

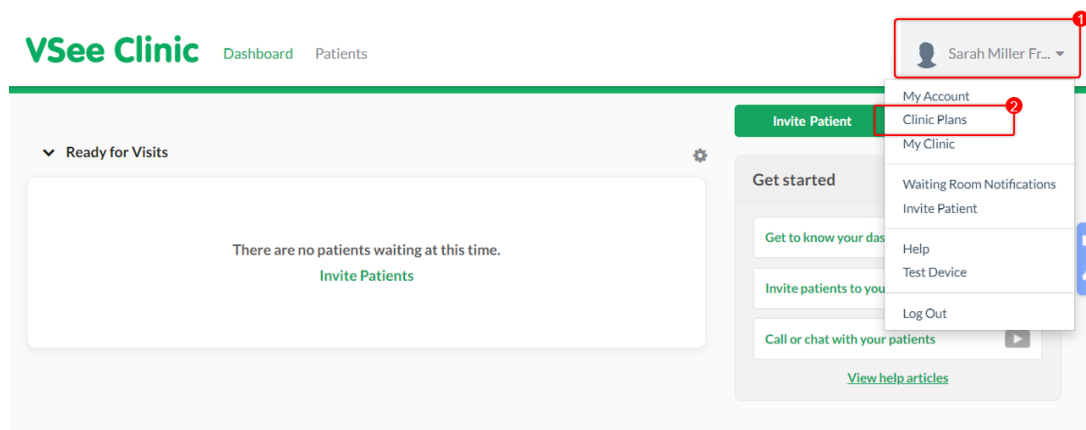
How to Upgrade or Downgrade your Plan

Jay-Ileen (AI) - 2023-05-26 - VSee Clinic for Providers

With the new tier's self-service feature, you have the ability to upgrade or downgrade your subscription plan.

Upgrading your Plan

1. Click on **Your Name** or the **Profile Menu**.
2. Select **Clinic Plans**.





On this page, you are able to see which plan you are currently subscribed to and the other subscription plans' pricing and features inclusions.

3.A. If you choose to upgrade to a **Plus** plan, click on the **Upgrade Now** button.

VSee Clinic Dashboard Patients Sarah Miller Fr...

Please choose a VSee Clinic plan

All the encrypted communication you need with your patient.

Free	Plus	Premium	Enterprise
For individual provider	For individual provider	For small remote teams	For large teams or complex workflows and integrations
\$0 / month	\$29 / month	\$49 / user/month	Contact Us
Upgrade Now	Upgrade Now	Upgrade Now	Contact Us
Everything in Free, and: <ul style="list-style-type: none">✓ No download, one-click video link✓ Unlimited 1-1 video, chats, and screenshare✓ Personalized waiting room✓ Simple intake✓ Signed BAA for HIPAA compliance✓ Knowledge Base & email support	Everything in Free, and: <ul style="list-style-type: none">✓ Customized subdomain✓ Patient portal✓ Unlimited group video*✓ Standard intake + consent✓ Credit card payment✓ 1-1 patient self-scheduling✓ Group scheduling✓ SMS/email invites & reminders✓ Phone dial-out	Everything in Plus, and: <ul style="list-style-type: none">✓ Custom logo and branding✓ Shared waiting room for same time video visits✓ Customizable intake form**✓ Standard EMR notes✓ Standard reports and usage analytics✓ User management✓ Notifications management✓ Patient and workflow	Everything in Premium, and: <ul style="list-style-type: none">✓ Branded mobile app✓ SSO✓ Custom workflows*✓ Custom intake process with logic, e.g. state and specialty routing✓ Custom EMR notes✓ Custom assessment forms✓ Central staffing and



You will be routed to the payment page.

4.A. Input your card details. The system will identify if your card is valid and with sufficient funds. And then click on **Proceed with Payment**.

Note: You can input a coupon code if you have one.

Subscribe to Clinic Plus (Monthly)

VISA  AMEX 

Name on Card

Card number

[Autofill link](#)

Clinic Plus (Monthly)

\$29.00 USD

Coupon Code

[Apply](#)

Subtotal

\$29.00 USD

Total

\$29.00 USD

[Proceed With Payment](#)

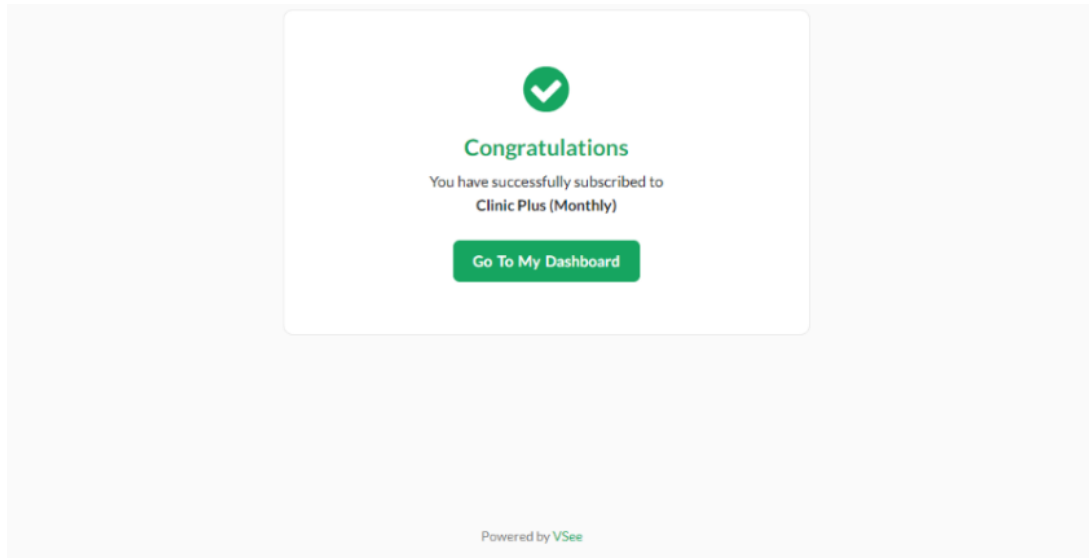
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You will see a confirmation that you have successfully subscribed to the

Plus plan.

You can click on **Go To My Dashboard** to go to your Dashboard and view the changes in your Clinic with your new subscribed plan.



3.B. If you choose to upgrade to a **Premium** plan, click on the **Upgrade Now** button.



VSee Clinic Dashboard Patients Sarah Miller Fr...

Please choose a VSee Clinic plan

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For individual provider	For individual provider	For small remote teams	For large teams or complex workflows and integrations
Free \$0 / month	Plus \$29 / month	Premium \$49 - / user/month	Enterprise
Upgrade Now	Upgrade Now	Upgrade Now	Contact Us
<ul style="list-style-type: none">✓ No download, one-click video link✓ Unlimited 1-1 video, chats, and screenshare✓ Personalized waiting room✓ Simple intake✓ Signed BAA for HIPAA compliance✓ Knowledge Base & email support	<p>Everything in Free, and:</p> <ul style="list-style-type: none">✓ Customized subdomain✓ Patient portal✓ Unlimited group video*✓ Standard intake + consent✓ Credit card payment✓ 1-1 patient self-scheduling✓ Group scheduling✓ SMS/email invites & reminders✓ Phone dial-out	<p>Everything in Plus, and:</p> <ul style="list-style-type: none">✓ Custom logo and branding✓ Shared waiting room for same time video visits✓ Customizable intake form**✓ Standard EMR notes✓ Standard reports and usage analytics✓ User management✓ Notifications management✓ Patient and workflow	<p>Everything in Premium, and:</p> <ul style="list-style-type: none">✓ Branded mobile app✓ SSO✓ Custom workflows*✓ Custom intake process with logic, e.g. state and specialty routing✓ Custom EMR notes✓ Custom assessment forms✓ Central staffing and

4.B. Input how many seats you would like to add. It will display the amount you will be charged depending on the number of user seats inputted.



Upgrade to Clinic Premium (Monthly)

How many user seats do you need? ⓘ

Billed monthly

\$49.00 / month

+ \$200 one-time clinic setup fee

Cancel

Continue

4


Powered by VSee

5.B. Input your card details. The system will identify if your card is valid and with sufficient funds. And then click on **Proceed with Payment**.

Note: You can input a coupon code if you have one.

Upgrade to Clinic Premium (Monthly)

VISA  AMEX 

Name on Card 

 Card number 

Autofill [link](#)

Clinic One-Time Setup Fee

\$200.00 USD

Clinic Premium (Monthly) - 1 user seat

\$49.00 USD

Coupon Code

[Apply](#)

Subtotal

\$249.00 USD

Total

\$249.00 USD

[Back](#)

[Proceed With Payment](#)

5



You will see a confirmation that you have successfully subscribed to the Premium plan.

And an email with the instructions to customize your branding and intake form has been sent to your email.

Getting Started

To access the Admin Panel, please see this [guide](#).



Customize Your Intake Form

It has 16 fields you can customize – 6 editable defaults and up to 10 custom fields you can add. [Create now](#)



Customize Your Branding

Logo - upload your logo in jpg or png format by going to the **Admin Panel > Clinic > Clinic**.

Theme - add the Hex color code or choose from the color picker by going to the **Admin Panel > Clinic tab > Customization**



Customize Your Consent and Policies

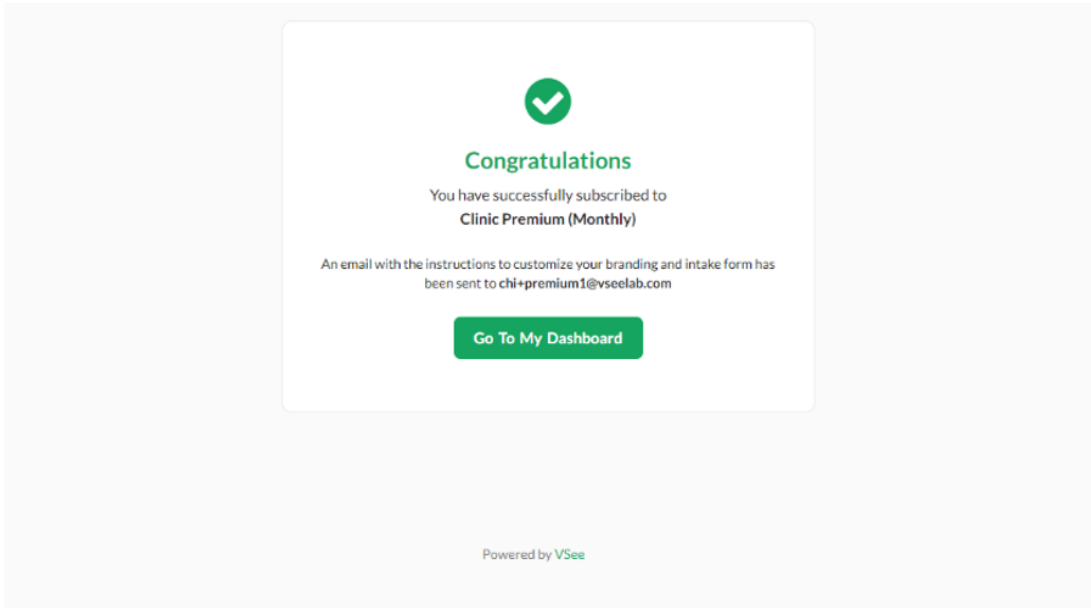
Upload your legal documents (i.e. consent form, privacy policy, and terms of use) in HTML format by going to the **Admin Panel > Clinic > Clinic**.



Manage Users



You can click on **Go To My Dashboard** to go to your Dashboard and view the changes in your Clinic with your new subscribed plan.



3.C. If you're interested in the **Enterprise** plan, you need to contact our Telemedicine experts. Click on **Contact Us**.



VSee Clinic Dashboard Patients Sarah Miller Fr...

Please choose a VSee Clinic plan

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For individual provider	For individual provider	For small remote teams	For large teams or complex workflows and integrations
Free \$0 / month	Plus \$29 / month	Premium \$49 / user/month	Enterprise
<ul style="list-style-type: none">✓ No download, one-click video link✓ Unlimited 1-1 video, chats, and screenshare✓ Personalized waiting room✓ Simple intake✓ Signed BAA for HIPAA compliance✓ Knowledge Base & email support	<ul style="list-style-type: none">✓ Customized subdomain✓ Patient portal✓ Unlimited group video*✓ Standard intake + consent✓ Credit card payment✓ 1-1 patient self-scheduling✓ Group scheduling✓ SMS/email invites & reminders	<ul style="list-style-type: none">✓ Custom logo and branding✓ Shared waiting room for same time video visits✓ Customizable intake form**✓ Standard EMR notes✓ Standard reports and usage analytics✓ User management✓ Notifications management	<ul style="list-style-type: none">✓ Branded mobile app✓ SSO✓ Custom workflows*✓ Custom intake process with logic, e.g. state and specialty routing✓ Custom EMR notes✓ Custom assessment forms✓ Central staffing and
	Upgrade Now	Upgrade Now	Contact Us

A new tab will open and will lead you to submit a ticket to our Sales team so that they can reach out to you.

You may also email us directly via sales@vsee.com.

Talk to one of our telemedicine experts today!

For troubleshooting and technical issues, contact our [VSee Helpdesk](#)

All other sales inquiries please complete the form below:

Request Type*

First name*
Last name*

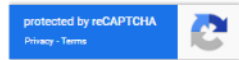
Work Email*
Phone number*

Organization*
Company Size*

Job Title*
How did you hear about VSee?*

Additional information related to your business needs*

* These fields are required.



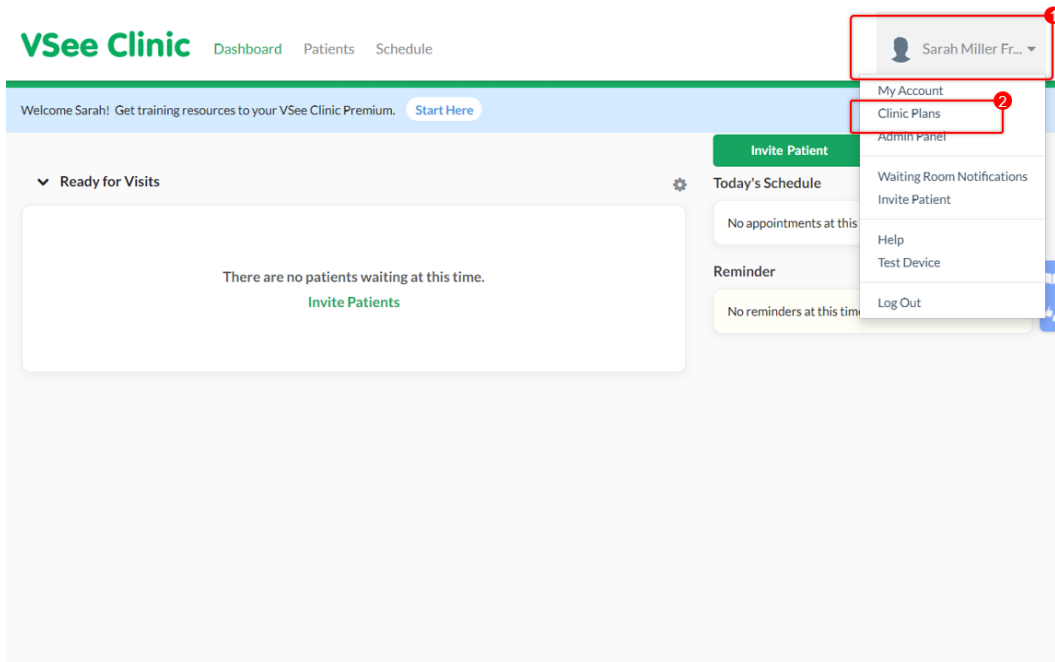
You can also contact us via:

✉ sales@vsee.com



Downgrading your Plan

1. Click on **Your Name** or the **Profile Menu**.
2. Select **Clinic Plans**.



On this page, you are able to see which plan you are currently subscribed to and the other subscription plans' pricing and features inclusions.

3. If you choose to downgrade to either **Plus** or **Free**, click on the

Downgrade button.

Please choose a VSee Clinic plan
All the encrypted communication you need with your patient.

For individual provider	For individual provider	For small remote teams	For large teams or complex workflows and integrations
Free \$0/month	Plus \$29/month	Premium \$49*/user/month	Enterprise
Downgrade	Downgrade		Contact Us
<ul style="list-style-type: none">✓ No download, one-click video link✓ Unlimited 1-1 video, chats, and screenshare✓ Personalized waiting room✓ Simple intake✓ Signed BAA for HIPAA compliance✓ Knowledge Base & email support	<p>Everything in Free, and:</p> <ul style="list-style-type: none">✓ Customized subdomain✓ Patient portal✓ Unlimited group video*✓ Standard intake + consent✓ Credit card payment✓ 1-1 patient self-scheduling✓ Group scheduling✓ SMS/email invites & reminders✓ Phone dial-out✓ Add or invite family, interpreters, and other guests <p>*on-demand and scheduled</p>	<p>Everything in Plus, and:</p> <ul style="list-style-type: none">✓ Custom logo and branding✓ Shared waiting room for same time video visits✓ Customizable intake form**✓ Standard EMR notes✓ Standard reports and usage analytics✓ User management✓ Notifications management✓ Patient and workflow tagging✓ Live chat and phone support <p>*\$200 one-time setup fee</p> <p>**Update default fields and add up to 10 custom intake fields</p>	<p>Everything in Premium, and:</p> <ul style="list-style-type: none">✓ Branded mobile app✓ SSO✓ Custom workflows*✓ Custom intake process with logic, e.g. state and specialty routing✓ Custom EMR notes✓ Custom assessment forms✓ Central staffing and scheduling✓ Custom SMS/email notifications✓ Custom reports and analytics dashboard✓ Waiting room(s) management



A pop-up window will appear.

4. Click on **Downgrade My Plan.**

VSee Clinic Dashboard Sarah Miller Fr...

Welcome Sarah! Get training resources to you

Downgrade plan to Free?

Your monthly subscription is paid until Jun 26 2023.
After Jun 26 2023, you will not have the ability to use the features that are only available on Clinic Premium.

[Cancel](#) [Downgrade My Plan](#)

For individual provider	For individual provider	For small remote teams	For large teams or complex workflows and integrations
Free \$0 / month Downgrade	Plus \$29 / month Downgrade	Premium \$49* / user/month	Contact Us
Everything in Free, and: <ul style="list-style-type: none">✓ No download, one-click video link✓ Unlimited 1-1 video, chats, and screenshare✓ Personalized waiting room✓ Simple intake✓ Signed BAA for HIPAA compliance✓ Knowledge Base & email support	Everything in Free, and: <ul style="list-style-type: none">✓ Customized subdomain✓ Patient portal✓ Unlimited group video*✓ Standard intake + consent✓ Credit card payment✓ 1-1 patient self-scheduling✓ Group scheduling✓ SMS/email invites & reminders✓ Phone dial-out✓ Add or invite family, interpreters, and other	Everything in Plus, and: <ul style="list-style-type: none">✓ Custom logo and branding✓ Shared waiting room for same time video visits✓ Customizable intake form**✓ Standard EMR notes✓ Standard reports and usage analytics✓ User management✓ Notifications management✓ Patient and workflow tagging✓ Live chat and phone support	Everything in Premium, and: <ul style="list-style-type: none">✓ Branded mobile app✓ SSO✓ Custom workflows*✓ Custom intake process with logic, e.g. state and specialty routing✓ Custom EMR notes✓ Custom assessment forms✓ Central staffing and scheduling✓ Custom SMS/email notifications

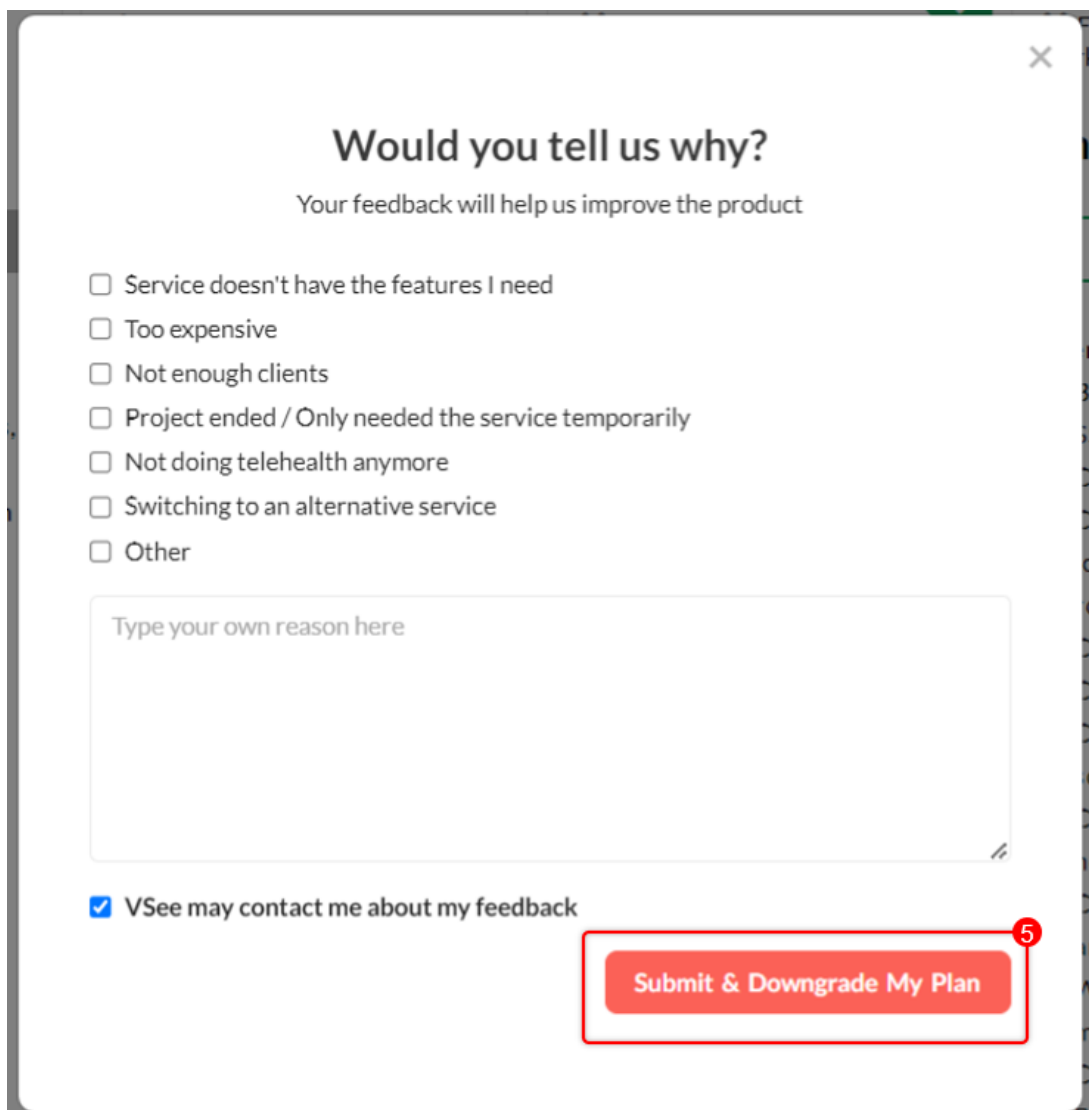


You will be asked for your feedback as to why you've decided to downgrade.

You can click on the check boxes of the possible reasons that you can select or type your own reason in the provided field.

If you click on the check box for **VSee may contact me about my feedback**, a ticket will not be generated and you will not be contacted by the support team.

5. Click on **Submit & Downgrade My Plan**.



The image shows a feedback form titled "Would you tell us why?" with the subtitle "Your feedback will help us improve the product". The form contains a list of reasons with checkboxes, a text input field, and a "Submit & Downgrade My Plan" button. A red box highlights the button, and a red circle with the number 5 is next to it.

Would you tell us why?
Your feedback will help us improve the product

- Service doesn't have the features I need
- Too expensive
- Not enough clients
- Project ended / Only needed the service temporarily
- Not doing telehealth anymore
- Switching to an alternative service
- Other

Type your own reason here

VSee may contact me about my feedback

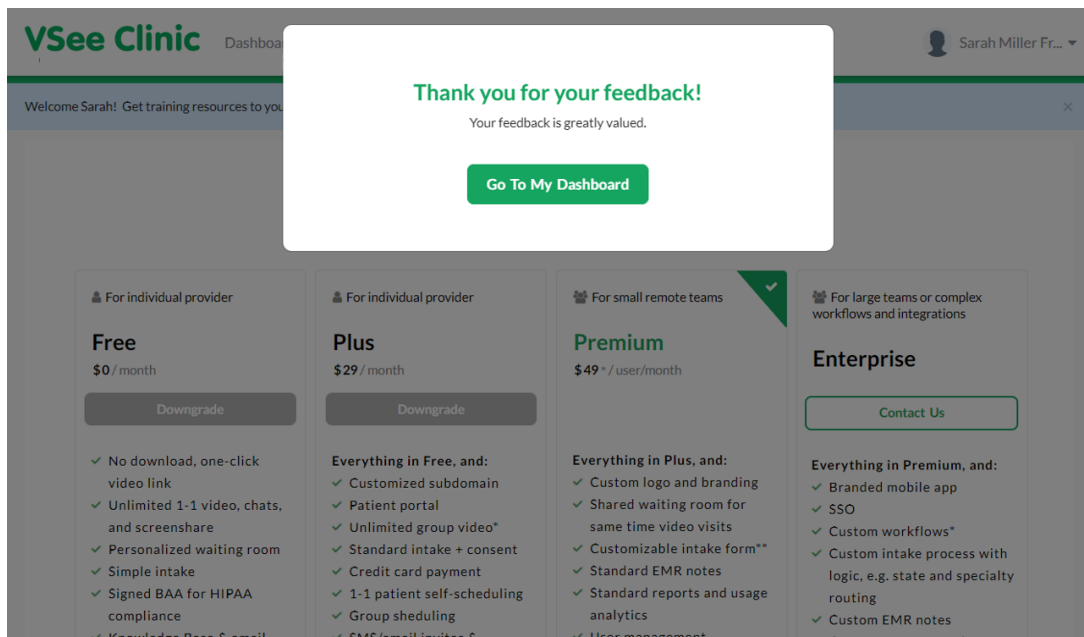
Submit & Downgrade My Plan 5



You will see a pop-up window informing “Thank you for your feedback!”

This is an indication that your plan has been successfully downgraded.

You can click on **Go To My Dashboard** to go to your Dashboard and view the changes in your Clinic.



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.

This article was last updated on: 26 May 2023

Tags

downgrade

upgrade