Virtual Visits Module

December,, 2023

# Overview

Effortlessly manage, update, and participate in virtual visits through our user-friendly portal. This comprehensive module serves as a centralized hub for all your virtual visit information. Seamlessly schedule virtual visits directly within the portal and extend secure invitations to other parties, fostering collaborative engagement.

## Placeholder image

## Efficient communication

Virtual visits help you directly connect with your clients so you can understand their needs and provide real-time collaboration.

File share

Files can be shared by all participants in the virtual visit. Files shared during the virtual visit will be stored along with participant information and time.

# How To

1. [Add a virtual visit](#a2t4dhl1ro8w)
2. [Start a scheduled virtual visit](#3y1vckwneekt)
3. [Get a shareable link for the virtual visit](#5uaftz1g5wro)
4. [View virtual visit appointment details](#s1c6zsojcx8g)
5. [View shared virtual visit files](#2ttcim8f1fvf)

**Add Virtual Visit:**

You can add a virtual visit by using the +Add button on the top right to select client, date, time, and guests (other admins).

**Start a scheduled virtual visit call:**

To start a scheduled virtual visit, use the ellipses on the far right of the client appointment and click start.

**Get Shareable Link:**

To get a shareable link to a virtual visit, use the ellipses on the far right of the client appointment and choose a copy meeting link that is shareable to other guests in the virtual visit.

**View appointment details:**

View appointment details to view virtual visit appointment details, use the + sign on the left side of that appointment, and navigate using the patient details, meeting details, and files tab.

**View virtual visit files:**

To view shared virtual visit files, use the + sign on the left side of that appointment and navigate using the files tab.