



[Knowledgebase](#) > [VSee Clinic for Providers](#) > [Scheduling](#) > [How to Create a Visit as a Provider](#)

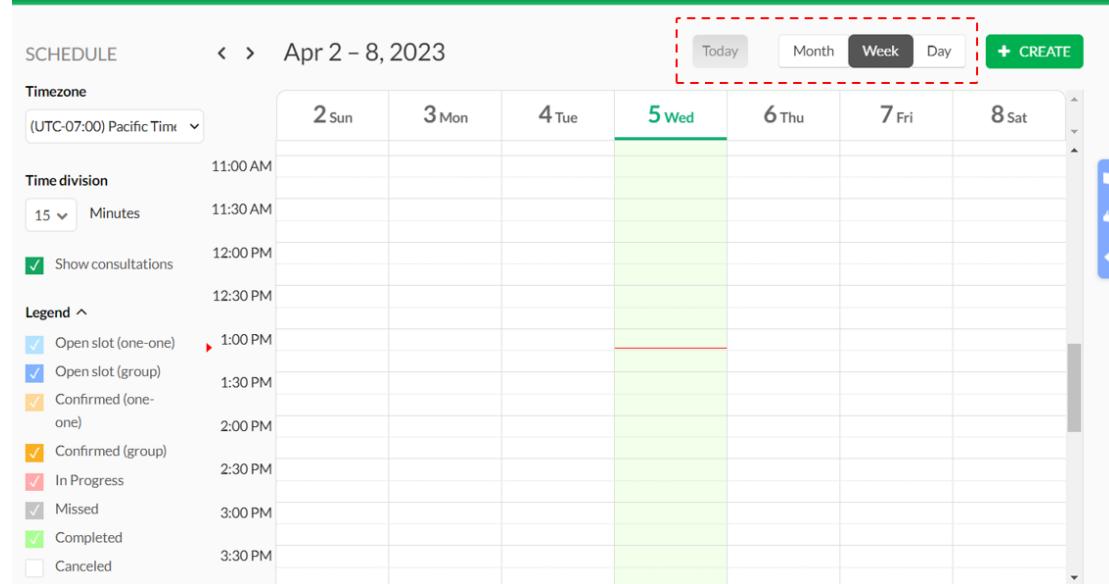
## How to Create a Visit as a Provider

- 2023-07-21 - [Scheduling](#)

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

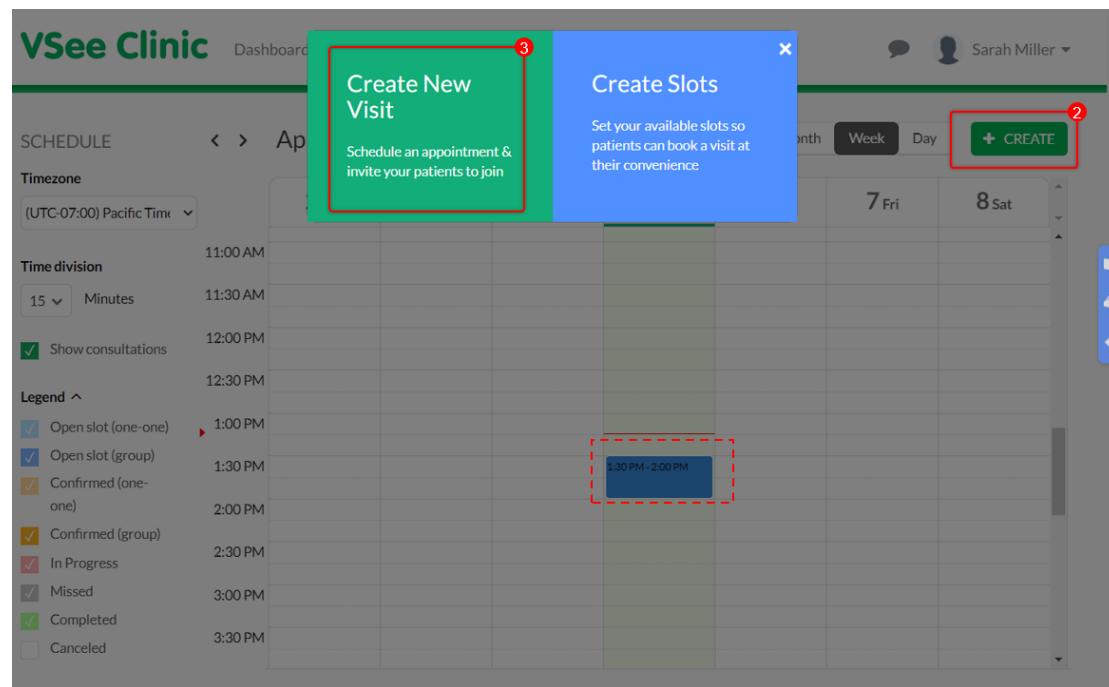
A screenshot of the VSee Clinic provider dashboard. The top navigation bar includes "VSee Clinic", "Dashboard", "Patients", "Schedule" (which is highlighted with a red box and a red number '1' indicating it's the active tab), and "e-Rx". On the right, there's a user profile for "Sarah Miller" and a dropdown menu. Below the navigation is a green header bar with "What's new on this dashboard?", "Invite Patient", and "Schedule" buttons. The main content area has a section titled "Ready for Visits" with a message: "There are no patients waiting at this time." and a "Invite Patients" button. To the right is a "Today's Schedule" section with a message: "No appointments at this time." A vertical sidebar on the right has navigation icons. At the bottom, it says "Powered by VSee".

*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.

4

Visit Name \*  Edit

Time \* Now Later Wed 04/05/2023 01:30 PM

Does not repeat ▼

Visit Type \* Video Phone In Person

Room \*  x ▼

Visit Option \*  + New

Add Patient \*  + New

Patient will be notified automatically via email and text message

MORE OPTIONS + More provider + Other guest + Reminder

Cancel Create Visit

## 5. Choose the Visit Type.

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

5

Visit Name \*  Edit

Time \* Now Later Wed 04/05/2023 01:30 PM

Does not repeat ▼

Visit Type \* Video Phone In Person

Room \*  x ▼

Visit Option \*  + New

Add Patient \*  + New

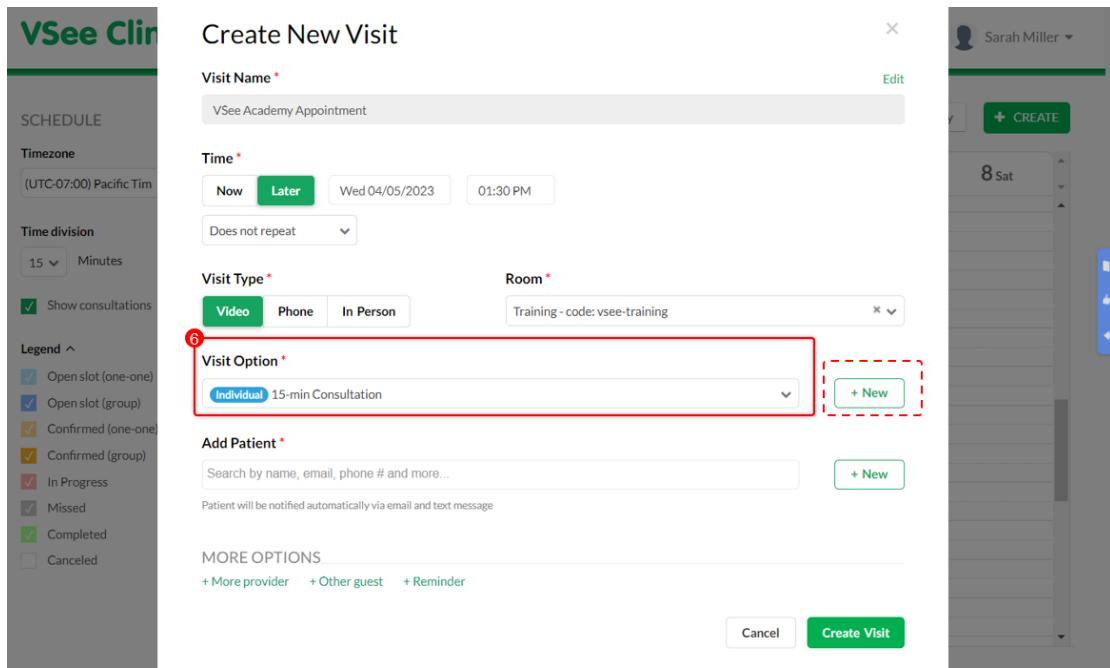
Patient will be notified automatically via email and text message

MORE OPTIONS + More provider + Other guest + Reminder

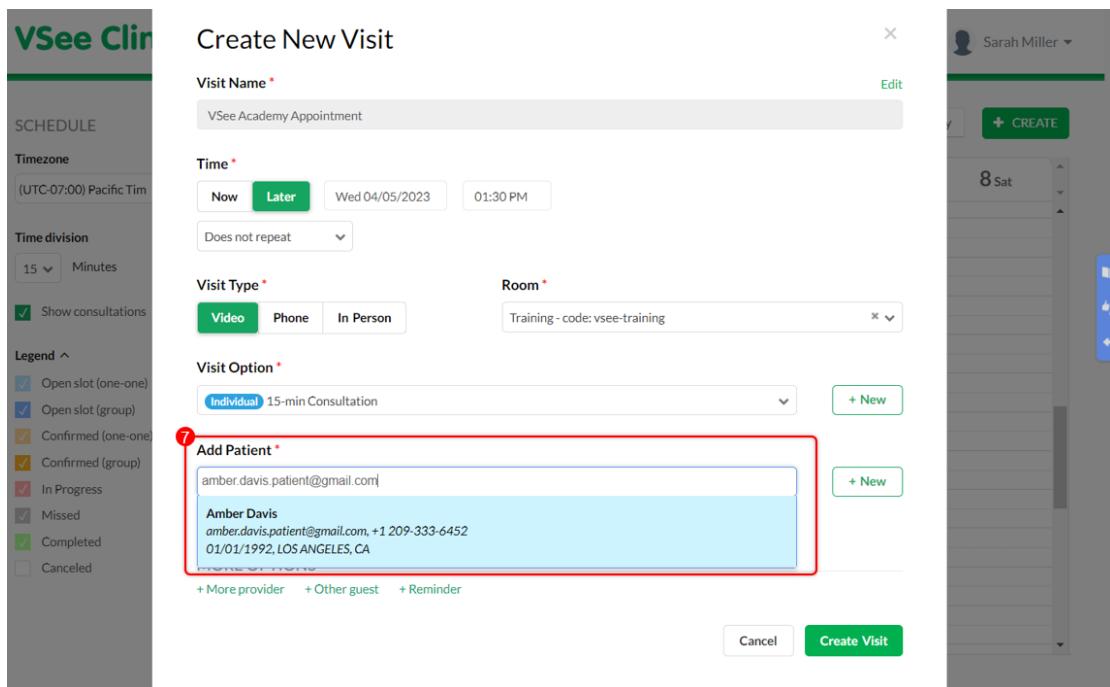
Cancel Create Visit

## 6. Select the Visit Option.

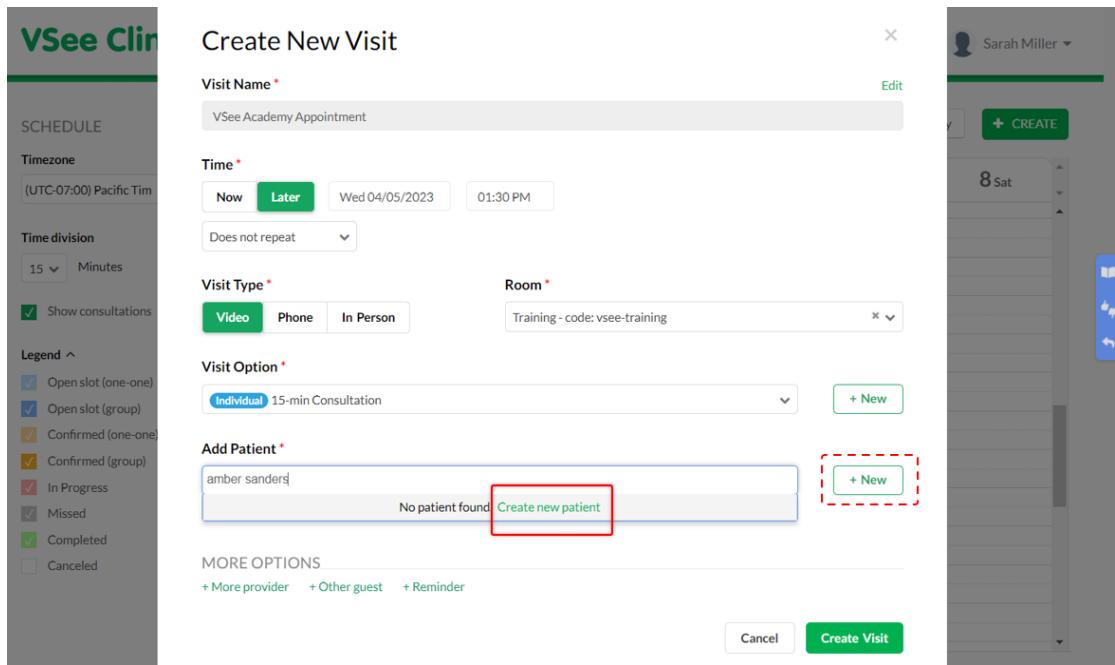
*Note: You can add more visit options by clicking on the +New button.*



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.*



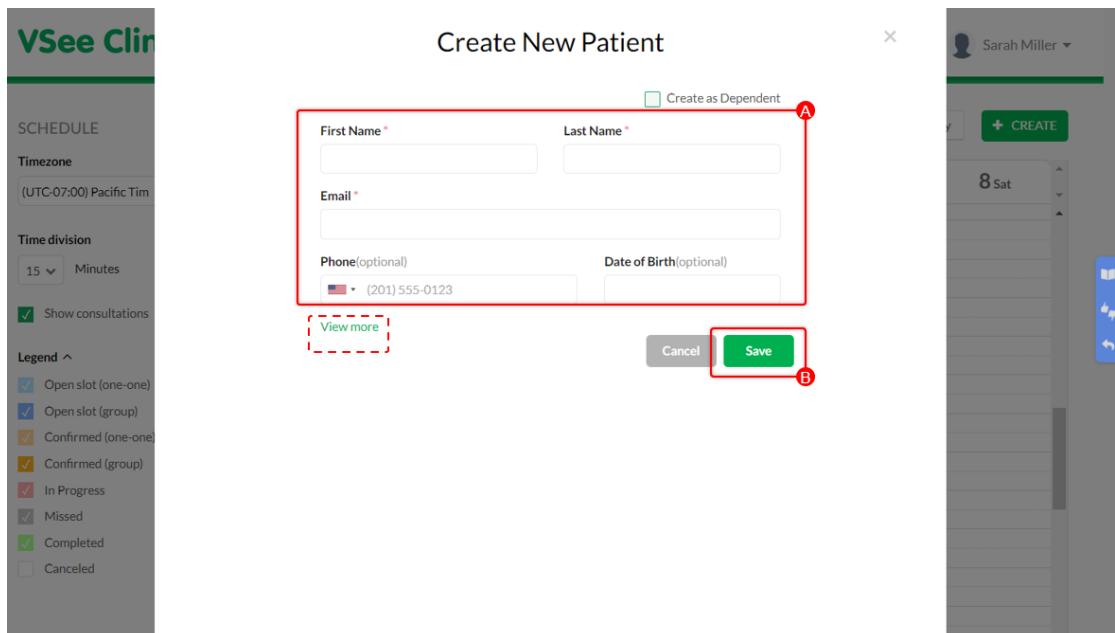
The "Create New Patient" field will appear.

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.*

Create New Patient

Primary Account\*

First Name\*  Last Name\*

Phone(optional)  Date of Birth\*

Create as Dependent

SCHEDULE

Timezone: (UTC-07:00) Pacific Time

Time division: 15 Minutes

Show consultations

Legend:

- 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.

Create New Visit

Visit Name\*  Edit

Time\*     Does not repeat

Visit Type\*    Room\*

Visit Option\*

Add Patient\*

Patient will be notified automatically via email and text message

MORE OPTIONS

SCHEDULE

Timezone: (UTC-07:00) Pacific Time

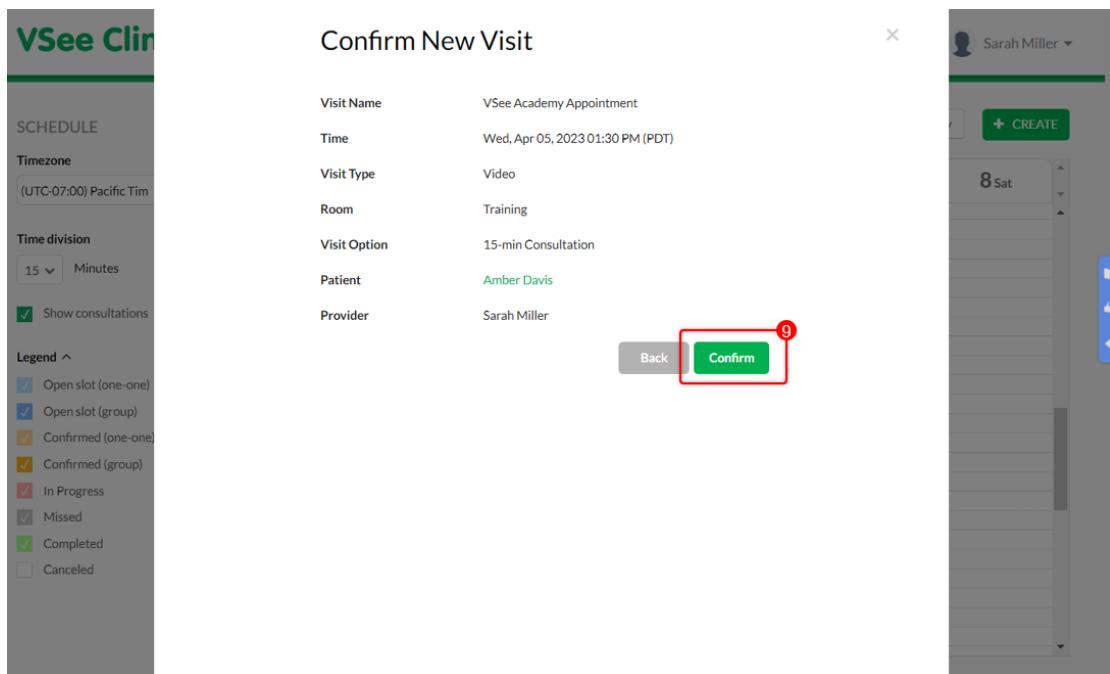
Time division: 15 Minutes

Show consultations

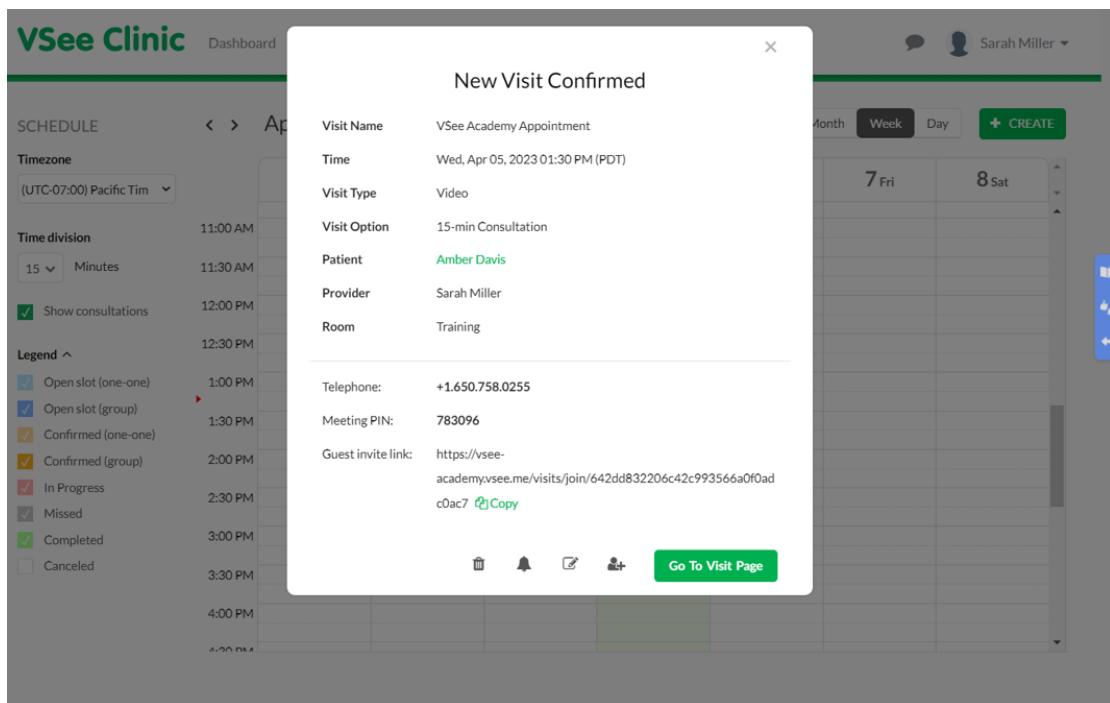
Legend:

- Open slot (one-one)
- Open slot (group)
- Confirmed (one-one)
- Confirmed (group)
- In Progress
- Missed
- Completed
- Canceled

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.

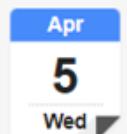
**Provider side**

## Confirmation: VSee Academy Appointment Clinic portal

A

VSee Academy <noreply@vsee.com>  
to   

1:21 PM

	<p>Appointment with Amber Davis at VSee ...</p> <p>When    Wed Apr 5, 2023 1:30pm – 1:45pm (PDT)</p> <p>Who    Sarah Miller*</p> <p><a href="#">Add to calendar »</a></p>
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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](mailto:help@vsee.com) or (650) 614-1746.

Thank you for using **VSee Academy!**

**Patient side**

Confirmation: VSee Academy Appointment Inbox x

 **VSee Academy** <noreply@vsee.com>1:21PM (1 minute ago) ...

to me Print ...

**Appointment with Sarah Miller at VSee...**

When **Wed Apr 5, 2023 8:30pm – 8:45pm (UTC)**  
Who **Sarah Miller\***  
[Add to calendar](#)

**Agenda**  
Wed Apr 5, 2023  
*No earlier events*  
8:30pm Appointment with Sarah Miller at 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.

**Test Your Device**

If you have any questions, please contact us at [help@vsee.com](mailto:help@vsee.com) 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 [help@vsee.com](mailto: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](#)