

Scheduling through the Admin Panel

Jay-Ileen (Ai) - 2022-04-21 - VSee Clinic for Admins

As a clinic admin, you also have the capability to set appointments with patients and open slots on behalf of the providers.

- [How to open appointment slots](#)
- [How to create a scheduled appointment](#)

Opening Appointment Slots

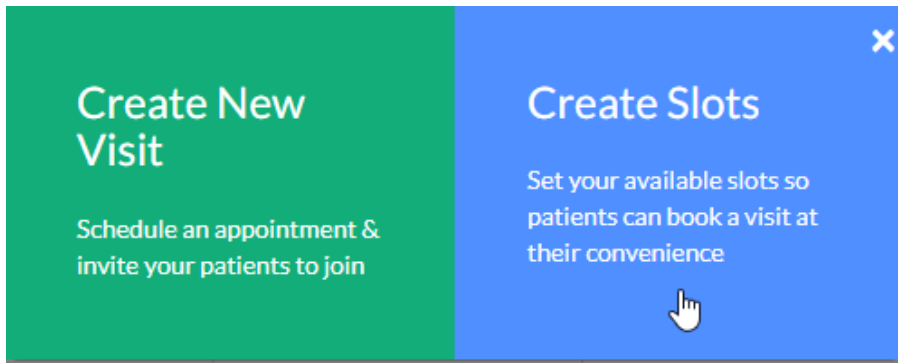
Go to the Admin panel. ([see guide](#))

1. Click on the **Schedule** tab.
2. You can filter the calendar by state, room, specialty and/or provider if you have a multi-provider. You may also edit the time division. If these are not necessary or applicable to you.
3. Proceed to click on **Create**.

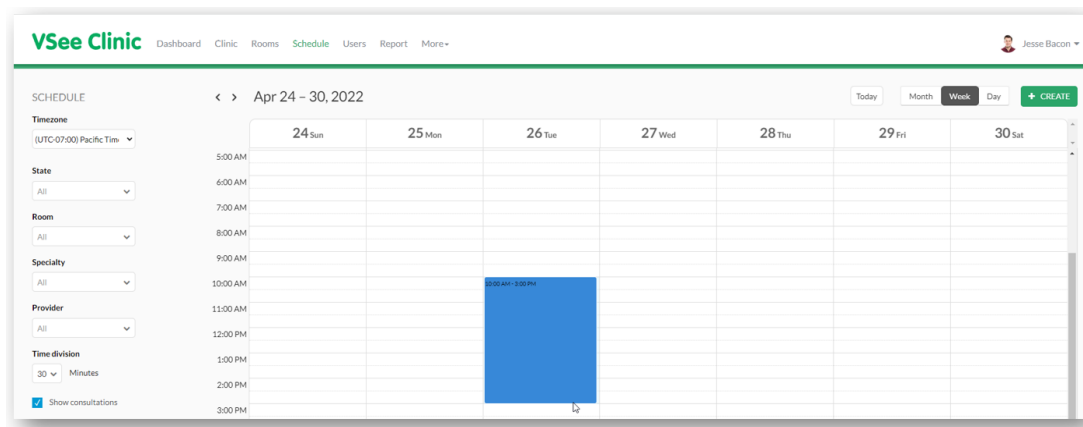
The screenshot shows the VSee Clinic Admin Panel. The top navigation bar includes 'Dashboard', 'Clinic', 'Rooms', 'Schedule' (1), 'Users', 'Report', and 'More'. The user profile 'Jesse Bacon' is visible in the top right. The main content area is titled 'SCHEDULE' and shows a calendar for 'Apr 24 - 30, 2022'. The calendar has columns for '24 Sun', '25 Mon', '26 Tue', '27 Wed', '28 Thu', '29 Fri', and '30 Sat'. The time slots range from 5:00 AM to 4:00 PM. A '+ CREATE' button (3) is located in the top right of the calendar area. On the left, there are filter options: 'Timezone' (UTC-07:00 Pacific Tim), 'State' (All), 'Room' (All), 'Specialty' (All), 'Provider' (All), and 'Time division' (30 Minutes). A red dashed box (2) highlights the filter options.

To create an appointment slot, you can:

- a) Click the green + **Create** button and choose **Create Slots**;

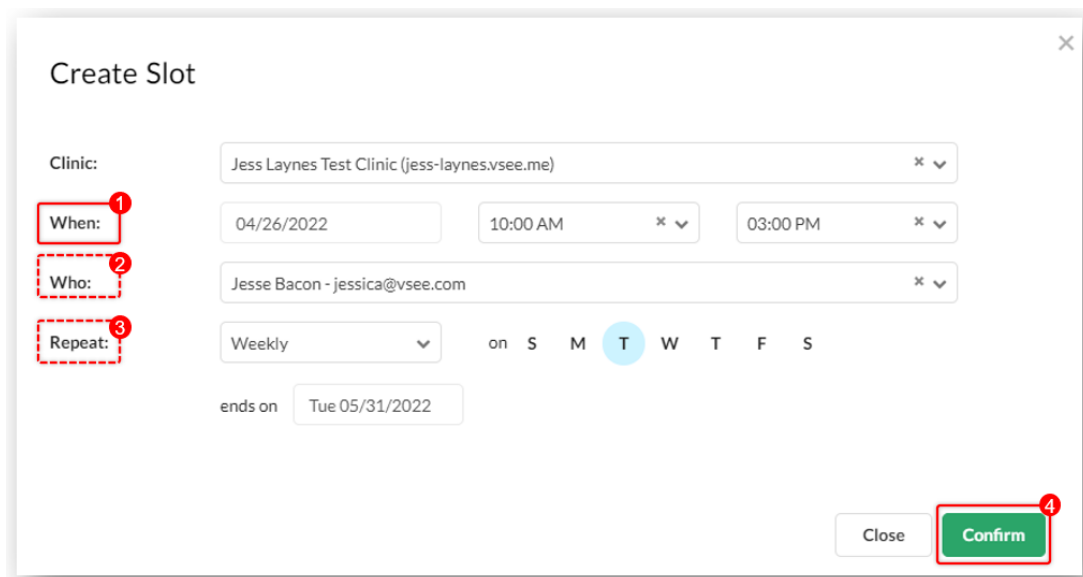


b) Another way is to click and drag the specific time on the calendar then choose **Create Slots**.



Specify the time slots and whose calendar you are setting the schedule for (if you have a multi-provider clinic). You can also opt to repeat the schedule daily, weekly, every weekday etc.

4. Click **Confirm** when done. These slots will now be visible to the patients when they book their appointments.

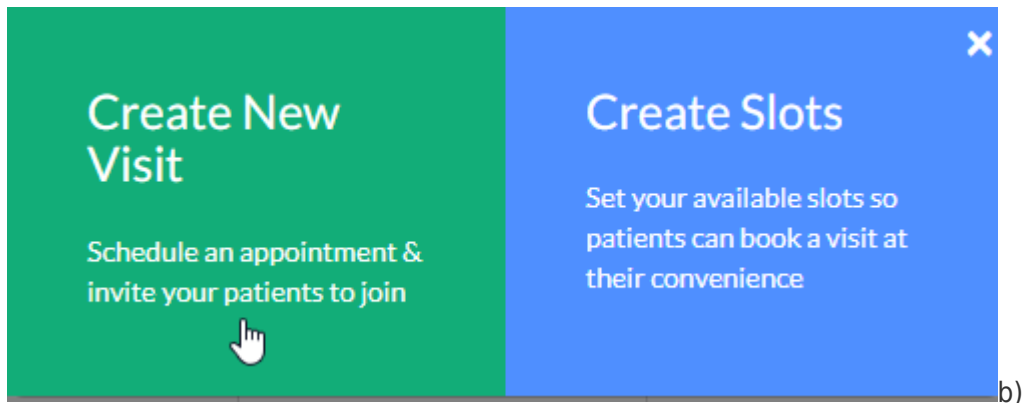


Creating a New Visit (Scheduled Appointment)

Follow steps 1 and 2 in [Opening Appointment Slots](#).

To create an appointment with a particular patient:

a) Click the green **+** **Create** button and choose **Create New Visit**.



Another way is to click and drag on particular time slots (as with creating new slots) and choose **Create New Visit** when the options pop up.

Fill out the required fields;

1. Input the **Visit Name**, which is already filled out by default but could be changed by clicking on **Edit** on the right corner of the field.
2. Add the time (and date).
3. Change frequency if necessary.
4. Choose the **Primary Provider** if it's a (multi-provider clinic).
5. Select the **Visit Type**.
6. Choose the **Room** (if Provider is assigned to multiple rooms).
7. Select the **Visit Option**.
8. Add the **Patient**.
9. After filling out all necessary fields, click on the **Create Visit** button.

Create New Visit ✕

Visit Name ¹ Edit

Jess Laynes Test Clinic(jess-laynes.vsee.me) Appointment

Time ²

Now Later Wed 04/27/2022 05:00 AM

Does not repeat ³

Primary Provider ⁴

Search for providers by name, state or specialties

Visit Type ⁵ **Room** ⁶

Video Phone In Person Select room...

Visit Option ⁷

Select consultation... + New

Add Patient ⁸

Search by name, email, phone # and more... + New

Patient will be notified automatically via email and text message

MORE OPTIONS

[+ Other guest](#) [+ Reminder](#)

Cancel **Create Visit** ⁹

Note: You can create a new visit option and patient by clicking the **+ New** button beside the **Visit Option** and **Add Patient** fields respectively.

Related Article:

[e-Scheduling > Visit Slots and Patient Scheduling](#)

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

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Tags

admin scheduling

Room Management

Visit Options