VSeehealth

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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.

Welcome Peter! Get training resources to your VSee Clinic Premium. Start Here			Clinic Plans
✓ Ready for Visits	¢	Invite Patient Today's Schedule	My Clinic Admin Panel Waiting Room Notificatio
There are no patients waiting at this time.		No appointments at this	Invite Patient
		Reminder	Help Test Device
nivite Fatients		No reminders at this time	Log Out

2. Click on Clinic.

VSee Clinic Dashboard Clinic CloudClinic/Version vc/4.16.2 Build -r-vc/4.16.2.5603910	Room	Schedule	Users	Report	More≠	
	Welcome F	Peter! Get train	ing resour	tes to your	/See Clinic Premium.	Start Here
Week - This Week Apr 10 - 16, 2023	>					

Dr Peter's 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 Dushboard Clinic Room Schedule Users Report More- CloudClinic/Versionvic4.16.2 Buld -virds.16.2 5003911	Peter Deen 👻
Welcome Peterl Get training resources to your VSee Clinic Premium. Start Here ×	
CLINIC DETAILS	
9	
Clinic Payments Reminders Walting Room Customization Tags Enable/Disable Features	
Display Settings	
show remnoers only to assigned providers show remnoers only to assigned providers	
Pending Actions Settings	
Parment .	
Always remind me to collect payment	
Only remind me for paid visits	
O Do not remind me at all	
Notes 0	
Always remind me to chart	
On not remind me at all	
Survey 🖲	
Always remind me to complete survey	
O Do not remind me at all	
Make completing the survey optional instead of required.	
Default Appointment Reminder	
1 day before ×	
	0
	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	¢	Invite Patient Schedule
		No appointments at this time.
There are no patients waiting at this time. Invite Patients		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	4 Add Participants
Aileen White Offline			
Intake Payment Visits			
Payment			
Paid			
Ref: ch_3Mr5bE4aYp0WGe911baH8ugF			
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
K 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.

ileen.test@gmail.co	n., Sacramento, CA, 95825	Video Visit
• 🎝 🛱	SUBMIT CHARGE	× suitation
	You are about to finalize this invoice. Do you want to continue?	
	Cancel	Premium Clinic Continue
ayment		
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
	Total	Update Invoice Submit Charge

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		Call	4 Add Participants
K Aileen White Offline			
Intake Payment Visits			
Payment			
Paid.			
Ref. ch_3Mr5bE4aYp0WGe911baH8ugF			
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

Need more assistance? Send us an email at <u>help@vsee.com</u> or check out the <u>Help</u> section under the Profile Menu of your VSee Clinic.

Tags	
epayment	

payment reminder reminders