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. Get product updates and tips directly in your dashboard.