

How to Download Visit Summary for Providers

Janette Esteban - 2022-12-27 - VSee Clinic for Providers

Once the call has ended, Visit Summary is needed by the Providers for reimbursement purposes; while Patients need this to view Provider's notes and instructions for them.

To know how to download a Visit Summary from the Visit Details Page, follow the steps below.

Downloading a Visit Summary for Providers

1. Click on the **Patients** Tab.



2. Select either Patients or All Visits, then click on the **name of the Patient** you need to download the Visit Summary from.



Note: Patients Tab only contains all your Patients' visits while All Visits Tab contains the consolidated Patients' visits of the entire clinic.

3. From the Visit Page, click on **View** adjacent to the visit date selected.



Note: Visit Page contains the upcoming and past visits of a specific Patient.

4. Click on the **ellipsis button** then select **"Download visit summary"**.



A zip file will be downloaded. There will be two files that will be included in the downloaded visit summary.

- Profile Summary: This pdf file contains the Patient information.
- Summary: This pdf file contains the Visit information of the call between the Provider and the Patient.



Note: If you want all the information from the Visit you had with your Patient, make sure to select "Summary".

If you have any questions, please contact us at help@vsee.com

Last updated on: 27 December 2022

Tags

patient details page

patients

visit summary