

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

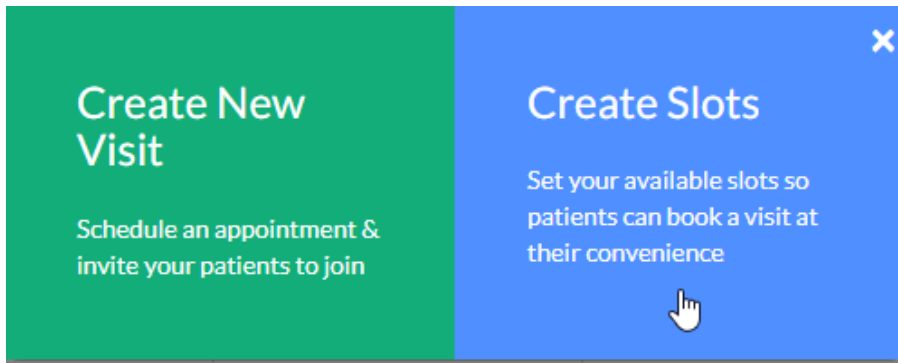
Go to the Admin panel. ([see guide](#))

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**.

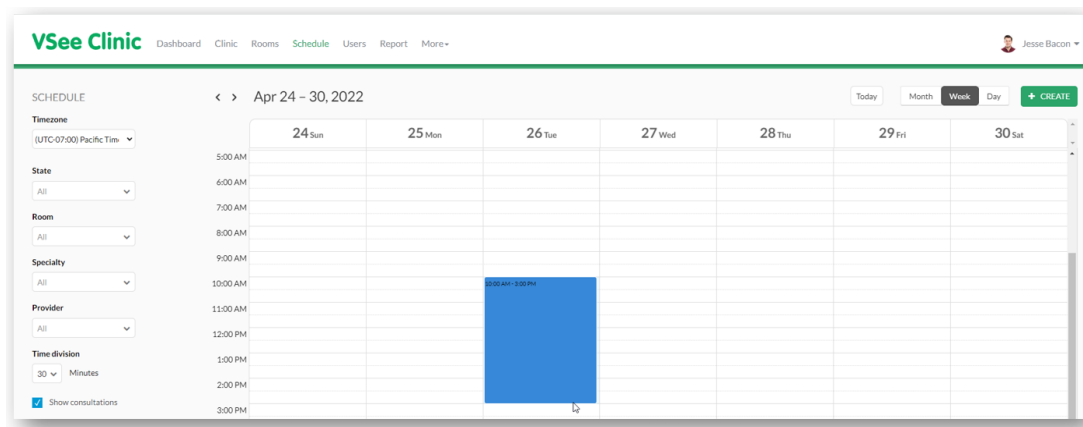
The screenshot shows the VSee Clinic Admin Panel interface. At the top, there is a navigation bar with the following items: Dashboard, Clinic, Rooms, **Schedule** (highlighted with a red box and a '1'), Users, Report, and More. On the right side of the navigation bar, there is a user profile for Jesse Bacon. Below the navigation bar, the main content area is titled 'SCHEDULE'. It features a date range selector for 'Apr 24 - 30, 2022' and a view selector with options for 'Today', 'Month', 'Week', and 'Day'. A green '+ CREATE' button is located in the top right corner of the calendar area, highlighted with a red box and a '3'. On the left side of the calendar, there are several filter dropdown menus: 'Timezone' (set to UTC-07:00 Pacific Tim), 'State' (set to All), 'Room' (set to All), 'Specialty' (set to All), 'Provider' (set to All), and 'Time division' (set to 30 Minutes). A red dashed box highlights these filter menus, with a '2' next to it. At the bottom left, there is a 'Feedback' button and a 'Legend' link.

To create an appointment slot, you can:

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

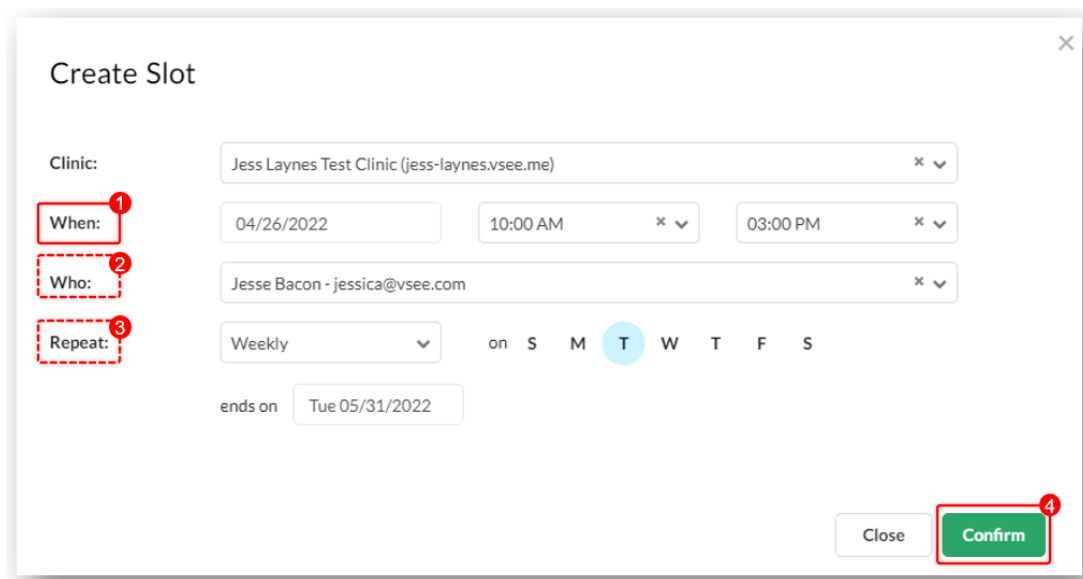


b) Another way is to click and drag the specific time on the calendar then choose **Create Slots**.



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.

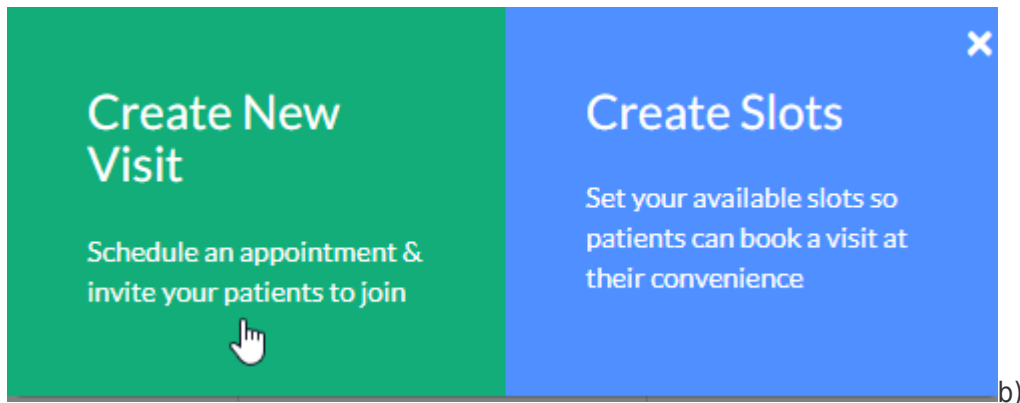


Creating a New Visit (Scheduled Appointment)

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

Last updated on: 21 April 2022

Tags

admin scheduling
 Room Management
 Visit Options