PIMSY Telehealth User Setup (what you need to know)

1. Setting -350 should have a company email address

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

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

4. The profile rule **Telehealth Open and Use** *must be* assigned to the user's profile.
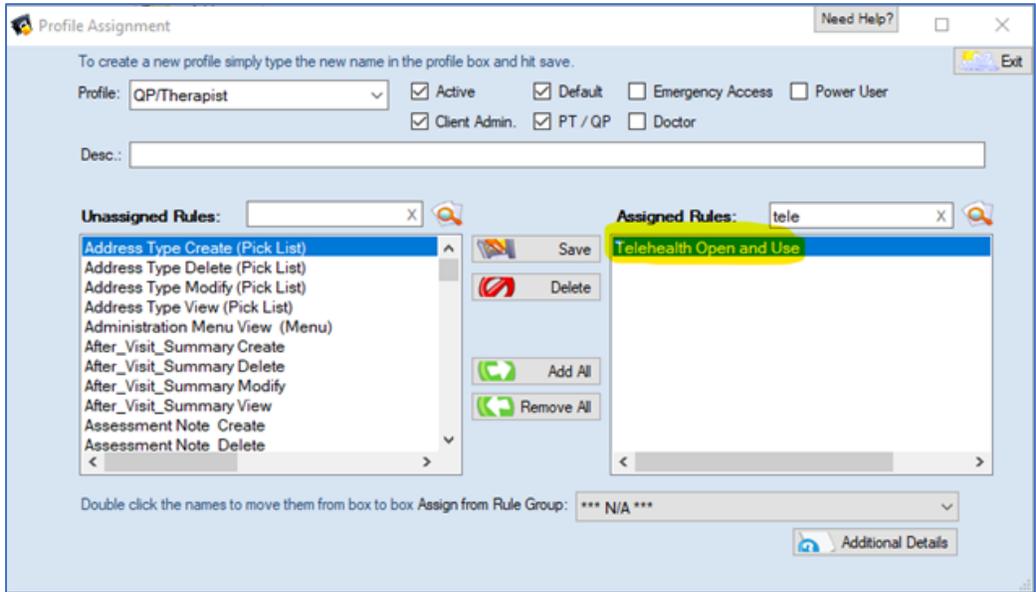
5. A test client needs to be setup with a valid email address for testing purposes. (real clients will need a valid email address to receive the **Telehealth** session details).
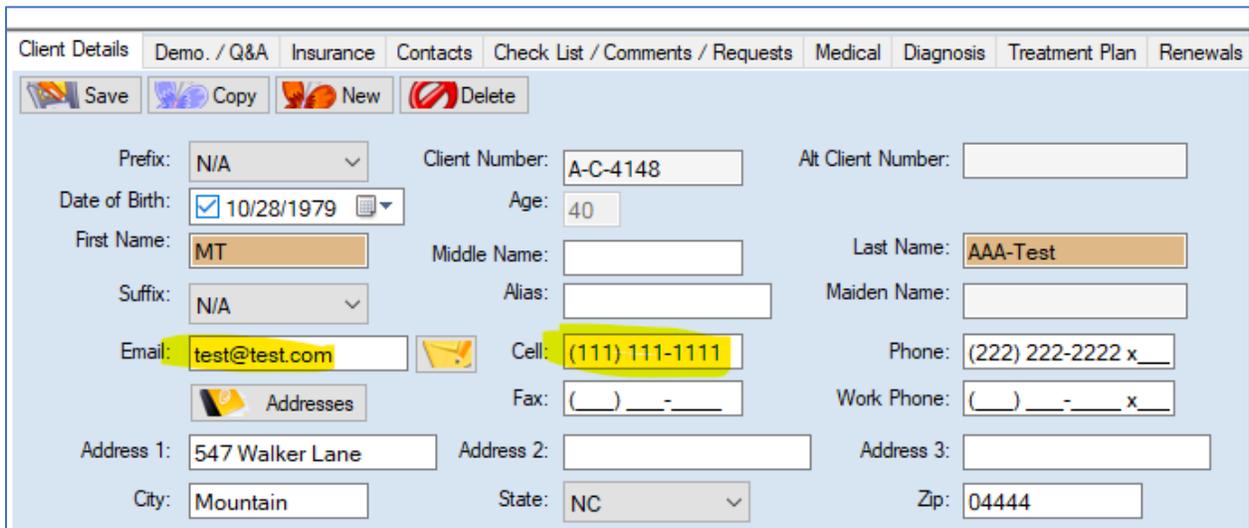
6. Make an appointment with the user and a test client.

    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.*

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.

*** 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.