

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 EMAIL (SENDGRID) - From Email

Default Description: This setting is used to send unsecure emails to users about various items including new appointments. This setting contains the email address from which these messages come.

Default Value:

Your Description:

Your Value: Company@gmail.com

Created Date: 07/15/2013 12:58:00 F Created By: System Administrator

Last Edited Date: 03/18/2020 02:39:00 F Last Edited By: System Administrator

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

User Details Ref. Renewals Clients Documents Codes / Rates Payroll Surveys Groups Q&A

Save Copy New Delete

Prefix: N/A

First Name: Bobby Middle Name: Last Name: Brady*

Suffix: *** N/A *** Title: AP Date of Birth: 03/18/2020

NPI #: 456321789L Medicaid ID #: 123346545L Medicare ID #:

SSN: Credential #: DEA #:

Email: ian@pimsyehr.co Cell: (404) 555-1212 Phone: () - x

Addresses

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

	Name	Description	Organization	Phone	Active	Default
▶	AAA Behavi...			(404) 555-1...	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Buncombe ...	Buncombe ...	ABC Thera...	(828) 654-6...	<input type="checkbox"/>	<input type="checkbox"/>
	Cindy Thera...		Logo Testing	(518) 555-5...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Clyde Elem				<input type="checkbox"/>	<input type="checkbox"/>
	Clyde Hosp...		XYZ Couns...	(568) 965-2...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Day care G...	Our Group ...		(252) 987-9...	<input type="checkbox"/>	<input type="checkbox"/>
	Home Office			(546) 549-8...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	IBCO				<input checked="" type="checkbox"/>	<input type="checkbox"/>

Name: Org.:

Description:

User Group:

Division:

Address1: Address2: Address3:

City: State: Zip:

Phone: Fax: Sched. Color:

Supervisor: Type: Active Default

Billing Location Information

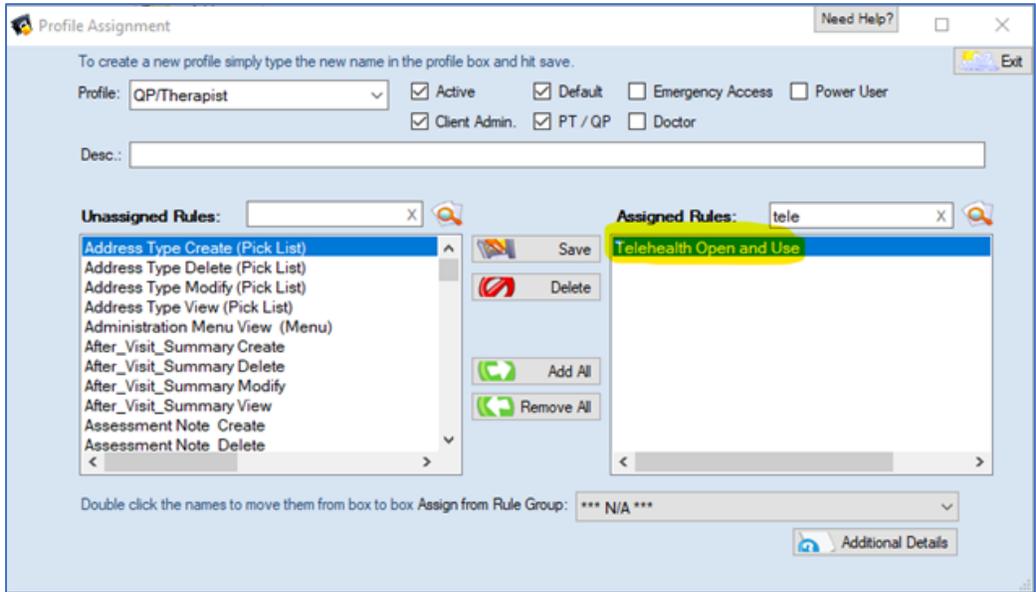
NPI Number: Federal Tax ID #: Docs

Taxonomy #: Is Individual (Not Company) Additional Details

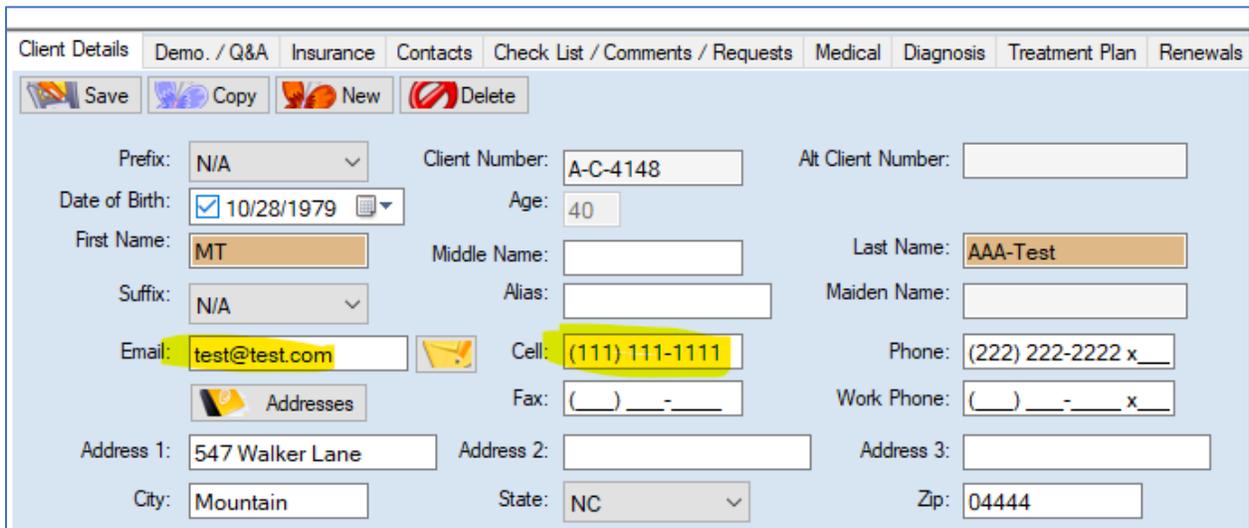
Created Date: Created By:

Last Edited Date: Last Edited By:

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



- 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).



- 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.*

The 'Edit SAL' dialog box contains the following fields and controls:

- Subject: AAA-Test, MT A-C-4148, DOB: 10/28/1979, Co Pay: Bobby Brady*, Scheduled, Cly
- Start time: 03/18/2020 3:00:00 PM
- End time: 03/18/2020 4:00:00 PM
- Duration: 60
- Client Name: AAA-Test, MT 10/28/1979
- Billing Code: *** N/A ***
- Division: *** N/A ***
- User Name: Bobby Brady*
- User Group: *** N/A ***
- Status: Scheduled
- Client Group: *** N/A ***
- SAL #: BB-MA-21423
- Note #:
- Client #: A-C-2261
- Group Note #:
- Buttons: Note, Group Note, Client, Additional Details, Take Payments, Statement
- Checkboxes: Released, Release For Review, Billable
- Balance Due: Pending
- Remarks: (empty text area)
- Background: Pale Green
- Buttons: MU Tracking, eMAR, Messaging, Recurrence, Docs
- Bottom Buttons: Save, Close, Delete, **Create** (highlighted), \$,

- 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.

The 'Telehealth: Client Details' dialog box contains the following fields and controls:

- 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
- Buttons: **Go to Session** (highlighted), **Create** (highlighted), Cancel

*** 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.