

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

1. Select the appointment.

The screenshot shows the VSee Clinic scheduling interface. At the top, there are navigation tabs: Dashboard, Patients, Schedule (active), Health, and e-Rx. The user is identified as Dr. Sarah Miller. The main area displays a weekly calendar for February 5-11, 2023, in Pacific Time. The calendar shows appointments for Dr. Sarah Miller at VSee Academy from 2:30 PM to 4:00 PM on Tuesday, Wednesday, Thursday, and Friday. A red box highlights a 4:00 PM - 4:15 PM appointment on Tuesday, Feb 7, which is being prepared for drag-and-drop. The interface includes a sidebar with settings for Timezone (UTC-08:00 Pacific Time), Time division (10 Minutes), Show consultations (checked), and a Legend with options for Open slot (one-one), Open slot (group), Confirmed (one-one), and Confirmed (group).

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

SCHEDULE < > Feb 5 - 11, 2023 Today Month Week Day + CREATE

Timezone (UTC-08:00) Pacific Time

Time division 10 Minutes

Show consultations

Legend

- Open slot (one-one)
- Open slot (group)
- Confirmed (one-one)
- Confirmed (group)

| Time | 5 Sun | 6 Mon | 7 Tue | 8 Wed | 9 Thu | 10 Fri | 11 Sat |
|---------|-------|-------|--------------|--------------|-------------------|--------------|--------|
| 3:30 PM | | | VSee Academy | VSee Academy | VSee Academy | VSee Academy | |
| 4:00 PM | | | | | 4:00 PM - 4:15 PM | | |
| 4:30 PM | | | | | | | |
| 5:00 PM | | | | | | | |
| 5:30 PM | | | | | | | |
| 6:00 PM | | | | | | | |

Visit Name: VSee Academy Appointment
 When: 02/07/2023 04:00 PM
 Provider: Dr. Sarah Miller
 Members: Aileen White

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 White

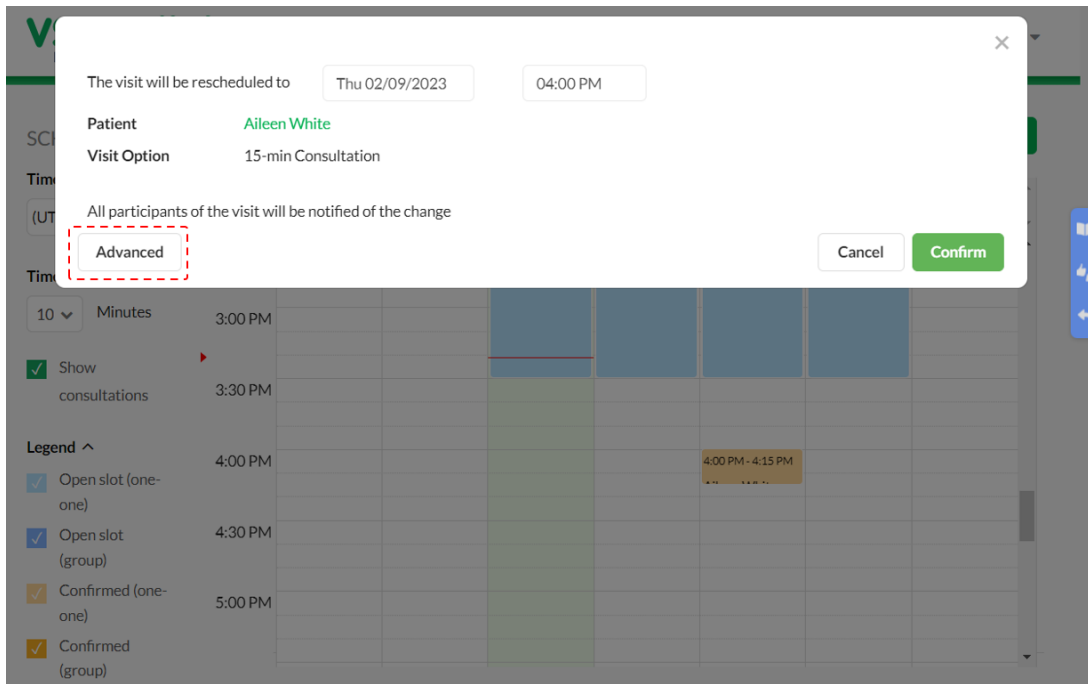
Visit Option 15-min Consultation

All participants of the visit will be notified of the change

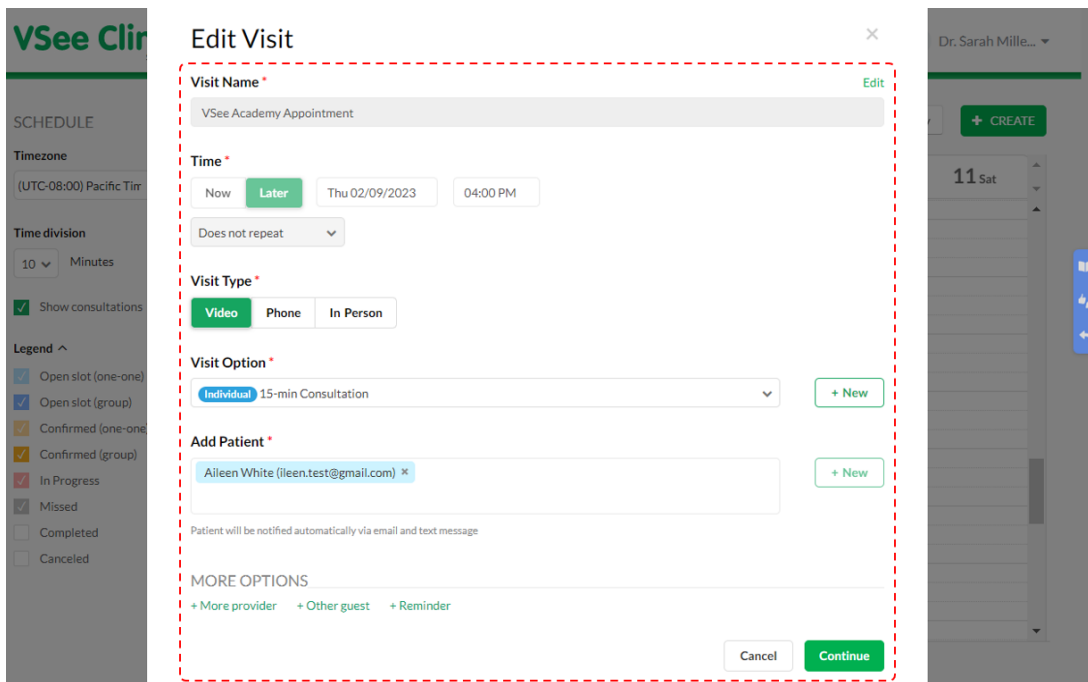
Advanced Cancel Confirm

| Time | 5 Sun | 6 Mon | 7 Tue | 8 Wed | 9 Thu | 10 Fri | 11 Sat |
|---------|-------|-------|-------|-------|-------------------|--------|--------|
| 3:00 PM | | | | | | | |
| 3:30 PM | | | | | | | |
| 4:00 PM | | | | | 4:00 PM - 4:15 PM | | |
| 4:30 PM | | | | | | | |
| 5:00 PM | | | | | | | |

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



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.

Edit Visit

Visit Name *
VSee Academy Appointment

Time *
Now Later Thu 02/09/2023 04:00 PM
Does not repeat

Visit Type *
Video Phone In Person

Visit Option *
Individual 15-min Consultation + New

Add Patient *
Aileen White (fileen.test@gmail.com) * + New

Patent will be notified automatically via email and text message

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 White

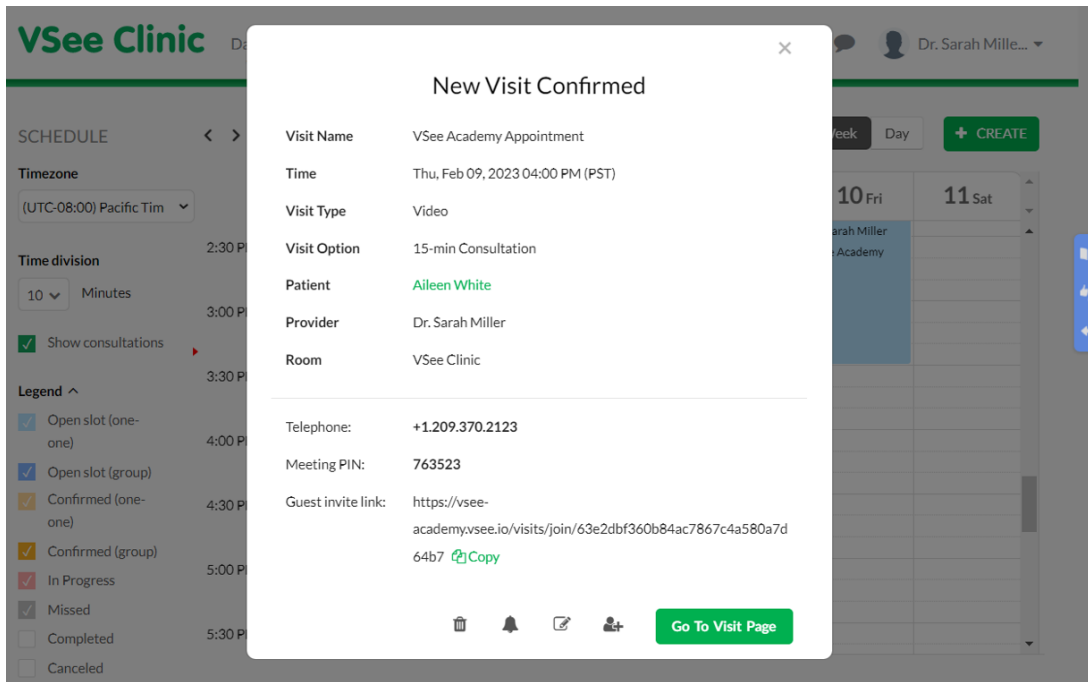
Visit Option 15-min Consultation

All participants of the visit will be notified of the change

Advanced Cancel Confirm

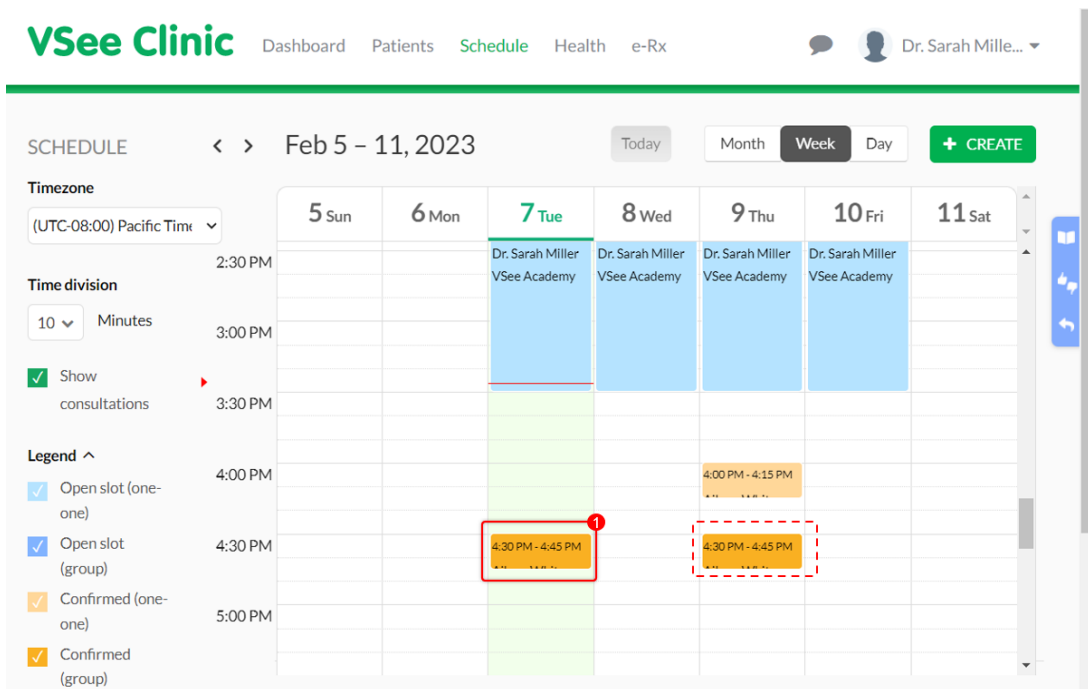
Once confirmed, you will see a notification informing that the new visit has been confirmed.

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



How to Drag-and-Drop a Recurring Visit

1. Select one of the recurring visits.



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

SCHEDULE < > Feb 5 - 11, 2023 Today Month Week Day + CREATE

Timezone (UTC-08:00) Pacific Time

Time division 10 Minutes

Legend

- Show consultations
- Open slot (one-one)
- Open slot (group)
- Confirmed (one-one)
- Confirmed (group)

| Time | 5 Sun | 6 Mon | 7 Tue | 8 Wed | 9 Thu | 10 Fri | 11 Sat |
|---------|-------|-------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|--------|
| 2:30 PM | | | Dr. Sarah Miller VSee Academy | Dr. Sarah Miller VSee Academy | Dr. Sarah Miller VSee Academy | Dr. Sarah Miller VSee Academy | |
| 3:00 PM | | | | | | | |
| 3:30 PM | | | | | | | |
| 4:00 PM | | | | | 4:00 PM - 4:15 PM | | |
| 4:30 PM | | | | | 4:30 PM - 4:45 PM | | |
| 5:00 PM | | | 5:00 PM | | | | |

Visit Name: VSee Academy Appointment
 When: 02/07/2023 04:30 PM
 Provider: Dr. Sarah Miller
 Members: Aileen White, Brianna Williams

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.

The visit will be rescheduled to Tue 02/07/2023 05:00 PM

Weekly Every 1 week(s) on S M T W T F S

ends on Tue 02/14/2023

Patient Group Aileen White, Brianna Williams

Visit Option Group Consultation

Update options

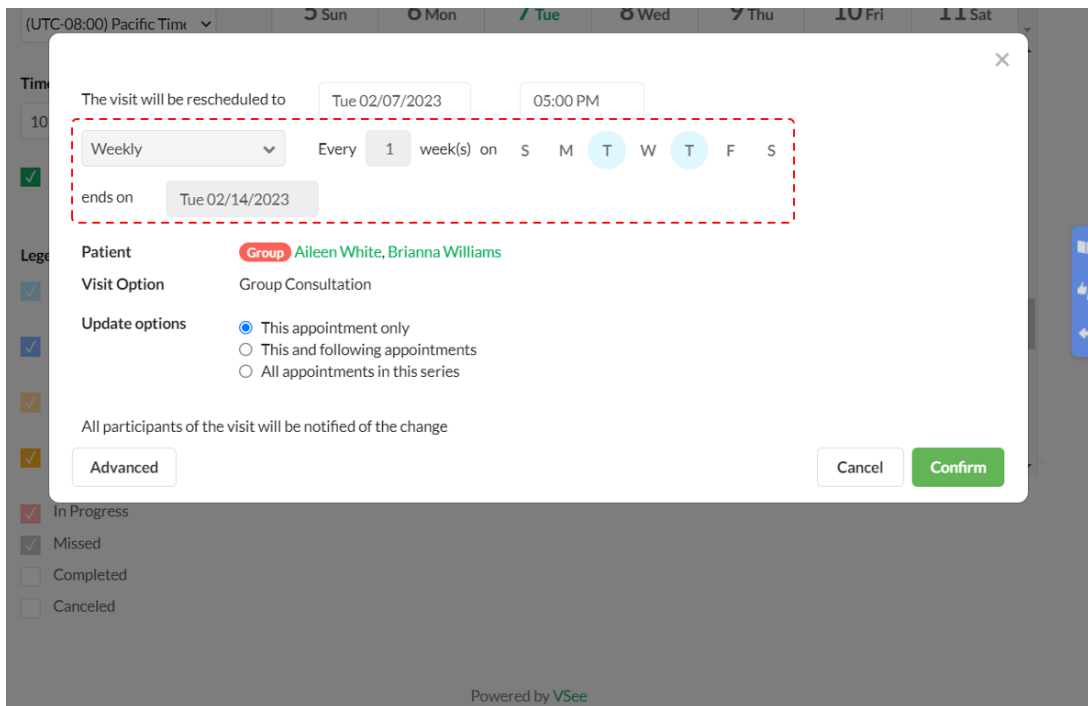
- This appointment only
- This and following appointments
- All appointments in this series

All participants of the visit will be notified of the change

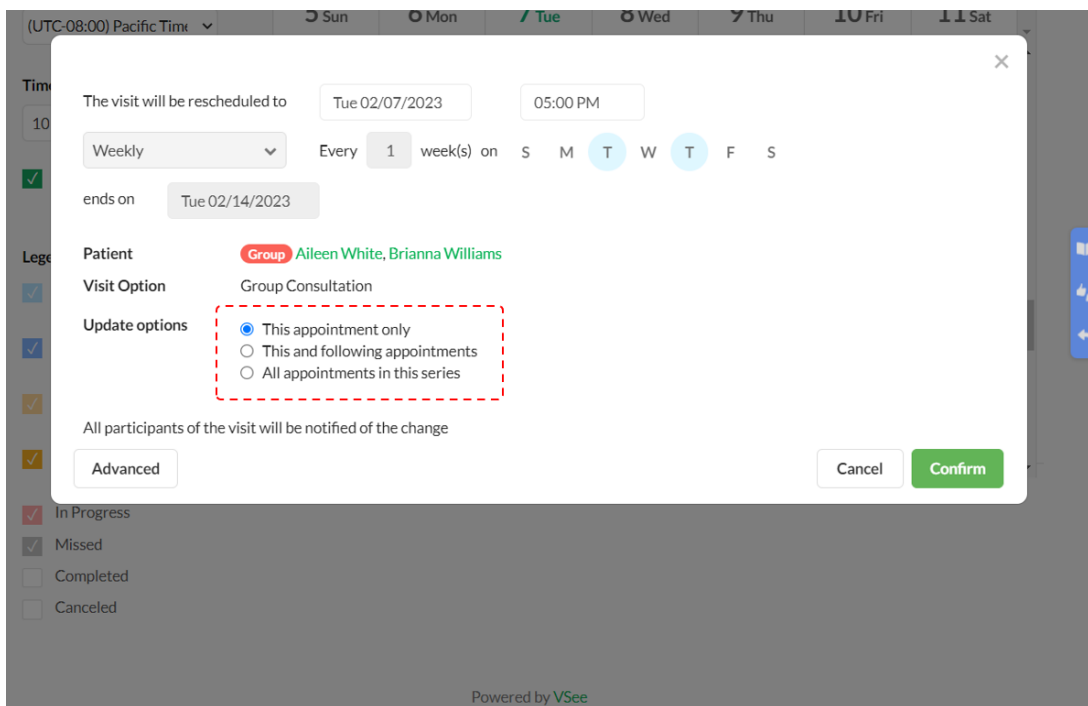
Advanced Cancel Confirm

Powered by VSee

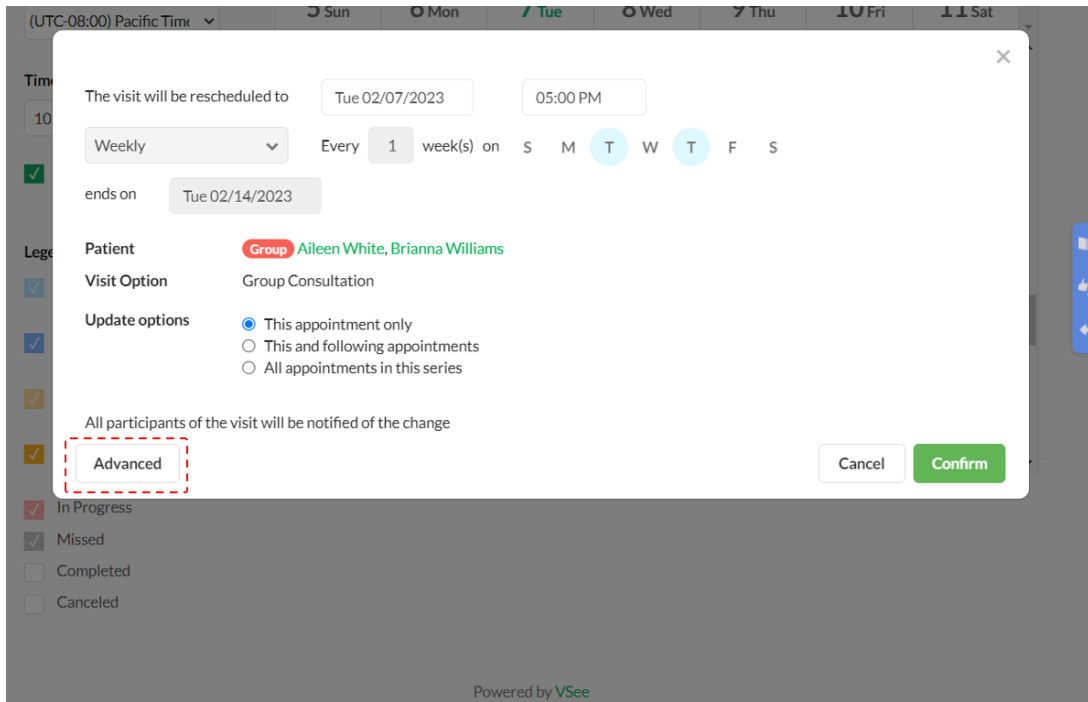
However, you are unable to edit the other fields below the date and time. These fields are greyed out or unclickable.



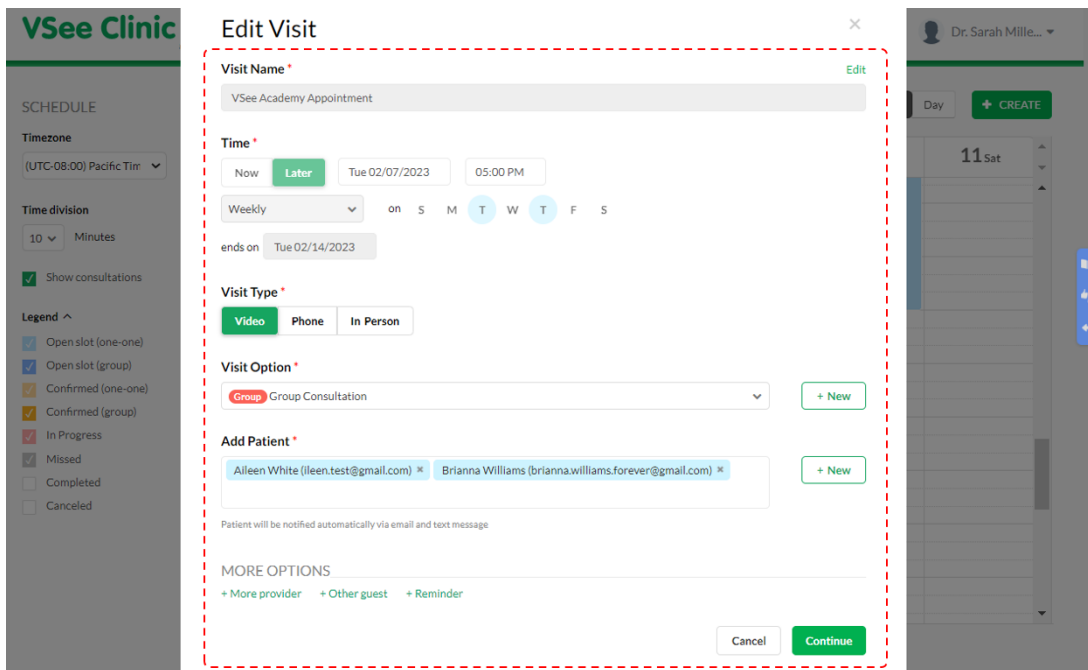
It is optional for you to edit the Update options field.



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

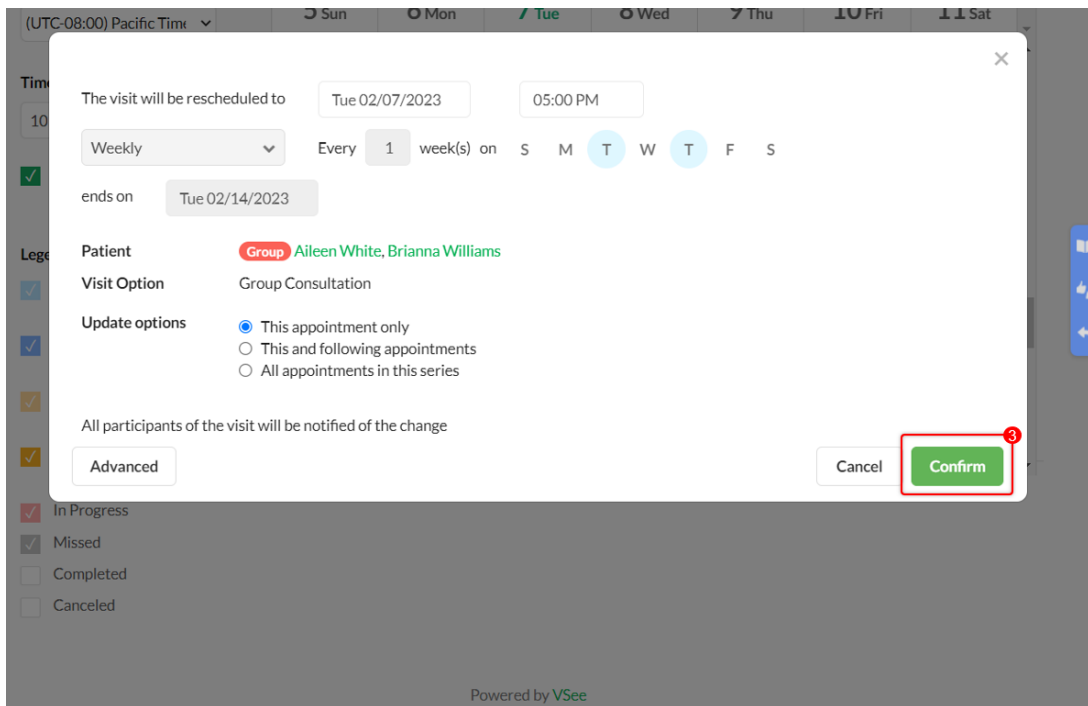


The Edit Visit window will appear for you to edit more information of the visit.



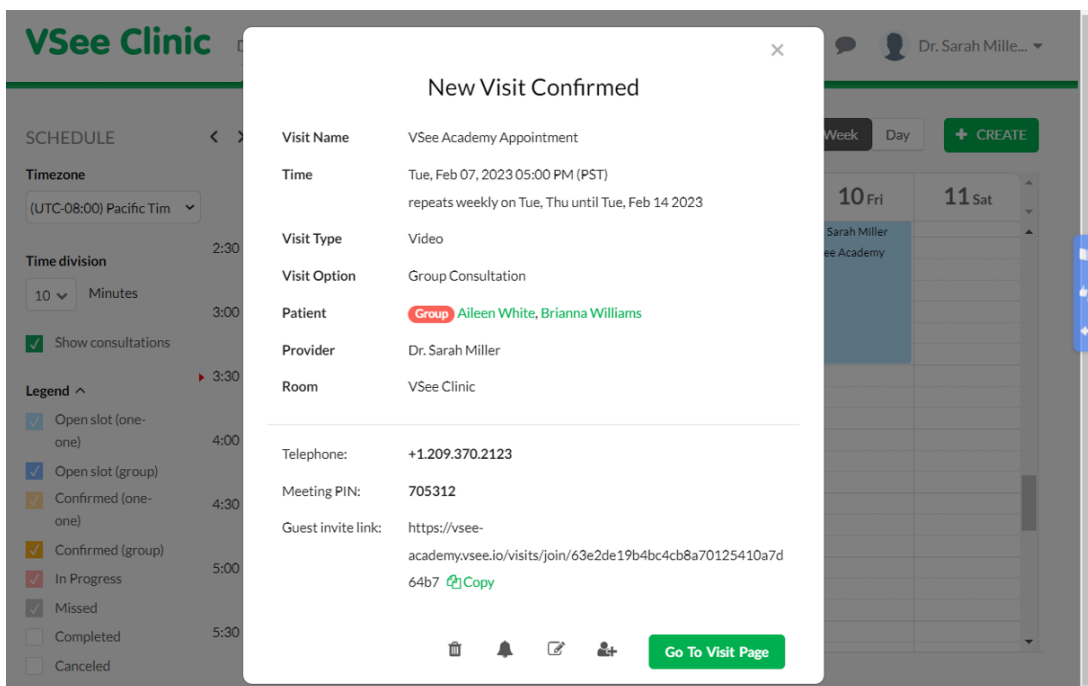
3. Click on Confirm to save changes.

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.



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

Tags

appointment

calendar

drag and drop

reschedule

visit