

How to Use Text Macro

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

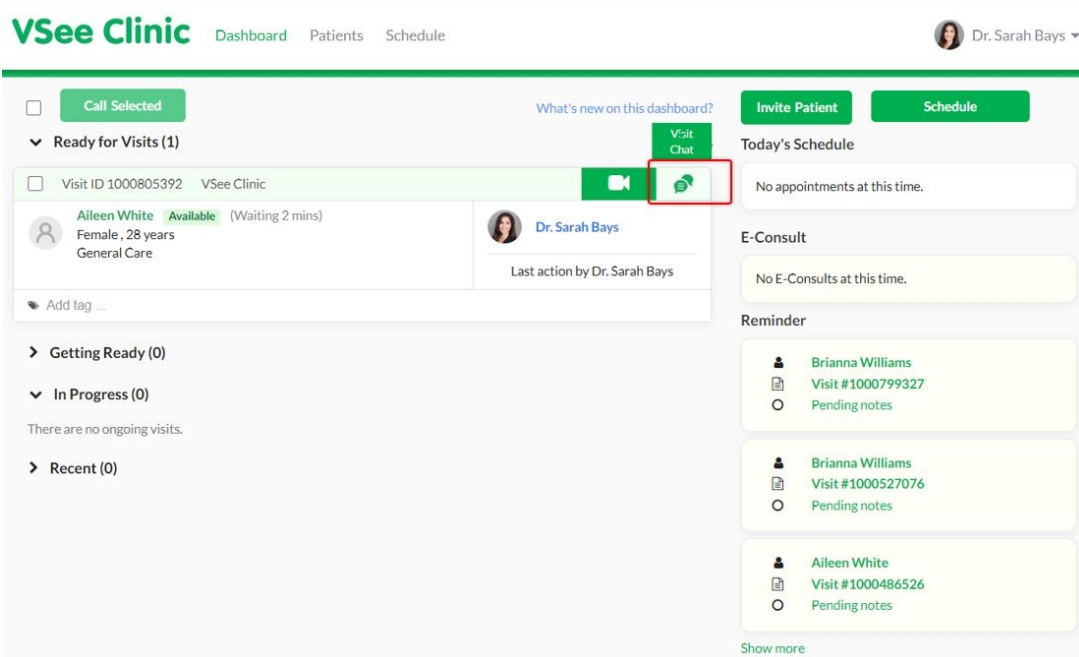
What is Text Macro?

Text Macro allows users to define and use shorthand notations for longer pieces of text or code. This is useful for automating repetitive tasks, inserting commonly used code snippets, or speeding up the text input process.

How to Use Text Macro in Chat

Even before you are on the call with the Patient, you can already use the Text Macro feature in the Visit Chat or Direct Message.

Click on the **chat** icon.



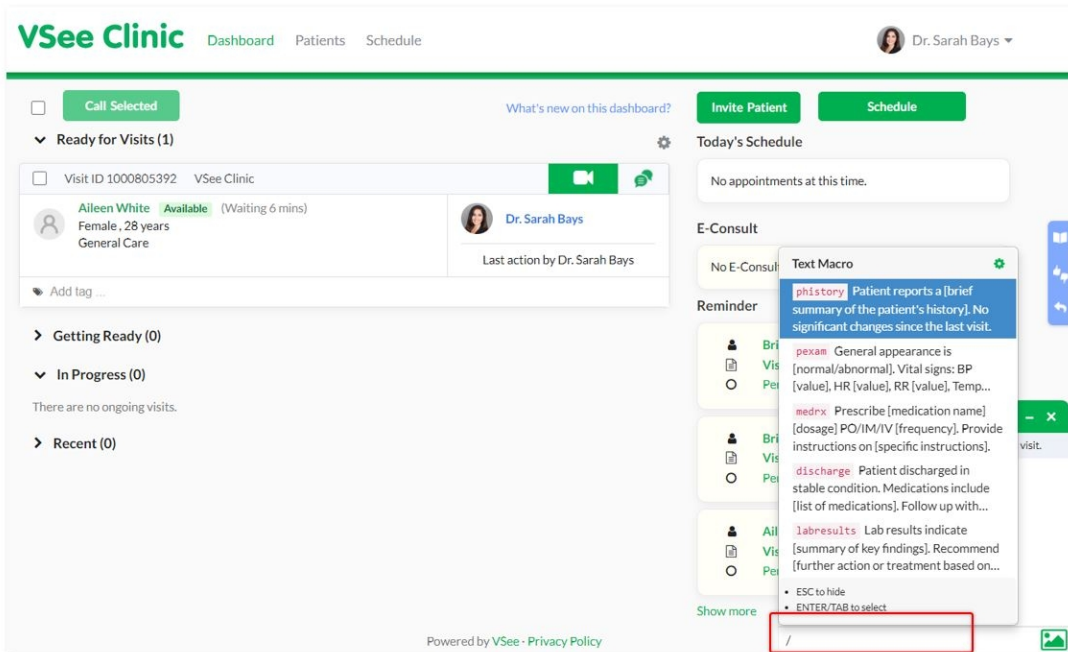
The screenshot displays the VSee Clinic dashboard for Dr. Sarah Bays. At the top, there are navigation tabs for 'Dashboard', 'Patients', and 'Schedule'. A 'Call Selected' button is visible. The main content area is divided into several sections:

- Ready for Visits (1):** A card for patient Aileen White (Female, 28 years, General Care) is shown. She is 'Available' and 'Waiting 2 mins'. A 'Visit Chat' icon is highlighted with a red box. Below the patient card is an 'Add tag ...' field.
- Getting Ready (0):** A section with a right-pointing arrow.
- In Progress (0):** A section with a downward-pointing arrow, indicating 'There are no ongoing visits.'
- Recent (0):** A section with a right-pointing arrow.
- Today's Schedule:** A section with the text 'No appointments at this time.'
- E-Consult:** A section with the text 'No E-Consults at this time.'
- Reminder:** A list of reminders for Brianna Williams (Visit #1000799327) and Aileen White (Visit #1000486526), both with 'Pending notes'.

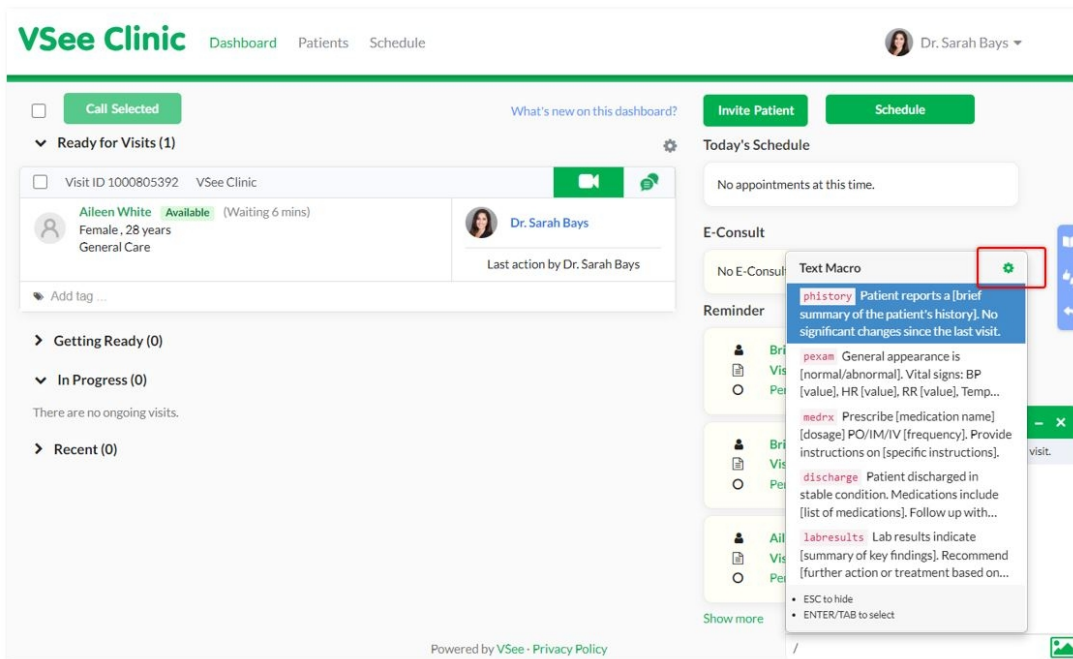
A 'Show more' link is located at the bottom right of the dashboard.

A chat window will open at the bottom right.

Type in a forward slash symbol (/) and it will show the recent text that you copied or the Text Macro customizations you recently created.



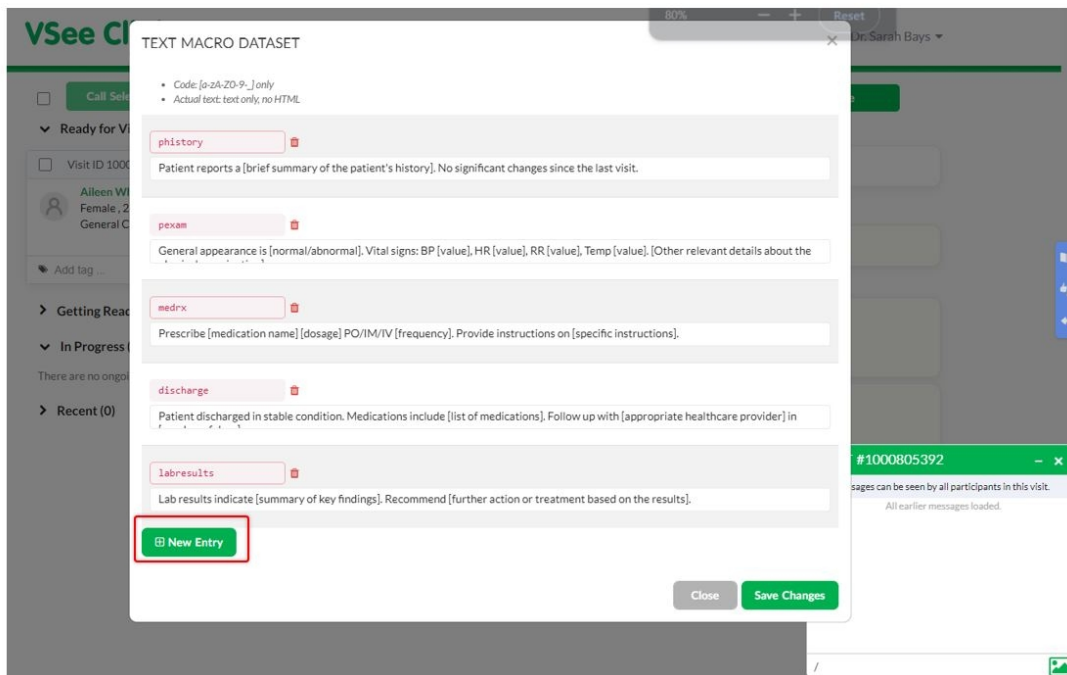
If you need to create a new Text Macro, click on the **gear** icon.



A pop-up window will appear to show the Text Macro Dataset.

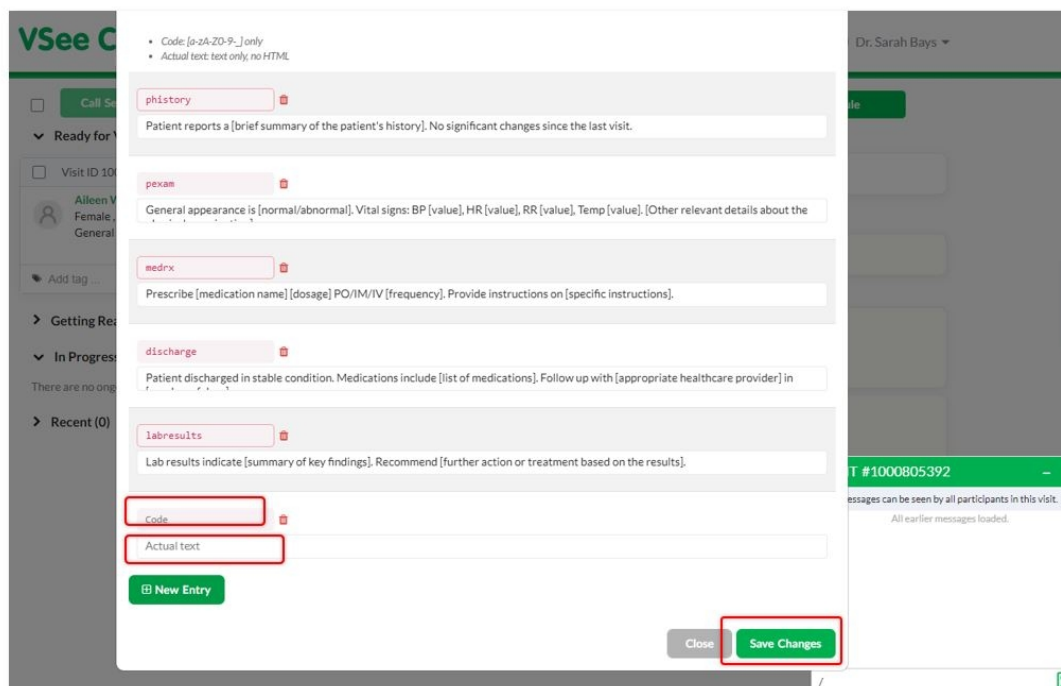
Here you will see all the customizations you've created.

Click on **New Entry** to create a new one.



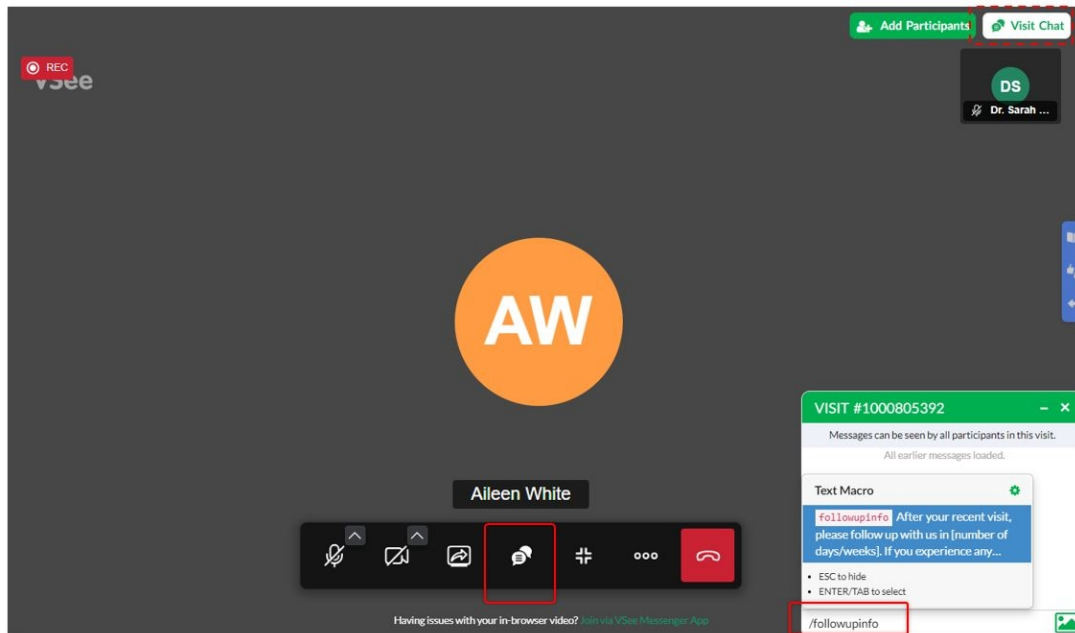
Enter the **Code** and the **Actual text**.

Click on **Save Changes**.

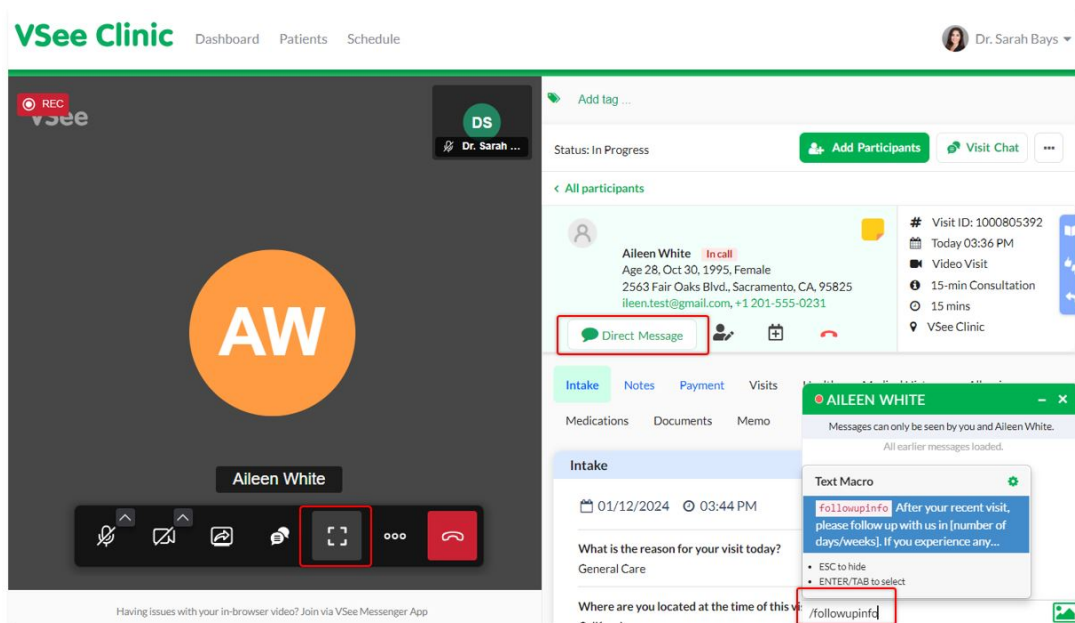


When you are on the call, you can also use the Text Macro feature.

Click on the **chat** icon on the menu bar or the **Visit Chat** icon at the top right.



You can also use Text Macro for Direct Message.
 A patient can also use the Text Macro feature just the same for both Visit Chat and Direct Message



How to Use Text Macro in Notes

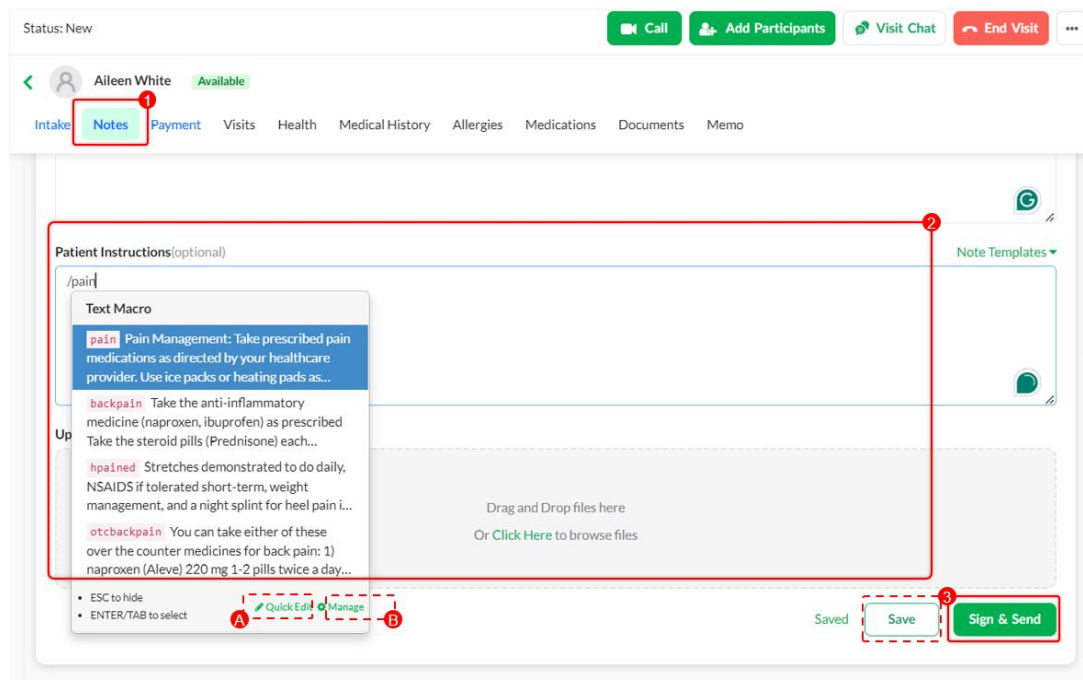
1. On the Visit Details page, click on **Notes**.
2. Under the SOAP Notes fields (from Subjective until Patient Instructions) type in a forward slash symbol (/) and it will show the recent text that you copied or the Text Macro customizations you recently created. You can also type in directly the Text Macro shortcut. Select the Text Macro from the dropdown.

3. Click on **Sign & Send** or Save to finish later.

A. Click on **Quick Edit** to open Text Macro Dataset where you can add or edit Text Macros.

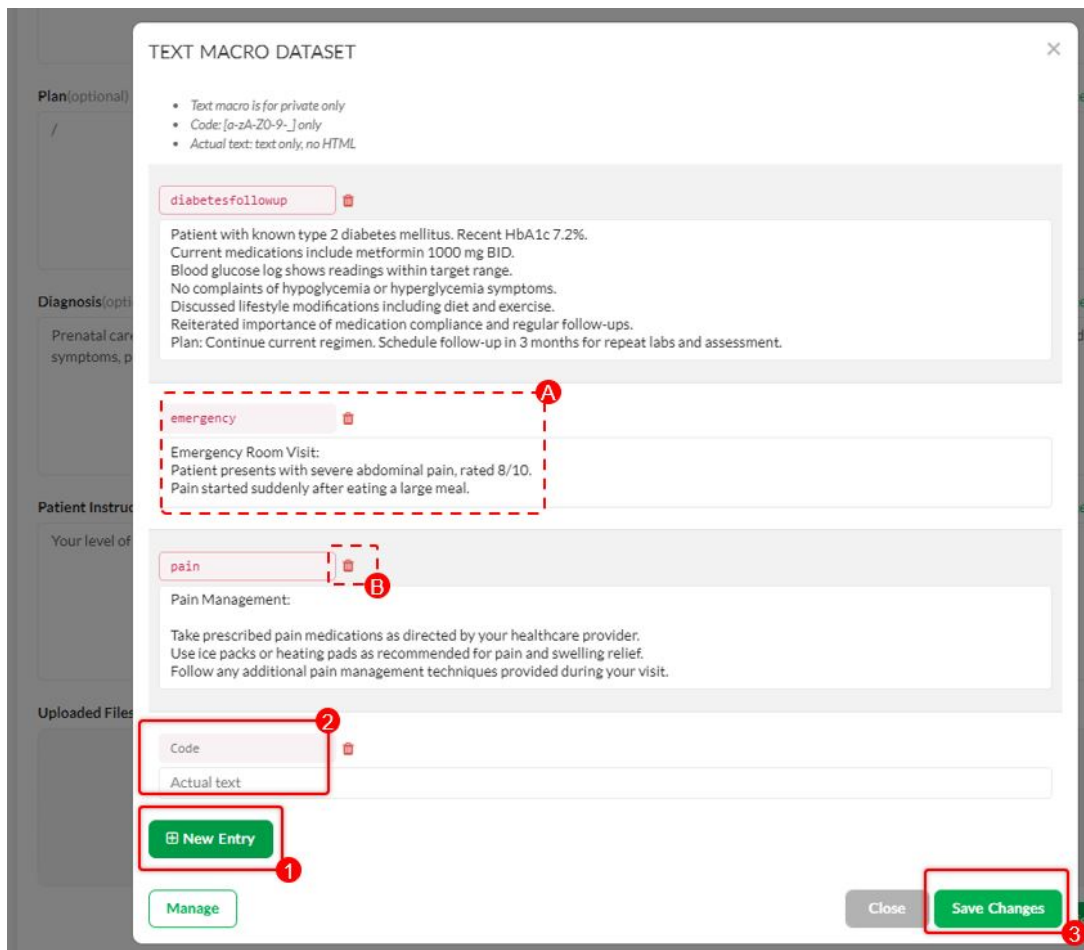
B. Click on **Manage** to go to your My Account page and manage the Text Macros.

Note: Read under Related Articles below the KBA How to Manage Text Macro



Under Text Macro Dataset:

1. To create a new Text Macro, click on **New Entry**.
2. Enter the **code** or **shortcut** text and the **Description** of the Text Macro.
3. Click on **Save Changes**.
 - A. You can edit the Text Macro shortcut and description.
 - B. You can also delete permanently a Text Macro.



How to Use Text Macro in Memo

1. On the Visit Details page, click on **Memo**.

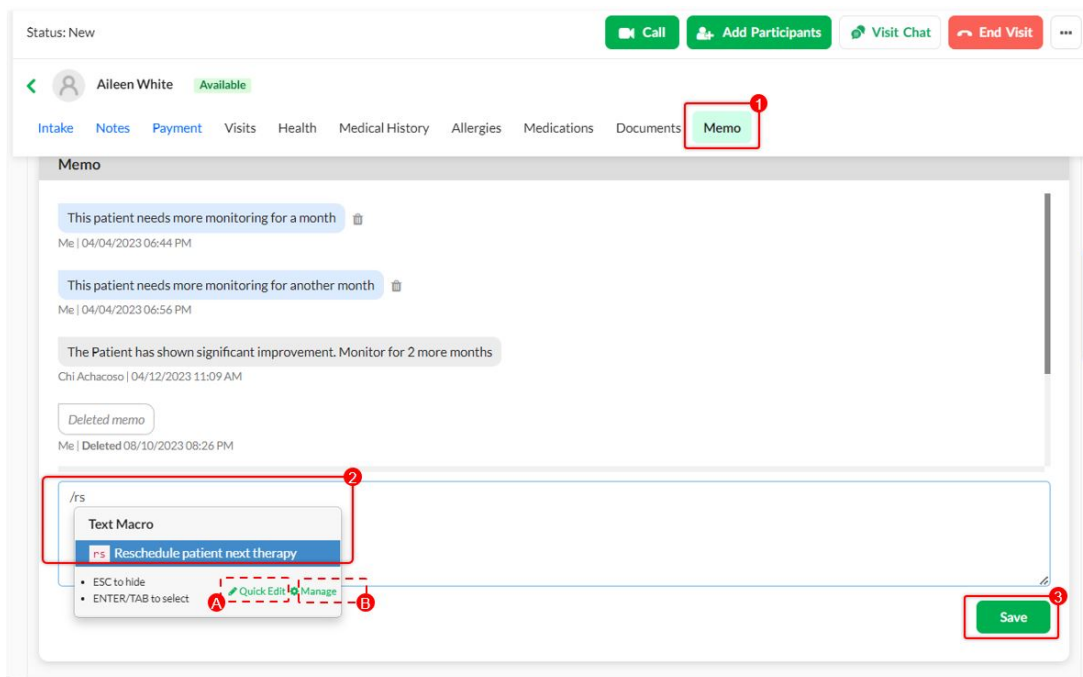
2. Under the field provided type in a forward slash symbol (/) and it will show the recent text that you copied or the Text Macro customizations you recently created. You can also type in directly the Text Macro shortcut. Select the Text Macro from the dropdown.

3. Click on **Save**.

A. Click on **Quick Edit** to open Text Macro Dataset where you can add or edit Text Macros.

B. Click on **Manage** to go to your My Account page and manage the Text Macros.

Note: Read under Related Articles below the KBA How to Manage Text Macro

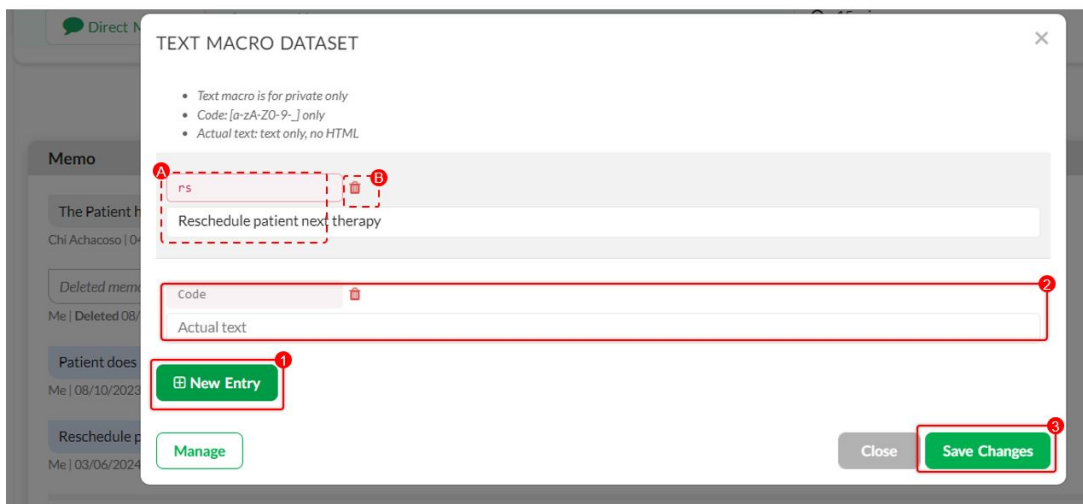


Under Text Macro Dataset:

1. To create a new Text Macro, click on **New Entry**.
2. Enter the **code** or **shortcut** text and the **Description** of the Text Macro.
3. Click on **Save Changes**.

A. You can edit the Text Macro shortcut and description.

B. You can also delete permanently a Text Macro.



Notes:

- The Text Macro you created from either the 'Visit chat' or the 'Direct Message' can be used interchangeably.

- All the Text Macro you've created can be used for the same patient on the next visit, or for other patients of yours.
- A Text Macro is created per Provider of the Clinic.

Related Article:

[How to Manage 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

Text Macro