

## Scheduling through the Admin Panel

Jay-Ileen (Ai) - 2023-07-17 - VSee Clinic for Admins

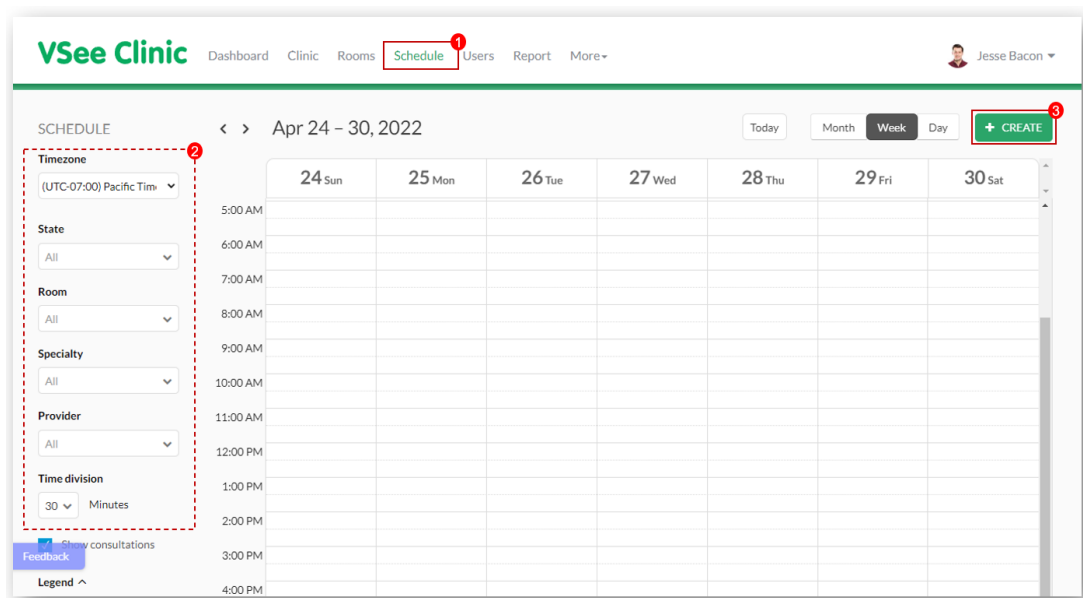
As a clinic admin, you also have the capability to set appointments with patients and open slots on behalf of the providers.

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

### Opening Appointment Slots

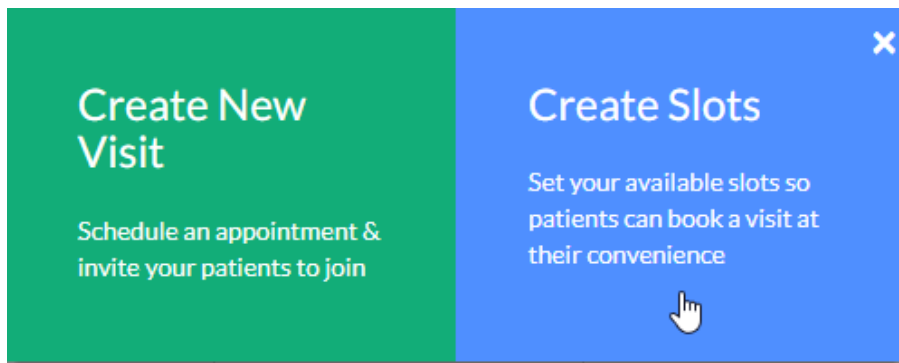
Go to the Admin panel. ([see guide](#))

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**.

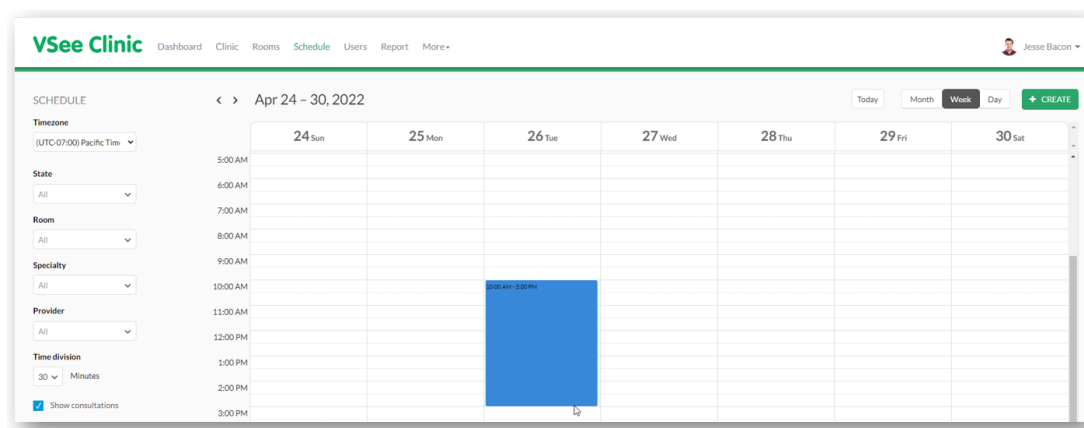


To create an appointment slot, you can:

- 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.

**Create Slot**

Clinic:

When:

Who:

Repeat:  on

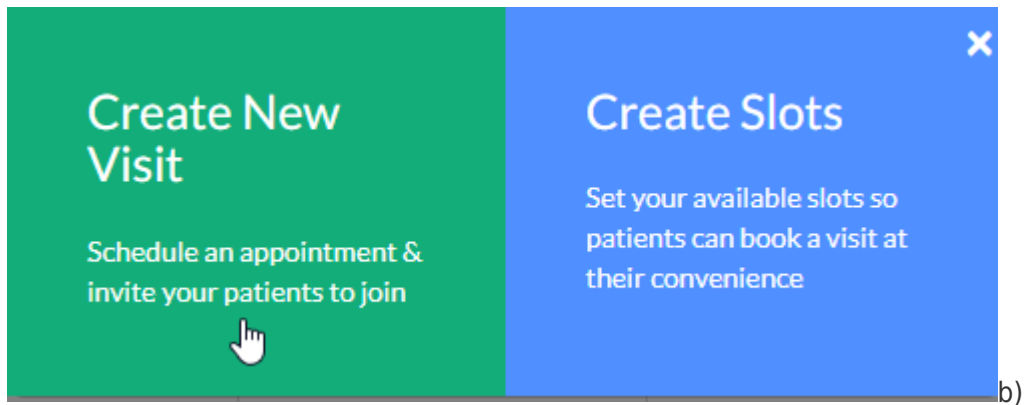
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## Creating a New Visit (Scheduled Appointment)

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 \*

Now

Later

Wed 04/27/2022

05:00 AM

Does not repeat

Primary Provider \*

Search for providers by name, state or specialties

Visit Type \*

Video

Phone

In Person

Room \*

Select room...

Visit Option \*

Select consultation...

+ New

Add Patient \*

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

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](mailto:help@vsee.com)

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### Tags

admin scheduling  
Room Management  
Visit Options