

Backline Telehealth Quick User Guide

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Starting a Telehealth Chat

Via a Web Browser

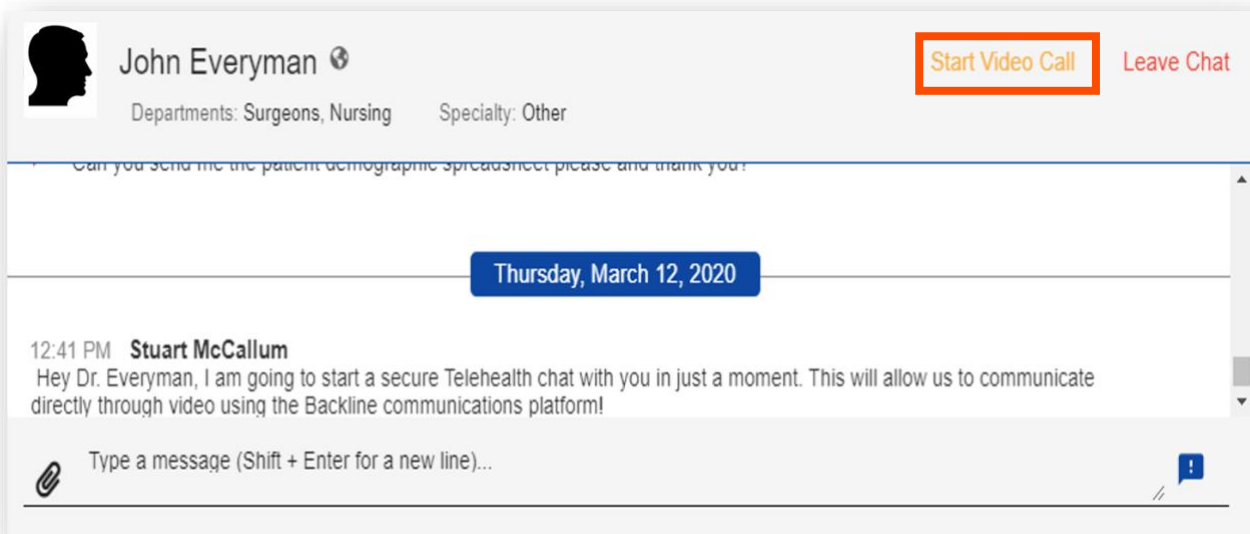
1. Log into your Backline account as normal using a supported web browser (Chrome, Edge, FireFox, or Safari). Telehealth does not require a separate account login.

Note: You will need to connect via a computer or laptop that has a built-in or attached microphone and camera.

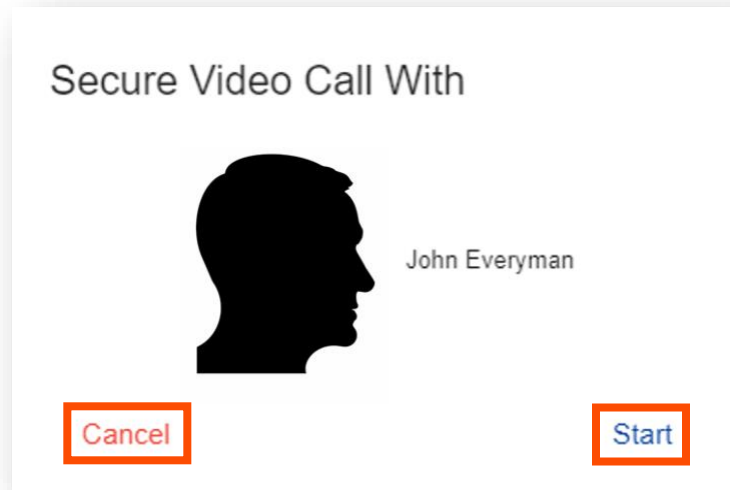
2. Select the **1-on-1** chat for the individual you would like to have a Telehealth chat with. The types of **1-on-1** chats that support Telehealth are:
 - a. 1-on-1 Chat
 - b. External Chat
 - c. Chat with Patient

Note: For more information on these various chat types, please see the Backline User Manual.

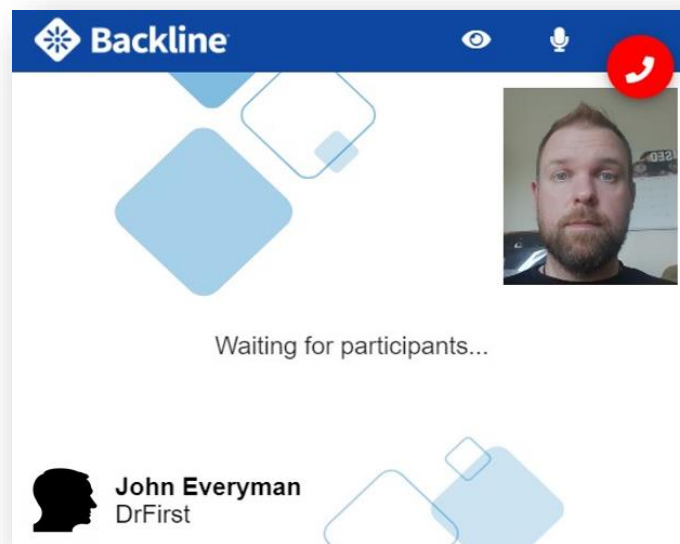
3. Once you are in the chat, click the **Start Video Call** link on the top of the chat window.






4. On the next screen, you can **Start** or **Cancel** the Telehealth chat.

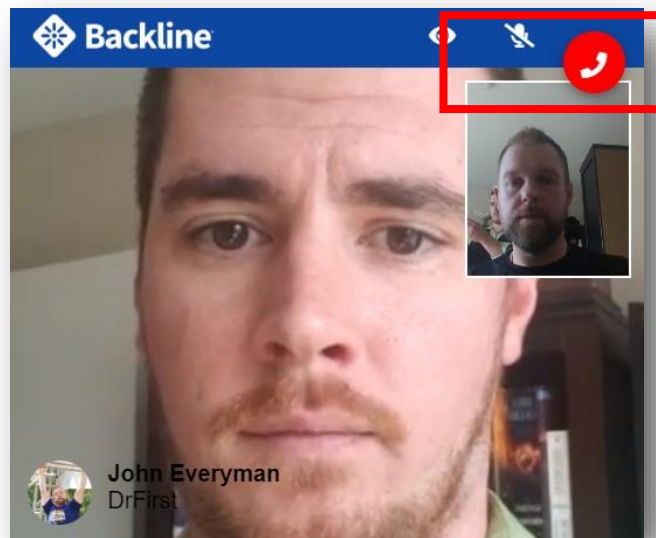


5. After starting the Telehealth chat, wait for the individual to join the conversation.



6. Once the individual joins, you can chat normally via the Telehealth connection. You will also see the following icons:

-  : Pause and un-pause your camera
-  : Mute and unmute your audio
-  : Disconnect from the Telehealth chat



On Your Mobile Device

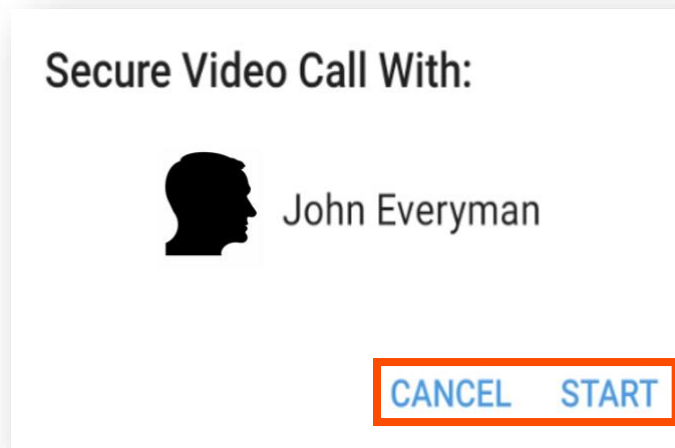
1. Log into your **Backline** mobile account as normal. Telehealth does not require a separate account login.
2. Select the **1-on-1** chat for the individual you would like to have a Telehealth chat with. The types of **1-on-1** chats that support Telehealth are:
 - 1-on-1 Chat
 - External Chat
 - Chat with Patient

Note: For more information on these various chat types, please see the Backline User Manual.

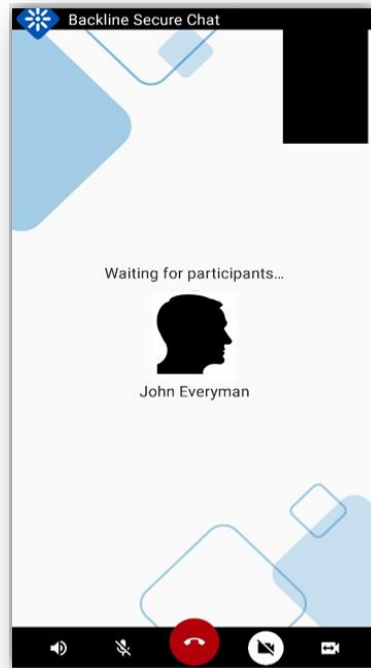
3. Once you are in the chat, press the  icon on the top right of the chat window.








4. On the next screen, you can **Start** or **Cancel** the Telehealth chat.



5. After starting the Telehealth chat, wait for the individual to join the conversation.



6. Once the individual joins, you can chat normally via the Telehealth connection. You will also see the following icons:

-  : Mute and unmute audio of the person you are communicating with
-  : Mute and unmute your audio
-  : Disconnect from the Telehealth chat
-  : Pause and un-pause your camera
-  : Switches between your device's front and back cameras

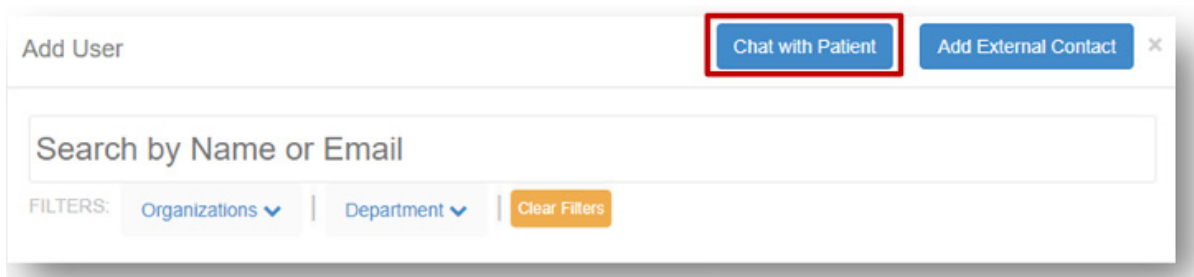


Managing Chat with Patient

This chat type allows you to initiate a chat with a patient. This can be done from both the desktop and mobile versions of Backline.

Via 1-on-1 Chat

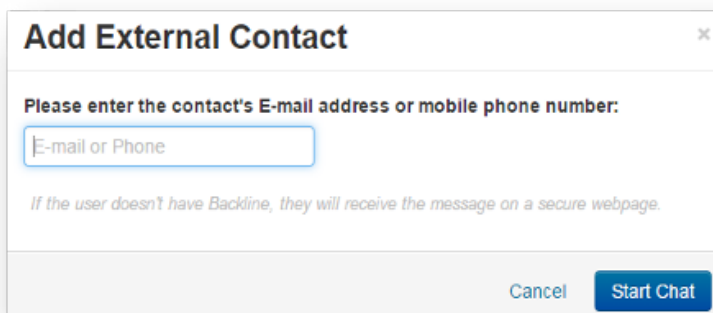
1. Click on **1-on-1** at the top of the page
2. Click the + button to the right of the search field
3. Click the **Chat with Patient** button



Adding an Individual Outside of Your Organization

You have the ability to connect and chat 1-on-1 with users outside of your organization, as long as your organization permits this.

1. **On the Add User screen**, you will see registered users in your organization, as well as users belonging to organizations with which your organization is connected
2. If the contact with whom you would like to securely communicate with is not available in the Add User search screen, you can **click on the Add External Contact button**. You will be asked to input their email address or mobile phone number.
 - a. If the contact is using Backline at another organization and their organization is connected with your organization, they will receive the message via Backline
 - b. If the contact has not registered for Backline, they will receive a notification via SMS or email and be brought to a secure chat webpage. They can send and receive 1-on-1 messages, including documents (web) or photo attachments (mobile), with you for a limited time through without having to download the Backline application.

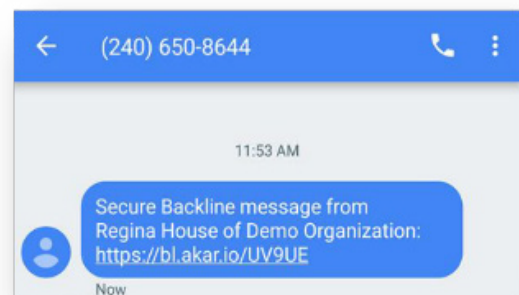


Add External Contact [X]

Please enter the contact's E-mail address or mobile phone number:

If the user doesn't have Backline, they will receive the message on a secure webpage.

Cancel Start Chat



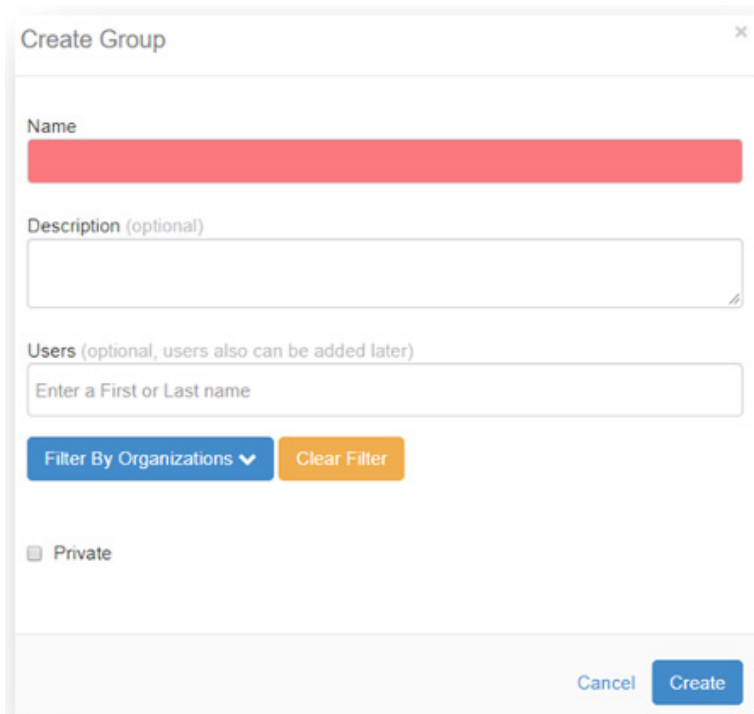
3. If the user is a member of another connected Backline organization, their organization name will appear below their name to identify them as an external contact; otherwise (External) will appear.

Managing Group Chats ***

Groups can be created to form a discussion with multiple contacts. This includes contacts outside of your organization, if this is allowed by your organization.

Creating a Group Chat

1. Select **Groups** from the top toolbar
2. Click the + button to the right of the search field
3. Click on the **Create New** Group button
4. Next, complete the fields for the new group
 - a. **Name:** Required to enter the group name
 - b. **Description:** Optional descriptor for the group's purpose
 - c. **Users:** Search directly or filter by Organization. This is also optional at this time, as users can be added later.
 - d. **Private checkbox:** Can be marked as non-searchable, private chats. A group with this checked off will be invite-only by users already in the chat.
5. Click the **Create** button to start the group chat



The screenshot shows a 'Create Group' dialog box with the following fields and controls:

- Name:** A text input field with a red error bar below it.
- Description (optional):** A text input field.
- Users (optional, users also can be added later):** A text input field with the placeholder text 'Enter a First or Last name'.
- Filter By Organizations:** A blue button with a dropdown arrow.
- Clear Filter:** An orange button.
- Private:** A checkbox that is currently unchecked.
- Cancel:** A light blue button.
- Create:** A blue button.