

Knowledgebase > VSee Clinic for Admins > How to Manage Text Macro

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**.

🚺 Dr. Sarah Bays 🔻
My Account My Clinic Admin Panel
Display patients <ul> <li>From this clinic only</li> <li>From all my clinics</li> </ul>

4. Click +Text Macro.

MY ACCOUNT Profile Preferences No	tifications Text Macro					
Q Search	Filter by Used for			Import fr	om file .CSV Delete selection	New Macro
Shortcut	Date created	Last Edited	Used For	Shared	Description	Action
discharge	01/12/2024	01/12/2024 03:42 PM	Web chat	🔒 Private	Patient discharged in stable condition. Medications include [list o medications]. Follow up with [appropriate healthcare provider] in [number of days].	f
followupinfo	01/12/2024	01/12/2024 03:47 PM	Web chat	🗄 Private	After your recent visit, please follow up with us in [number of days/weeks If you experience any concerning symptoms, call our office at [phone number].	I

- 5. Enter the **Shortcut** text.
- 6. Under Used for, select if for Web chat, Visit note, or Memo.

VSee Clinic Dashboa	ard Patients Sched	ule		Create new Text macro is for private only
MY ACCOUNT Profile Preferences Notificatio	ins Text Macro			Shortcut * Used for *
	Date created	Last Edited	Used For	Web chat Visit note Memo
diabetesfollowup	03/13/2024	03/13/2024 12:38 AM	Visit Note	Clinic

Note: You can select multiple options from the dropdown.

VSee Clinic	Dashboard Patients Scher	dule		X Create new Text macro is for private only
				Shortcut *
MY ACCOUNT				
Profile Preferences No	otifications Text Macro		_	Used for *           Web chat         ×         Visit note         ×         Memo         ×
	Filter by Used for			
Q. Search			🖄 In	Description *
Shortcut	Date created	Last Edited	Used Shared For Shared	Submit

- 7. Add the **Description**.
- 8. Click on **Submit** to save.

VSee Clinic Dash	board Patients Schedu	le			Create new Text macro is for private only
					Shortcut *
MY ACCOUNT Profile Preferences Notific	ations Text Macro				Used for *
Q Search	Filter by Used for			🛛 In	Description *
Shortcut	Date created	Last Edited	Used For	Shared	Submit 0
diabetesfollowup	03/13/2024	03/13/2024	Visit	Clinic	

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.

MY ACCOUNT	otifications Text Macro					
Q Search	Filter by Used for	Last Edited	Used For	Import Shared	from file .CSV Delete selection Description	+ New Macro
diabetesfollowup	Memo 03/13/2024	03/13/2024 12:38 AM	Visit Note	Clinic	Patient with known type 2 diabet mellitus. Recent HbA1c 7.2%. Cur medications include metformin 1 mg BID. Blood glucose log shows readings within target range. No complaints of hypoglycemia or hyperglycemia symptoms. Discus lifestyle modifications including c and exercise. Reiterated importar medication compliance and regu follow-ups. Plan: Continue curren regimen. Schedule follow-up in 3 months for repeat labs and assessment.	rent 000 sed liet liet lar t Del

## Importing a .csv file

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

1. Click on Import from file .CSV.

			_			_
MY ACCOUNT Profile Preferences Notif	ications Text Macro					
	Filter by Used for					
Q Search	All v			Import fr	om file .CSV Delete selection + N	New Macro
Shortcut	Date created	Last Edited	Used For	Shared	Description	Action
discharge	01/12/2024	01/12/2024 03:42 PM	Web chat	🖶 Private	Patient discharged in stable condition. Medications include [list of medications]. Follow up with [appropriate healthcare provider] in [number of days].	:
followupinfo	01/12/2024	01/12/2024 03:47 PM	Web chat	🗄 Private	After your recent visit, please follow up with us in [number of days/weeks]. If you experience any concerning symptoms, call our office at [phone number].	1
labresults	01/12/2024	01/12/2024 03:43 PM	Web chat	🗄 Private	Lab results indicate [summary of key findings]. Recommend [further action or treatment based on the results].	:

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.

VSee Clinic Dashboard	Patients Schedule	🚺 Dr. Sarah Bays 👻
MY ACCOUNT Profile Preferences Notifications	Import from file .CSV Text macro is for private only	×
Filter by	U Select a CSV file to upload Select a file or drag and drop here. We only accepts csv file under 5MB	Delete selection + New Macro
Shortcut	Download sample template here	on Action
diabetesfollowup	rear con 03/13/2024 Visit Clinic hyp	tecent HbA1c 7.2%. Current ans include metformin 1000 BID. Blood glucose log shows dings within target range. No nplaints of hypoglycemia or erglycemia symptoms. Discussed

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**.

See Clinic Dash	board Clinic Rooms	Schedule User:	s Report	Record	More≁	👂 Dr. Sarah Ba
CLINIC DETAILS						
Clinic Directory Paym ERX Enable/Disable Features	<b>P</b>	nders Health Se	ttings Ed	ducational Mater	ial Waiting Room Customizatio	n Tags
Q Search	Filter by Used for			Import fro	m file .CSV Delete selection	+ New Macro
Shortcut	Date created	Last Edited	Used For	Shared	Description	Action
o pain	03/12/2024	03/12/2024 08:26 AM	Memo, Visit Note	Clinic	Pain Management: Take prescriber pain medications as directed by your healthcare provider. Use ice packs or heating pads as recommended for pain and swellin relief. Follow any additional pain management techniques provided during your visit.	ng :
emergency	03/13/2024	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	I

- 4. Enter the **Shortcut** text.
- 5. Under Used for, select if for Web chat, Visit note, or Memo.

				Shortcut *	
CLINIC DETAILS					
Clinic Directory Pay	ments Notifications Remind	lora – Haalth Sai	ttings Educa	Used for *	
		iers Health se	tungs Educa		
ERX Enable/Disable Featur	es Text Macro			Web chat	
	Filter by Used for			Visit note	
Q. Search			6	Memo	
Shortcut	Date created	Last Edited	Used For	Submit	

Note: You can select multiple options from the dropdown.

VSee Clinic Dash	board Clinic Rooms	Schedule Users	Report Reco	X Create new Text macro is for clinic only
CLINIC DETAILS				Shortcut *
Clinic Directory Paym	ents Notifications Ren	ninders Health Setting		Used for *           Web chat         X         Visit nota:         X         Memo         X
ERX Enable/Disable Features	Text Macro Filter by Used for			Description *
Q Search	All		🖄 Imj	ĥ
Shortcut	Date created	Last Edited	ised Share or	Submit

- 6. Add the **Description**.
- 7. Click on **Submit** to save.

	shboard Clinic Rooms Schedule Users Report Reco × Create new Text macro is for clinic only	
	Shortcut *	
CLINIC DETAILS		=
Clinic Directory Pay	Used for *	
ERX Enable/Disable Featur	res Text Macro Description *	6
	Filter by Used for	
Q Search	All v	
Shortcut	Date created Last Edited Used Share Submit	ie.

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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.

ee Clinic D	ashboard Clinic Rooms !	Schedule Users	Report	Record N	Aore-	Dr. Sarah E
CLINIC DETAILS	ayments Notifications Remir	iders Health Se	ttings Fe	ducational Materi	al Waiting Room Customization	Tags
ERX Enable/Disable Featu	ures Text Macro				an manifiction continuation	1053
Q Search	Filter by Used for		ſ	Import from	m file .CSV	New Macro
Shortcut	Web chat Visit Note Memo	Last Edited	Used For	Shared	Description	Action
✓ pain	03/12/2024	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
emergency	03/13/2024	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.	ł

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

Tags	
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