

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***

ZTEST	ESIGN, L	×		
ZTESTESIGN, L DOB:02/01/2018 MRN:3678967				
Menu				
Workflow				
Nurse Workflow				
MAR Summary				
Medicat	+ Add			
Clinical Imaging		+ Add		
Orders		+ Add		
ClinNotes				
Docum	entation	+ Add		
Billing/Quick Orders				
Facesheet				
Results Review				
Growth Chart				
Immunizations				
Prob/Dx				
Histories				
Patient Information				
Telehealth				





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 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 1/1/1/23 at 1:30 pm*). Click "Save".

Uisit Now Start Visit	Patient TESTAMWELL, THREE	Invite Setting	*Tip Sibling Appointments:
	Participa TESTAMWELI Disconnected Test, Medica Se Not Connected	Set your name shown to other participants:	An invitation(s) will be sent to each sibling
		Display Name Provider's name, Clinic 23/128	
		Cancel Save	

Sending the Patient Invitation

3. 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".

	Patient Testamwell, Three	5 Invite Settings
Visit Now Start Visit	Participants TESTAMWEL Disconnected Dr. Choco, C Not Connected	(A)
		Invite TESTAMWELL, THREE
		Cancel Send