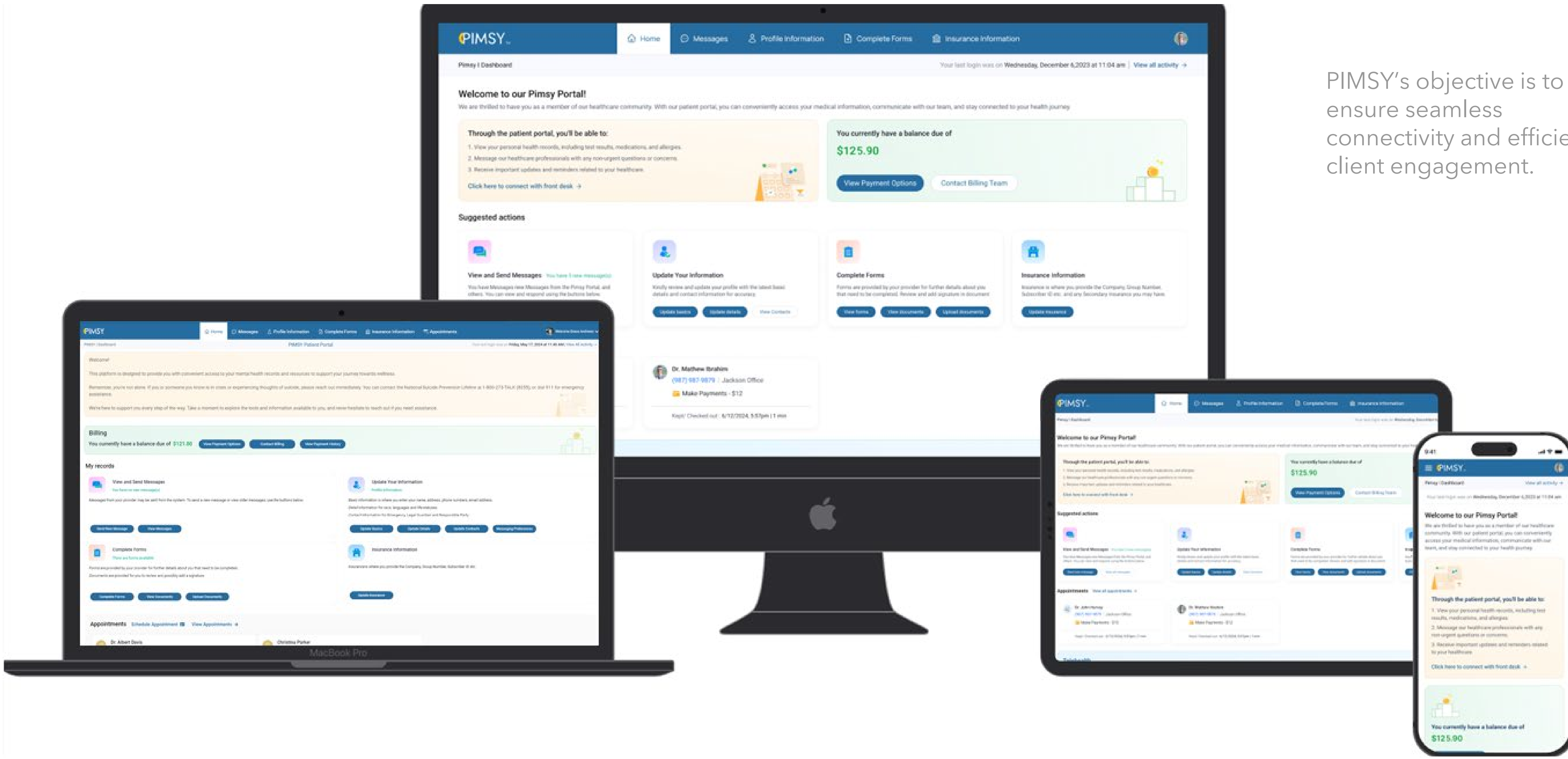
The New Client Portal

Quick Guide

PIMSY Client Portal

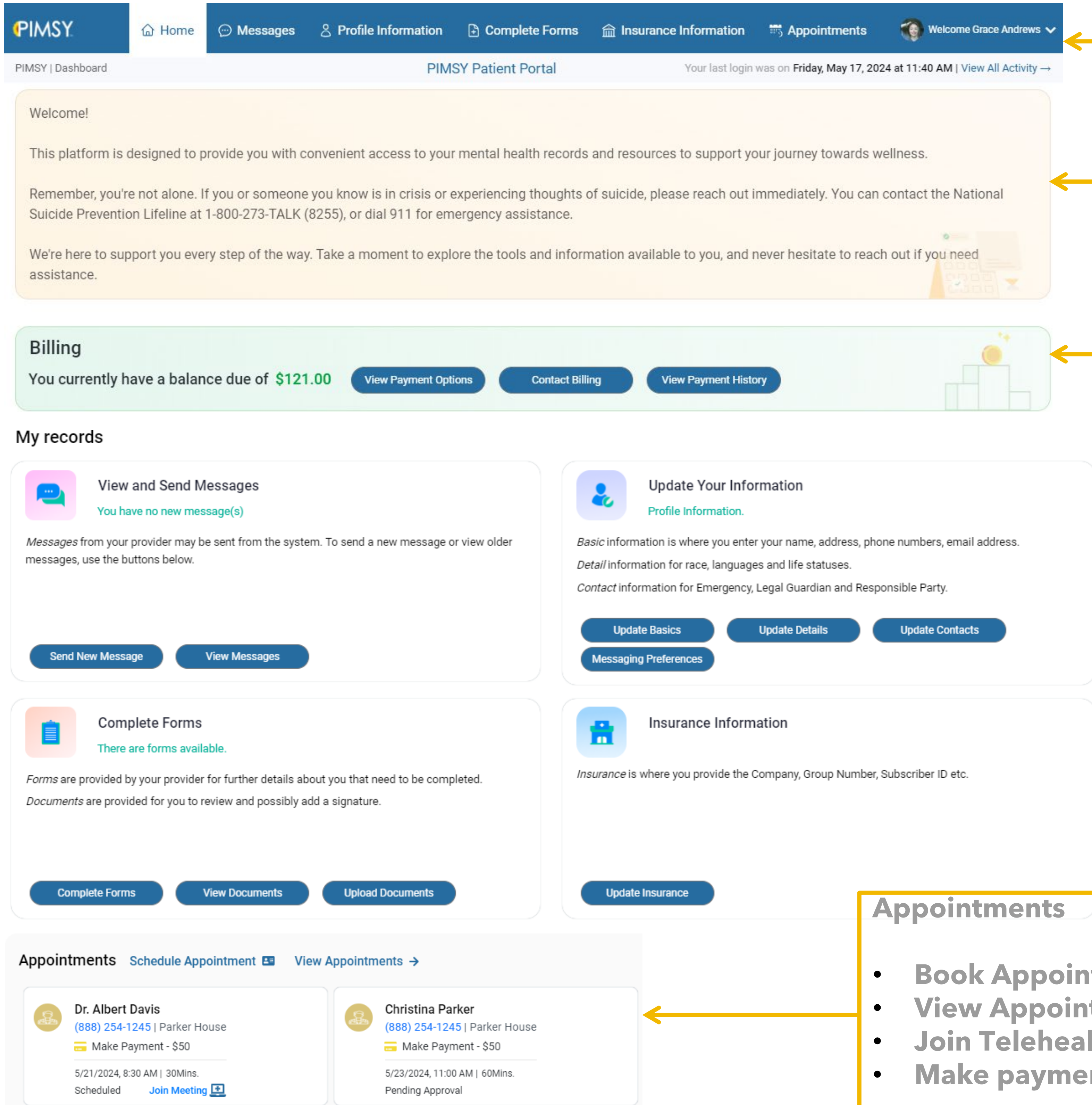
The PIMSY Client Portal provides clients with flexible access to their secure client portal, either through the mobile app (IOS/Android) or web-based platform, based on their preference. With this versatile system, clients can easily request new appointments, make payments, communicate securely via Secure Messages, and complete necessary intake paperwork.



PIMSY's objective is to ensure seamless connectivity and efficient client engagement.

PIMSY Client Portal

Main Page



Header Section

Welcome Message

Billing Section

My Records

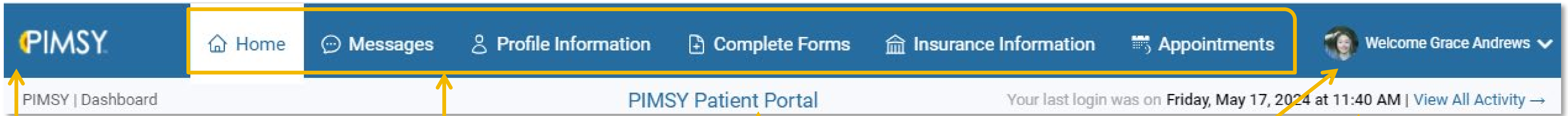
- View and Send Messages
- Update your information
- Complete Forms
- Insurance Information

Appointments

- Book Appointment
- View Appointments
- Join Telehealth Session
- Make payment on Session

Top Menu Bar

The New Client Portal is enhanced with visual and functional changes that provide a more intuitive experience for the clients.



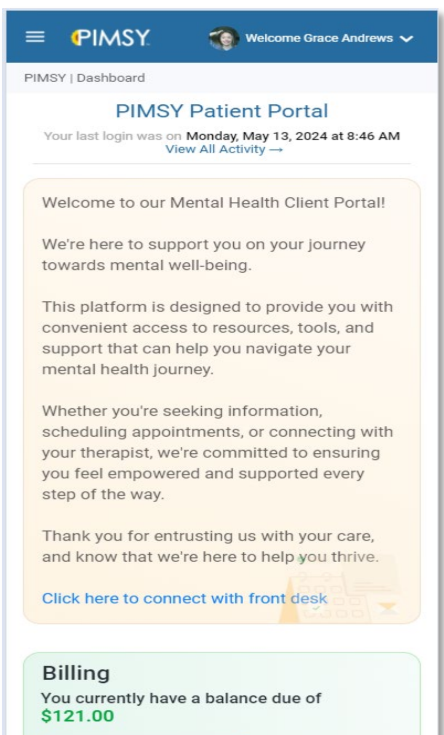
1. Your Logo is positioned on the left, serving as a quick menu to return to the dashboard from other details pages.

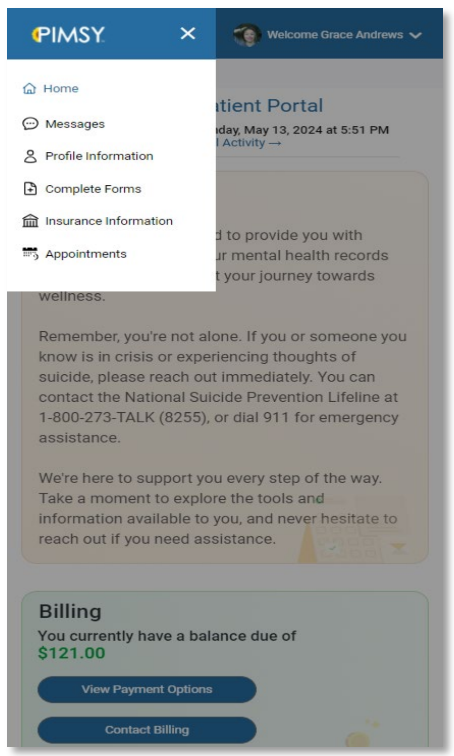
2. The main menus are located at the top, facilitating easy and seamless navigation.

3. The practice's preferred title for the portal is determined by setting **-328**

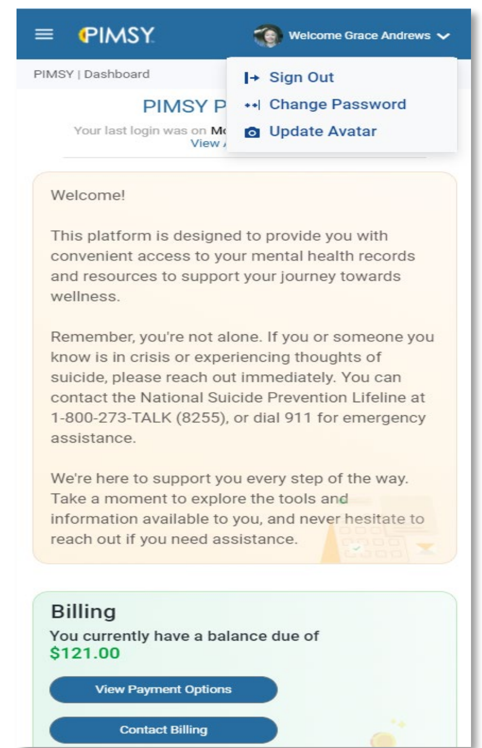
4. On the right side, clients can find options for password reset, signing out, and updating the profile picture.

5. Audit activities are captured and displayed below the main menus to ensure compliance with ONC-HIT standards





Mobile view

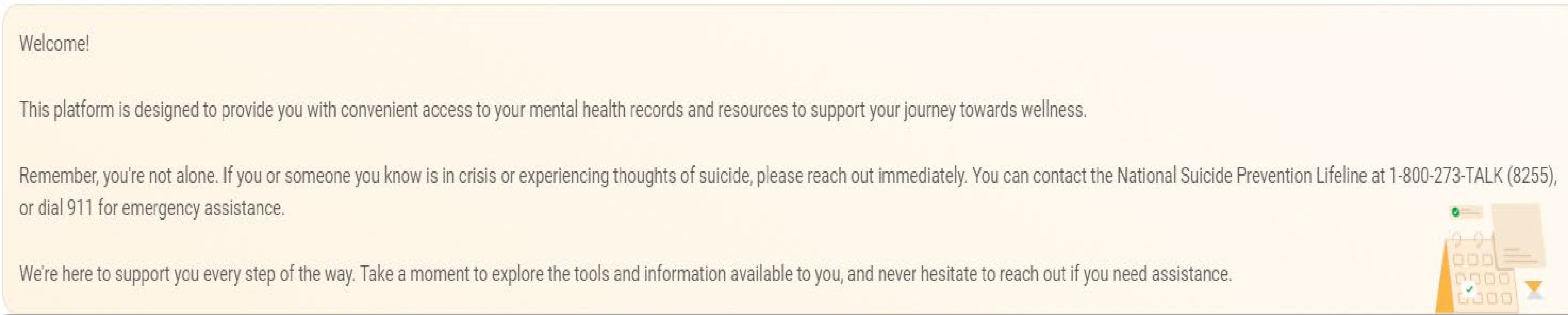


Mobile view

Customizable Welcome Message

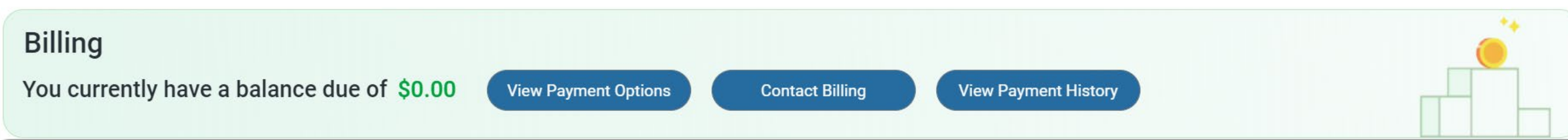
PIMSY focuses on client-centric design, customization, and personalization.
The following message, intended for clients, can be customized by the practice according to their specific needs.

Setting **-330** allows you to change the default Portal instruction text that is posted on the client portal.



Billing Information

PIMSY client portal provides convenient billing features, enabling you to securely manage your payments online, review payment history and communicate with billing team for questions.

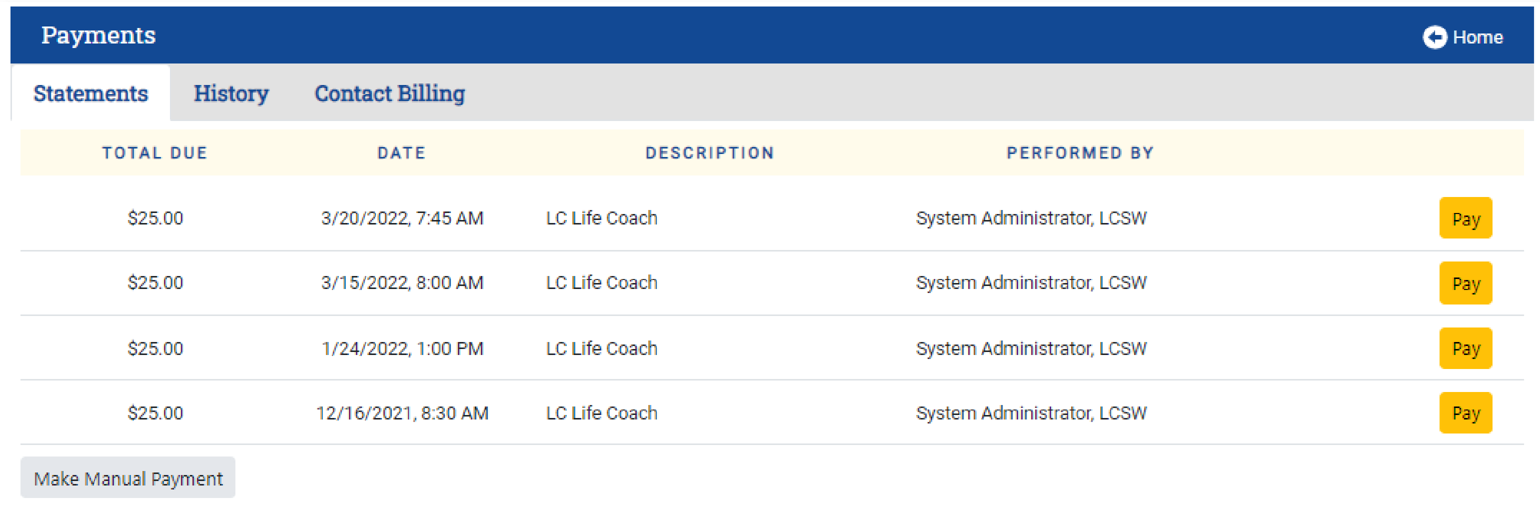


Statements

Here, clients can view statements that detail total due, description, performed by, and the option to make a payment.

To hide *Make Manual Payment*, use setting **-664**.

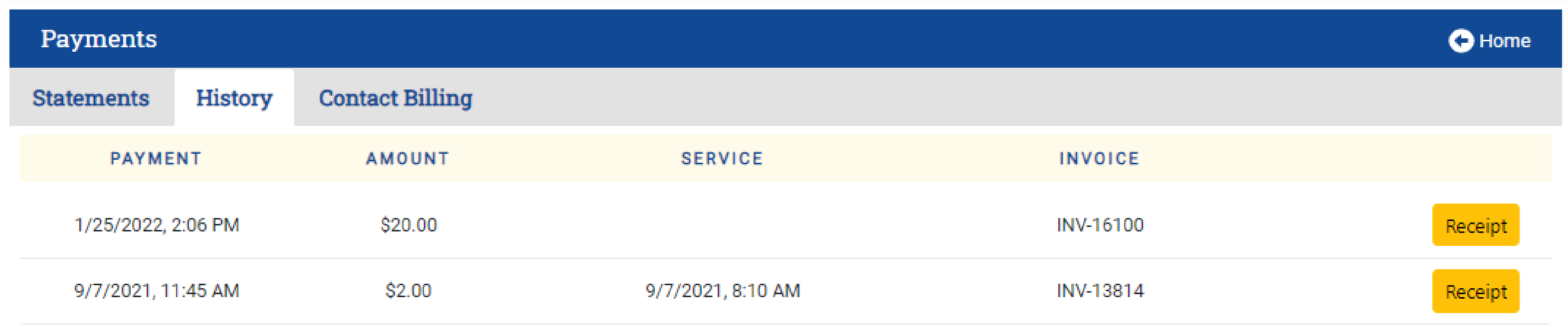
To hide payment option on invoices, use setting **-663**.



History

When selecting the history tab, clients can view their payment history.

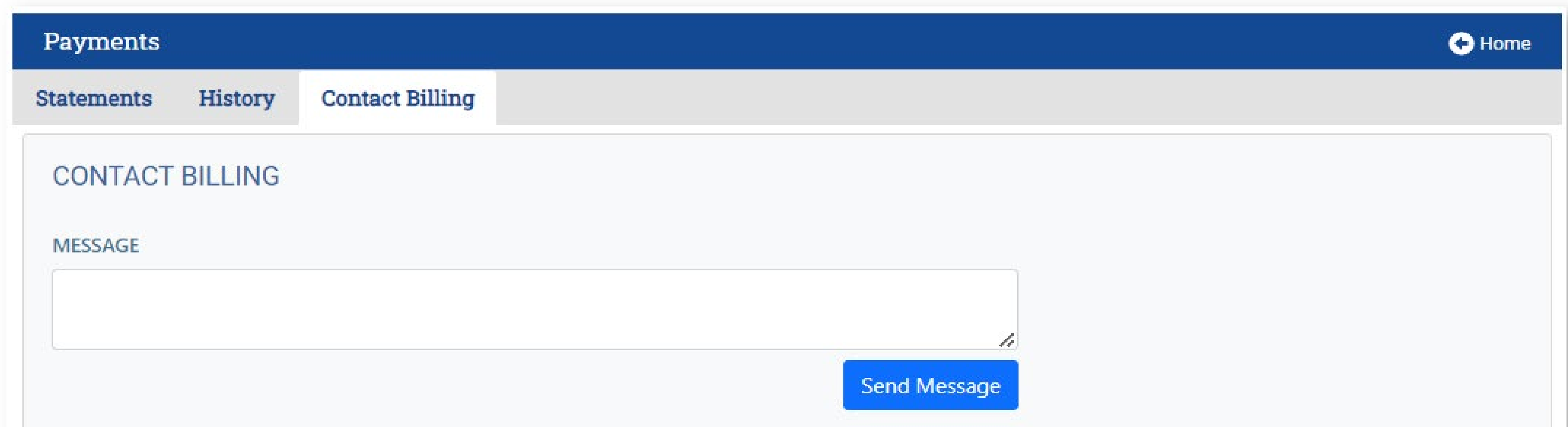
This can be turned on/off via setting **-762**.

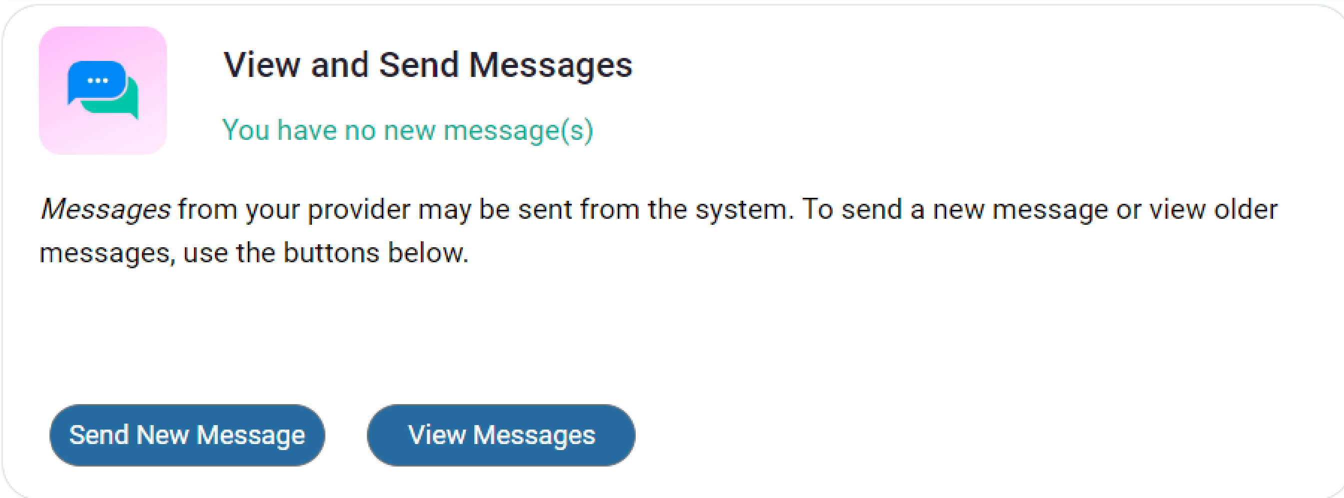


Contact Billing

When selecting the Contact Billing tab, clients can send billing messages.

This area will be hidden if there isn't an email provided in setting **-641**.

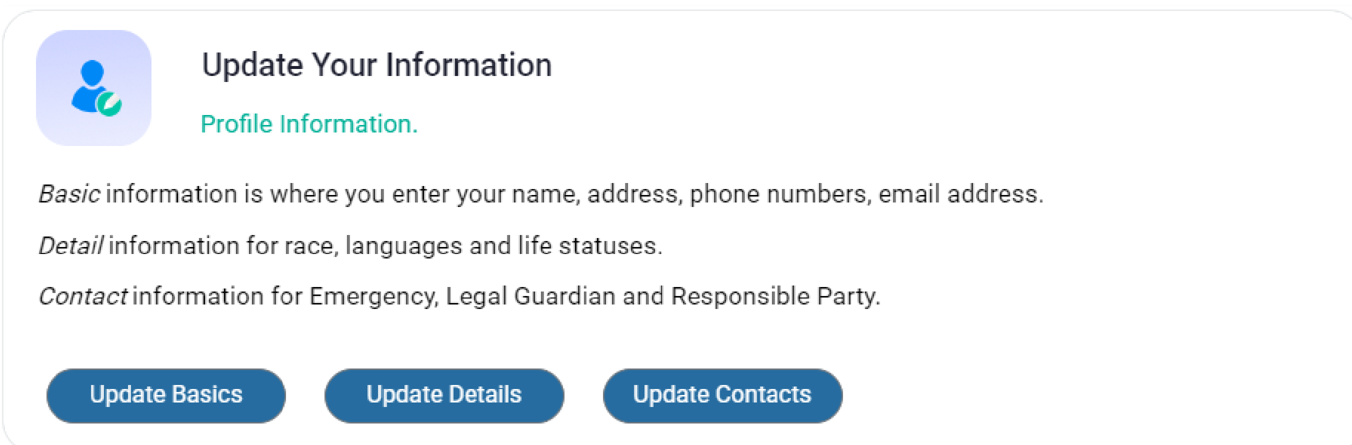




View and Send Messages

Here, clients can send messages to the provider via the ***Send New Message*** button, they can also view messages from the provider via the ***View Messages*** button.

This can be exposed by setting **-620**.



Update Your Information

To update client information, click the ***Update Basics*** button. Here, you can enter/update your address, phone numbers, and email. This is controlled by settings **-621** and **-636**.

To update information for race, languages, and life statuses, click the ***Update Details*** button.

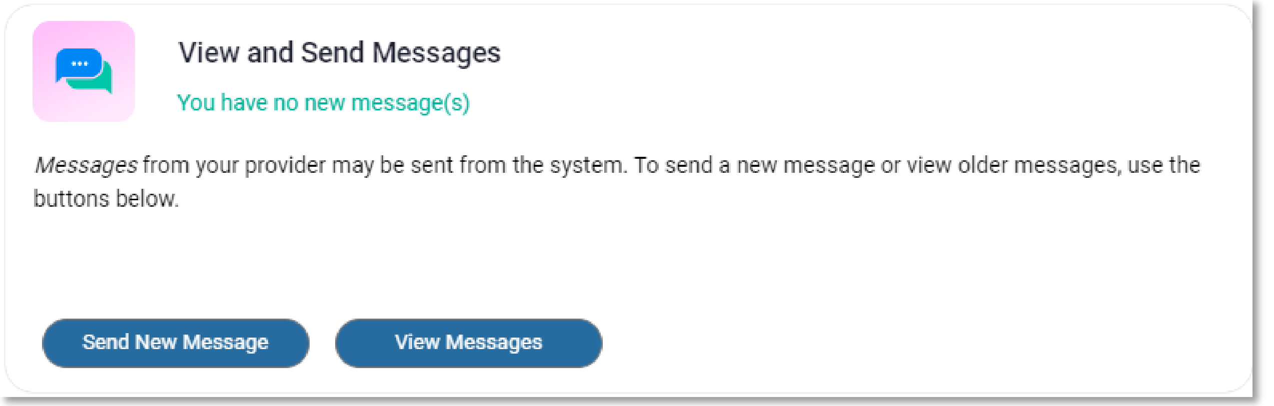
To update contact information for Emergency, Legal Guardian, and Responsible Party, click the ***Update Contacts*** button.

Complete Forms

Here, clients can complete forms and documents by clicking either the ***View Forms*** or ***View Documents*** buttons.

To upload documents, click ***Upload Documents***.

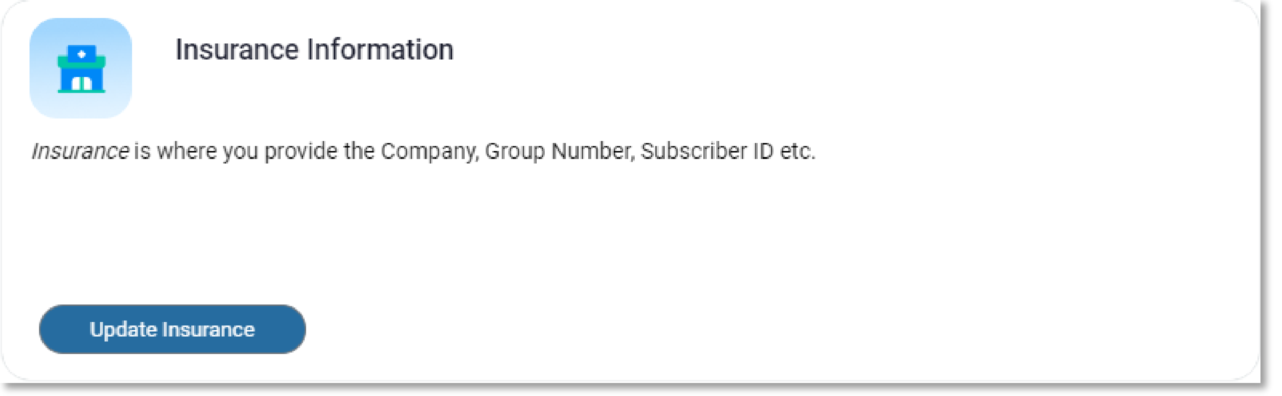
This is controlled by the provider's document type setup and the forms assigned to client by the provider.



Insurance Information

To update insurance information, clients can click the ***Update Insurance*** button.

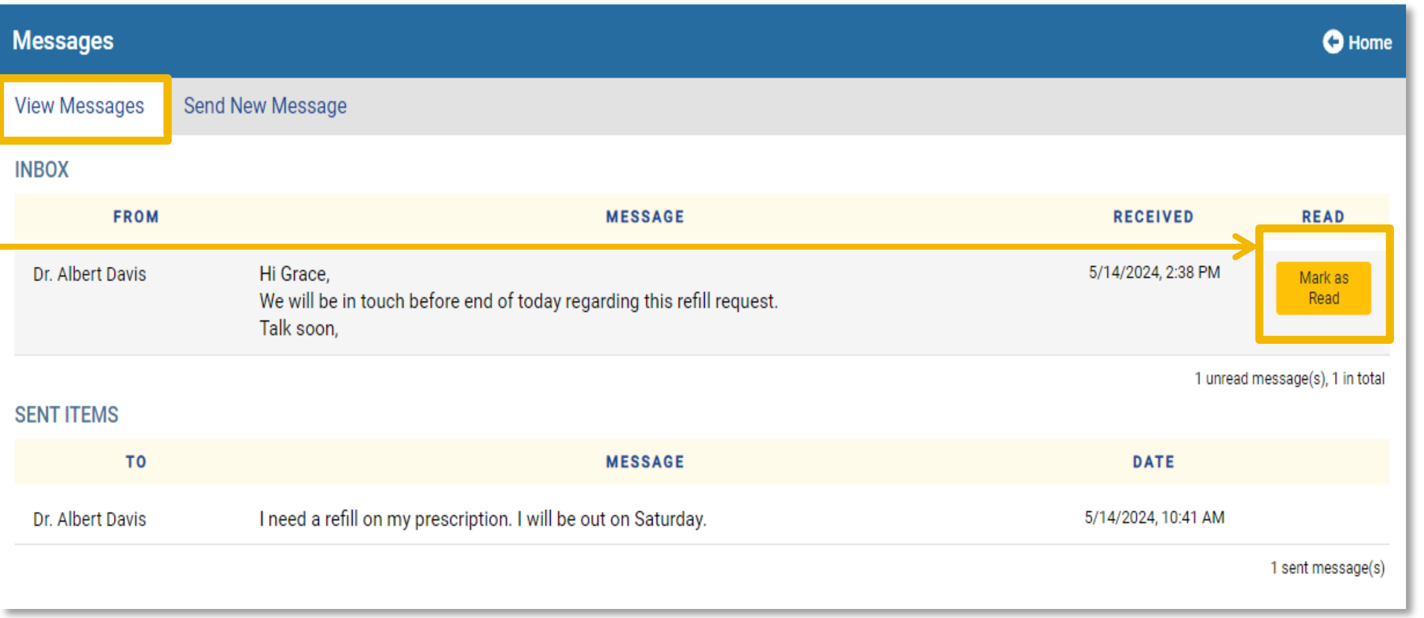
This is controlled by setting **-366**.

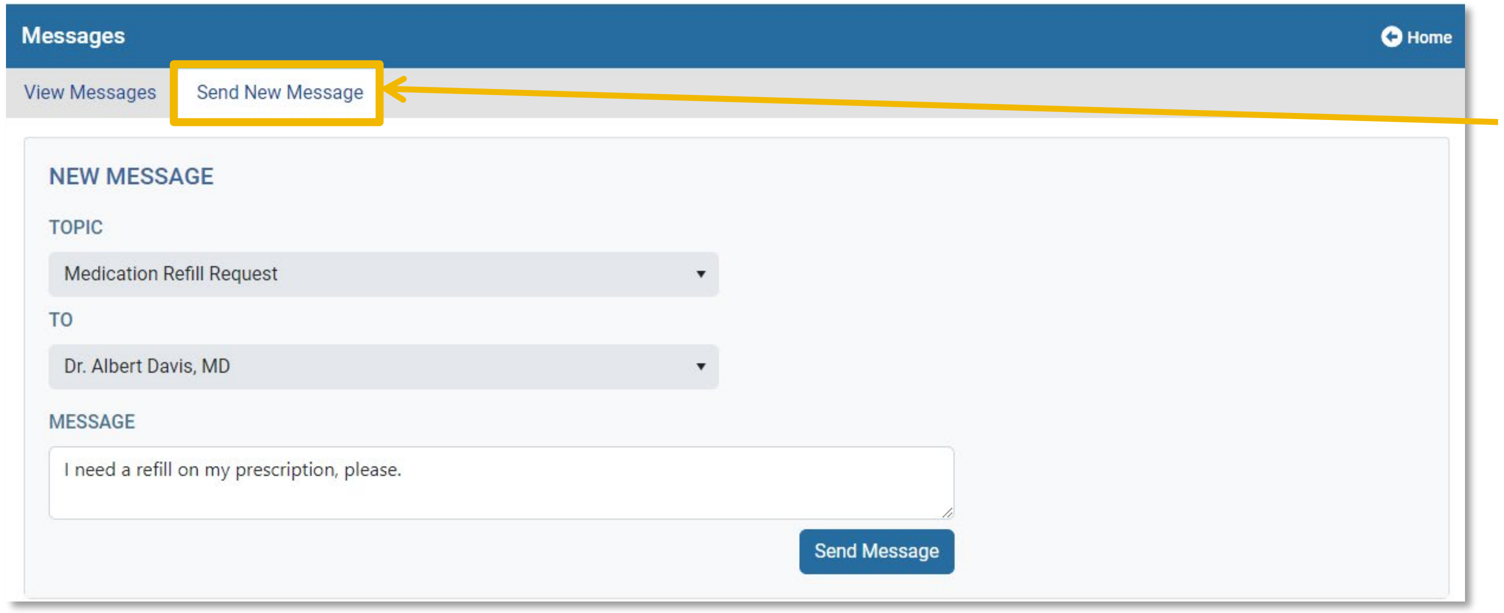


Viewing Messages

Selecting the ***View Messages*** tab will bring up any messages from the provider for the client.

Selecting ***Mark as Read*** will clear the message out.



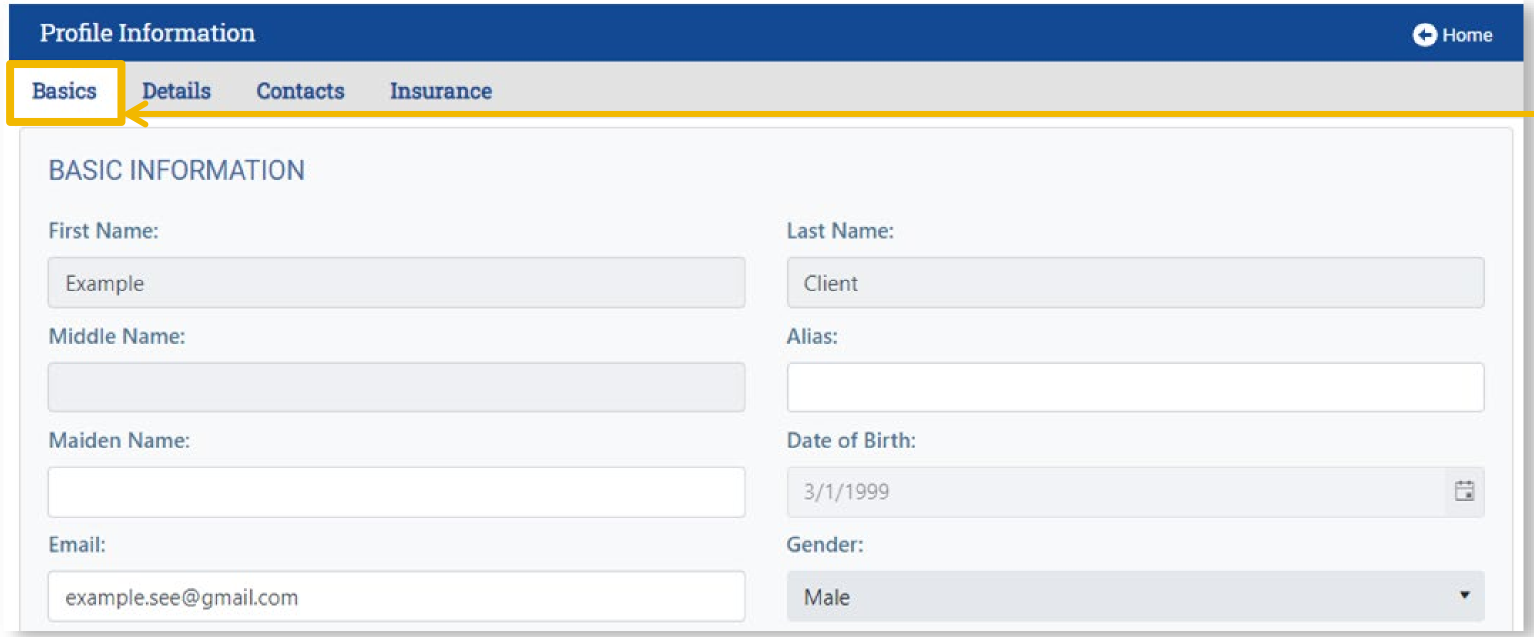


Send New Messages

Selecting the ***Send New Message*** tab will give the client the option to send a message to their provider's office.

The options you see in the Topic dropdown depend on which Topic Types are set to show up on the Client Portal. Clients can pick a topic type for their message, and it'll be sent to users assigned under the selected user group for that topic type. If a client picks a topic without an assigned user group, they'll need to choose a specific person to send the message to.

For setup instructions, please reference this guide

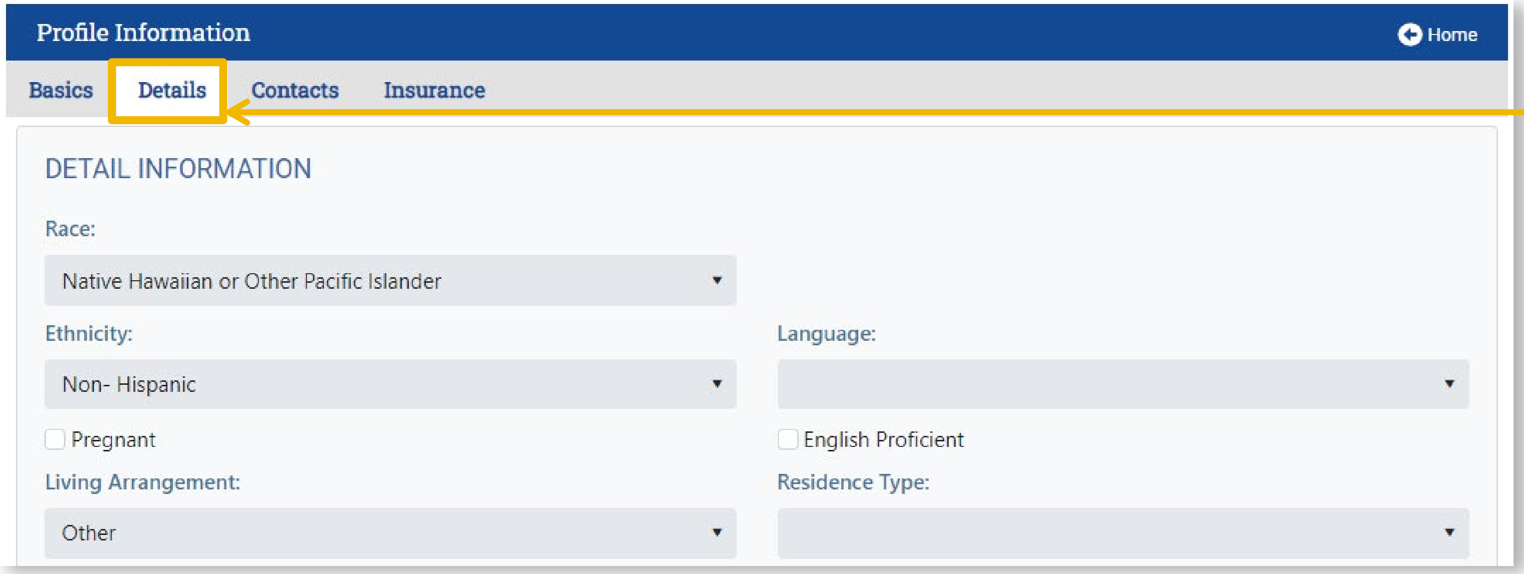


Basics

Selecting the ***Basics*** tab will allow clients to view and/or modify their basic information.

Client access is controlled by setting **-636**.

Read only can be turned on/off via setting **-621**.



Details

Selecting the ***Details*** tab will allow clients to view and/or modify their demographic information.

Client access is controlled by setting **-649**.

Read only can be turned on/off via setting **-622**.

Contacts

Selecting ***Contacts*** tab will allow viewing and or modifying of client contact information.

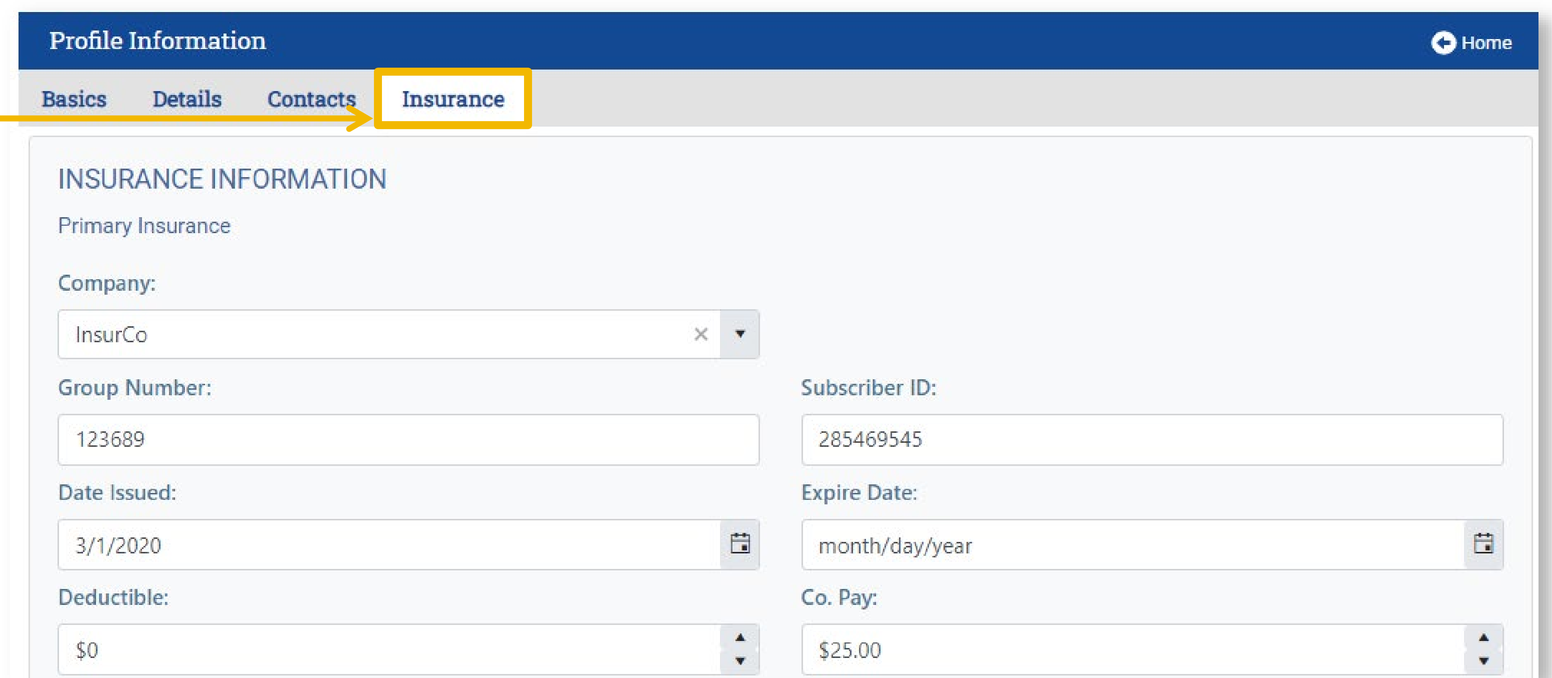
Read only can be turned on/off for all items via setting **-624**.

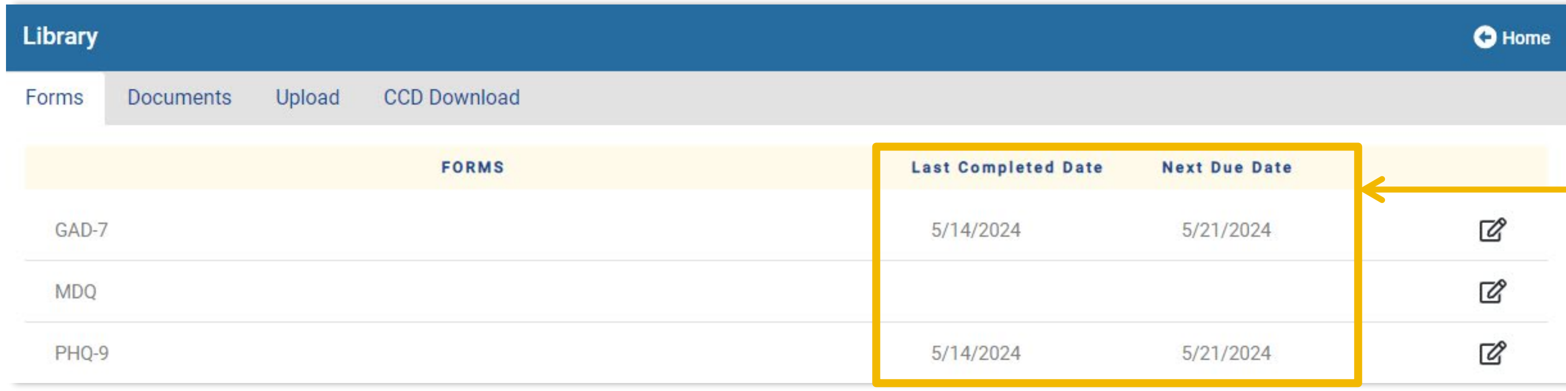
To modify Responsible Party use setting **-623**.

Insurance Information

Selecting the ***Insurance*** tab will allow viewing and or modifying of client insurance information.

To hide the Insurance Tab use setting ***-366***.



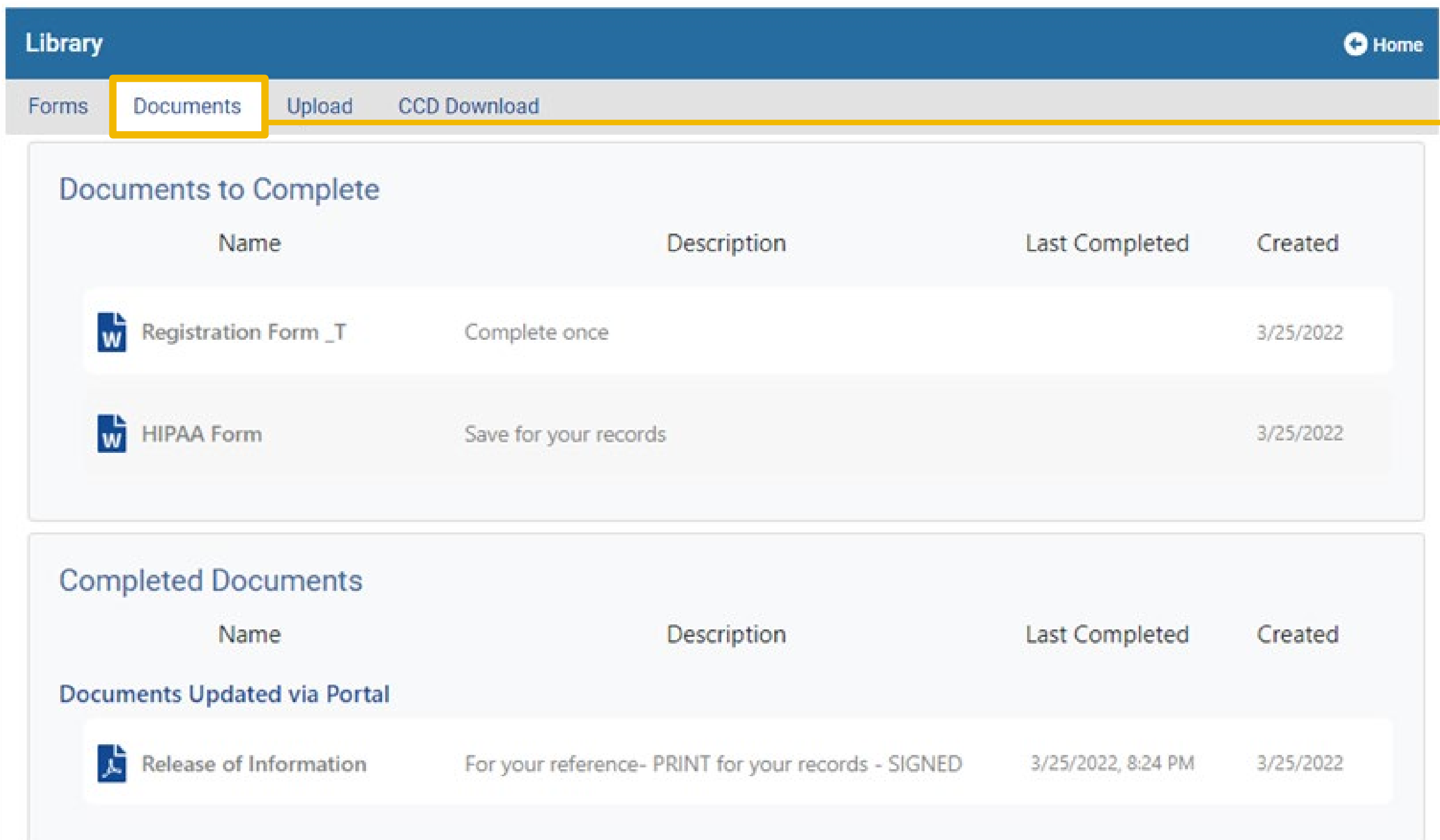


Forms

Q&A Forms Page Updates

We have added new columns on the Q&A Forms page for the *Last Completed Date* and the *Next Due Date*. The *Next Due Date* column will be driven by your renewal setup.

Please refer to the Renewals guide to learn more on how to set up renewals.



*Please note that document descriptions will show on the client portal and can be used for instructions.

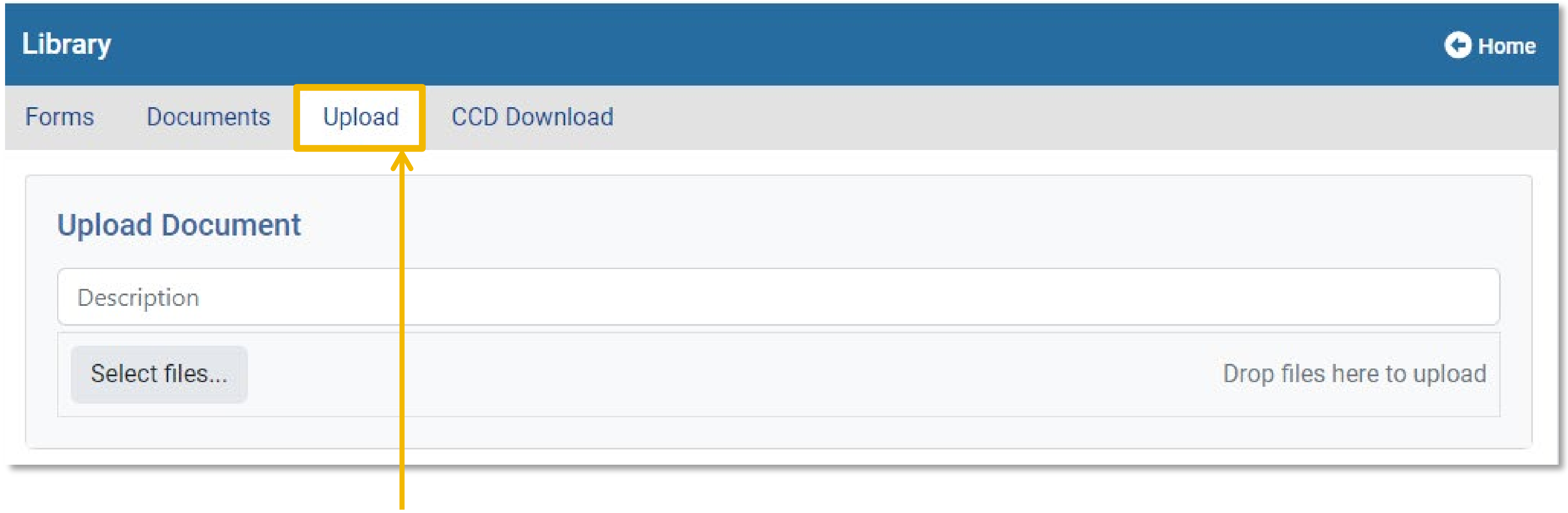
Documents

Selecting the ***Documents*** tab will show any forms that need to be completed and that have been completed by the client.

Selecting a document will bring it up for the client to review and/or make edits.

Clients can also save documents to complete for later if they are unable to complete at that time.

**In the document settings, documents that are not checked as "Persistent on Client Portal" will be removed from the Documents to Complete section in the portal once the client has saved and completed the document. This would be used for documents that are only completed once.*

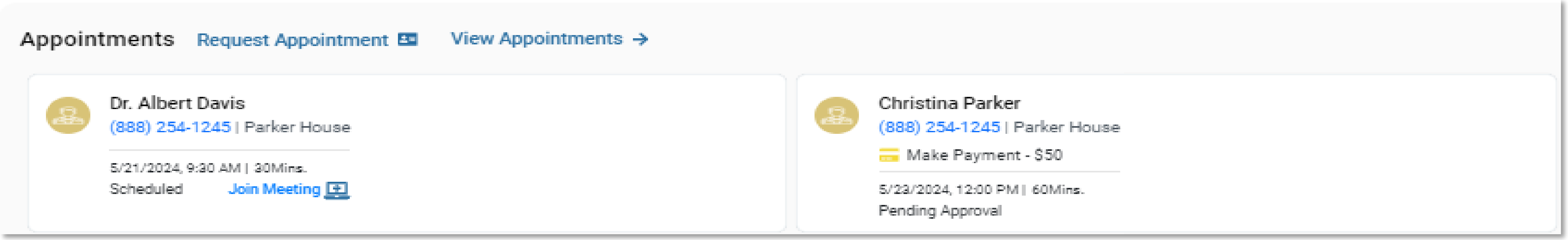


Upload Documents

Selecting the ***Upload*** tab will allow clients to upload any necessary forms. Clients can either select the files from their local drive or they can drag & drop to upload the file.

Appointments

To improve client satisfaction and reduce administrative burden, PIMSY provides appointment booking option for the clients with clinicians through the client portal. Clients will be able to book appointments with their assigned primary therapist and internal physician



When viewing the appointments panel at the bottom on the main page, in addition to the date and general appointment information, clients may notice them in either blue or yellow.

Blue represents appointments that have already occurred.

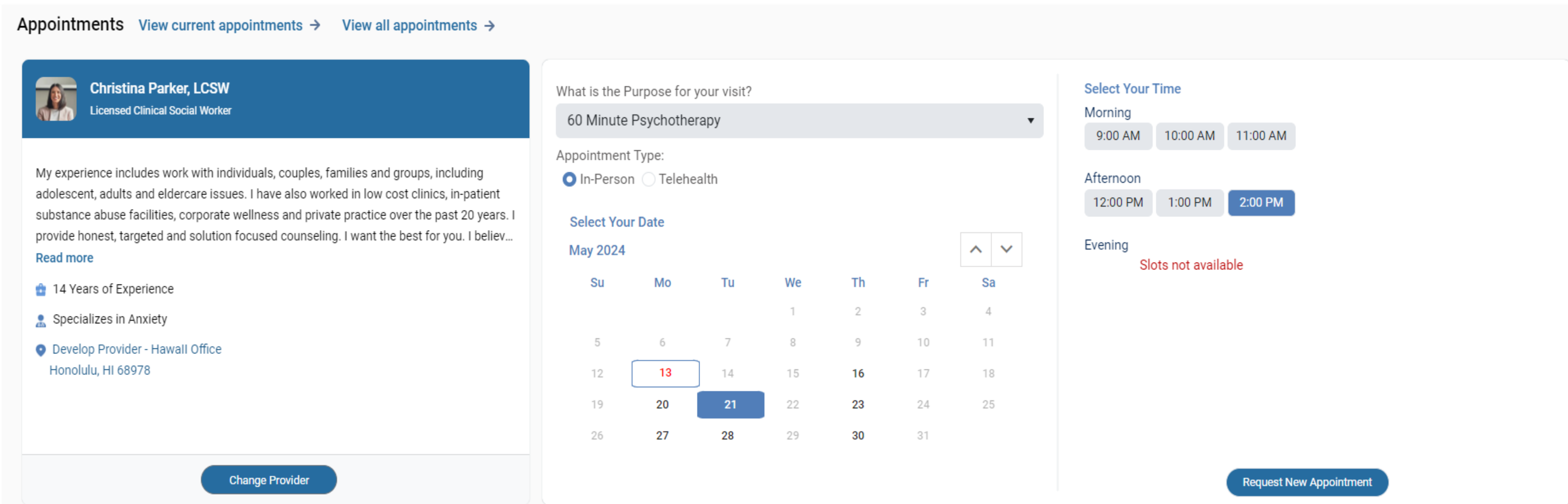
Yellow represents future appointments and may have a telehealth link available.

If available, the option to make a payment may be visible.

New Appointment

Clients are given the option to book an appointment in their preferred timeslots, based on the schedule preferences set by the provider.

Providers can set their bio, years of experience, and specialties under the Public Profile Q&A section, which will be visible to the clients as shown below. Based on the purpose of the visit and available time slot, clients will be able to book their appointments.



View Appointment

When viewing the appointments panel, in addition to the date and general appointment information, clients may notice them green shaded, which means it represents future appointments.

Questions? Comments?

Please contact us at

support@pimsyehr.com