VSeehealth

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;
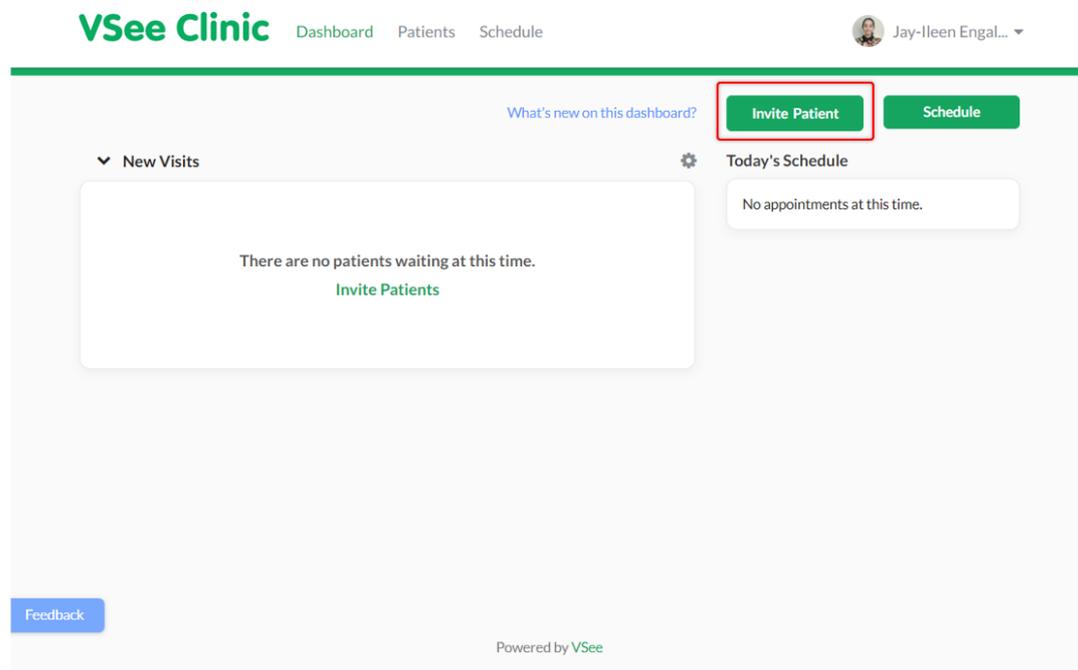
1. When the clinic has been set up, you can start introducing it to your Patients by sending the invite link.

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**

3. **Profile Menu**

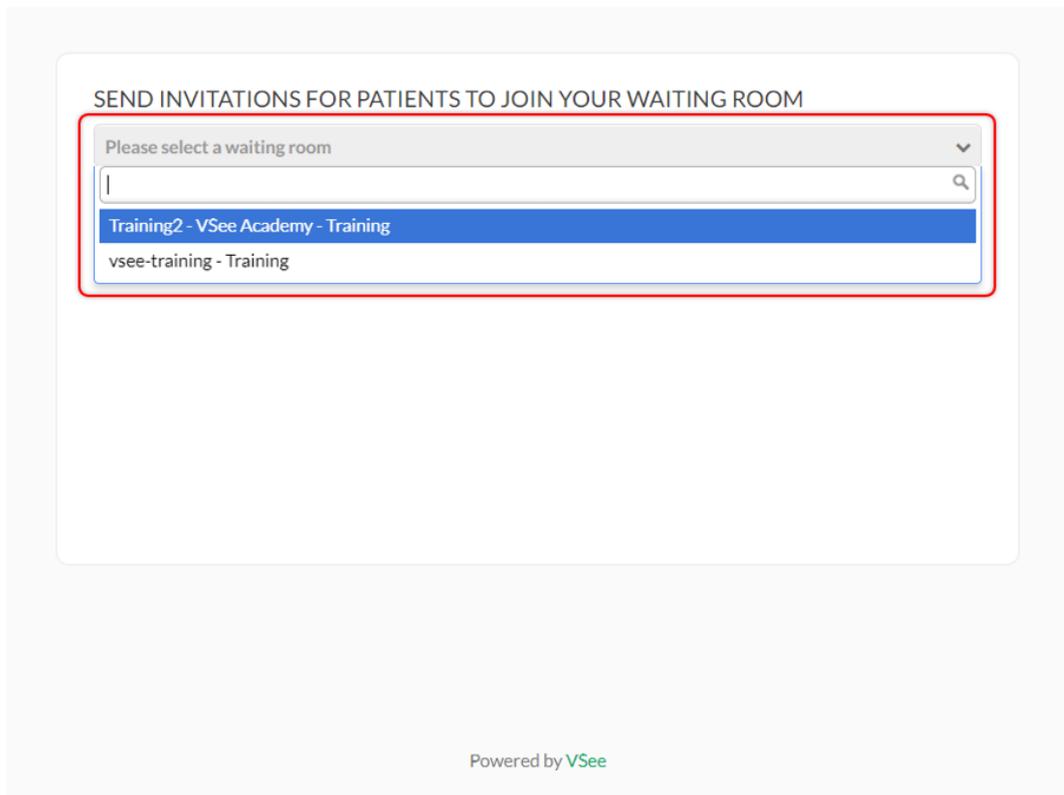## How to Send Invitations

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**.

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.
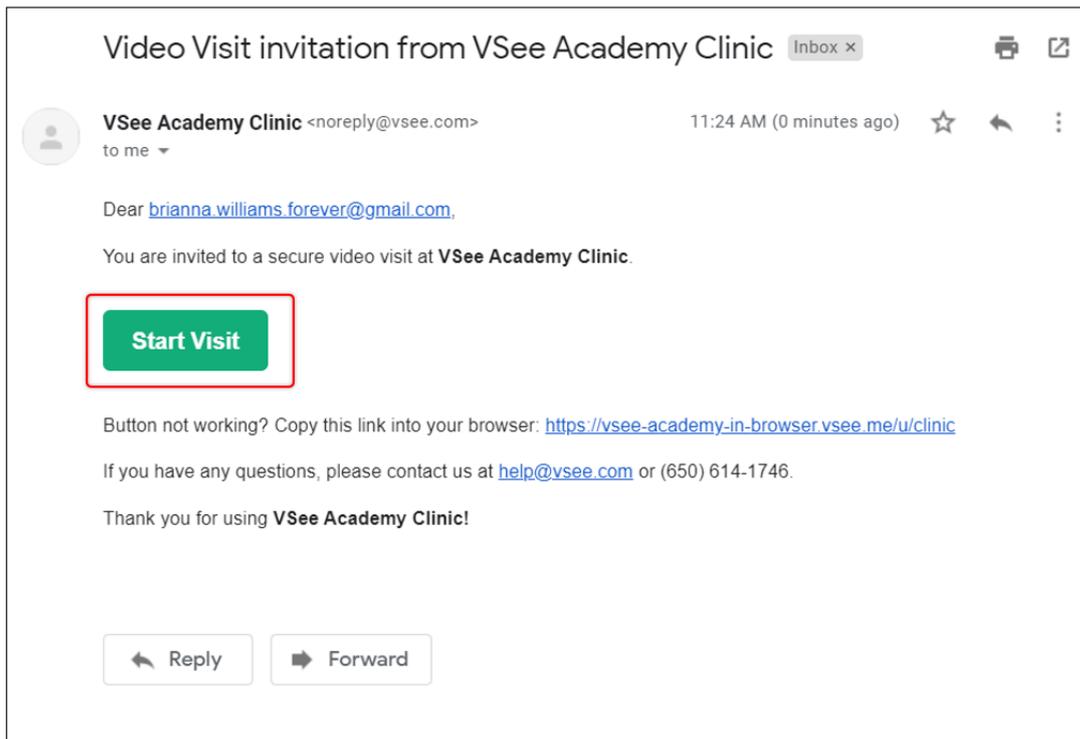
Send Invitation Via SMS

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**.

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

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- [invite](#)
- [invite a patient](#)
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