

How to Use Text Macro

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

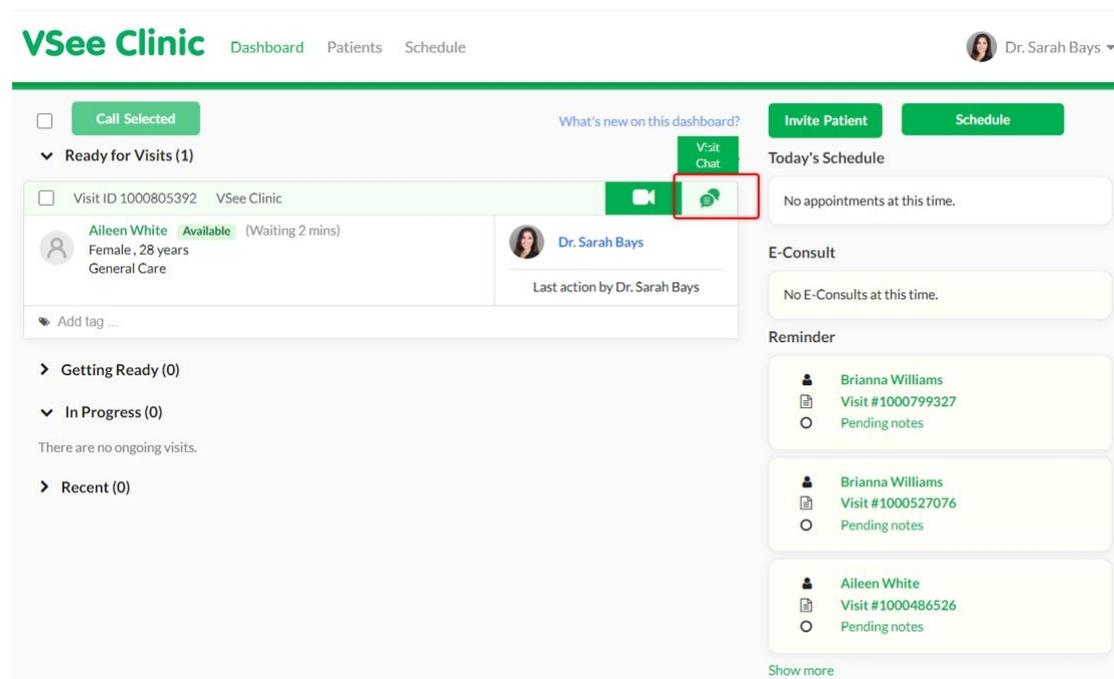
What is Text Macro?

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 shows the VSee Clinic dashboard interface. At the top, there are navigation tabs for 'Dashboard', 'Patients', and 'Schedule', along with a user profile for 'Dr. Sarah Bays'. Below the navigation, there are several sections: 'Call Selected' with a 'Call Selected' button, 'Ready for Visits (1)' with a list of visits including one for 'Aileen White' (Female, 28 years, General Care) who is 'Available' and 'Waiting 2 mins'. To the right of the visit card, there is a 'Visit Chat' button highlighted with a red box. Other sections include 'Today's Schedule' (No appointments at this time), 'E-Consult' (No E-Consults at this time), and 'Reminder' with three items for 'Brianna Williams' and 'Aileen White', each with a 'Pending notes' status. A 'Show more' link is visible at the bottom right of the reminder section.

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.

The screenshot shows the VSee Clinic dashboard interface. On the left, there's a patient card for Aileen White, 28 years old, in General Care, who is available and waiting 6 minutes. The dashboard also shows sections for 'Ready for Visits (1)', 'Getting Ready (0)', 'In Progress (0)', and 'Recent (0)'. On the right, there's a 'Today's Schedule' section with 'No appointments at this time.' Below that, there are sections for 'E-Consult', 'Reminder', and 'Text Macro'. The 'Text Macro' pop-up window is open, showing a list of macros with their descriptions. A red box highlights the gear icon in the top right corner of the pop-up window, indicating where to click to create a new macro.

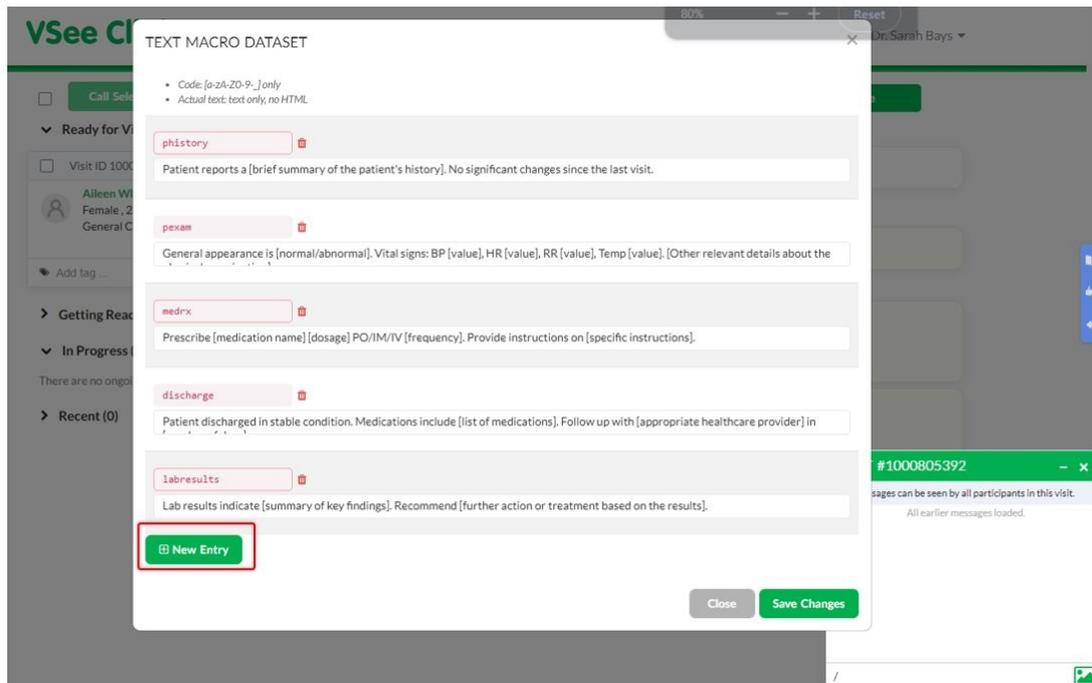
If you need to create a new Text Macro, click on the **gear** icon.

This screenshot is similar to the one above, but the 'Text Macro' pop-up window is more prominent. A red box highlights the gear icon in the top right corner of the pop-up window, indicating where to click to create a new macro. The pop-up window shows a list of macros with their descriptions, including 'phistory', 'pexam', 'medrx', 'discharge', and 'labresults'. The gear icon is located in the top right corner of the pop-up window.

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

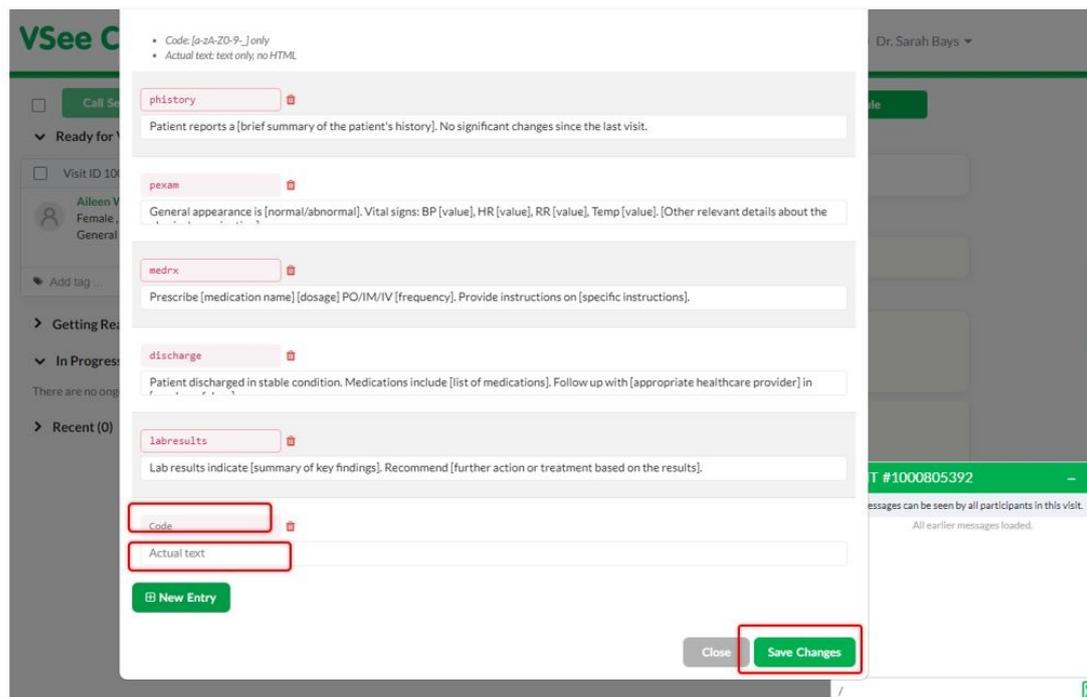
Here you will see all the customizations you've created.

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



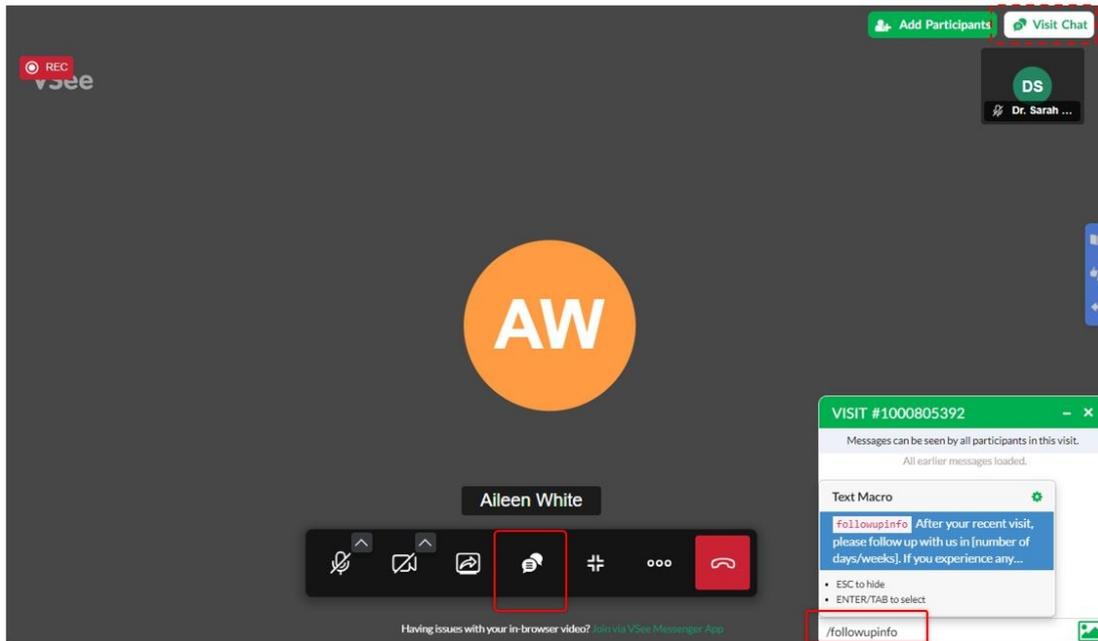
Enter the **Code** and the **Actual text**.

Click on **Save Changes**.

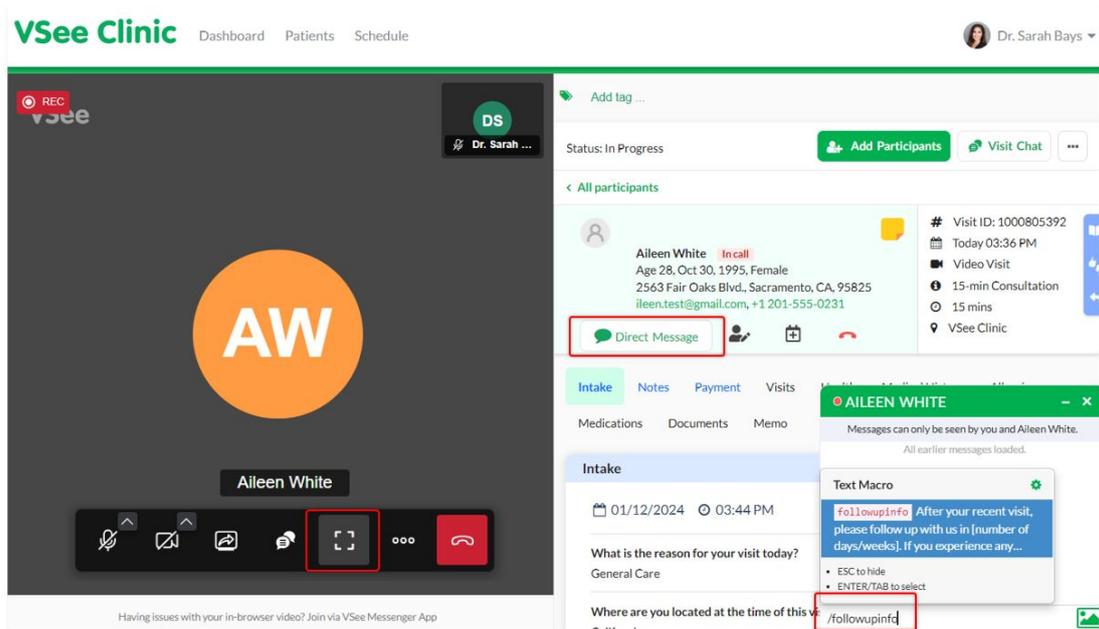


When you are on the call, you can also use the Text Macro feature.

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

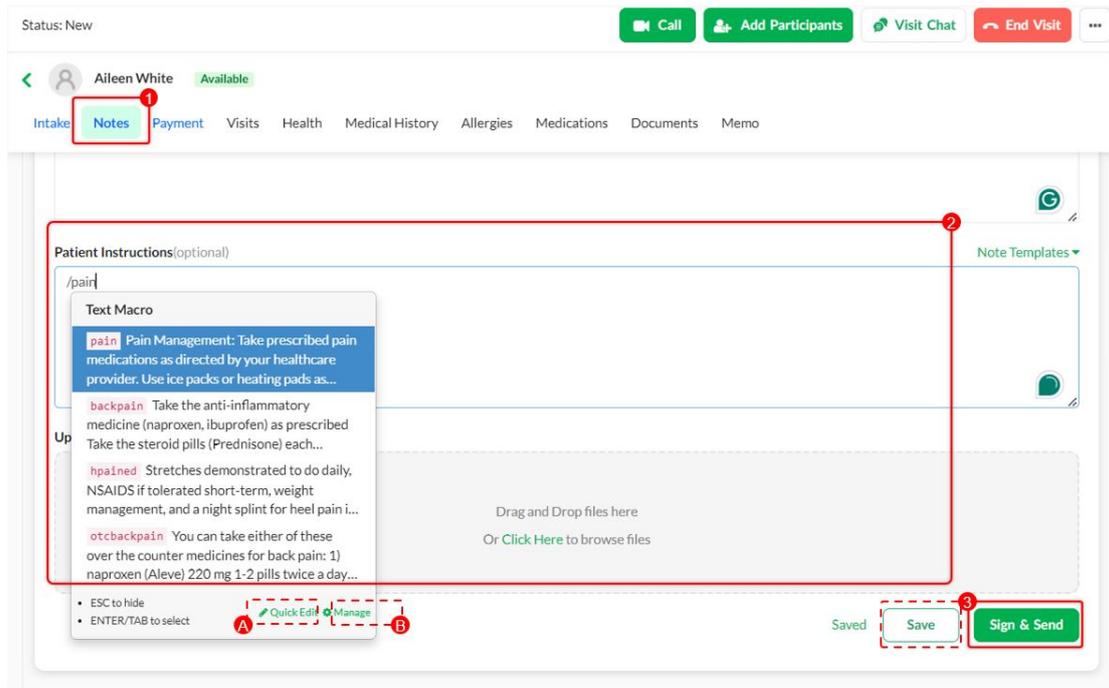
1. On the Visit Details page, click on **Notes**.
2. Under the SOAP Notes fields (from Subjective until Patient Instructions) type in a forward slash symbol (/) and it will show the recent text that you copied or the Text Macro customizations you recently created. You can also type in directly the Text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

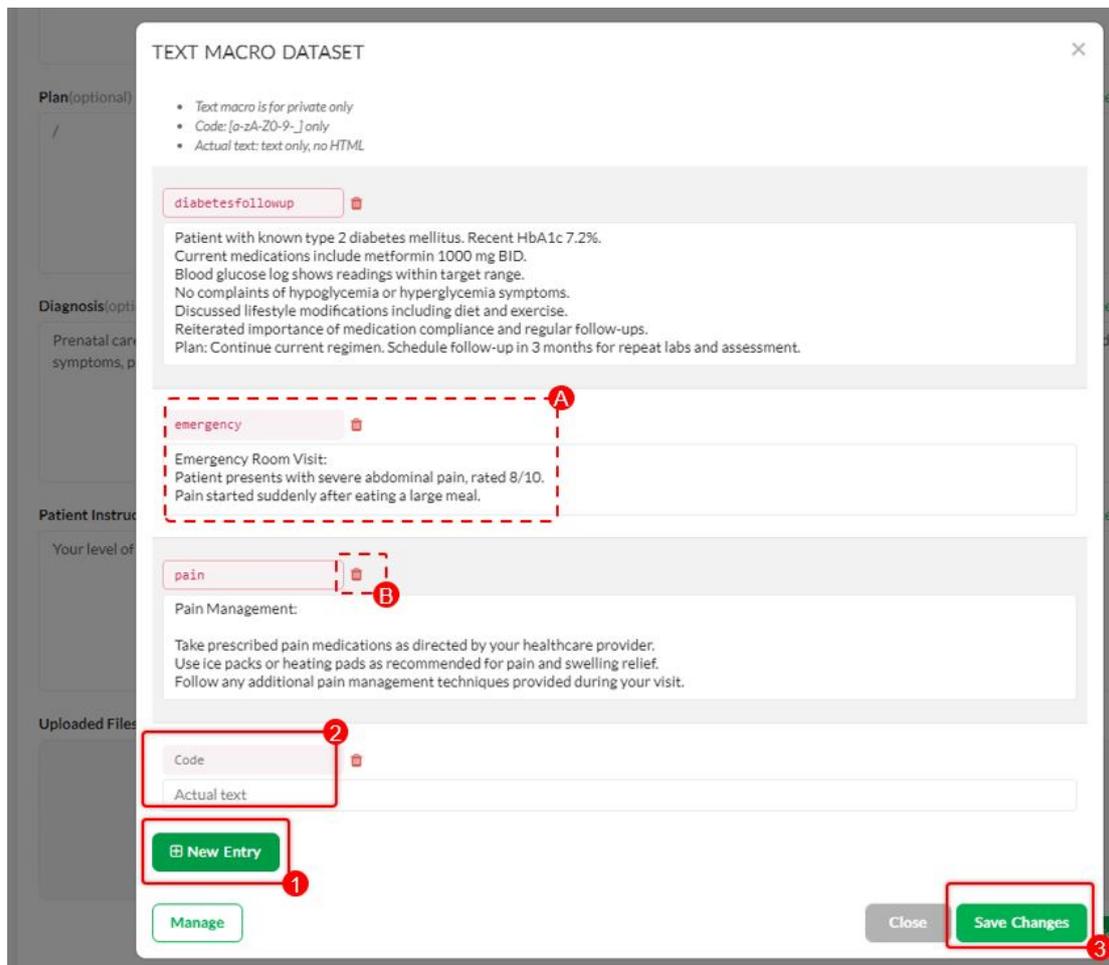
1. To create a new Text Macro, click on **New Entry**.

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.

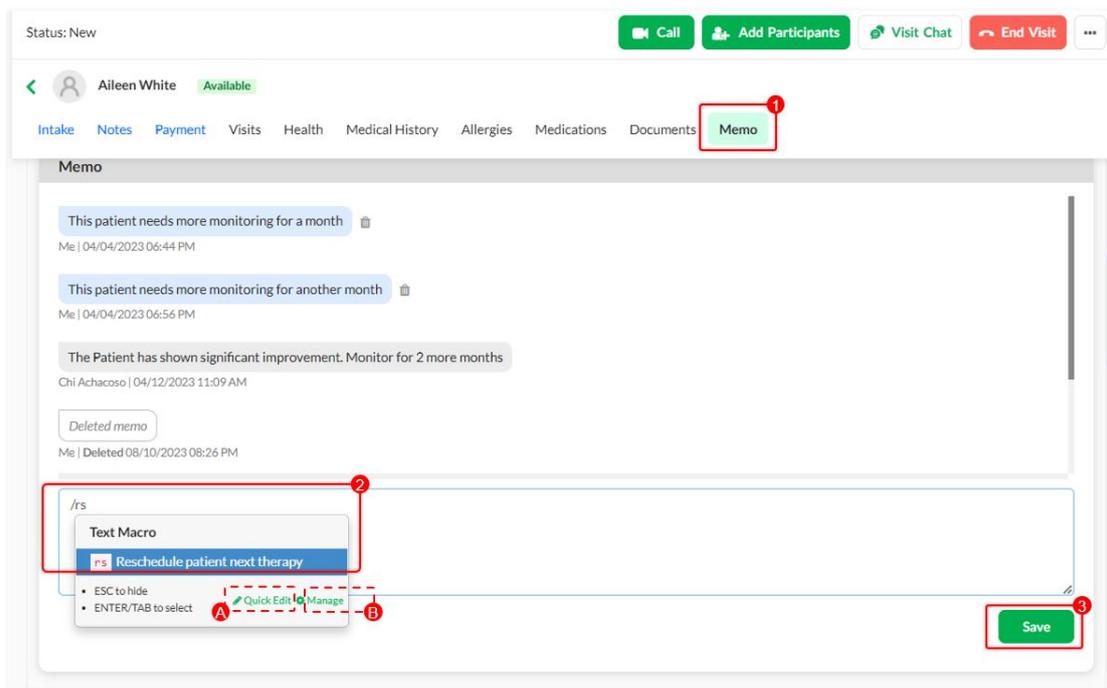
B. You can also delete permanently a Text Macro.



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

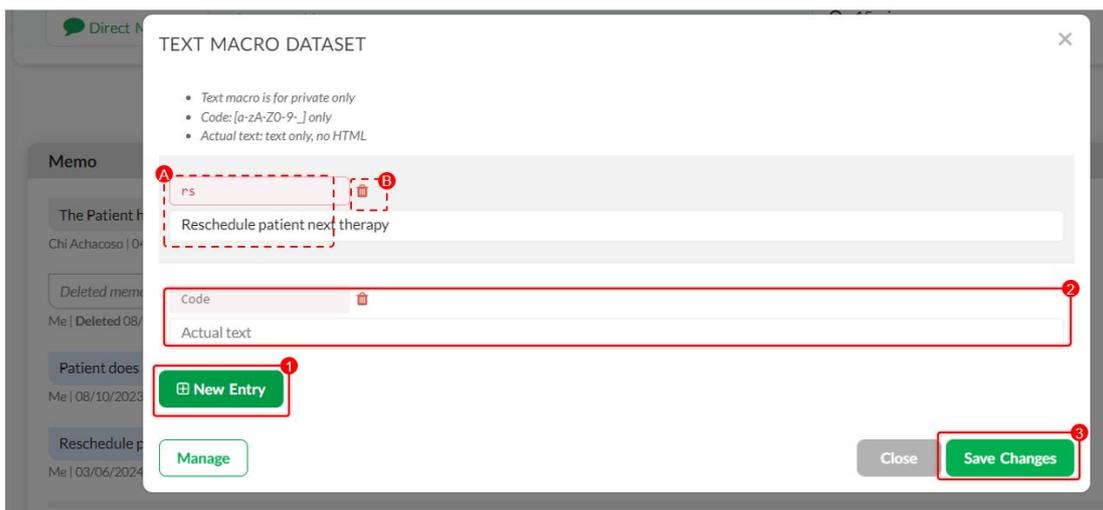


Under Text Macro Dataset:

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.

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