

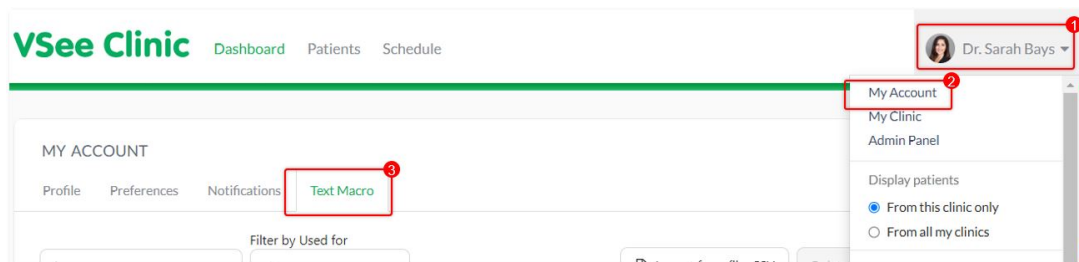
How to Manage Text Macro

Jay-Ileen (Ai) - 2024-03-20 - VSee Clinic for Admins

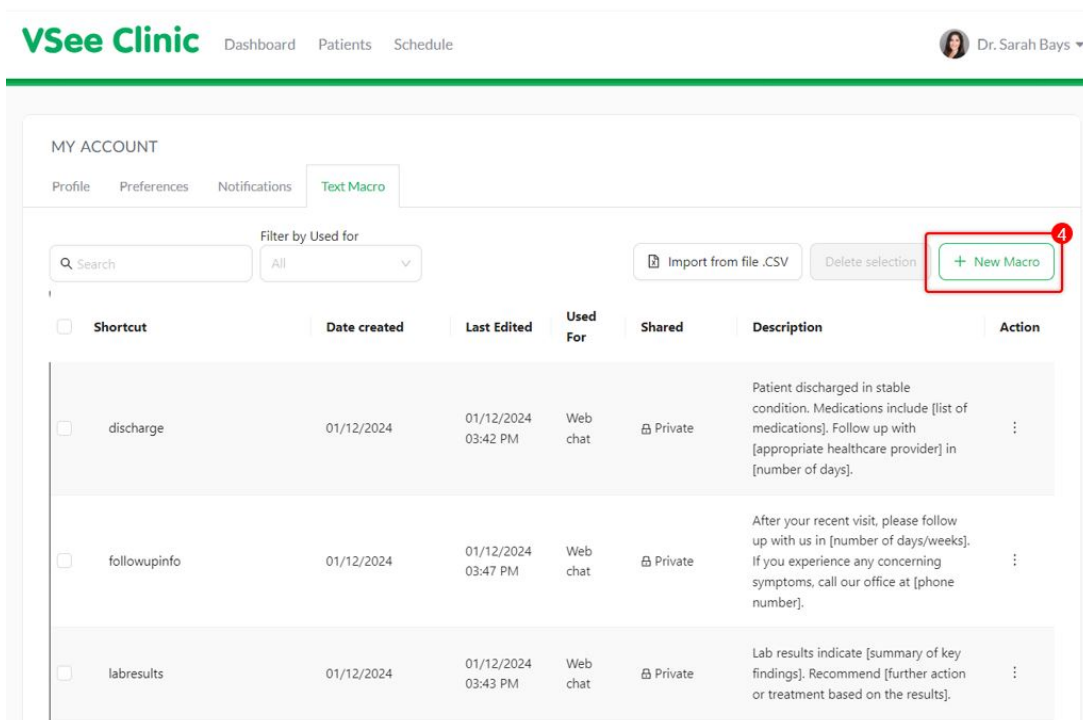
Both Providers and Clinic Admins have access to manage the Text Macro feature. You can create, edit, and assign the text macro keys under **Chats**, **Notes**, and **Memo**.

How to Manage Text Macro as a Provider

1. Click on **Your Name** or the **Profile Menu**.
2. Select **My Account**.
3. Click on **Text Macro**.



4. Click **+Text Macro**.



5. Enter the **Shortcut** text.

6. Under **Used for**, select if for **Web chat**, **Visit note**, or **Memo**.

VSee Clinic Dashboard Patients Schedule

MY ACCOUNT Profile Preferences Notifications **Text Macro**

Filter by Used for All

Search

Shortcut Date created Last Edited Used For Shared

diabetesfollowup 03/13/2024 03/13/2024 12:38 AM Visit Note Clinic

Create new
Text macro is for private only

Shortcut *

Used for *

Web chat
Visit note
Memo

Submit

Note: You can select multiple options from the dropdown.

VSee Clinic Dashboard Patients Schedule

MY ACCOUNT Profile Preferences Notifications **Text Macro**

Filter by Used for All

Search

Shortcut Date created Last Edited Used For Shared

Create new
Text macro is for private only

Shortcut *

Used for *

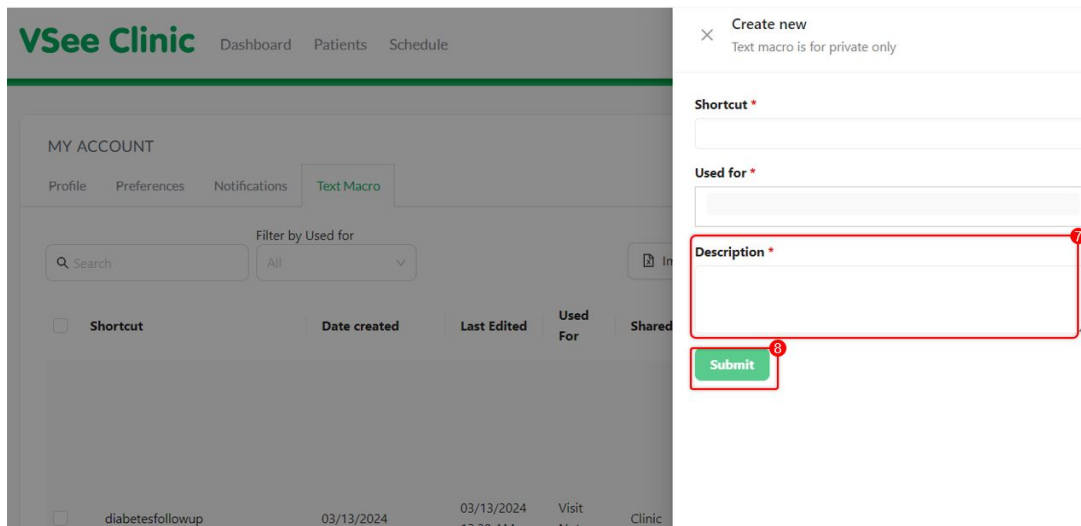
Web chat x Visit note x Memo x

Description *

Submit

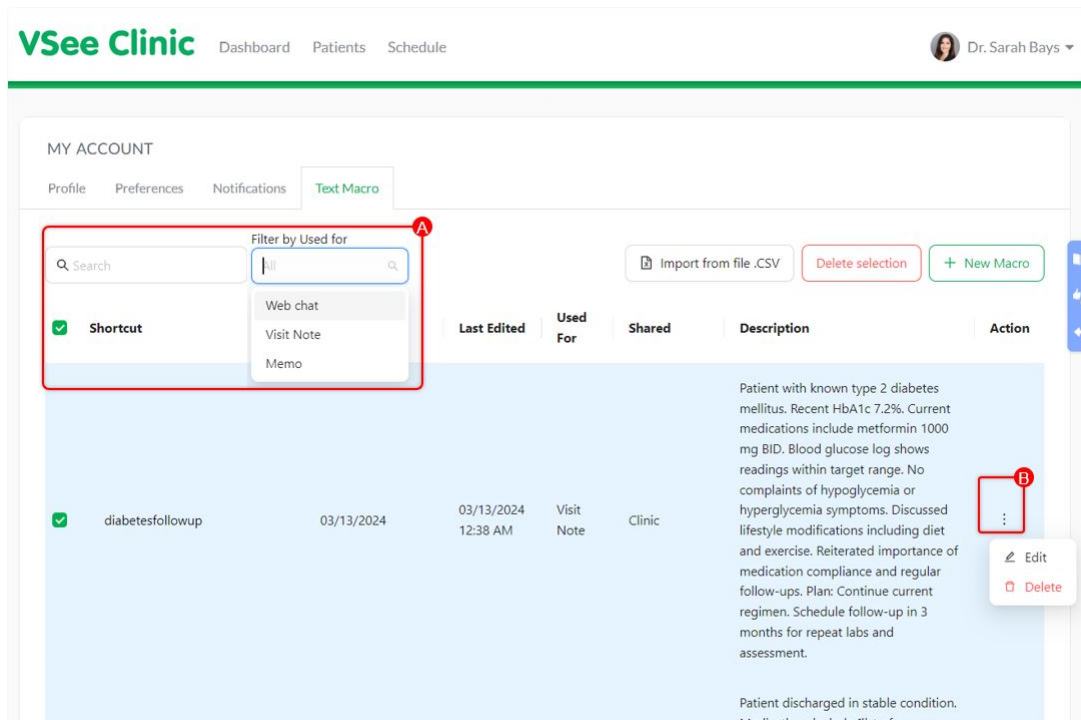
7. Add the **Description**.

8. Click on **Submit** to save.



A. You can use the search bar and filter when searching for a Text Macro you created.

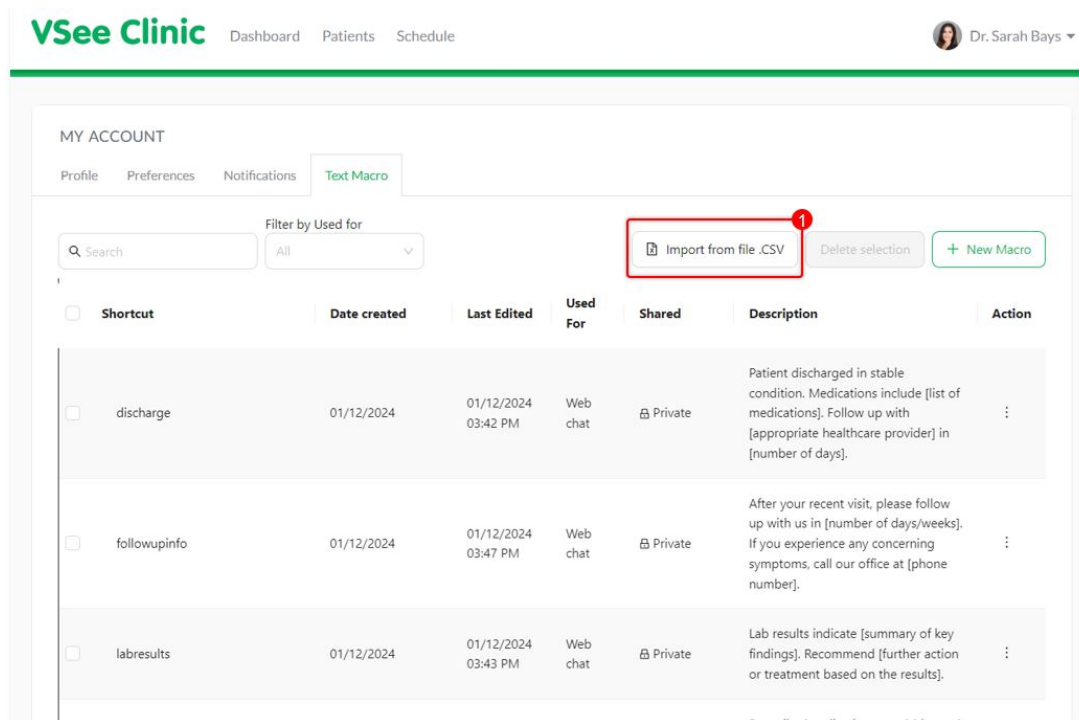
B. On the 3 dots or ellipsis, you can edit or delete the Text Macro.



Importing a .csv file

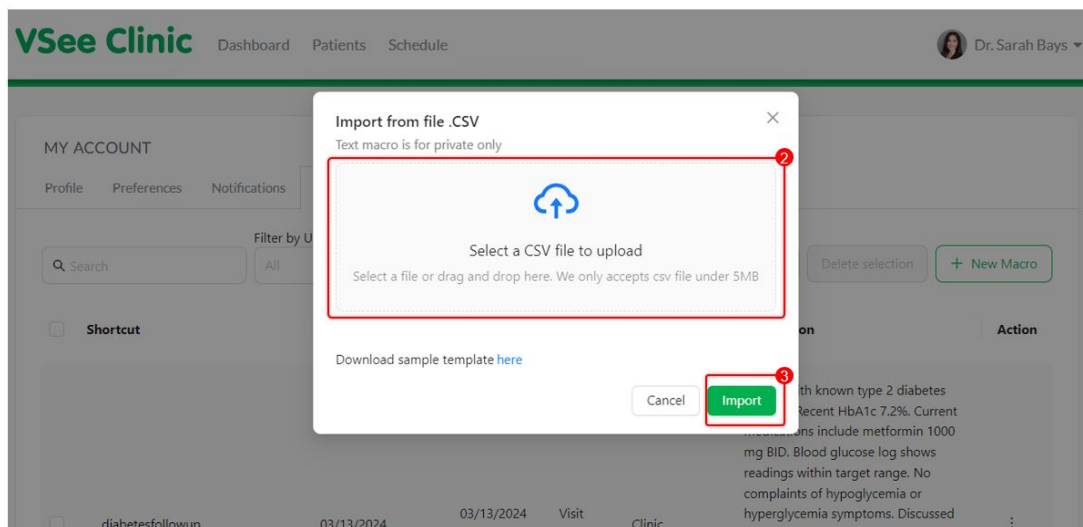
You also have the option to import a .csv file.

1. Click on **Import from file .CSV.**



2. A pop-up window will appear. Click on **Select a CSV file to upload** and select the file from your device.

3. Click on **Import** to save.



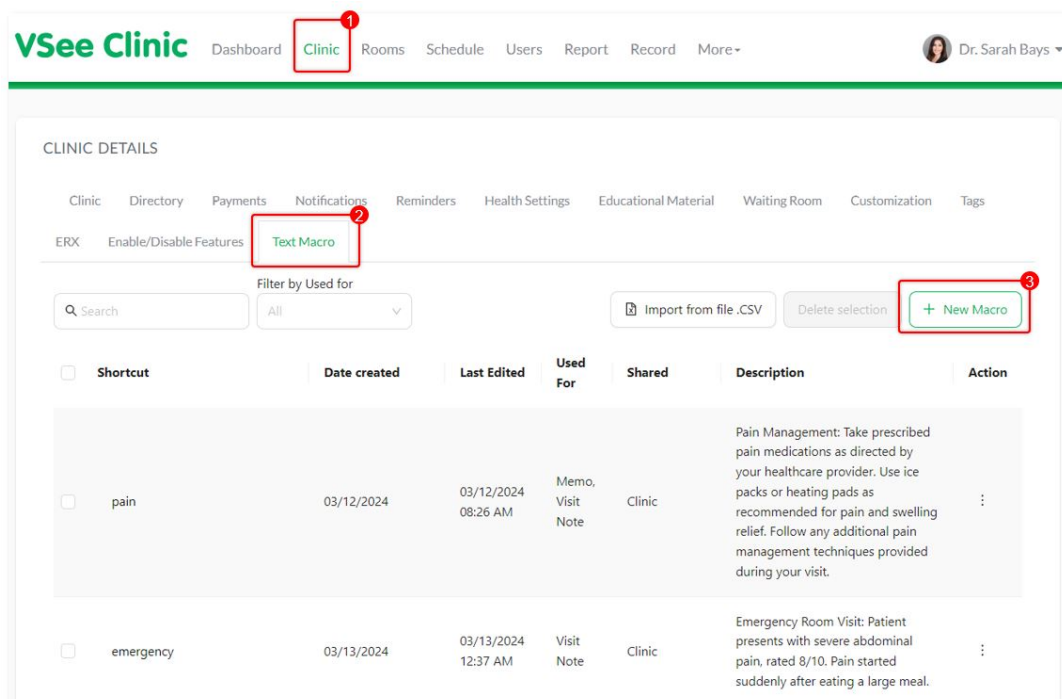
Note: A Provider is not able to edit Text Macros created by other Providers.

How to Manage Text Macro as a Clinic Admin

1. Go to the **Clinic** tab.

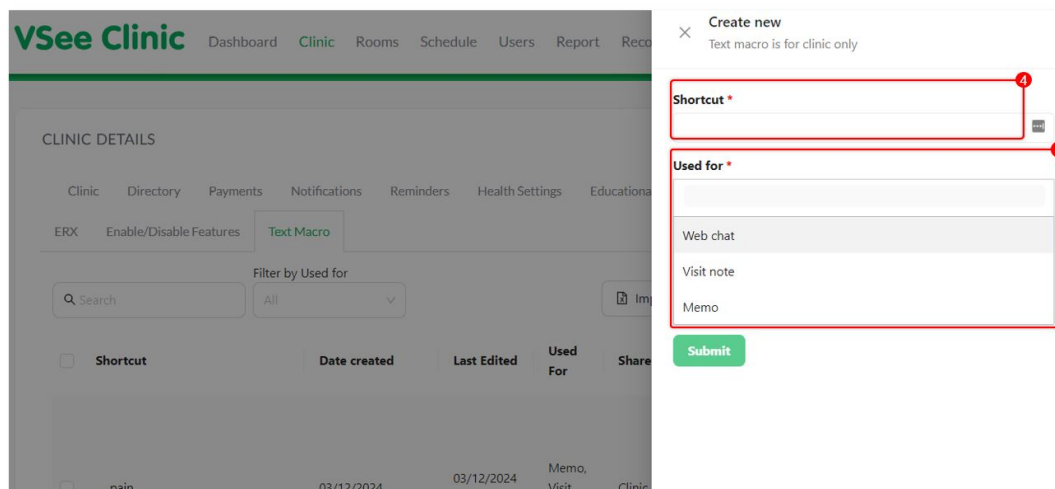
2. Select **Text Macro**.

3. Click on **+New Macro**.



4. Enter the **Shortcut** text.

5. Under **Used for**, select if for **Web chat**, **Visit note**, or **Memo**.



Note: You can select multiple options from the dropdown.

The screenshot shows the VSee Clinic interface with the 'Create new' modal open. The modal title is 'Create new' with a subtitle 'Text macro is for clinic only'. It has three main sections: 'Shortcut *', 'Used for *', and 'Description *'. The 'Used for *' section contains three tags: 'Web chat', 'Visit note', and 'Memo'. The 'Description *' section is empty. A green 'Submit' button is at the bottom. The background shows the 'CLINIC DETAILS' section with tabs for 'Clinic', 'Directory', 'Payments', 'Notifications', 'Reminders', 'Health Settings', and 'Education'. The 'Text Macro' tab is active, showing a search bar, a filter dropdown set to 'All', and a table with columns: 'Shortcut', 'Date created', 'Last Edited', 'Used For', and 'Share'.

6. Add the **Description**.

7. Click on **Submit** to save.

This screenshot is similar to the first one, but with red boxes and numbers highlighting specific elements. A red box labeled '6' highlights the 'Description *' text area. Another red box labeled '7' highlights the green 'Submit' button. The 'Used for *' section is now empty. The background interface remains the same.

A. You can use the search bar and filter when searching for a Text Macro you created.

B. On the 3 dots or ellipsis, you can edit or delete the Text Macro.

Note: You also have the option to import a .csv file.

VSee Clinic Dashboard Clinic Rooms Schedule Users Report Record More ▾

Dr. Sarah Bays ▾

CLINIC DETAILS

Clinic Directory Payments Notifications Reminders Health Settings Educational Material Waiting Room Customization Tags

ERX Enable/Disable Features **Text Macro**

Search Filter by Used for

Web chat
Visit Note
Memo

Import from file .CSV Delete selection + New Macro

Shortcut	Last Edited	Used For	Shared	Description	Action
✓ pain	03/12/2024 08:26 AM	Memo, Visit Note	Clinic	Pain Management: Take prescribed pain medications as directed by your healthcare provider. Use ice packs or heating pads as recommended for pain and swelling relief. Follow any additional pain management techniques provided during your visit.	Edit Delete
✓ emergency	03/13/2024 12:37 AM	Visit Note	Clinic	Emergency Room Visit: Patient presents with severe abdominal pain, rated 8/10. Pain started suddenly after eating a large meal.	

Notes:

- A Provider is not able to edit Text Macros created by other Providers.
- Clinic Admins can manage Text Macro at the clinic-wide level and not per room level

Related Article:

- [How to Use Text Macro](#)

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.

Tags

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