PIMSY Telehealth User Setup (what you need to know)

1. Setting -350 should have a company email address

Setting ID:	-350			
Setting Name:	SAL APPOINTMENT EMA	IL (SENDGRID) -	From Email	
Default Description:	This setting is used to s appointments. This set come.	end unsecure er ting contains the	nails to users about various items inclu email address from which these messa	ding new ages
Default Value:				
Your Description:				
Your Description: Your Value:	l I <mark>Company@gmail.com</mark>	•		
Your Description: Your Value: Created Date:	Company@gmail.com	Created By:	System Administrator	

2. Each user needs an email address and phone number on their personal PIMSY account.

User Details User Details	Ref. Renewals Clients Documents Cod	es / Rates Payroll Surv	eys Groups Q8	A
Save Save Copy	New Of Delete			
Prefix:	N/A 🗸			
FirstName:	Bobby Middle Name:		Last Name:	Brady*
Suffix:	*** N/A *** V Title:	AP ~	Date of Birth:	03/18/2020 🗐 🔻
NPI #:	456321789L Medicaid ID #:	123346545L	Medicare ID #:	
SSN:	Credential #:		DEA #:	
Email:	lan@pimsyehr.co	(404) 555-1212	Phone:	()x
	V Addresses			

3. You also need to make sure you have a phone number set up on the **Default Location** under **Administration** > **Organization Management** > **Location**

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1ain	ain Organizations Division Locations Documents							
ĸ	🗙 1 of 18 🛛 💓	N Seport				🔍 Filter		
	Name	Description	Organization	Phone	Active	Default		
►	AAA Behavi			(404) 555-1				
	Buncombe	Buncombe	ABC Thera	(828) 654-6				
	Cindy Thera		Logo Testing	(518) 555-5				
	Clyde Elem							
	Clyde Hosp		XYZ Couns	(568) 965-2	\checkmark			
	Day care G	Our Group		(252) 987-9				
	Home Office			(546) 549-8	\checkmark			
	IPCO							

🚺 <u>H</u> elp 🧔	Links 🔇 About 🖾 Log Out	📔 Lock		
Save 🧏	Copy Sew Copy Delete			
Name:	AAA Behavioral Health Inc.	Org.: *** N/A ***	*	~
Description:			User Group: E	Behavioral Hea 🗸 📥
	Addresses		Division: *	** N/A *** 🗸 🗸
Address1:	123 Companies address Address2:		Address3:	
City:	north canton State:	NC ~	Zip: 4	56987125
Phone:	(404) 555-1212 x Fax:		Sched. Color:	Green 🗸
Supervisor:	Туре:	Clinic ~	Active	Default
Billing Location	Information			
NPI Numb	per: organizationNPI-1234 Fe	deral Tax ID #: 02254896	654	Docs
Taxonomy	r #: 45698756258 Is Individua	al (Not Company) 📃	🔈 🔪 Additional I	Details
Created Date:	2/3/2010 8:58:00 AM Created By:	Morgan Demo		
Last Edited Date:	3/19/2020 1:37:00 PM Last Edited By:	System Administrator		

4. The profile rule **Telehealth Open and Use** *must be* assigned to the user's profile.

Profile: QP/Therapist	Active Client Adm	in. ☑ PT/QP	Emergency Access Doctor	Power User	
Desc.:					
Unassigned Rules:	X 🔍		Assigned Rules: te	le	×
Address Type Create (Pick List)	<u>^</u>	Save	Telehealth Open and U	se	
Address Type Delete (Pick List)		Delete			
Address Type View (Pick List)		Delete			
Administration Menu View (Menu)					
After_Visit_Summary Create					
After_Visit_Summary Delete		Add All			
After_Visit_Summary Modify	10.1	Demous All			
Assessment Note Create		Nemove Air			
Assessment Note Delete	~				
<	>		<		
					_
Double click the names to move them from be	ox to box Assign from H	ule Group: *** N	N/A ***		\sim

5. A test client needs to be setup with a valid email address for testing purposes. (real clients will need a valid email address to receive the **Telehealth** session details).

Client Details	Demo. / Q&A	Insurance	Contacts Check	List / Comments / Re	quests Medical	Diagnosis	Treatment Plan	Renewals
Save Save	🧏 Сору	y New	Delete					
Pre	fix: N/A	~	Client Number:	A-C-4148	Alt Client N	lumber:		
Date of Bir	th: 🗹 10/28	3/1979 🔲 🗖	Age:	40	1			
First Nan	ne: MT		Middle Name:		Last	Name: AA	A-Test	
Suf	fix: N/A	~	Alias:		Maiden	Name:		
Em	ai <mark>l: test@tes</mark>	st.com	Cell <mark>:</mark>	(111) 111-1111]	Phone: (2	22) 222-2222 x_	
	N 🖉	ddresses	Fax:	(Work	Phone: (_)x_	
Address	1: 547 Wal	ker Lane	Address 2:		Ado	dress 3:		
С	ity: Mountai	n	State:	NC ~	·	Zip: 04	1444	

6. Make an appointment with the user and a test client.

Press the **Telehealth** button on the appointment which prompts PIMSY to register the new user with **Secure Video** and send them an email for resetting their password. They should follow the instructions in the email.

dit SAL							
Subject	AAA-Test, MT A-C-4148	3, DOB: 10/28	3/1979, Co Pay	, Bobby Brady*, Sche	duled, Clyı	Check A	wailability
Start time:	03/18/2020 - 3:0	0:00 PM 💲	User Name:	Bobby Brady*			*
End time:	03/18/2020 - 4:0	0:00 PM 🔶	User Group:	*** N/A ***			
Duration:	60 All d	lay event 📕	Status:	Scheduled			÷
Client Name:	AAA-Test, MT 10/28/197	9 ~	Client Group:	*** N/A ***			ч %
Billing Code:	*** N/A ***				SAL #:	BB-MA-2142	23
Division:	*** N/A ***			*	Note #:		
Location:				-	Client #:	A-C-2261	
Room:				*	caroup Note #.		
🔗 Note	Group Note		🔮 Client	Additional Details	📜 Take Payme	ents 🅦 8	atement
Released	Release For Review	8 Ilable	🛒 MU Trac	sking eMAR	Bal	ance Due:	Pending
							<u>^</u>
							v.
	Background:	Pale Green	-	Messaging M	Recurrence	-	Docs
Save	Close				\$		0

7. This opens the **Schedule a Telehealth Session** dialog box where you can schedule a new session with *Secure Video*. The **Create** button creates the session and the **Go to Session** link will take them to the session in *Secure Video*'s website.

💐 Telehealth: Client Details	Need Help?		\times
Session Start Time	2020-03-18T19:00:00		
Full Name	MT AAA-Test		
Email Address	test@test.com		
SMS Number	111-111-1111		
Screen Resolution	High	•	
Notification Type	Email	Ŧ	
Go to Session			

*** We **HIGHLY recommend** setting this up and testing it on your device prior to an actual appointment with a client. Your device settings for microphone and video may need to be changed so please do a test session first.