

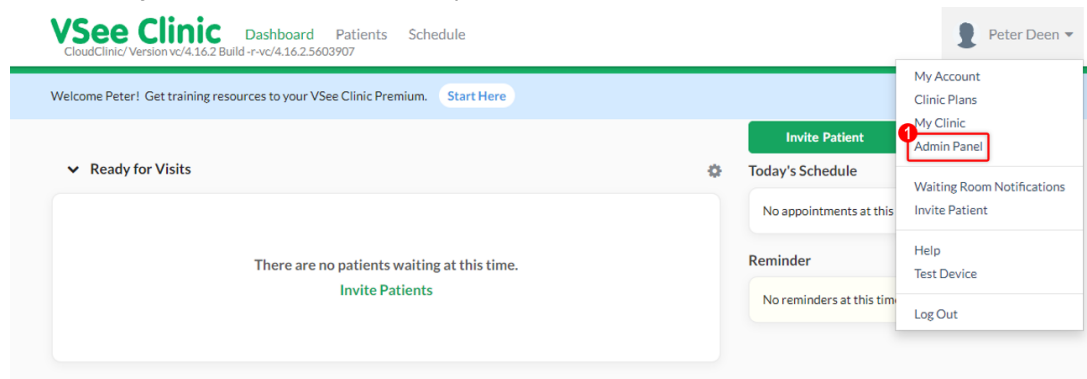
Setup Payment Reminders

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

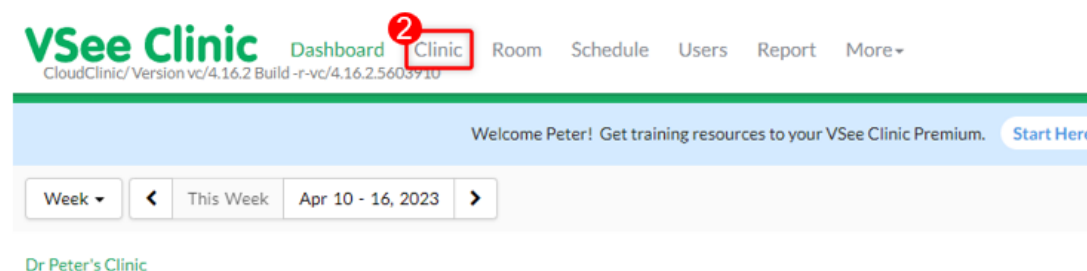
Setup Payment Reminders

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+

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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

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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_3Mr5bE4aYpOWGe9i1baH8ugF

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

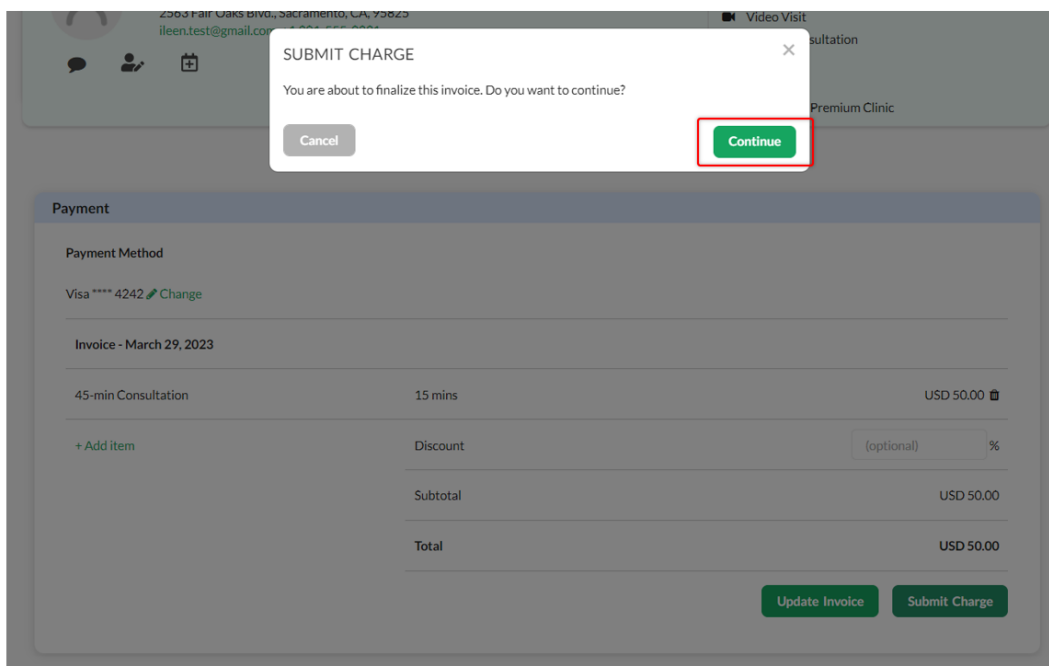
Invoice - March 29, 2023

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

Update Invoice

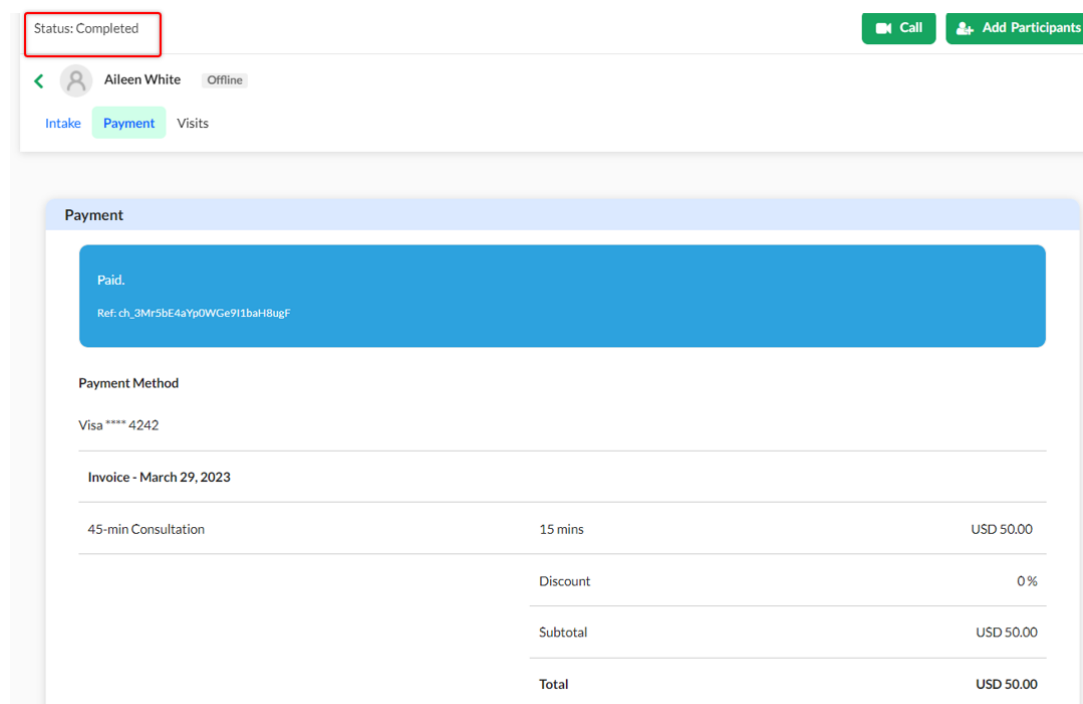
Submit Charge

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