

Knowledgebase > VSee Clinic for Providers > Invite Guests To A Call As A Provider

# Invite Guests To A Call As A Provider

- 2023-08-09 - VSee Clinic for Providers

When enabled on the clinic settings, providers and patients can invite guests to a call by using the Guest Invite Feature. This can allow providers and patients to securely bring a family member or an interpreter into a video visit using a meeting link or dialin number. This invitation can be sent through e-mail and text message as well.

#### How do I invite a guest to a call prior to a scheduled appointment? How do I invite a guest while a call is in progress?

#### While Scheduling an Appointment

You can invite a guest to a scheduled call by following the steps below:

VSee Clinic Dashboard Patients Schedule Health e-Rx 🗩 \, 🌔 Joel B 🔻 Invite Patient ✓ New Visits (1) ÷ Today's Schedule Visit ID 21827874 Joel B's Test Clinic Call No appointments at this tim No Host E-Consult 8 . No E-Consults at this time Tags: Add tag Reminder In Progress (0) 0

1. From your clinic dashboard, click on the **Schedule** tab.

2. Drag from the calendar to select the time slot for the appointment and click on **Create New Visit**.

| VSee Clinic Dastboard Part                      | tlents Schedule | 2 | Create New   | ×<br>Create Slots   |  |                     | Joel B -                |
|---|-----------------|---|--|---|--|---------------------|-------------------------|
| SCHEDULE<br>Timezone<br>(UFC-07-00) Pacific Tim |                 |   | Visit<br>Schedule an appointment &<br>Invite your patients to join | Set your available slots so<br>patients can book a vhit at<br>their convenience |  |                     | Manth Week Day + CREATE |
|   |                 |   |  |   |  |                     |                         |
|   |                 |   |  |   |  |                     |                         |
|   |                 |   |  |   |  |                     |                         |
|   |                 |   |  |   |  |                     |                         |
|   |                 |   |  |   |  |                     |                         |
|   |                 |   |  |   |  | E00 994 - 830 994 - |                         |
|   |                 |   |  |   |  |                     |                         |
|   |                 |   |  |   |  |                     |                         |
| Feedback  |                 |   |  |   |  |                     |                         |

- 3. Fill-in the necessary details for the visit.
- 4. Click on + Other guest.

| Visit Nam       | e*              |                        |           |          | Ed    |
|-----------------|-----------------|------------------------|-----------|----------|-------|
| VSee Aca        | demy Clinic     | Appointment            |           |          |       |
| Time*           |                 |                        |           |          |       |
| Now             | Later           | Fri 04/08/2022         | 08:00 PM  |          |       |
| Does not r      | repeat          | ~                      |           |          |       |
| Visit Type      |                 |                        |           |          |       |
| Video           | Phone           | In Person              |           |          |       |
| Visit Opti      | on *            |                        |           | <b>~</b> | + New |
| 13-11111-00     | Insultation     |                        |           | Y        |       |
| Add Patie       | nt *            |                        |           |          |       |
| Search by       | name, ema       | ail, phone # and more. |           |          |       |
| Patient will be | e notified auto |                        | d message |          |       |
|                 |                 |                        |           |          |       |
| MORE O          |                 | 4                      |           |          |       |
|                 | vider + C       | Other guest + Remir    | ider      |          |       |
|                 |                 |                        |           |          |       |

5. You can choose to enter the e-mail address or the phone numbers of the guests you wish to invite.

6. Once the details are complete, click **Create Visit.** 

|           | herguest  |
|-----------|---|
| Invite ot | thers to the visit by entering their email addresses or phone numbers below, separated by ; guest@email.com |
|           |   |
|           | (201) 555-0123  |
|           |   |
|           |   |

- 7. Confirm the details of the visit.
- 8. Click on **Confirm** to proceed.

| Confirm No   | ×                                      |  |
|--------------|--|--|
| Visit Name   | VSee Academy Clinic Appointment        |  |
| Time         | Now (Fri, Apr 08, 2022 06:47 PM (PDT)) |  |
| Visit Type   | Video                                  |  |
| Room         | VSee Academy Clinic                    |  |
| Visit Option | 15-min Consultation                    |  |
| Patient      |  |  |
| Provider     |  |  |
| Other guest  |  |  |
|              | Back Confirm                           |  |

The scheduled visit with the patient and a guest is now confirmed.

# During a call

There are two ways to invite a guest while a call is already on-going:

#### A. From the active call window:

1. Click on the **+Person / Add Participants** button.

| VSee Clinic Dashboard Patients Schedule |   | 🕕 Joel B 🔻   |
|---|---|--|
|   | Add tag Status: In Progress ( All participants  | Add Participants   |
|   | Adm Doze Strold<br>Ager 42, Apr 07, 1980  | # Visit ID: 21870574     Today 07-942 PM     Video Visit     15-min Consultation     0 15-min     Visee Academy Clinic |
| JD                                      | Intake Valts Documents Intake C 00/08/2022 O 07/12 PM                                   |  |
|   | —<br>The patient gave consent to participate in this Televendricine Comultation.<br>Yes |  |
|   | add Des   |  |
| x* x* @                                 |   |  |

2. You will then be able to see the link (For Windows and macOS computers or Android phones, iPhones and iPads) and the Dial In number (Landline or mobile phone via cellular network).

3. You can also send the invitation link and Dial-In Number for the guest through email or SMS by typing in their e-mail or phone number, respectively.

4. Once you have typed in the e-mail addresses and phone numbers, click on **Send Invitation**.

| Invite Guests   |                 |
|---|-----------------|
| Copy the message below and send to your guests:   | 2               |
| You are invited to join a scheduled meeting at Thu, 04/07/2022 03:20 PM. <ul> <li>Join call: https://vsee-academy-in-browser.vsee.me/visits/join/624f6397f7104675b691014e64457b11</li> <li>Dial in: +1.650.758.0255 (PIN 323068)</li> </ul> |                 |
|   | Copy Invitation |
| OR  |                 |
| Send invitation via email or SMS:   | Ĭ               |
| guest@email.com   |                 |
| Enter phone numbers here separated by;  |                 |
|   | Send Invitation |
|   | 4               |

### **B.** From the Clinic Dashboard:

1. On the waiting room dashboard, click on the **patient's name**.

| VSee Clinic Dashbo                    | ard Patients | Schedule | Health | e-Rx    | Doel B 🕈 💭 🖉   |
|---------------------------------------|--------------|----------|--------|---------|--|
|                                       |              |          |        |         | Invite Patient Schedule  |
| ✓ New Visits (1)                      |              |          |        |         | Today's Schedule   |
| Visit ID 21852190 voel B's Test Clini |              |          |        | Call    | No appointments at this time.  |
| Available<br>Male , 22 years          |              | æ        |        | No Host | E-Consult  |
| Tags: Add tag                         |              |          |        |         | No E-Consults at this time.  |
| ✓ In Progress (0)                     |              |          |        |         | Reminder   |
| There are no ongoing visits.          |              |          |        |         | <ul> <li>John Doe</li> <li>Visit #21851811</li> <li>Pending notes</li> </ul> |
|                                       |              |          |        |         | Lohn Doe     Visit #21827874     Pending notes                               |
|                                       |              |          |        |         | Visit #21573145<br>O Pending notes   |
|                                       |              |          |        |         |  |

2. Click on Add Participants.

| VSee Clinic Dashboard Patients Schedule Health e-Rx                               | 🗩  🕕 Joel B 🕶   |
|---|---|
| <ul> <li>Add tag</li> <li>Status: New</li> <li>&lt; All participants</li> </ul>   | Call Add Participants End Visit   |
| John Doe Available<br>Age 22, Jan 01, 2000, Male                                  | # Visit ID: 21852190     idit iD: 41852190     idit iD: 418741 PM     Video Visit     Test Visit         Test Visit |
| Intake Notes Payment Visits Health Medical History Allergies Medications Intake   | Documents   |
| Od/07/2022 O 04:41 PM  Where are you located at the time of this visit? Virginia  |   |
| The patient gave consent to participate in this Telemedicine Consultation.<br>Yes |   |

3. You will then be able to see the link (For Windows and macOS computers or Android phones, iPhones and iPads) and the Dial In number (Landline or mobile phone via cellular network).

4. You can also send the invitation link and Dial-In Number for the guest through email or SMS by typing in their e-mail or phone number, respectively.

| Invite Cu                       |   |  |                 |  |  |  |
|---------------------------------|---|--|-----------------|--|--|--|
| <b>Invite Gu</b><br>Copy the me | ests<br>essage below and send to your guests:   |  |                 |  |  |  |
| • Join ca                       | 3<br>You are invited to join a scheduled meeting at Thu, 04/07/2022 03:20 PM.<br>• Join call: https://vsee-academy-in-browser.vsee.me/visits/join/624f6397f7104675b691014e64457b11<br>• Dial in: +1.650.758.0255 (PIN 323068) |  |                 |  |  |  |
|                                 |   |  | Copy Invitation |  |  |  |
|                                 | OR  |  |                 |  |  |  |
| Send invitat                    | ion via email or SMS:   |  | 4               |  |  |  |
|                                 | guest@email.com   |  |                 |  |  |  |
|                                 | Enter phone numbers here separated by;  |  |                 |  |  |  |
|                                 |   |  | Send Invitation |  |  |  |
|                                 |   |  |                 |  |  |  |

5. Once the guest clicks the link, they will be taken to the VSee Clinic appointment details screen. They will be prompted to input their name.

Note: If the guest joined through phone using the Dial-in number, they will be prompted to input the Pin, and once confirmed, they will be able to join the call through voice call.

6. Once the guest typed in their name, they should click on **Join Meeting**. They will then be added unto the call as a guest participant.

| V                       | 'See Clinic                           |
|-------------------------|---------------------------------------|
| Date:<br>Time:<br>Host: | Fri, 04/08/2022<br>06:33 PM<br>Joel B |
| Enter your              | name*                                 |
|                         | Join Meeting                          |

7. From your dashboard, you will be able to confirm the presence of the guest from the Visit Details.

| VSee Clinic   | Dashboard Patients | Schedule Health | e-Rx                          |  | 🗩 🌔 Joel B 🗸 |
|---|--------------------|-----------------|-------------------------------|--|--------------|
| Call Selected   |                    |                 | What's new on this dashboard? | Invite Patient   | Schedule     |
| <ul> <li>New Visits (0)</li> <li>There are no participants waiting</li> </ul> |                    |                 | ¢                             | Today's Schedule No appointments at this time.                                     |              |
| <ul> <li>In Progress (1)</li> <li>Visit ID 21870492, VS</li> </ul>            | See Academy Clinic |                 | Call                          | E-Consult<br>No E-Consults at this time.   |              |
| Jane Gal Available<br>21 years  |                    | e 🙆             | Joel B                        | Reminder   |              |
| Guest Available   |                    | Ø               | Last action by Joel B         | John Doe Visit #21852190 Pending notes   |              |
| Tags: Add tag   |                    |                 |                               | <ul> <li>John Doe</li> <li>Visit #21851811</li> </ul>                              |              |
|   |                    |                 |                               | O Pending notes  |              |
|   |                    |                 |                               | <ul> <li>Jane Doe</li> <li>♥ Visit #21850991</li> <li>♥ Pending payment</li> </ul> |              |
|   |                    |                 |                               |  |              |

# **Scope and Limitations**

• Since the participants will be added as guests, there will be no information about the participants that will be accessible from the clinic.

The Guest Invite Link will expire when:

- The time has lapsed for the scheduled visit.
- The provider completes the visit.

#### **Related Articles**

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- Invite Guests for Ad Hoc Group Call

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

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