

Getting Started

thera-LINK Provider Guide



12 things you should know when using thera-LINK.



1 Your account

You've created your account and started a trial for 15 days free. To continue using after 15 days, you must choose a plan and enter your payment details. You can do that under Practice>Subscription.



2 Your calendar

Scheduling menu item is where you will find your calendar to see all of your appointments, edit an upcoming appointment, create an appointment, etc... Office managers can also see different views for the entire practice. Additionally, you can find Appointment Types and Client Scheduler under the Scheduling menu item!



3 Getting paid

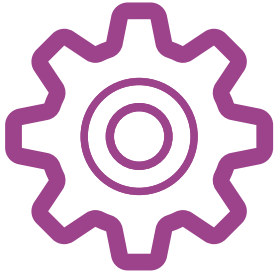
You may wish to get paid by a client prior to having a session. **You'll need to setup and configure your Stripe account in order to request payments.** There's a yellow box on the top of the Payments page that you can click to get this process started. They ask a lot of questions, but it's so they can get your money where you want it - in your bank account!



4 Your clients

You'll need to invite a client to thera-LINK to join your practice in order to be able to schedule an appointment, have a session, or share documents with them. **The client must accept the invitation by clicking a link in their email before they will appear in your clients list.**

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5 Your settings

The settings page has a lot of different tabs to help you configure thera-LINK to be *uniquely yours*. You can setup your waiting room image and music, setup your notification preferences for your clients, your office hours to be reflected on your calendar, and enable/disable the ability for clients to request appointments through thera-LINK.



6 Your device

You can use a variety of devices with thera-LINK including a Windows or Apple laptop, an Android tablet or phone, or an iPad or iPhone. Make sure your device has the latest updates to both the operating system and the browser. Chrome or Firefox are the easiest browsers to use because there's no download needed. You and your client will need a camera and a microphone in order to be seen and heard.



7 Your reports

Reports provide an easy way to see your past appointments and how much money you earned on thera-LINK. If you manage a staff, you'll be able to see how much a staff member is using thera-LINK as well.



8 Your documents

You and your clients can share files back and forth with one another. When a file has been shared *with* you, you'll receive an email notification to log in and retrieve it. The same is true when you share with a client - they get an email! The documents that we provide you as templates to use and your BAA can also be found under Documents.

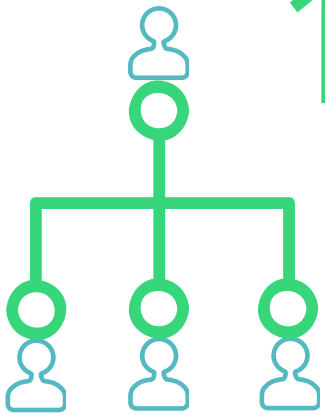
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9 Your colleagues

Your colleagues are other professionals or supervisees that you may wish to meet with on thera-LINK. Colleagues will also receive an invitation and need to accept it before appearing in your colleagues list. Colleagues are able to join a session with just you or a multi-party session.

10 Your staff



Staff can be added to your account if you are on the ultimateLINK or practiceLINK subscription. Staff are invited to join and given a role by you. Plus plan and higher subscribers can add one office manager to their account. Ultimate plan subscriptions allow you to add providers, office managers, and even have another owner if you would like.

11 Your sessions



Your sessions will show up on the dashboard under the "Today's Appointments" heading when it is the day of a scheduled session. You will click to start the session and then wait to hear the doorbell chime notifying you an invitee has joined the waiting room and is ready to enter. Click their name and let them in to see them on the screen.

12 Your training



We love to show you how to navigate and use thera-LINK! We are happy to train you and your staff as much as needed. Just contact us using the chat pod in the lower right corner after you login and we'll gladly get you scheduled.



hello@thera-LINK.com



<https://intercom.help/thera-link>



972-674-9855



Check out our amazing video library here:
<https://www.thera-link.com/videos/>



We hope you enjoyed our guide!
Have a great day!



@theralink1



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