

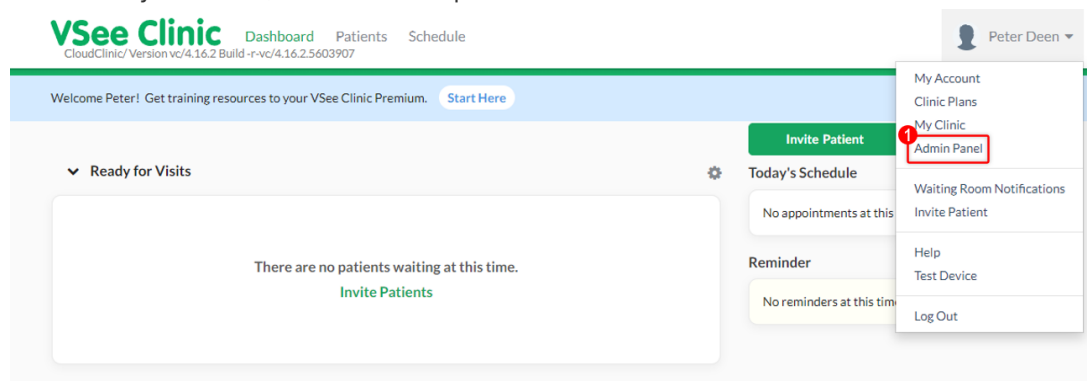
Setup Payment Reminders

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

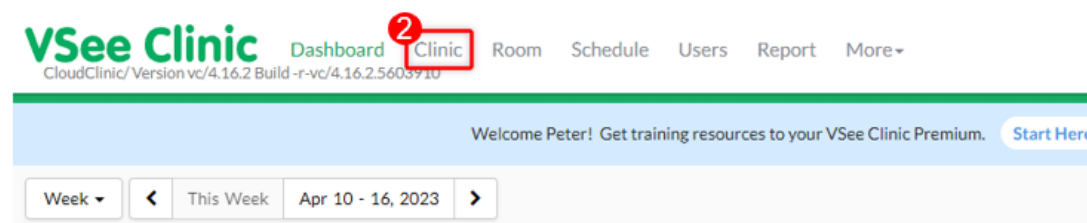
Setup Payment Reminders

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 VSee Clinic interface. At the top, there is a navigation bar with 'VSee Clinic' logo and menu items: Dashboard, Clinic, Room, Schedule, Users, Report, More. The user 'Peter Deen' is logged in. Below the navigation bar, there is a welcome message: 'Welcome Peter! Get training resources to your VSee Clinic Premium. Start Here'. The main content area is titled 'CLINIC DETAILS' and has several tabs: Clinic, Payments, Reminders (highlighted with a red box and a '3'), Waiting Room, Customization, Tags, and Enable/Disable Features. Under the 'Reminders' tab, there are sections for 'Display Settings', 'Pending Actions Settings' (highlighted with a red box and a '4'), 'Payment', 'Notes', 'Survey', and 'Default Appointment Reminder'. The 'Payment' section has three radio button options: 'Always remind me to collect payment', 'Only remind me for paid visits' (selected), and 'Do not remind me at all'. The 'Default Appointment Reminder' is set to '1 day before'. An 'Update' button with a refresh icon is located at the bottom right of the settings area, highlighted with a red box and a '5'.

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 VSee Clinic interface for user 'Sarah Miller'. The navigation bar includes 'VSee Clinic' logo and menu items: Dashboard, Patients, Schedule. The user 'Sarah Miller' is logged in. Below the navigation bar, there is a welcome message: 'Welcome Sarah! Get training resources to your VSee Clinic Premium. Start Here'. The main content area is titled 'Ready for Visits' and contains a message: 'There are no patients waiting at this time. Invite Patients'. On the right side, there are two buttons: 'Invite Patient' and 'Schedule'. Below these buttons, there is a section titled 'Today's Schedule' with a message: 'No appointments at this time.' Underneath, there is a 'Reminder' section with a card for 'Aileen White' (Visit #1000097774). The card has a radio button next to 'Pending payment', which is highlighted with a red box.

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

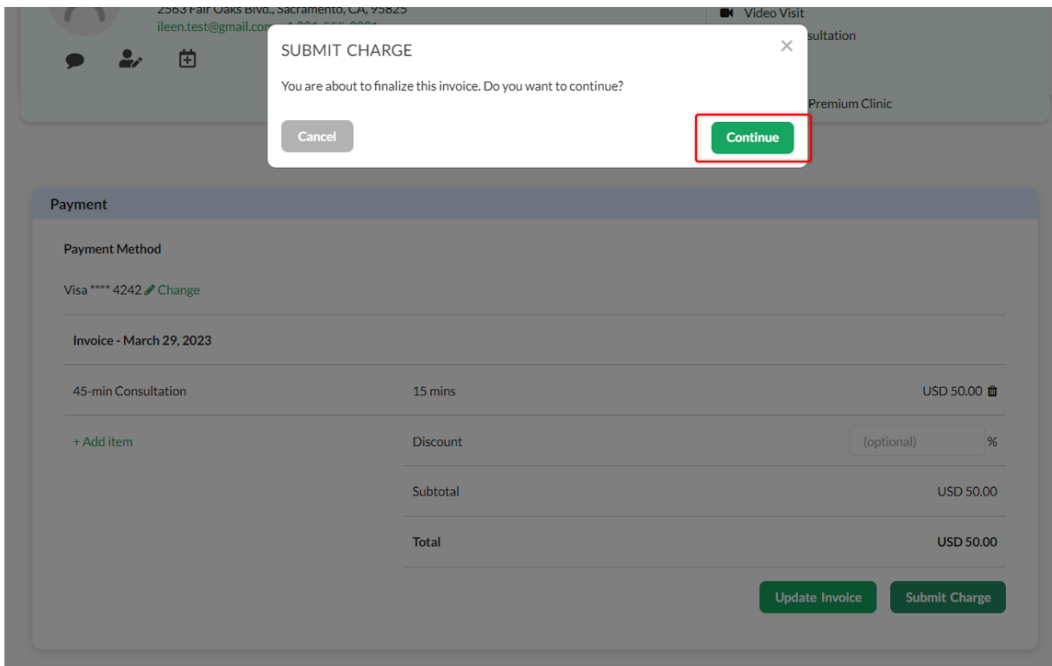
Payment Method
Visa **** 4242 [Change](#)

Invoice - March 29, 2023

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

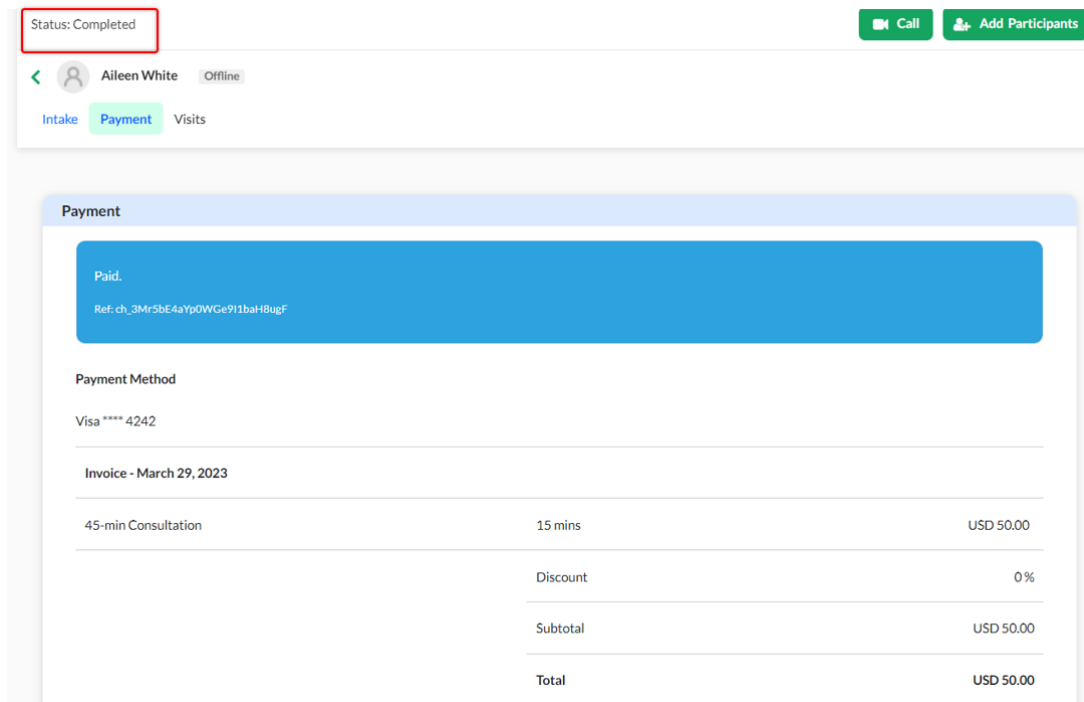
[Update Invoice](#) [Submit Charge](#)

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