The Visit Note Templates

Jay-Ileen (Ai) - 2024-07-09 - VSee Clinic for Admins

The Visit Note Templates for all the sections of the SOAP notes were created to eliminate the need to retype everything that is commonly used.
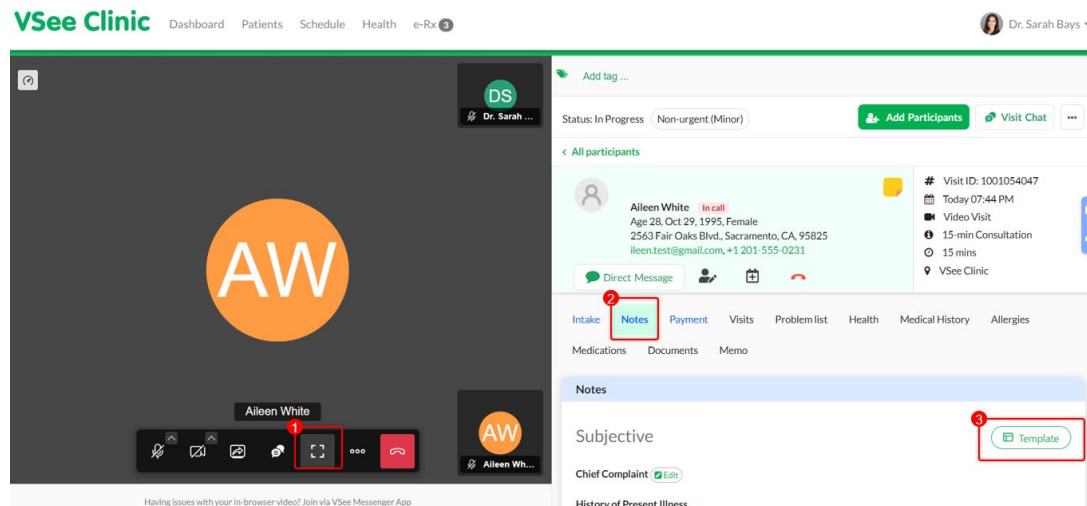
Note: Please reach out to your Account Manager if you'd like to enable this feature in your Clinic.

How to Use the Visit Note Templates

1. Hover on the patient's window and click the **Minimize** icon from the menu tray.

The Visit Details page will appear on the right side of the screen.

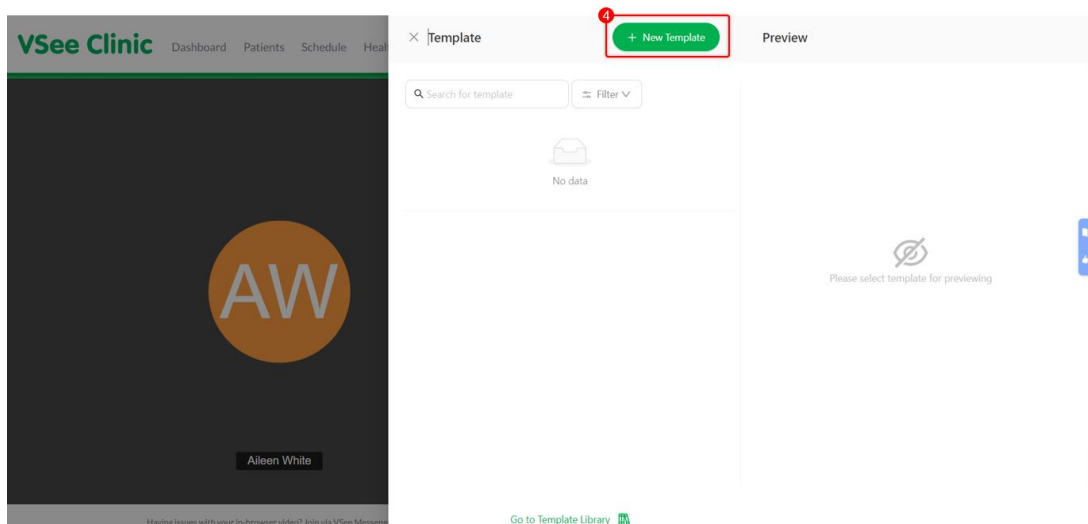1. Click on the **Notes** tab.

2. Click the **Template** button.

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1. Click the **+New Template** button.

Note: This view shows the first time a Provider will create a Visit Note template so no other Templates are showing for now.

1. Enter the **Template name**, select the **Category**, enter all the necessary details under each field:

- **Chief Complaint**

- **History of Present illness**

- **Review of System**

- **Physical Exam**

- **Assessment**

- **Procedure Code(s)**

- **Plan/Care Instructions**

Note: You can click on the checkbox if you want to share this template with the entire clinic so that other providers can use this template as well.

Click **Submit** once finished.

Note: The structure of each template can be customized by our Development team once requested.

On this photo it shows that Template example 1 has been selected as this visit's SOAP Notes template.

You can choose to click on:

A. Replace - to select another template to use instead of the current one selected

B. Merge Template - select multiple templates and combine them on this visit's SOAP Notes field.
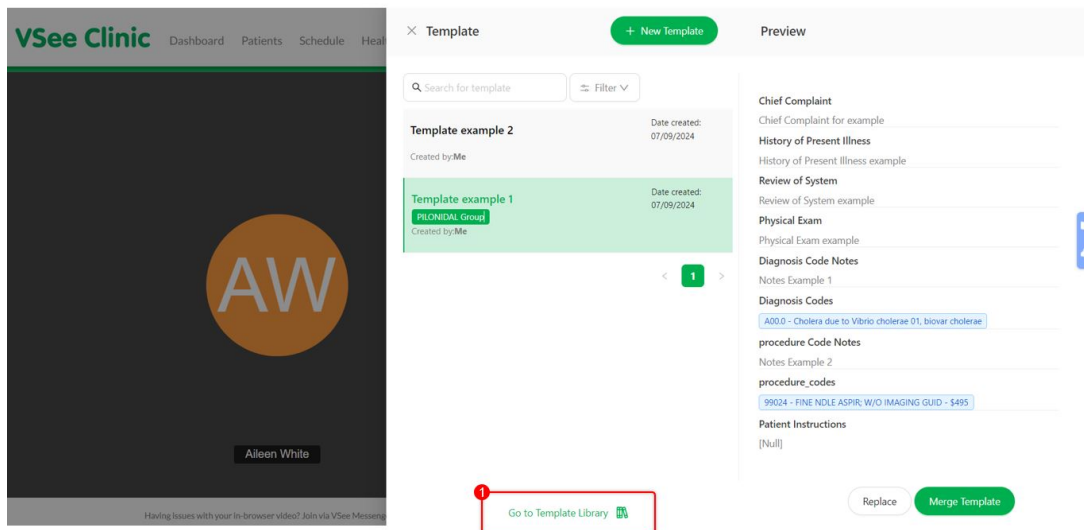
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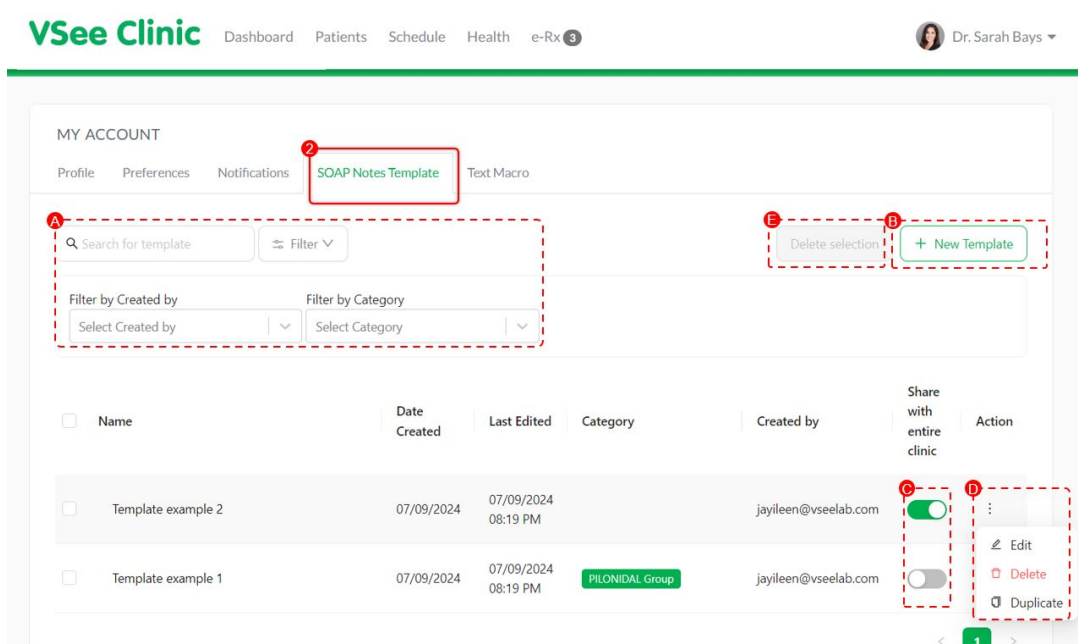## How to Manage the Visit Note Templates as Providers

1. Click on **Go to Template Library**.

1. You will be routed to the **SOAP Notes Template** field.

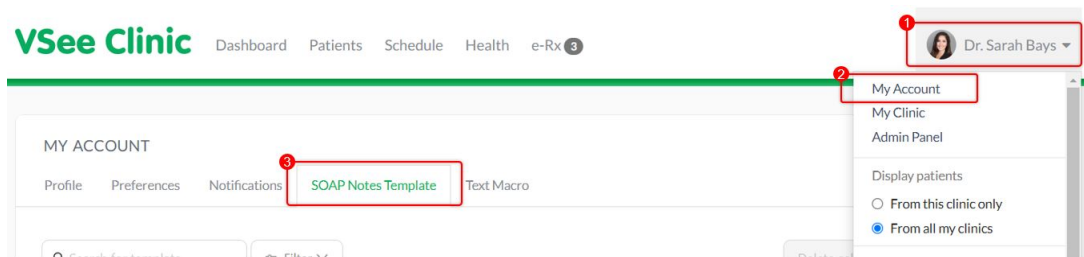Here you have options to manage the SOAP Notes Template as a Provider:

A. You can search and filter the templates via (1) Created by (2) Category

B. Create new templates even when you're not on a patient's visit details page

C. Toggle ON/OFF if you want to share a template that you created with all other providers of the clinic

D. Under Action, edit the selected template, delete permanently, or duplicate the selected template

E. Delete multiple selected templates permanently

Alternatively, you can go to SOAP Notes Template management as a Provider by choosing this path:

1. Click on **Your Name** or the **Profile Menu**.

2. Select **My Account**.
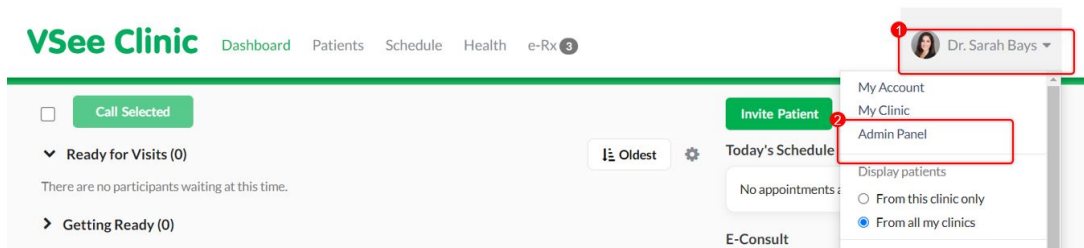
3. Select **SOAP Notes Template**.
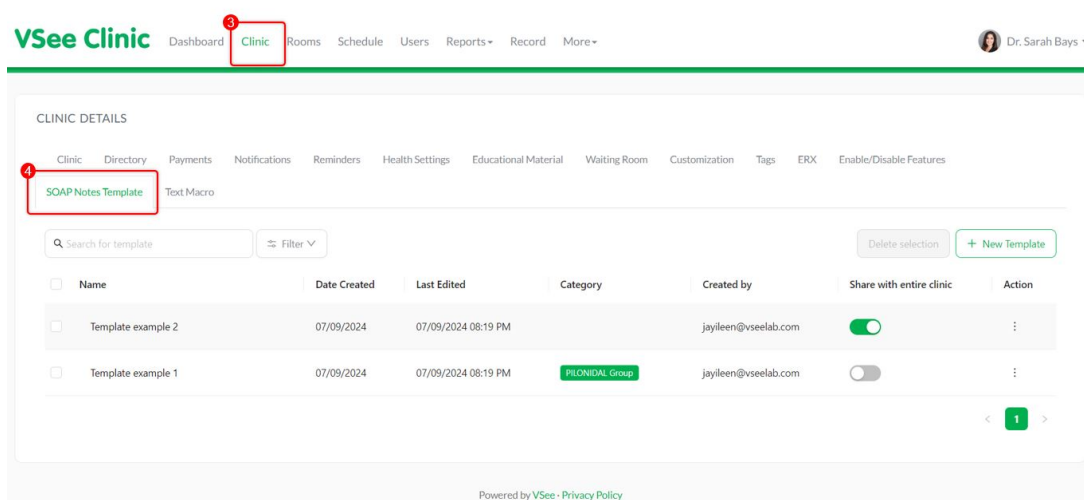
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How to Manage the Visit Note Templates as Admins

1. As a Provider with Clinic Admin access, click on **Your Name** or the **Profile Menu**.

2. Select **Admin Panel.**

Note: If you are not a Provider and only has Clinic Admin access, you will no longer need steps 1-2.

1. Click the **Clinic** tab.

2. Click **SOAP Notes Template** tab.

Here you have options to manage the SOAP Notes Template as a Provider:

A. You can search and filter the templates via (1) Created by (2) Category

B. Create new templates even when you're not on a patient's visit details page

C. Toggle ON/OFF if you want to share a template that you created with all other providers of the clinic

D. Under Action, edit the selected template, delete permanently, or duplicate the selected template

E. Delete multiple selected templates permanently

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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.

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