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## Setup Payment Reminders

Joel Barcillo - 2023-04-11 - [Step-by-Step Guides](#)

### Setup Payment Reminders

The reminder feature on your dashboard will show your recent visits that are still pending notes or payments. This is especially helpful in times when you didn't charge the patient during the visit and would like to continue working on it afterward. Following are the steps to set up Payment reminders

1. Click on your name, choose Admin panel.

The screenshot shows the VSee Clinic Premium dashboard. At the top, there is a user dropdown menu with the name 'Peter Dean'. A red box highlights the 'Admin Panel' option in the dropdown menu. The main dashboard area shows a message: 'Welcome Peter! Get training resources to your VSee Clinic Premium.' and a button 'Start Here'. Below this, there is a section titled 'Ready for Visits' with a message: 'There are no patients waiting at this time.' and a button 'Invite Patients'. To the right of this section, there are several buttons: 'Invite Patient' (green), 'Today's Schedule' (grey), 'Reminder' (grey), and 'Log Out'. The 'Admin Panel' button is also located in this sidebar area.

2. Click on Clinic.

The screenshot shows the VSee Clinic Premium dashboard. The top navigation bar has a 'Clinic' tab with a red box around it, indicating it is selected. The main dashboard area shows a message: 'Welcome Peter! Get training resources to your VSee Clinic Premium.' and a button 'Start Here'. Below this, there is a date range selector: 'Week' (dropdown), '<' (button), 'This Week' (button), 'Apr 10 - 16, 2023' (button), and '>'. The text 'Dr Peter's Clinic' is displayed below the date range.

3. Select Reminders tab.

4. Under Pending Actions Settings for Payment, select Always remind me to collect payment.

5. Click Update to save.

Welcome Peter! Get training resources to your VSee Clinic Premium. [Start Here](#)

**CLINIC DETAILS**

[Clinic](#) [Payments](#) **Reminders** [Waiting Room](#) [Customization](#) [Tags](#) [Enable/Disable Features](#)

**Display Settings**

Show reminders only to assigned providers  Show reminders to all waiting room providers

**4 Pending Actions Settings**

**Payment**

Always remind me to collect payment  Only remind me for paid visits  Do not remind me at all

**Notes**

Always remind me to chart  Do not remind me at all

**Survey**

Always remind me to complete survey  Do not remind me at all  Make completing the survey optional instead of required.

**Default Appointment Reminder**

1 day before:

**5 Update**

## Charge a Patient After the Visit from a Payment Reminder

To charge the patient after the visit, click on the **Payment** tab on the Visit details page.

Click on **Pending Payment** of the selected visit under the Reminders field.

Welcome Sarah! Get training resources to your VSee Clinic Premium. [Start Here](#)

[Invite Patient](#) [Schedule](#)

**Ready for Visits**

There are no patients waiting at this time.

[Invite Patients](#)

**Today's Schedule**

No appointments at this time.

**Reminder**

**Aileen White**  
Visit #1000097774

Pending payment

Powered by VSee

You will be routed to the visit details page. You can see the status is still "pending payment" and "pending completion".

*Note: It is important to mark the visit as completed so processing the payment when there is a charge for the visit is required.*

Status: Completed

Call Add Participants

Aileen White Offline

Intake Payment Visits

### Payment

Paid.  
Ref: ch\_3Mr5bE4aYp0WGe9l1baH8ugF

Payment Method  
Visa \*\*\*\* 4242

Invoice - March 29, 2023

45-min Consultation	15 mins	USD 50.00
	Discount	0 %
	Subtotal	USD 50.00
	Total	USD 50.00

After reviewing the payment details and making the necessary changes, click on **Submit Charge**.

Status: Pending Completion Pending Payment

Call Add Participants

Aileen White Offline

Intake Payment Visits

### Payment

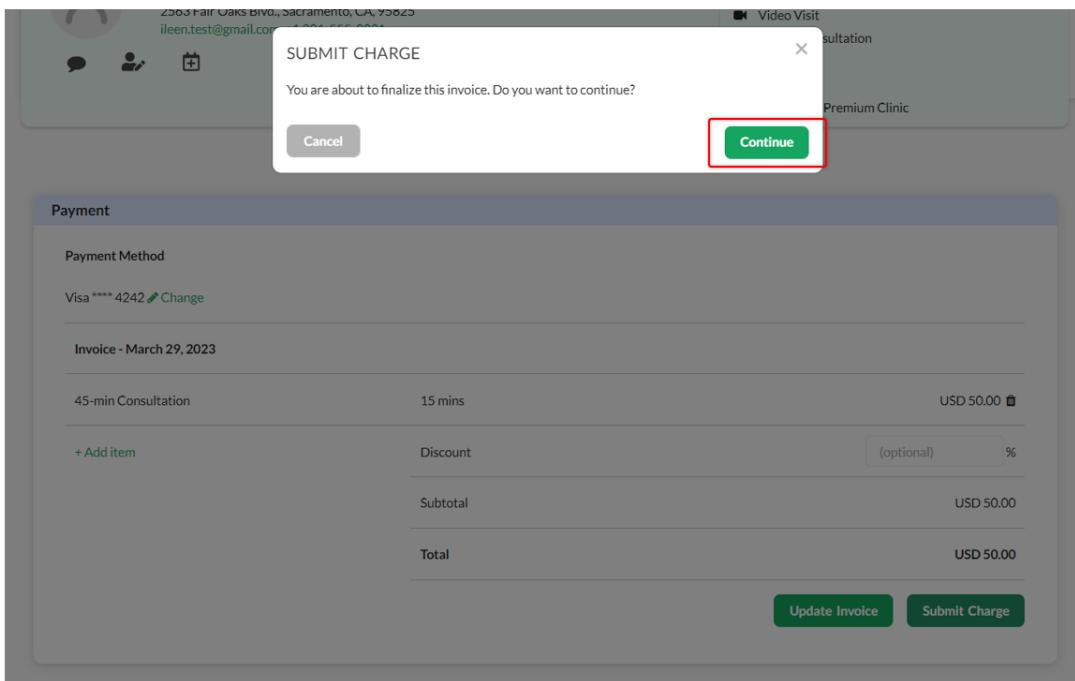
Payment Method  
Visa \*\*\*\* 4242 

Invoice - March 29, 2023

45-min Consultation	15 mins	USD 50.00 
+ Add item	Discount	(optional) %
	Subtotal	USD 50.00
	Total	USD 50.00

**Update Invoice** **Submit Charge**

A pop-up window will appear, click on **Continue** to confirm.



You will see a confirmation that the visit has been paid. And the visit status is now marked as completed.

*Note: If your clinic has enabled the SOAP notes feature, you also need to submit it to mark the visit completed.*

Status: Completed

Aileen White Offline

Intake Payment Visits

Paid.

Ref: ch\_3Mr5bE4aYp0WGe9I1baH8ugF

Payment Method

Visa \*\*\*\* 4242

Invoice - March 29, 2023

45-min Consultation	15 mins	USD 50.00
Discount	0 %	
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Total	USD 50.00	

Need more assistance? Send us an email at [help@vsee.com](mailto:help@vsee.com) or check out the [Help](#) section under the Profile Menu of your VSee Clinic.

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- [payment reminder](#)
- [reminders](#)