Telehealth setup

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Telehealth is set up in Zedmed during a call with Customer Success. The practice then follows this guide to create the Telehealth Appointment type and a ZedSMS reminder, which sends the Telehealth link to the patient.

To use Telehealth, see the Telehealth documentation.

Requirements

- Zedmed version 38.6.2 or later.
- A subscription to Zedmed's Telehealth add-on.
- ZedSMS to send Telehealth links.
- The practitioner should have audio input and output, for example, a headset with a microphone.

How to set up Telehealth for your practice

It only takes a few minutes to set up Telehealth. Watch the process in this video guide or follow the steps in the sections below.

Step 1 - Create a Telehealth Appointment Type

A new Appointment Type must be created and used for Telehealth appointments.

1. Select **Practice Setup** > **Appointments** > **Appointment Type Settings**.

   To learn more, see the Appointment Type guide.
2. Select **New.**

   The screen will show empty fields, ready to populate with the new Appointment Type information.
3. In the field **Type Name**, type: **Telehealth**

   > **Important**: If your practice offers different Telehealth consultations, we suggest using just one Telehealth Appointment Type. If you do require multiple Telehealth Appointment Types, we recommend prefixing each name with TH to assist with notification management and troubleshooting.

4. In the field **Type Code**, enter a code—e.g TEL or TH1.
5. Choose a **Background** colour.
6. In the **Appointment Type** options, tick **Telehealth**.
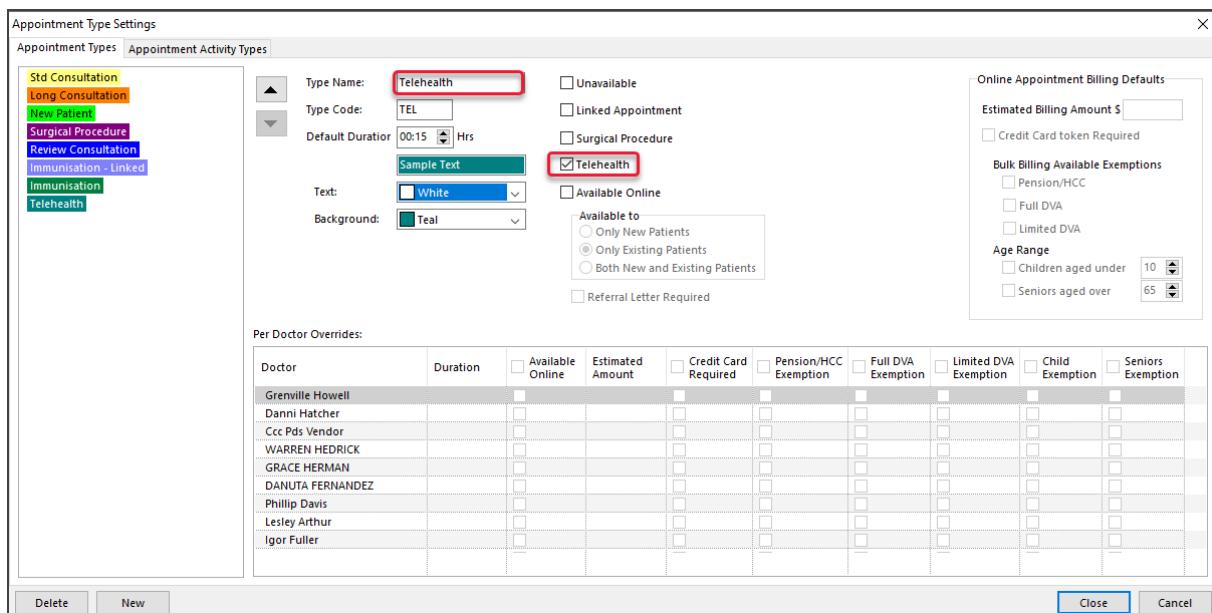
7. Select the **Appointment Activity Types** tab.
8. Select the Activity type used and tick **Telehealth**.

   This allows the Telehealth appointment to be booked in the time slot scheduled for that Activity in the Appointment Grid.

9. Select **Close** to save and exit.
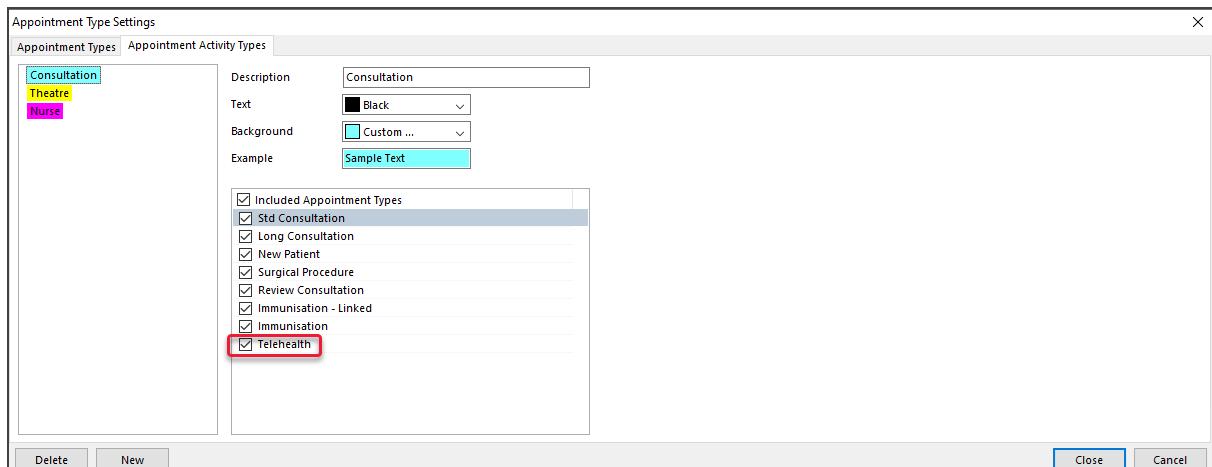
Step 2 - Create a Telehealth reminder message

Create a Telehealth reminder message. This reminder is only used for Telehealth and includes the **Telehealth Link** merge field.

Create a Reminder (to learn more, see Custom Reminder):

1. From the **Management** tab, select **Practice Setup** > **SMS Configuration.**
2. On the **Appointment Reminders** tab, select the **Branch** the reminder is for.
3. Select **Add Message**.
4. Select the **Telehealth** Appointment from the drop-down.
5. Select **Create New**.
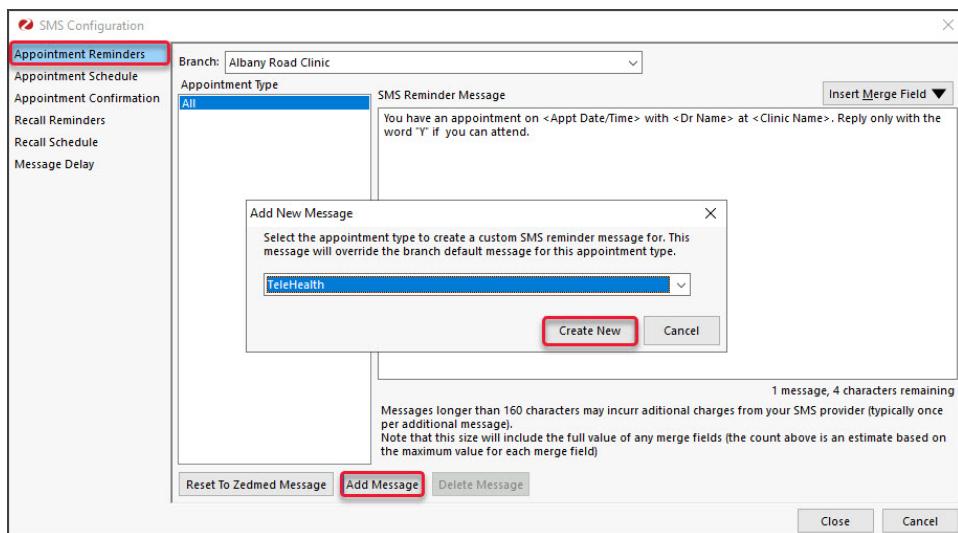
6. Type in your reminder text. e.g 'Telehealth appointment reminder. Please click to join.'
7. Use the **Insert Merge Field** to add the **Telehealth Link** merge field at the end of the message.

   The **Telehealth Link** merge field is available only if the Appointment Type has Telehealth enabled (steps 2-6 above).

   > **Important:** Do not copy the merge field from another Telehealth Appointment as the merge field may not work. Always use the **Insert Merge Field**
   >
   > **Important:** Every Telehealth Appointment must have its own 'reminder text' entry, as any Appointment Type not added will get the default **All** Appointment Types text, which does not include a Telehealth link.

8. Select **Close** to save and exit.
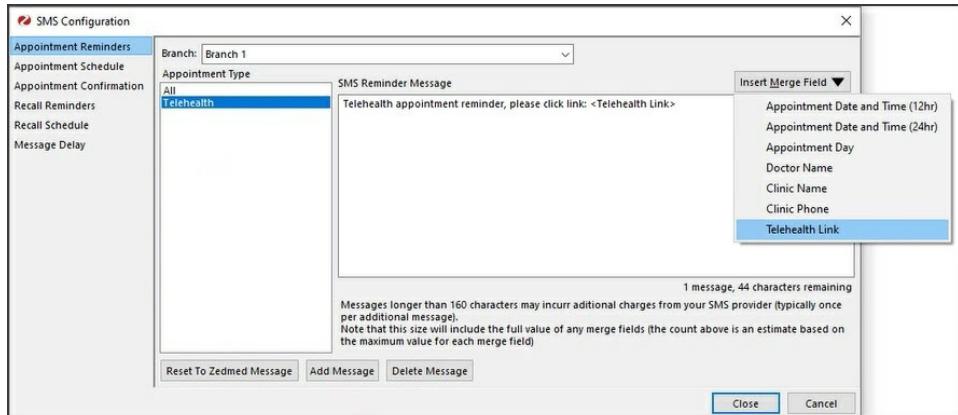
Step 3 - Schedule the Telehealth reminder

Schedule the Telehealth reminder to be sent before the appointment time. It can be sent up to 12 hours before the appointment, but the patient will not be able to join until 30 minutes before the appointment.

This schedules the time the reminder is sent to the patient. The reminder SMS includes a link that opens the Telehealth landing page with a Join button.

> **Important**: Telehealth sends a confirmation SMS when the booking is made and a reminder SMS with the join link on the day of the consult. It does not currently support additional reminders, for example, a Y/N verification

Schedule the Reminder (to learn more, see Schedule Reminder):

1. From the **Management** tab, select **Practice Setup** > **SMS Configuration.**
2. Select the **Appointment Schedule** tab.
3. Select **Add Schedule**.
4. In the **Description** field, enter a meaningful description. e.g Telehealth or Telehealth2.
5. Use the **>** button to add the **Telehealth** reminder to the **Selected** pane.
6. Select **On the day of the appointment.**
7. Use the hours and minutes counter to select how long before the reminder SMS + join link should be sent.

   For example, 15 minutes: **00.15**

   We suggest selecting a time not long before the appointment to stop the patient from initiating the appointment early.
8. Select **Close** to save the schedule.
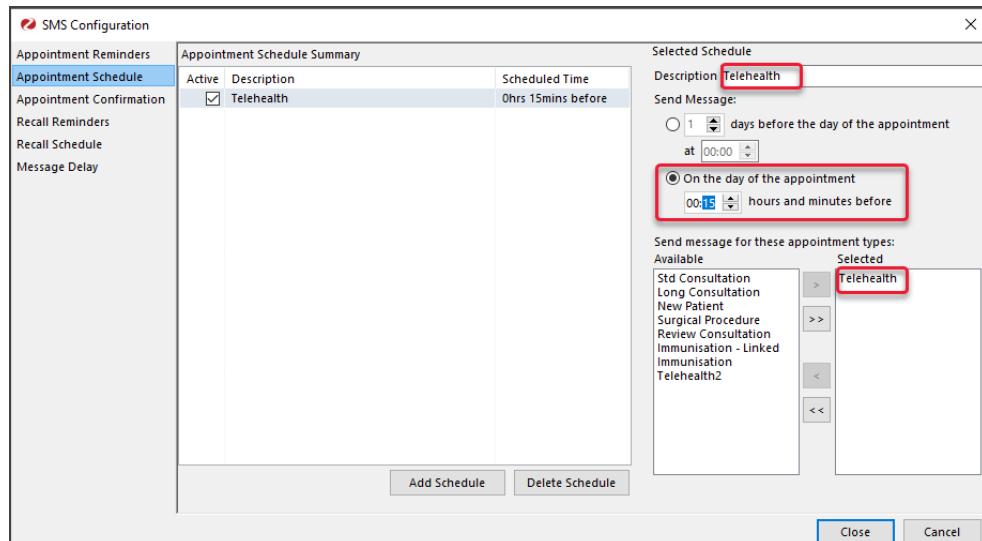
Step 4 - Set up Zedmed Mobile (Zedmed Cloud practitioners only)

Zedmed Cloud users open the Telehealth screen in a web browser on their local computer. To streamline this process, an online portal called Zedmed Mobile is used to monitor patients who have connected to Telehealth (and are waiting) and to initiate Telehealth sessions with them.

This guide explains how to provision access to Zedmed Mobile. Zedmed Mobile setup guide

The steps are performed by the practitioner and repeated for each branch they require access to.

Documentation

- Telehealth Office guide
- Telehealth FAQ

For Zedmed On-premises customers

- [Telehealth guide for practitioners](#)
- [Telehealth quickstart for practitioners](#) (1-page printable)

For Zedmed cloud

- [Telehealth with Zedmed Mobile for practitioners](#)
- [Telehealth with Zedmed Mobile quickstart](#) (1-page printable)