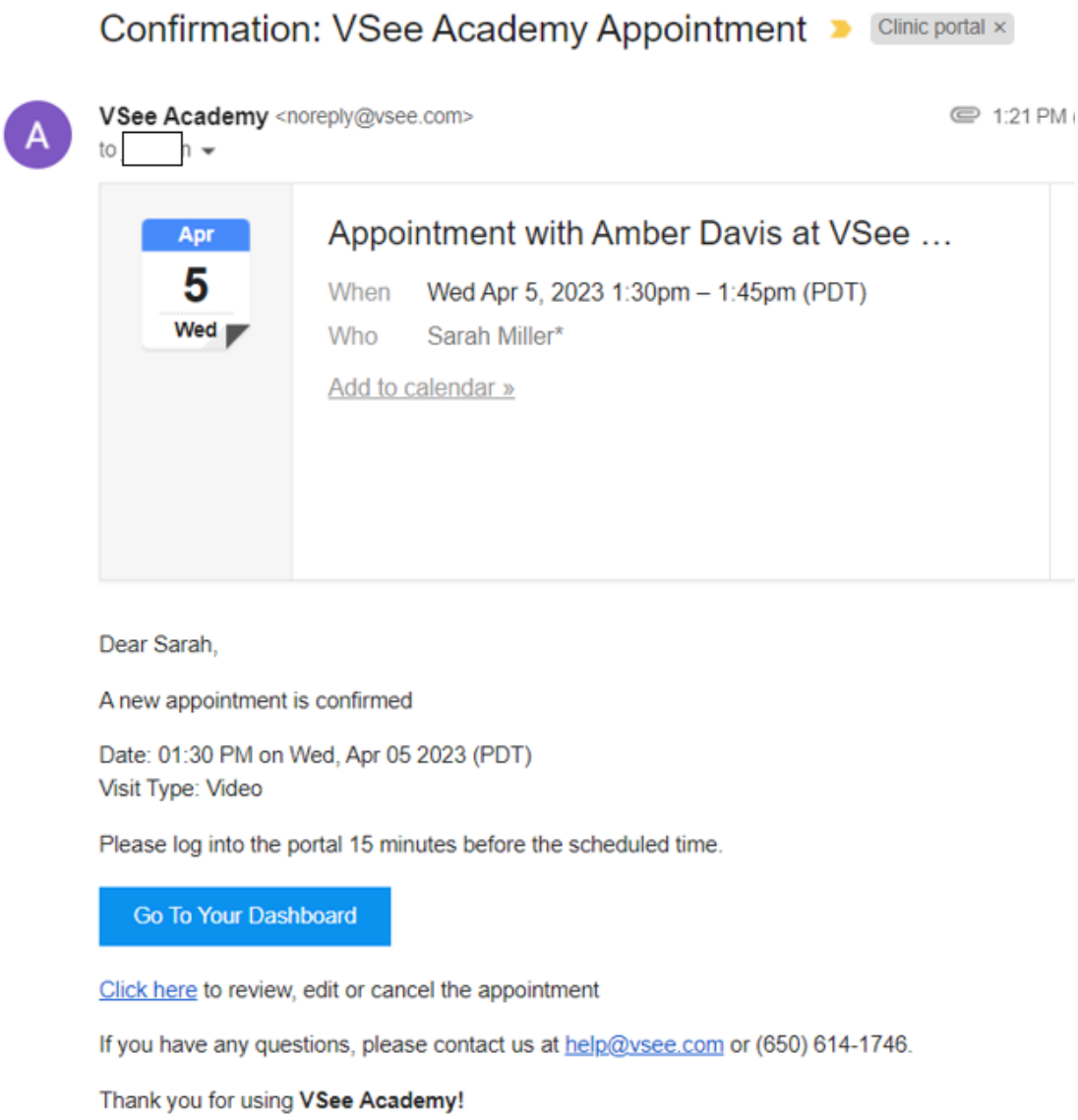


The visit has been confirmed.



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

Provider side



Confirmation: VSee Academy Appointment Clinic portal ×

A **VSee Academy** <noreply@vsee.com> 1:21 PM
to [redacted]

Apr
5
Wed

Appointment with Amber Davis at VSee …

When Wed Apr 5, 2023 1:30pm – 1:45pm (PDT)
Who Sarah Miller*

Add to calendar »

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.

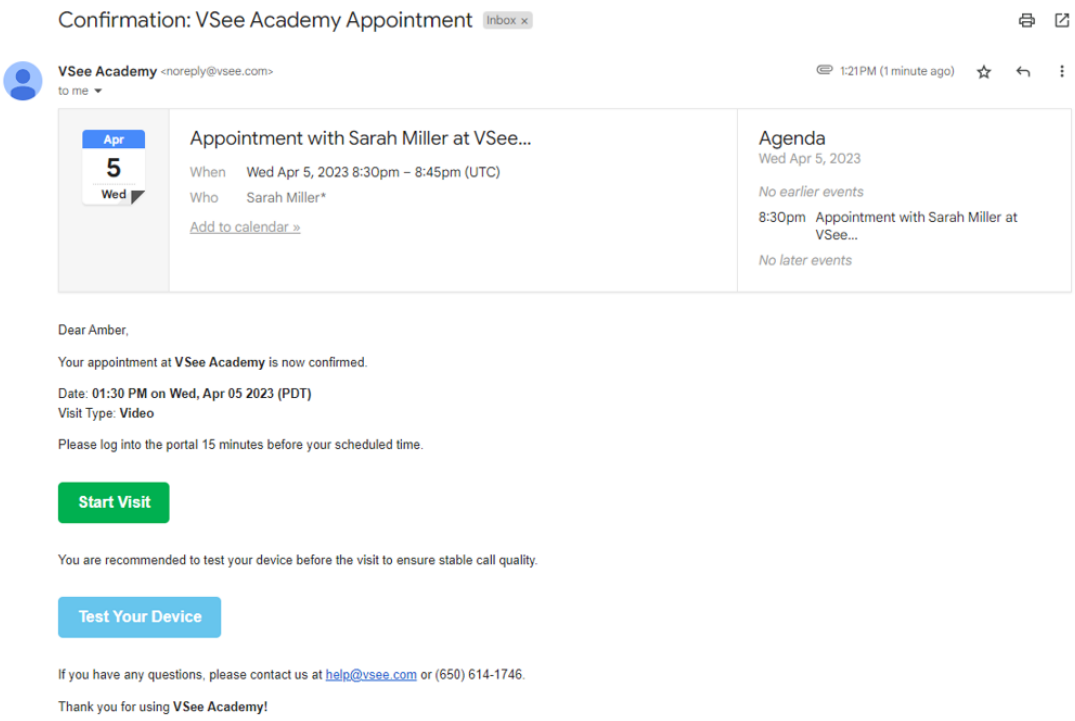
Go To Your Dashboard

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



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 help@vsee.com or check out the Help section under the Profile Menu of your VSee Clinic.

This article was last updated on: 05 April 2023

- Tags

- create a visit
- schedule
- scheduled appointment
- visit