

## Invite Patients To Your Clinic

- 2023-08-09 - Basic Workflow

### Start Sending Invitations

There are a few scenarios where sending an invite to a Patient is needed;

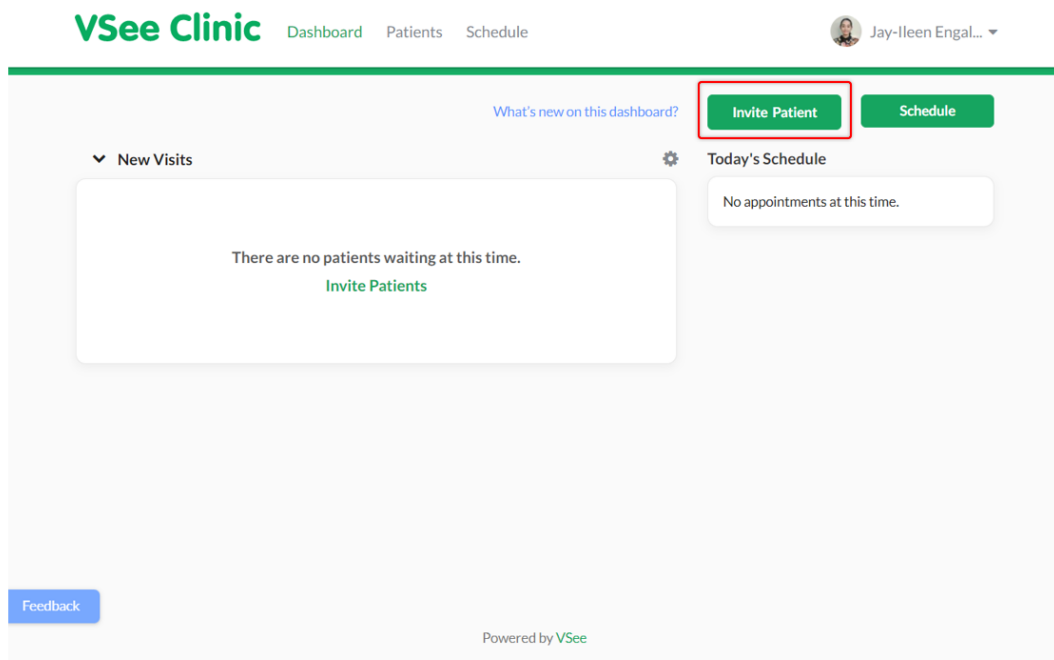
1. When the clinic has been set up, you can start introducing it to your Patients by sending the invite link.
2. If a recurring patient forgot the link to your clinic.

This option is different from setting an appointment for a patient. Check: [Schedule an Appointment with a Patient](#).

### Where to Find the Invite Patient Option?

There are three locations where you will find the Invite Patient option;

#### 1. Dashboard



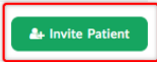
#### 2. Patients

Patients All Visits

Show:  All  Only my patients

Show 25 entries Search:

Name	Gender	Age	Email	Phone Number	Rooms	Date of Last Visit
Aileen White	Female	26 years	ileen.test@gmail.com	+1 209-333-6451	Angel Kids Pediatrics Quest HealthConnect Clinic - Training VSee Academy Clinic Eversound Clinic Training Jay-Ileen's Clinic Jay-Ileen's Basic VSee Clinic UAT for See First MD Jayson Alfaro's Waiting Room ChronicCare 360 Caloptima Test Waiting Room Quest HealthConnect Clinic	01/24/2022 08:14 PM



### 3. Profile Menu

VSee Clinic Dashboard Patients Schedule

Jay-Ileen Engal...

What's new on this dashboard?

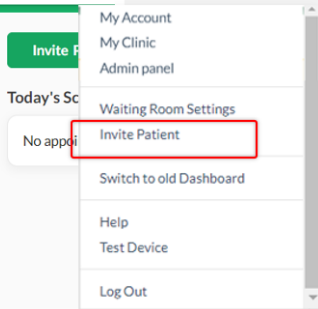
▼ New Visits

There are no patients waiting at this time.  
[Invite Patients](#)

My Account  
My Clinic  
Admin panel  
Today's Schedule  
Waiting Room Settings  
[Invite Patient](#)  
Switch to old Dashboard  
Help  
Test Device  
Log Out

Feedback

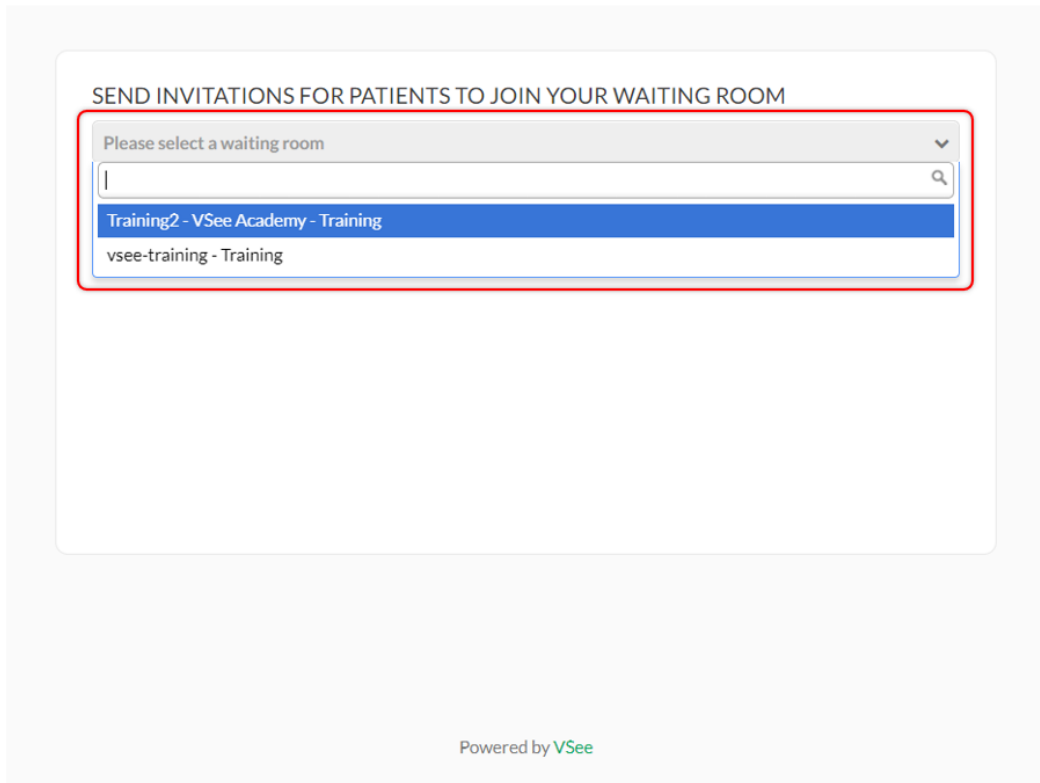
Powered by VSee



## How to Send Invitations

Click on the **Invite Patient** button located on the Dashboard/Patient/Profile Menu.

On the send invitation page, if the clinic has multiple waiting rooms, make sure you choose the right waiting room from the dropdown list.



## Send Invitation Via Email

Under **Send via Email** tab, type the patient's email address. You can input multiple email addresses separated by a semicolon (;)

To edit the email subject and body, click **Edit**.

Send a test email to yourself by clicking on **Send me a test email**.

To proceed sending the invitation, click **Send Invitation**.

SEND INVITATIONS FOR PATIENTS TO JOIN YOUR WAITING ROOM

Send via Email    Send via SMS    Copy Instruction

**Enter patient's emails below to invite**

Enter emails here separated by ;

**Email Subject** Edit

Video Visit invitation from VSee Academy Clinic

**Email Body** Edit

Add your custom message here, scheduled date and time...

Dear [user email],

You are invited to a secure video visit at VSee Academy Clinic.

[Start Visit](#)

Button not working? Copy this link into your browser: <https://vsee-academy-in-browser.vsee.me/u/clinic>

If you have any questions, please contact us at [help@vsee.com](mailto:help@vsee.com) or (650) 614-1746.

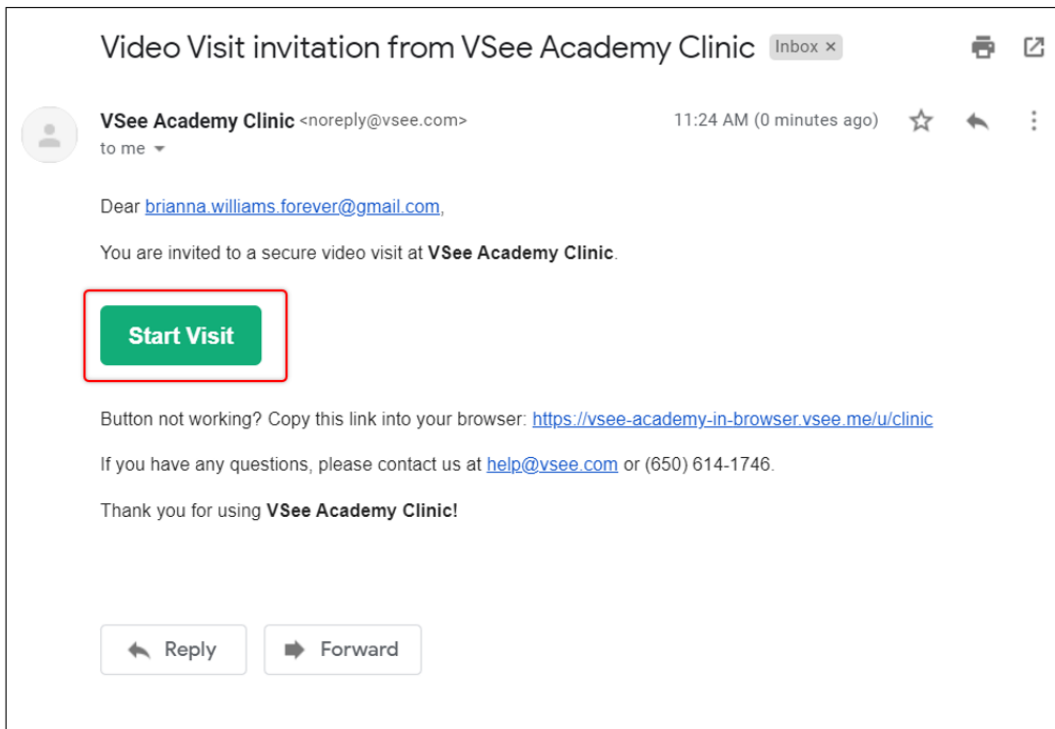
Thank you for using VSee Academy Clinic!

[Send me a test email](#)   [Send Invitation](#)

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Patients will receive an email invitation that will look like below.

They just need to click the **Start Visit** button to be routed to the landing page of the clinic.



## Send Invitation Via SMS

Under **Send via SMS tab**, type the patient's mobile number. You can input multiple numbers separated by a semicolon (;)

To edit the message, click **Edit**.

To proceed sending the invitation, click **Send Invitation**.



Once the Patients will receive the SMS invitation same as below, they just need to click on the link for a browser to open and be routed to the landing page of the clinic.



## Copy Clinic Instruction

If your patient did not provide an email address, you can choose to copy the invite instructions and send it through your preferred means of communication (chat, EMR etc).

Click **Copy to Clipboard**.

SEND INVITATIONS FOR PATIENTS TO JOIN YOUR WAITING ROOM

vsee-training - Training

Send via Email Send via SMS Copy Instruction

Copy the invitation below and send to your patients

You have been invited to a secure video visit at <https://vsee-academy.vsee.me/u/training>

Copy To Clipboard

Powered by VSee

## Scope and Limitations

- Invite Link is not a [scheduled appointment](#).
- Invite Link will route the Patient to the clinic's landing page, it will require the Patient to either **enter as a guest** or **log in** to their Patient account to start a visit.
- **Invite patient** is best for guest walk-in visits.

For further assistance, please contact us [here](#).

Last updated on: 27 Jan, 2022

Tags

invite

invite a patient

invite patient