

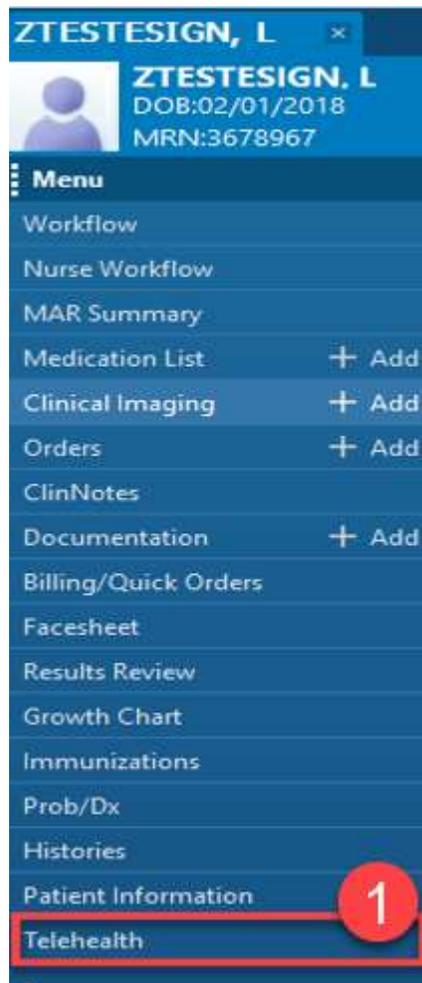


Sending a Telehealth Patient Invitation

- Associate will need to set the “Display Name” shown to participants prior to sending an invitation or joining a visit. “Display Name” will default to the user’s name.
- Update “Display Name” with the Provider’s name the patient is seeing and the clinic name (*i.e., Dr Grant, Gastrointestinal Clinic*).

Changing the Display Name

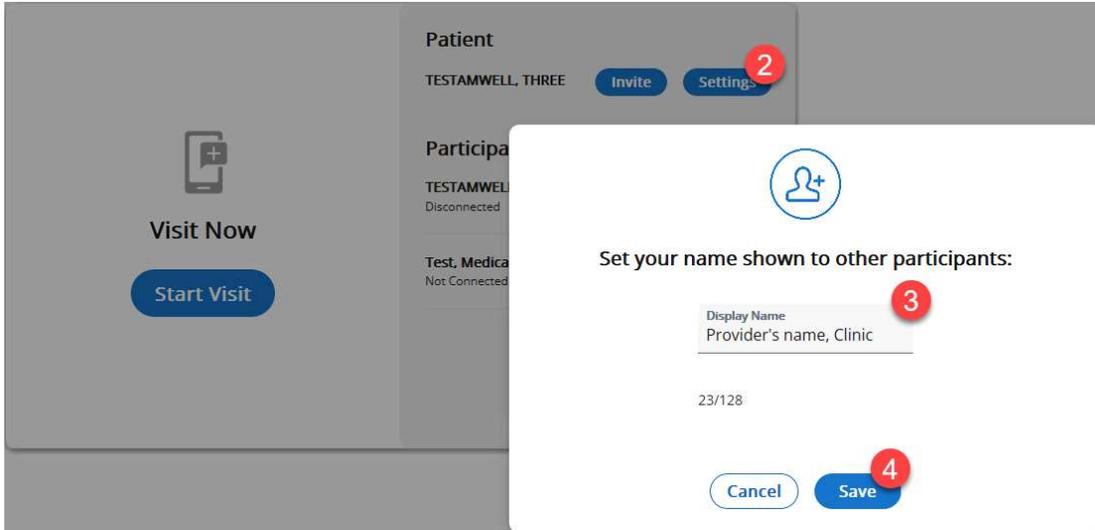
1. Open the patient’s chart and click the “Telehealth” tab in the Table of contents.
*** Please note that the integrated telehealth platform may take up to 15 seconds to load***





Sending a Telehealth Patient Invitation

- Select “**Settings**” and change the “**Display Name**” to the Provider’s name and Clinic, Patient’s First Name, and Appointment date and time (*i.e., Dr. Grant, Gastrointestinal Clinic, Jane on 1/1/23 at 1:30 pm*). Click “**Save**”.



***Tip**
Sibling Appointments:
An invitation(s) will be sent to **each sibling**

Sending the Patient Invitation

- Once the display name is changed, click “**Invite**”, select the appropriate “**Contact Method**” (*to send an invitation to both text and email, send individual invitations via both methods*) and click “**Send**”.

