



# The Software Girl - Healthcare SaaS Onboarding Guide

## 1. Account Activation

Look for an email from The Software Girl to activate your account. Set a secure password and log in at your clinic's custom portal. Enable two-factor authentication for added security.

## 2. Clinic Profile Setup

Navigate to Account Settings > Clinic Profile. Enter your clinic's name, contact details, and operating hours. Upload your logo for a personalized dashboard.

## 3. Add Providers and Staff

Under User Management, invite your team (doctors, nurses, admins). Assign roles and permissions for security and efficiency.

## 4. Configure Services and Appointment Types

Define appointment types (e.g., check-ups, telehealth). Set durations, availability, and reminder preferences (email/SMS).

## 5. Import or Add Patient Records

Upload existing patient data via CSV or EHR integration, or add profiles manually. Ensure consent and privacy settings are enabled.

## 6. Set Up Telehealth

Test camera and mic settings. Customize virtual visit links and enable a branded waiting room experience for patients.

## 7. Connect Insurance & Billing

Add insurers, CPT/ICD-10 codes, and fee structures. Generate invoices and streamline claims processing.

## 8. Explore Your Dashboard

View appointments, billing, and patient interactions. Use filters and reports to track key metrics.

## 9. Train Your Team

Share tutorial videos or schedule an onboarding call. Access our Help Center for quick answers.

## 10. HIPAA Compliance

Log out after sessions, use secure messaging, and monitor activity in Security Logs to maintain compliance.

## 11. Support and Updates

Use the in-app chat or email [help@thesoftwaregirl.com](mailto:help@thesoftwaregirl.com). Get product updates and tips directly in your dashboard.