

Schedule an Appointment with a Patient

- 2020-10-05 - Scheduling

1. Access the calendar.

- For providers, click **Calendar** on your provider dashboard.
- For clinic admins assisting the provider, go to **Admin panel > Schedule**.

2. The calendar can be displayed in month, week or day view. Select your preferred appointment date.

VSee Clinic Dashboard Patients **Calendar** Health e-Rx Dr. April Inciong

MY SCHEDULE

Filter

Division: 15 Minutes

Show consultations

Legend:

- Open slot
- Confirmed
- Completed
- Deleted / Canceled
- In Progress
- Pending

America/Los_Angeles

Jul 19 – 25 2020

month week day

	Sun 7/19	Mon 7/20	Tue 7/21	Wed 7/22	Thu 7/23	Fri 7/24	Sat 7/25
8am							
9am						8:45 - 5:45 Dr. April Inciong Clinic Portal	8:45 - 5:45 Dr. April Inciong Clinic Portal
10am							
11am							

3. Click **Schedule Appointment**.

SCHEDULE APPOINTMENT OR CREATE SLOT

Would you like to Schedule an Appointment for a patient or Create Available Slots on your calendar?

SCHEDULE APPOINTMENT CREATE SLOTS

4. On the New Appointment window, select and check if all the details such as visit options, date and time are correct.

- If you belong to multiple rooms, make sure you choose the correct room.
- If you are a clinic staff or admin, make sure you assigned the correct provider.

NEW APPOINTMENT
✕

Room

A1 Clinic - code: 3vh80
✕ ▼

Visit Type

IN PERSON

PHONE

VIDEO

Visit Option

	Visit Option	Duration	Fee
<input checked="" type="radio"/>	15-min Consultation	15 mins	USD 15
<input type="radio"/>	30-min Consultation	30 mins	USD 30
<input type="radio"/>	45-min Consultation	45 mins	USD 45

Date & Time

NOW

SCHEDULE FOR A LATER TIME

07/22/2020

09:00 AM

5. Search and select a patient account from the list by clicking on it.

If not found, create one by clicking on **New Patient**. You need at least the patient's first name, last name and email address.

Click **Continue**.

Select Patient

ANNA SMITH ✕

Type patient name, email SEARCH + NEW PATIENT

Anna Smith	3
Andy Barrera	15
Taha Tauqir	29
Ely Barrera	9
Chloe Ann	5
Emma Akiki	9

Showing 1 to 10 of 765 entries

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6. Check the appointment details and click **Confirm**.

CONFIRM NEW APPOINTMENT ✕

Appointment Details

- Visit Type Video
- Visit Option 15-min Consultation
- Date & Time 07/22/2020 09:00 AM
- Patient Name Anna Smith
- Provider Name Dr. April Inciong
- Room Name A1 Clinic

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CONFIRM

7. Both the patient and provider will receive an email and/or SMS (if enabled) regarding the confirmed appointment.