

How to Send Reminders

- 2023-07-12 - Scheduling

For confirmed scheduled appointments, VSee Clinic automatically sends two notifications to both provider and patient via email and/or SMS (if SMS is enabled):

- Appointment confirmation - sent right after the appointment is confirmed.
- Appointment reminder - sent 24 hours by default before the actual appointment time.

However, patients may sometimes miss an appointment due to various reasons (email went to spam, forgot the details or the notification was accidentally deleted). With this feature, a provider or clinic admin can manually re-send the appointment reminder to the same patient from the calendar or visit record.

- [Sending a Visit Reminder From the Visit Details](#)
- [Sending a Reminder From the Calendar/Schedule Tab](#)
- [What a Visit Reminder Will Look Like on the Side of the Patient](#)

Resend the Reminder From the Visit Details

1. From the provider dashboard, click on **Patients** tab.
2. Once the Patient tab is loaded, click on **All Visits**.
3. Search for the patient and click **View** to open the patient's upcoming visit record.

The screenshot shows the VSee Clinic interface. At the top, there are navigation tabs: Dashboard, Patients (highlighted with a red box and number 1), and Schedule. On the right, the user's name 'John Smith' is displayed. Below the navigation, there is a sub-tab for 'Patients' with 'All Visits' (highlighted with a red box and number 2) selected. A search bar is present. Below the search bar is a table with the following columns: Patient, Waiting Room, Provider, Gender, Age, Email, Visit Status, Visit Type, Charge Amount, Payment Status, Call Duration, and Action. The first row of data shows 'John Doe' in the Patient column, 'Test Clinic' in the Waiting Room column, 'John Smith' in the Provider column, and 'j @gmail.com' in the Email column. The Visit Status is 'New' and the Visit Type is 'Video'. The Charge Amount is 'USD 0' and the Payment Status is 'No payment required.'. In the Action column, there is a 'View' button (highlighted with a red box and number 3).

4. Click on the **ellipsis button (...)**
5. On the drop-down menu, click on **Send visit reminder**.

The screenshot shows the VSee Clinic interface for a visit with John Doe. At the top right, there are buttons for 'Call', 'Add Participants', 'End Visit', and a menu icon. The menu icon is highlighted with a red box and the number '4'. A dropdown menu is open, showing options: 'Edit Visit', 'Send visit reminder' (highlighted with a red box and the number '5'), 'Cancel visit', and 'Download visit summary'. The visit details include: Visit ID: 2213463, Today 01:00 PM, Video Visit, Test Visit, 5 mins, and Test Clinic. Below the visit details, there are tabs for 'Intake', 'Notes', 'Payment', 'Visits', 'Health', 'Medical History', 'Allergies', 'Medications', and 'Documents'. The 'Intake' tab is selected, showing the date '04/23/2022' and time '01:00 PM'.

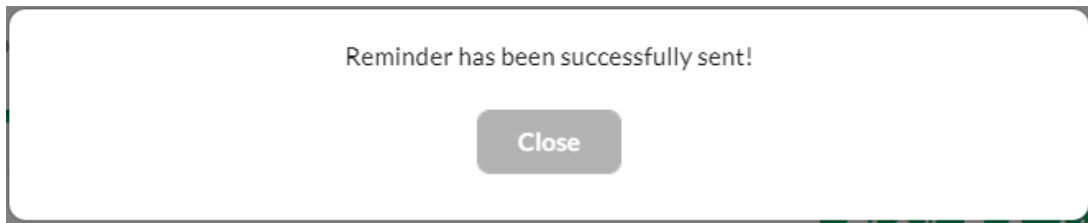
6. A pop-up for the Visit Reminder will appear. Select which parties will be notified by clicking the **drop-down menu**.

The screenshot shows a 'Visit Reminder' pop-up dialog. The title is 'Visit Reminder'. Below the title, it asks 'Would you like to send additional reminder to'. A dropdown menu is open, showing options: 'All participants', 'Patient only', 'Provider only', and 'Provider & patient only'. The 'Patient only' option is highlighted with a blue background. A red box highlights the dropdown menu and the number '6' is next to it.

7. Once you have selected to whom you want to send the reminder (In this case, the Patient only), click **Send Reminder**.

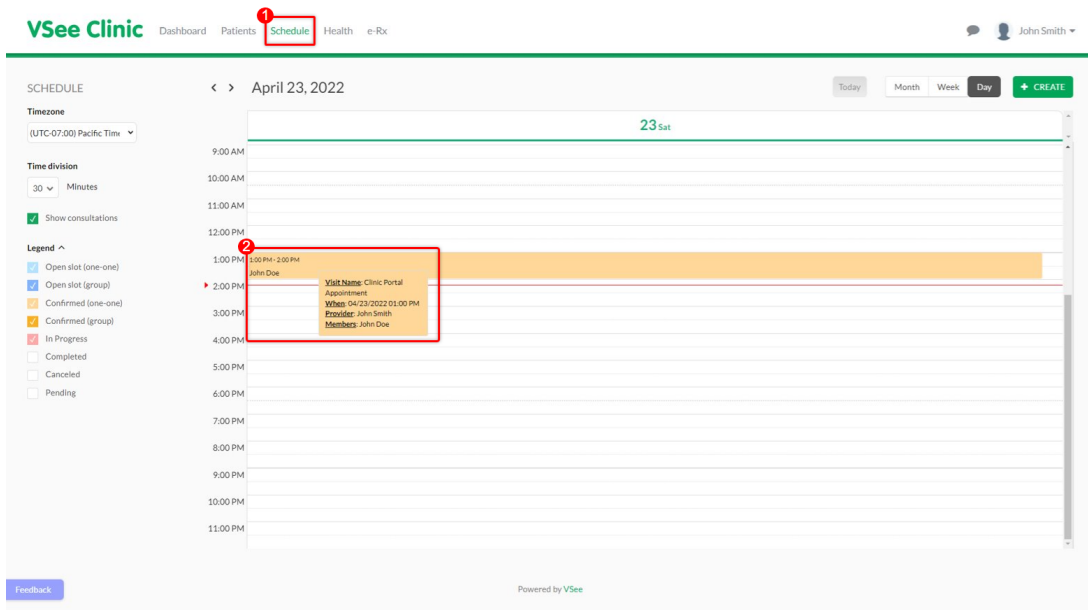
The screenshot shows the 'Visit Reminder' pop-up dialog with the dropdown menu set to 'Patient only'. At the bottom, there are two buttons: 'Cancel' and 'Send Reminder'. The 'Send Reminder' button is highlighted with a red box and the number '7' is next to it.

You will receive a confirmation that the reminder had been sent. The patient will then be notified through e-mail and/or SMS depending on the provided details from the patient (e-mail and/or mobile number) when the visit was scheduled.



Resend the Reminder From the Calendar

1. On the provider dashboard, go to the calendar by clicking on **Schedule**.
2. Click on an upcoming and confirmed appointment.



3. You will be taken to see the Visit Details. Click on the **bell icon**.

Visit Details

Visit Name: Clinic Portal Appointment

Time: Sat, Apr 23, 2022 01:00 PM (PDT)

Visit Type: Video

Visit Option: Initial Consultation

Patient: [John Doe](#)

Provider: John Smith


Room: Test Clinic

Reminder: 1 day before

Telephone: +1.650.758.0

Meeting PIN: 262449

Guest invite link: <https://clinic.vsee.me/visits/join/6264-64457b0a> [Copy](#)

 [Go To Visit Page](#)

[Send Reminder](#)

4. The confirmation to send the reminder will pop up. Select **Patient only**.

5. Click on **Send Reminder** to confirm sending.

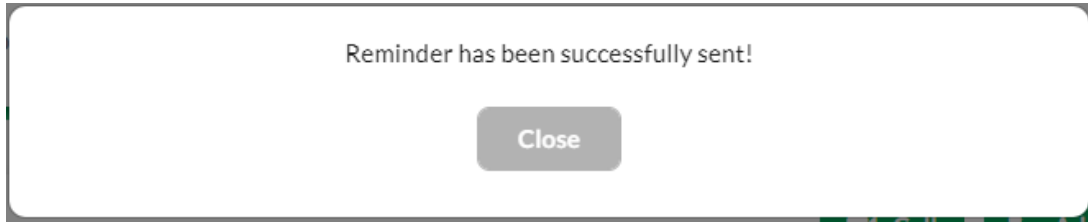
Visit Reminder

Would you like to send additional reminder to

[Cancel](#) [Send Reminder](#)

You will receive a confirmation that the reminder had been sent. The patient will then be notified through e-mail and/or SMS depending on the provided details from the

patient (e-mail and/or mobile number) when the visit was scheduled.



What a Visit Reminder E-mail/SMS Looks Like

Here is an example of what the e-mail reminder will look like for the patient:

Reminder: Clinic Portal Appointment Inbox x

Clinic Portal <noreply@vsee.com>

to me ▾

Dear John,

You have an appointment at **01:00 PM on Sat, Apr 23 2022 (PDT)**.

Please log into the portal 15 minutes before your scheduled time. To log in, click on the button below.

[Start Visit](#)

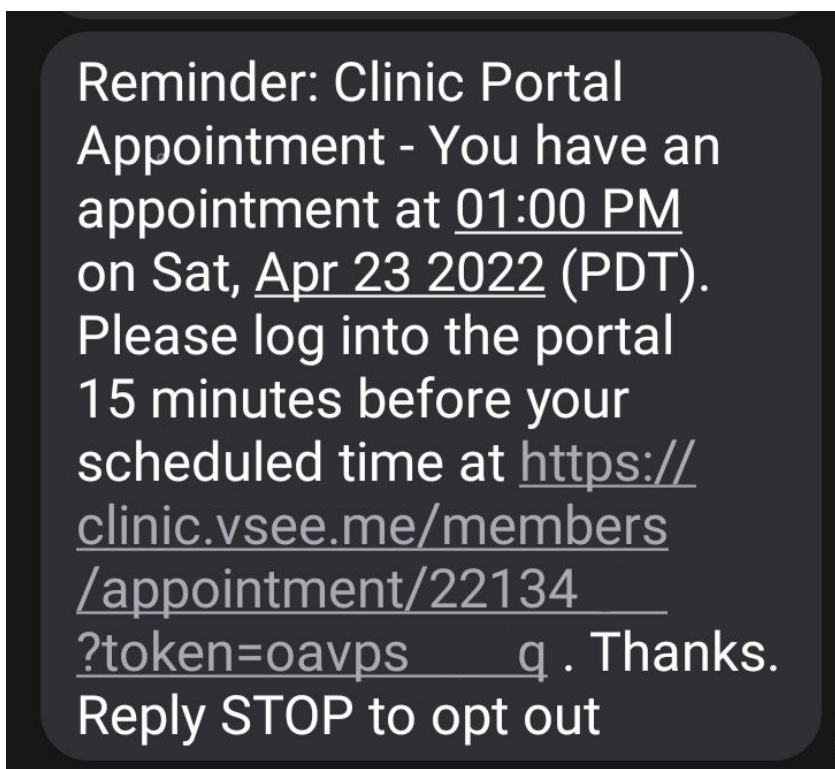
You are recommended to test your device before the visit to ensure stable call quality.

[Test Your Device](#)

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

Thank you for using **Clinic Portal!**

Here is an example of what an SMS reminder will look like for the patient:



Related Article:

[How to Create a Visit as a Provider](#)

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.

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Tags

appointment

E-mail

schedule

SMS

visit reminder