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How to Use the Drag-and-Drop Feature

Jay-Ileen (Ai) - 2023-02-07 - VSee Clinic for Providers

The Drag-and-Drop appointment feature allows you to drag an appointment on the VSee calendar and drop it to another date and time slot to reschedule the selected visit.

How to Drag-and-Drop a Visit

VSee Clin	IC Dat	shboard P	atients Sc	hedule Heal	th e-Rx		۰ و ا	Dr. Sarah Mille.	🔻
SCHEDULE	< >	Feb 5 – 1	L1, 2023		Today	Month	Week Day	+ CREAT	
(UTC-08:00) Pacific Time	•	5 Sun	6 Mon	7 Tue	8 Wed	9 Thu	10 Fri	11 Sat	-
Time division	2:30 PM			Dr. Sarah Miller VSee Academy		•			
10 v Minutes	3:00 PM								
✓ Show consultations	3:30 PM				-				
Legend ^	4:00 PM			4:00 PM - 4:15 PM	•				
 Open slot (one- one) 									1
✓ Open slot (group)	4:30 PM								
Confirmed (one- one)	5:00 PM								
Confirmed (group)									•

1. Select the appointment.

2. Drag and drop it to the desired new date and time slot.

SCHEDULE	< >	Feb 5 – 3	11, 2023		Today	Month	Week Day	+ CREATE
Timezone		5 Sun	6	7 Tue	0	9 Thu	10 Fri	11 _{Sat}
(UTC-08:00) Pacific Time	~	J Sun	6 Mon		8 Wed	7 Thu	IU Fri	⊥ ⊥ Sat
Time division	3:30 PM			VSee Academy	VSee Academy	VSee Academy	VSee Academy	
10 🗸 Minutes							2	
✓ Show	4:00 PM			3.0-1		4:00 PM - 4:15 PM		
consultations	4:30 PM			VSee	Name: Academy bintment			
Legend ^				<u>Whe</u> 02/0	<u>n</u> : 7/2023			
Open slot (one- one)	5:00 PM			04:0 Prov				
✓ Open slot (group)	5:30 PM			Men	ibers: n White			
Confirmed (one-								
Confirmed (group)	6:00 PM							

As soon as you drop or release the selected appointment, a pop-up window will appear.

The visit will be	rescheduled to	Thu 02/09/2023	04:00 PM			
Patient	Aileen W	/hite				
Visit Option	15-min C	Consultation				
All participants	of the visit will be	notified of the change				
Advanced					Cancel	Confirm
Minutes	3:00 PM					
างพ	•					
onsultations	3:30 PM					
1 ^	4:00 PM			4:00 PM - 4:15 PM		
pen slot (one- ne)						
pen slot roup)	4:30 PM					
onfirmed (one- ne)	5:00 PM					

You are still able to edit again the date and time in this section.

						×
The visit will be	rescheduled to	Thu 02/09/2023	04:00 PM			
Patient	Aileen Wh	nite				
Visit Option	15-min Co	onsultation				
All participants	of the visit will be r	notified of the change			Cancel	Confirm
✓ Minutes	3:00 PM					
Show consultations	3:30 PM					
nd 🛆						
Open slot (one- one)	4:00 PM			4:00 PM - 4:15 PM		
Open slot (group)	4:30 PM					
Confirmed (one-	5:00 PM					
Confirmed (group)						

If you want to edit more details of the visit, click on Advanced.

VSee Clir	Edit Visit	×	Dr. Sarah Mille 🔻
	Visit Name *	Edit	
SCHEDULE	VSee Academy Appointment		+ CREATE
Timezone	Time *		44
(UTC-08:00) Pacific Tim	Now Later Thu 02/09/2023 04:00 PM		11 sat
Time division	Does not repeat 🗸		
10 V Minutes	Visit Type *		
Show consultations	Video Phone In Person		
Legend ^	Visit Option *		
Open slot (one-one)Open slot (group)	Individual 15-min Consultation	+ New	
Confirmed (one-one)	Add Patient *		
Confirmed (group)	Aileen White (ileen.test@gmail.com) ×	+ New	
Missed			
Completed	Patient will be notified automatically via email and text message		
Canceled	MORE OPTIONS		
	+ More provider + Other guest + Reminder		
	Cancel	Continue	· ·

The Edit Visit window will appear for you to edit more information of the visit.

VSee Clir	Edit Visit	×	Dr. Sarah Mille 🔻
	Visit Name *	Edit	
SCHEDULE	VSee Academy Appointment		+ CREATE
Timezone	Time*		
(UTC-08:00) Pacific Tim	Now Later Thu 02/09/2023 04:00 PM		11 Sat
Time division	Does not repeat 🗸		
10 V Minutes	Visit Type *		
Legend ^	Visit Option *		
Open slot (group)	Individual 15-min Consultation	+ New	
Confirmed (one-one)	Add Patient *		
In Progress	Aileen White (ileen.test@gmail.com) *	+ New	
Missed			
Completed	Patient will be notified automatically via email and text message		
Canceled	MORE OPTIONS		
	+ More provider + Other guest + Reminder		
	Cancel	Continue	*

3. Click on Confirm to save changes.

Note: If you did not confirm the visit, there will be no changes saved to the existing appointment and it will return to its original date and time slot.

						×
The visit	will be rescheduled to	Thu 02/09/2023	04:00 PM			
Patient	Aileen Wh	nite				
Visit Opt	tion 15-min Co	onsultation				
All partic	ipants of the visit will be	notified of the change				
Advanc	ed				Cancel	Confirm
- Minute	s 3:00 PM					
Show consultations	3:30 PM					
end へ Open slot (on	4:00 PM			4:00 PM - 4:15 PM		
one) Open slot (group)	4:30 PM					
Confirmed (o	ne- 5:00 PM					
Confirmed (group)						-

Once confirmed, you will see a notification informing that the new visit has been confirmed.

Note: For group appointments, all participants of the visit will be notified of the change.

VSee Clinie	C Da		×	• •	Dr. Sarah Mille 👻
	_		New Visit Confirmed		
SCHEDULE	< >	Visit Name	VSee Academy Appointment	/eek Day	+ CREATE
Timezone		Time	Thu, Feb 09, 2023 04:00 PM (PST)	10	
(UTC-08:00) Pacific Tim		Visit Type	Video	10 Fri	11 Sat
Time division	2:30 PI	Visit Option	15-min Consultation	arah Miller : Academy	^ _
10 V Minutes		Patient	Aileen White		
	3:00 PI	Provider	Dr. Sarah Miller		
Show consultations	•	Room	VSee Clinic		
Legend ^	3:30 PI				
Open slot (one- one)	4:00 PI	Telephone:	+1.209.370.2123		
Open slot (group)	4.0011	Meeting PIN:	763523		
Confirmed (one-	4:30 PI	Guest invite link:	https://vse-		
one) Confirmed (group)			academy.vsee.io/visits/join/63e2dbf360b84ac7867c4a580a7d		
In Progress	5:00 PI		64b7 🔮 Copy		
✓ Missed					
Completed	5:30 PI		🛍 🌲 🗭 🏰 Go To Visit Page		
Canceled					

How to Drag-and-Drop a Recurring Visit

1. Select one of the recurring visits.

SCHEDULE	< >	Feb 5 – 1	L1, 2023		Today	Month	Week Day	+ CREATE
Timezone (UTC-08:00) Pacific Time		5 Sun	6 Mon	7 Tue	8 Wed	9 Thu	10 Fri	11 Sat
Time division	2:30 PM			Dr. Sarah Miller VSee Academy	A			
10 🗸 Minutes	3:00 PM							
Show consultations	3:30 PM							
egend Open slot (one- one)	4:00 PM					4:00 PM - 4:15 PM		_
Open slot (group)	4:30 PM			4:30 PM - 4:45 PM		4:30 PM - 4:45 PM		
Confirmed (one- one)	5:00 PM							
Confirmed (group)								

2. Drag and drop it to the desired new date and time slot.

VSee Clir	nic Dat	shboard P	Patients Sc	hedule	Health	e-Rx		ء 🕽	Dr. Sarah Mille	. 🔻
SCHEDULE	< >	Feb 5 – 1	11, 2023			Today	Month	Week Day	+ CREATE	
Timezone										_
(UTC-08:00) Pacific Time	~	5 Sun	6 Mon	71	Tue	8 Wed	9 Thu	10 Fri	11 Sat	-
Time division	2:30 PM 3:00 PM			Dr. Sarah VSee Aca		r. Sarah Miller See Academy	Dr. Sarah Miller VSee Academy	Dr. Sarah Miller VSee Academy		*
Show consultations	3:30 PM									
Legend へ Open slot (one-	4:00 PM				Visit Name		4:00 PM - 4:15 PM			
one) Open slot	4:30 PM				VSee Acad Appointme <u>When</u> : 02/07/202	ent	4:30 PM - 4:45 PM		·	
(group) Confirmed (one- one)	5:00 PM		•	5:00 PM	04:30 PM <u>Provider</u> : I Sarah Mille <u>Members</u> :					
Confirmed (group)					Aileen Wh Brianna Williams	ite,				•

As soon as you drop or release the selected appointment, a pop-up window will appear.

You are still able to edit again the date and time in this section.

(UTC-	08:00) Pacific Time 🔻	, D	Sun	O Mon	/ Tue	8 Wed	7 Thu	LU Fri	L L Sat	
Time 10	The visit will be res		Tue 02/07/ Every 1	2023 week(s) on	05:00 P S M	M T W T	F S		×	
	ends on Tue	02/14/2023								
Lege	Patient	Group Aile	en White, Br	ianna Williams	5					
V	Visit Option	Group Const	ultation							÷.,
	Update options	O This and the second secon	pintment only following app ntments in th	ointments						
	All participants of t	he visit will be no	tified of the c	hange						
	Advanced							Cancel	Confirm	
	Progress									
	lissed									
	ompleted									
C	anceled									
				Pow	vered by VSee					

However, you are unable to edit the other fields below the date and time. These fields are greyed out or unclickable.



It is optional for you to edit the Update options field.

(UT	C-08:00) Pacific Time 🗸	5	Sun	O Mon	/ Tue	O Wed	7 Thu	LU Fri	L L Sat	-
Time 10	The visit will be reso		Tue 02/07 Every 1	/2023 week(s) on	05:00 P S M	M T W T	F S		×	
✓	ends on Tue (02/14/2023								
Lege	Patient	Group Aile	en White, Bi	rianna Williams	5					
V	Visit Option	Group Cons	ultation							4.
V	Update options	This andAll appoi	ntments in t	pointments his series						
	All participants of th	ne visit will be no	tified of the	change						
\checkmark	Advanced							Cancel	Confirm	
\checkmark	In Progress									
	Missed									
	Completed									
	Canceled									
				Pow	ered by VSee					
					,					

If you want to edit more details of the visit, click on Advanced.



The Edit Visit window will appear for you to edit more information of the visit.

VSee Clinic	Edit Visit	× Dr. Sarah Mille •
	Visit Name *	Edit
SCHEDULE	VSee Academy Appointment	Day + CREATE
Timezone	Time *	44
(UTC-08:00) Pacific Tim 🖌	Now Later Tue 02/07/2023 05:00 PM	11sat
Time division	Weekly V on S M T W T F S	
10 V Minutes	ends on Tue 02/14/2023	
Show consultations	Visit Type *	
Legend へ Open slot (one-one)	Video Phone In Person	
 Open slot (group) 	Visit Option *	
Confirmed (one-one)	Group Group Consultation + New	
Confirmed (group)		
In Progress	Add Patient *	
Missed Completed	Aileen White (ileen.test@gmail.com) × Brianna Williams (brianna.williams.forever@gmail.com) × + New	v
Canceled		
	Patient will be notified automatically via email and text message	
	MORE OPTIONS + More provider + Other guest + Reminder	
	- Horeprovider - OtherBost - Exclusive	
	Cancel Continu	

3. Click on Confirm to save changes.

Note: If you did not confirm the visit, there will be no changes saved to the existing appointment and it will return to its original date and time slot.



Once confirmed, you will see a notification informing that the new visit has been confirmed.

Note: For group appointments, all participants of the visit will be notified of the change.

VSee Clini	C		×	🗩 👔 Dr. Sarah Mille 👻
	_		New Visit Confirmed	
SCHEDULE	< >	Visit Name	VSee Academy Appointment	Week Day + CREATE
Timezone (UTC-08:00) Pacific Tim 🖌	.]	Time	Tue, Feb 07, 2023 05:00 PM (PST) repeats weekly on Tue, Thu until Tue, Feb 14 2023	10 Fri 11 Sat
Time division	2:30	Visit Type Visit Option Patient	Video Group Consultation Group Aileen White, Brianna Williams	Sarah Miller
Show consultations	3:30	Provider Room	Dr. Sarah Miller VSee Clinic	
 Open slot (one- one) Open slot (group) Confirmed (one- one) 	4:00 4:30	Telephone: Meeting PIN: Guest invite link:	+1.209.370.2123 705312 https://vsee-	
Confirmed (group) In Progress Missed	5:00	Guest invite init.	academy.vsee.io/visits/join/63e2de19b4bc4cb8a70125410a7d 64b7 《Copy	
Completed Canceled	5:30		🛍 🌲 🗭 🏭 Go To Visit Page	

If you have any questions, please contact us at <u>help@vsee.com</u>.

Last updated on: 7 February 2022

Tags		
appointment		
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drag and drop		
reschedule		
visit		