

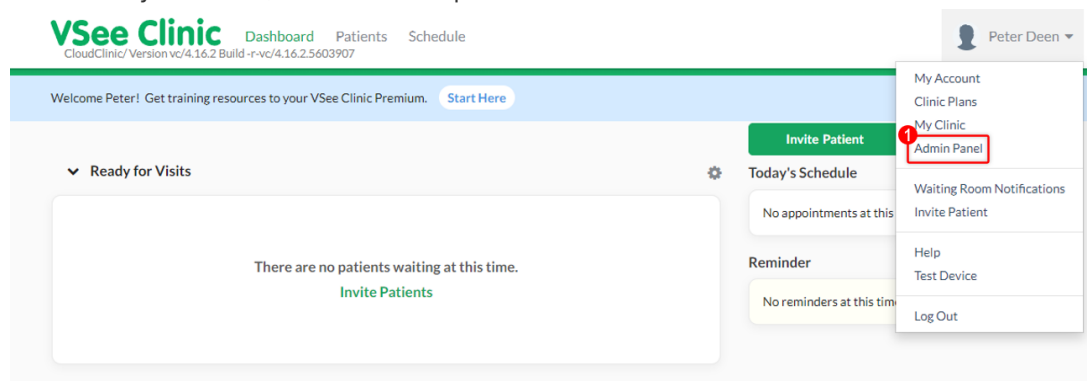
Setup Payment Reminders

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

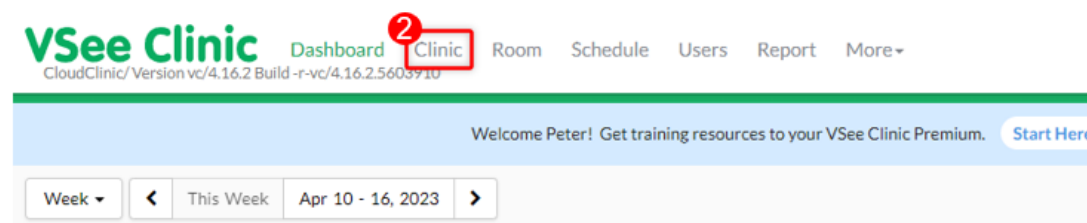
Setup Payment Reminders

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.

VSee Clinic Dashboard Clinic Room Schedule Users Report More- Peter Deen

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

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

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.

VSee Clinic Dashboard Patients Schedule Sarah Miller

Welcome Sarah! Get training resources to your VSee Clinic Premium. Start Here

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_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

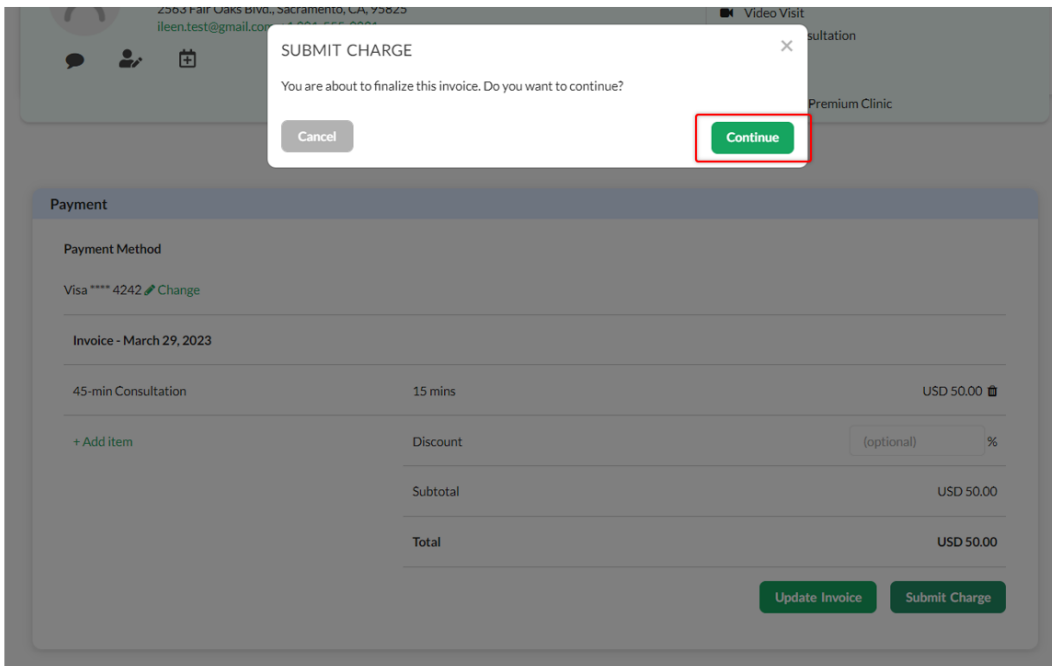
Visa **** 4242 Change

Invoice - March 29, 2023

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

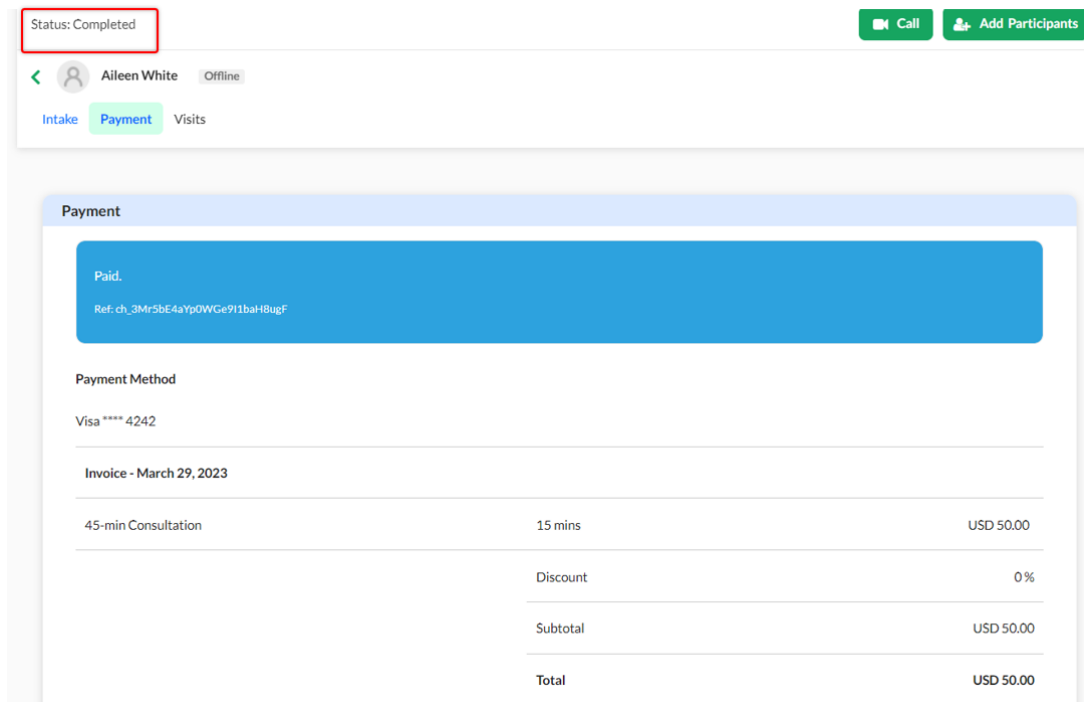
Update Invoice
Submit Charge

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.



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