How to Invite a Patient (Plus/Premium)

Jay-Ileen (Ai) - 2023-12-29 - Essential Articles to Help Get You Started

Start Sending Invitations

There are a few scenarios where sending an invite to a Patient is needed;

1. When the clinic has been set up, you can start introducing it to your Patients by sending the invite link.

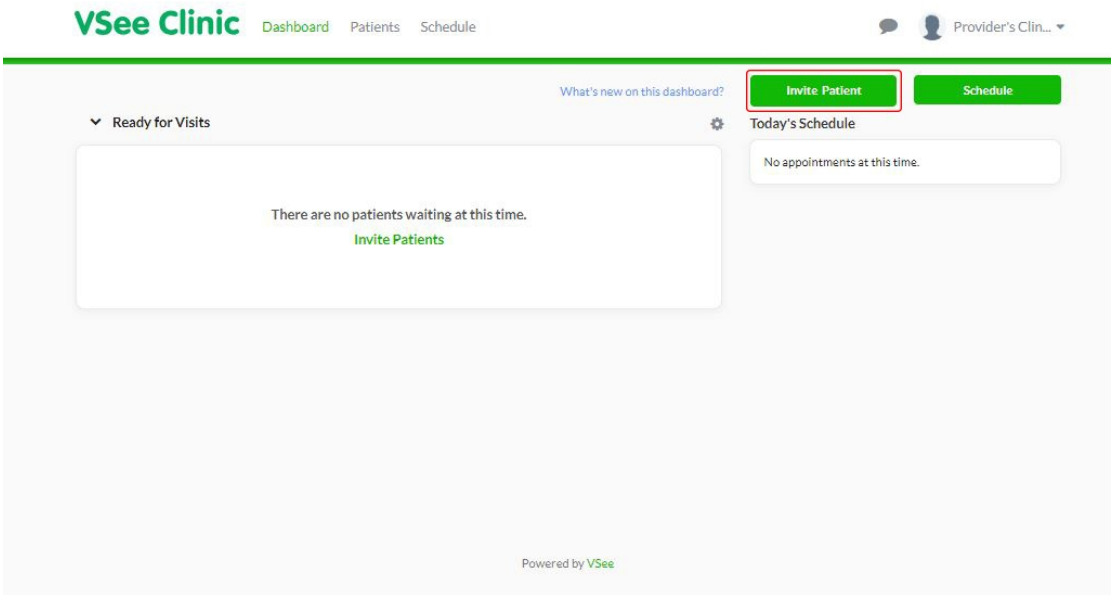
2. If a recurring patient forgot the link to your clinic.

This option is different from setting an appointment for a patient. Check: Schedule an Appointment with a Patient.

Where to Find the Invite Patient Option?

There are three locations where you will find the Invite Patient option;

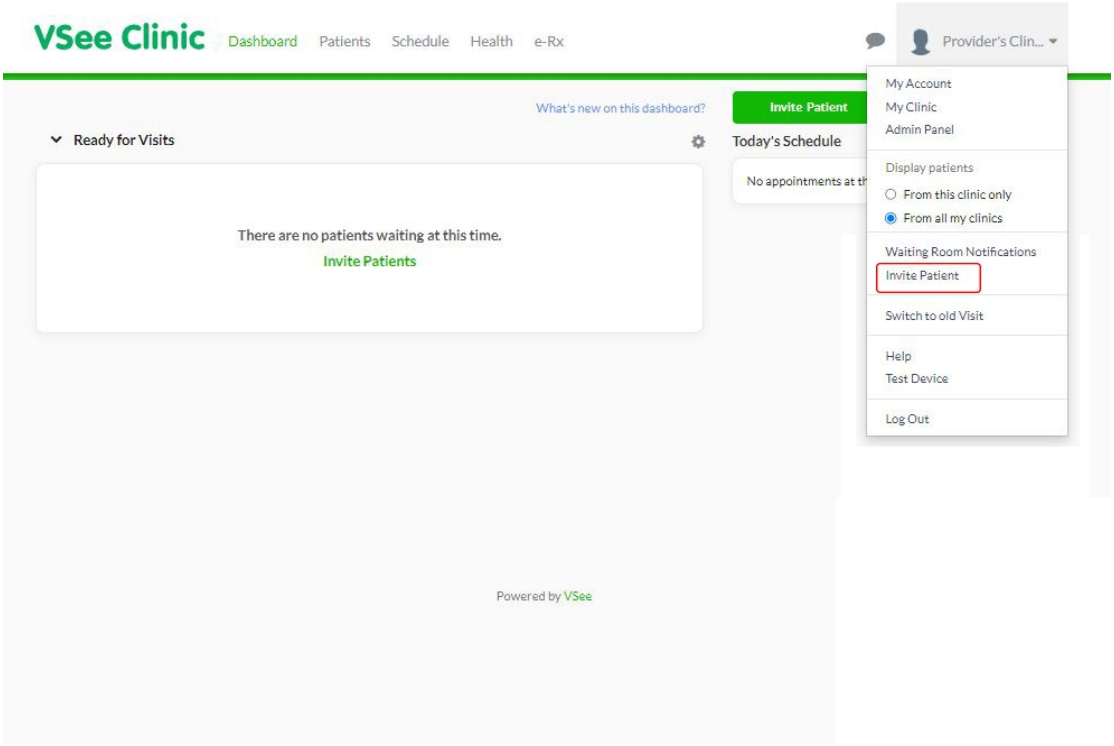
1. **Dashboard**



2. **Patients**



3. **Profile Menu**



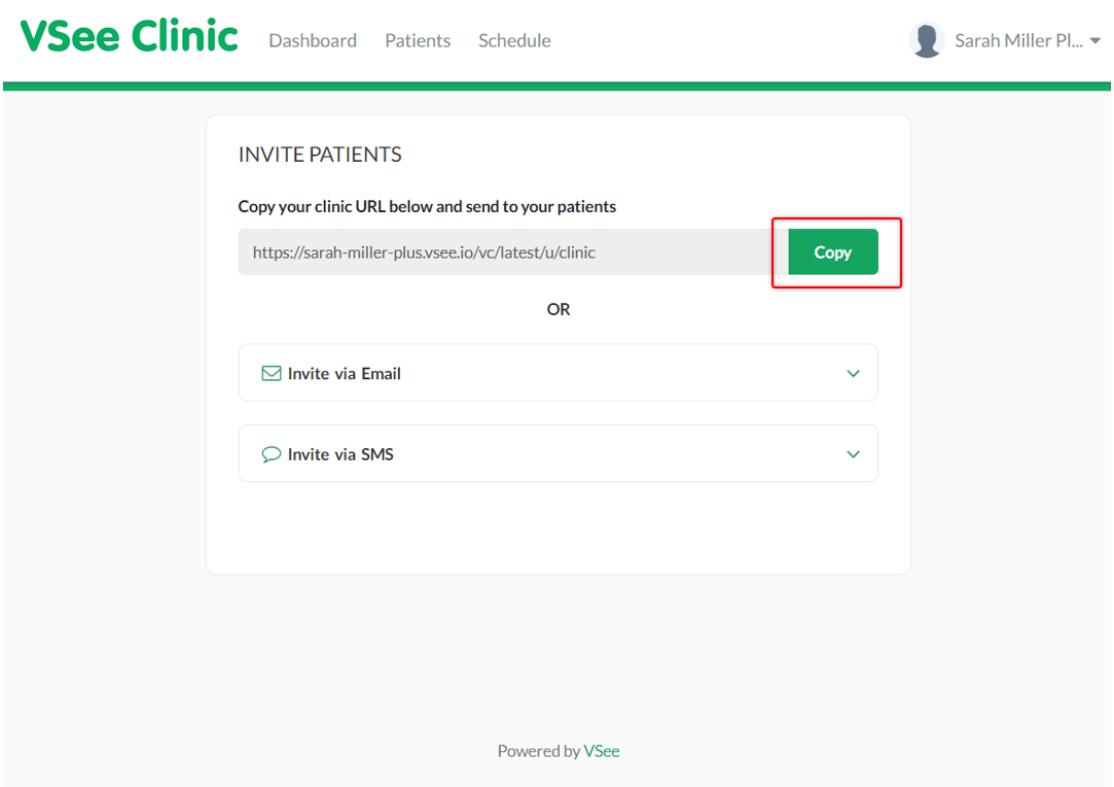
How to Send Invitations

Click on the **Invite Patient** button located on the Dashboard/Patient/Profile Menu.

1. Copy Clinic URL

If your patient did not provide an email address, you can choose to copy the invite instructions and send it through your preferred means of communication (chat, EMR etc).

Click **Copy**.



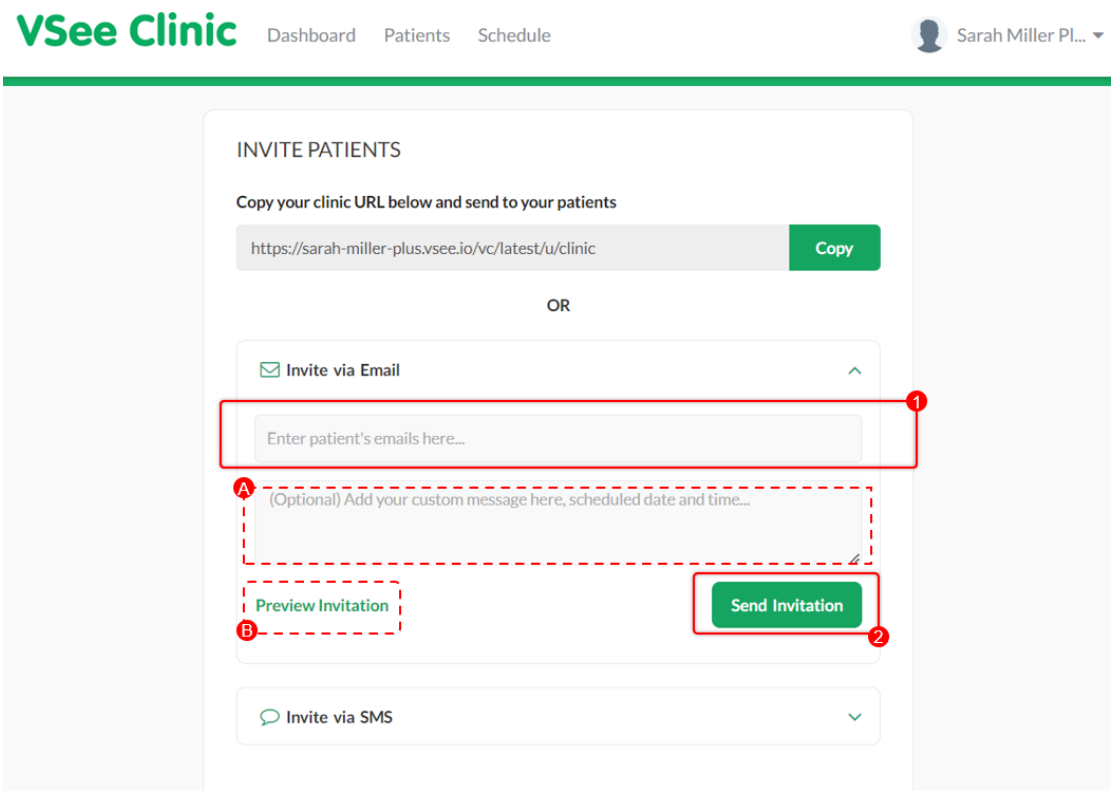
2. Send Invitation Via Email

1. Under the **Invite via Email** field, type the patient's email address. You can input multiple email addresses separated by a semicolon (;)

A. It is optional to add your custom message (e.g. scheduled date and time).

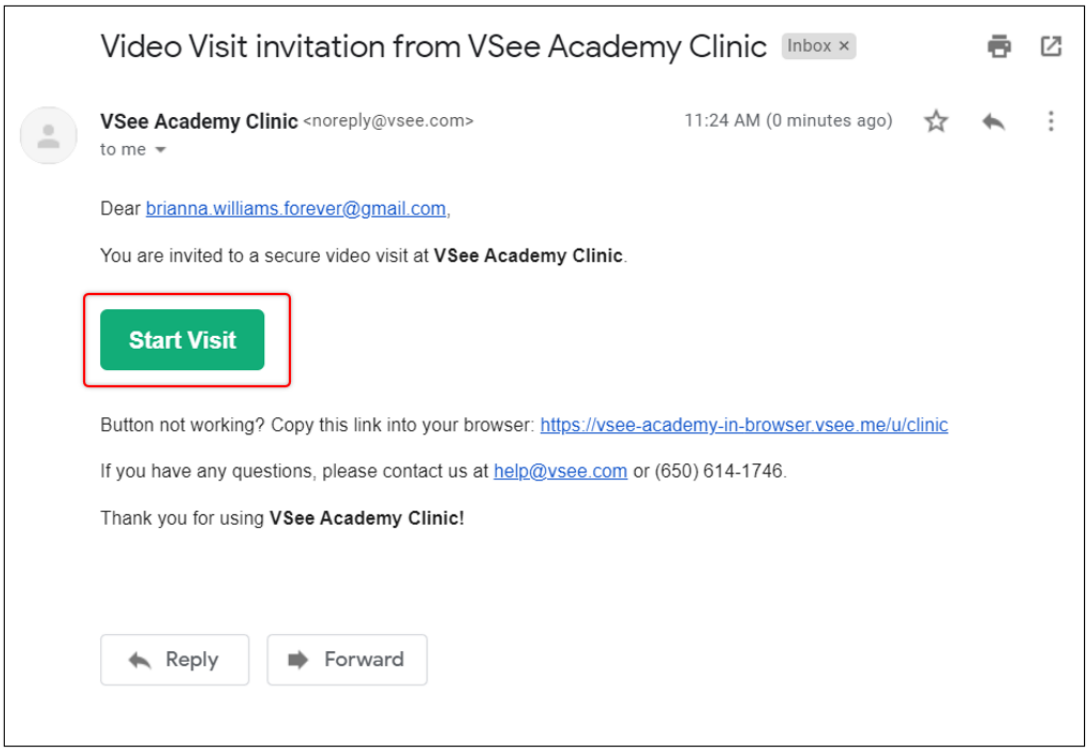
B. You can review the invite by clicking **Preview Invitation**.

2. To proceed to send the invitation, click **Send Invitation**.



Patients will receive an email invitation that will look like below.

They just need to click the **Start Visit** button to be routed to the landing page of the clinic.



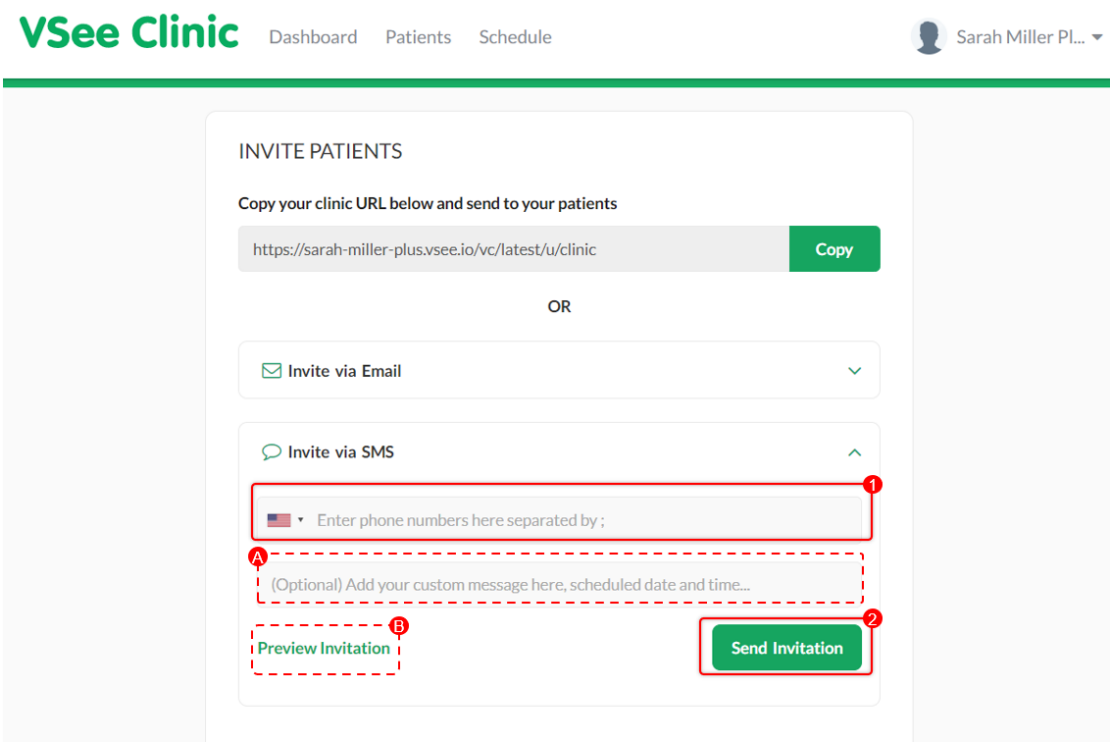
3. Send Invitation Via SMS

1. Under the **Invite via SMS** field, type the patient's mobile number. You can input multiple numbers separated by a semicolon (;)

A. It is optional to add your custom message (e.g. scheduled date and time).

B. You can review the invite by clicking **Preview Invitation**.

2. To proceed to send the invitation, click **Send Invitation**.



Once the Patients will receive the SMS invitation same as below, they just need to click on the link for a browser to open and be routed to the landing page of the clinic.

Scope and Limitations

- Invite Link is not a scheduled appointment.
- Invite Link will route the Patient to the clinic's landing page, it will require the Patient to either **enter as a guest** or **log in** to their Patient account to start a visit.
- The **Invite Patients** feature is best used for guest walk-in visits.

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

- Tags

- invite a patient
- patient invite