



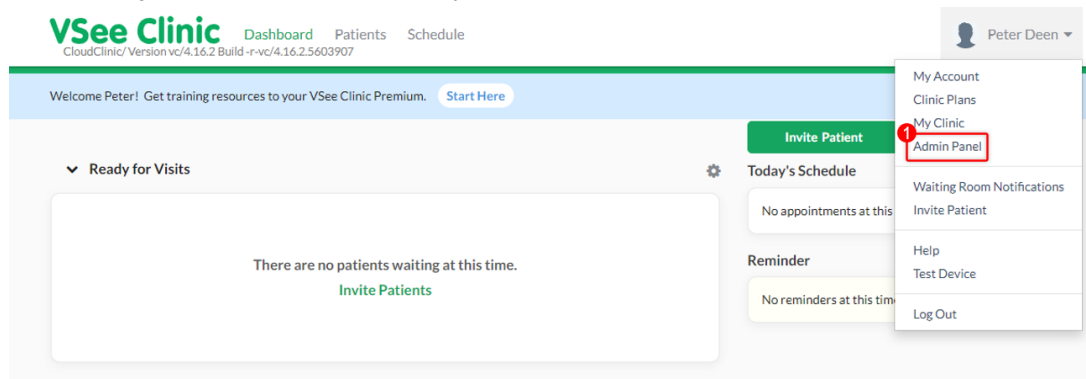
Setup Payment Reminders

Joel Barcillo - 2023-04-10 - Step-by-Step Guides

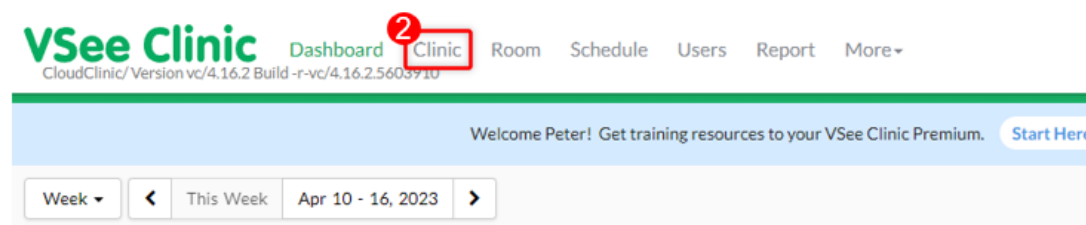
Setup Payment Reminders

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.



2. Click on Clinic.



3. Select Reminders tab.

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

5. Click Update to save.

The screenshot shows the 'Reminders' settings page in VSee Clinic. The 'Reminders' tab is selected and highlighted with a red box and a circled '3'. Under 'Display Settings', the option 'Show reminders to all waiting room providers' is selected with a blue radio button, and this section is highlighted with a red box and a circled '4'. Under 'Pending Actions Settings', the 'Payment' section has 'Only remind me for paid visits' selected with a blue radio button. The 'Notes' section has 'Do not remind me at all' selected with a blue radio button. The 'Survey' section has 'Make completing the survey optional instead of required.' selected with a blue radio button. At the bottom right, there is an 'Update' button with a red circle containing the number '5' and a refresh icon.

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.

The screenshot shows the patient schedule page for Sarah Miller. On the right side, under the 'Reminder' section, a reminder for 'Aileen White' with 'Visit #1000097774' is shown. The 'Pending payment' status is highlighted with a red box. The 'Today's Schedule' section shows 'No appointments at this time.' The 'Ready for Visits' section shows 'There are no patients waiting at this time.' with an 'Invite Patients' button. The page footer says '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_3Mr5bE4aYpDWGe911baH8ugF

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

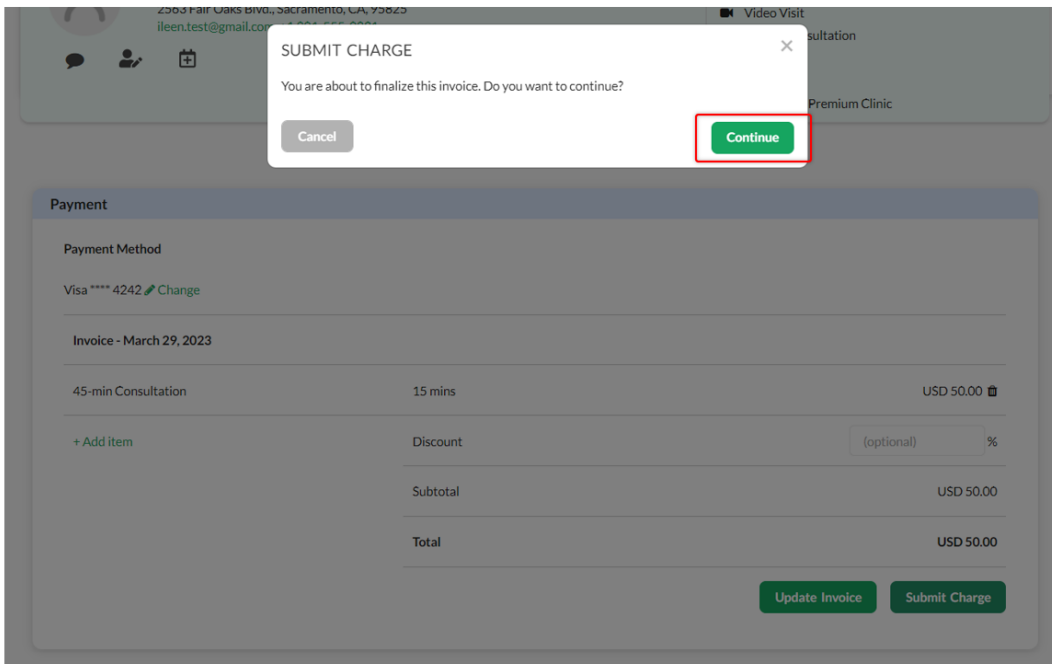
Payment Method
Visa **** 4242 [Change](#)

Invoice - March 29, 2023

45-min Consultation	15 mins	USD 50.00
+ Add item	Discount	<input type="text" value="(optional)"/> %
	Subtotal	USD 50.00
	Total	USD 50.00

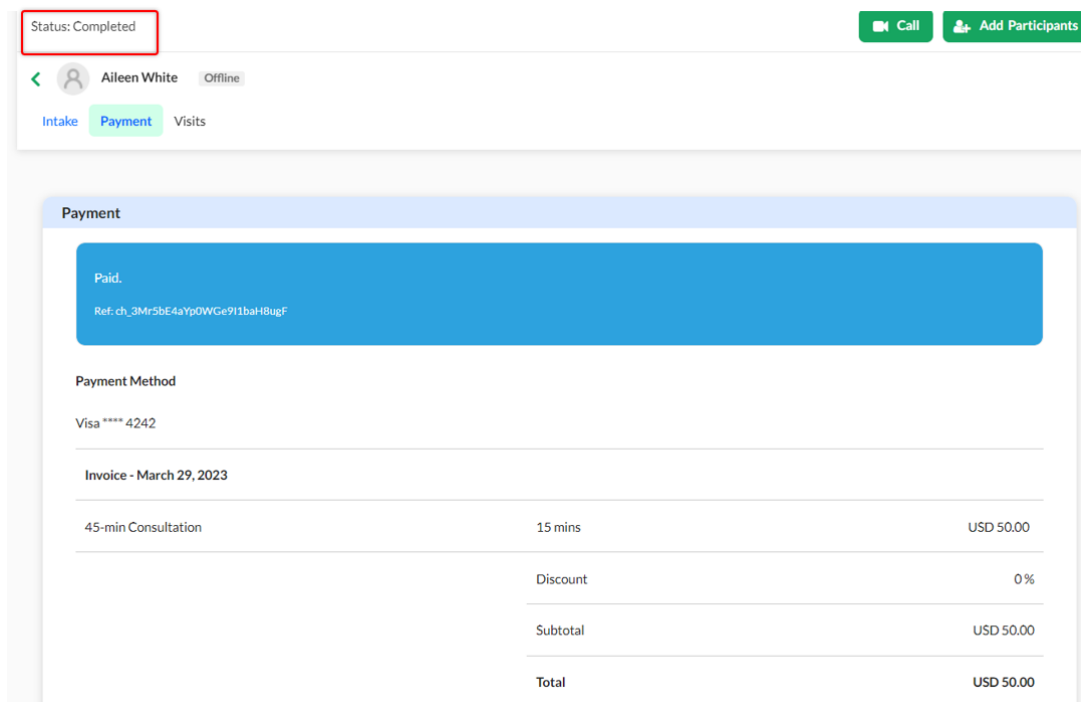
[Update Invoice](#) [Submit Charge](#)

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.



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

Tags
 epayment

payment reminder
reminders