



Quick Start Guide

For Staff with Organization Administrator Role

Follow these easy steps to get your Telehealth Practice up and running quickly!

☐ **Create your VTC Account Credentials** Look for an email from VTConnect with the subject “Confirm your VTConnect account.” Follow the instructions in the email to establish your VTC username and password. These credentials will allow you to login to the Virtual Office Portal and the VTConnect Care App.

☐ **Set up your Virtual Office Portal** Go to portal.vtconnect.net and login with your VTC account credentials.

- **Retrieve your Office Portal Unique URL** – Once you’ve logged in, bookmark the URL displaying in your browser’s address bar and/or copy the Unique Office Portal Link listed on your Portal homepage, as this is the URL you and your clients should use for easy, direct access to your Office Portal.
- **Add Departments** – Click the Departments top menu. You will notice that there is a default single department automatically created and all staff members will be assigned to this department by default. You can click on the default department and click Edit to update the details and description of this department. You can also add additional departments by clicking the "Create New" button. View our [FAQ](#) for more details.
- **Add Staff** – Click the Staff top menu, click the Create New button, and enter the staff name, email, and any other desired details. Each staff member can be assigned to specific system roles and/or departments during the set-up process or this can be done later by editing the staff account. Click the “Create” button. View our [FAQ](#) for more details.
- **Add Clients** – Click the Clients top menu, click the Create New button, and enter the first name, last name, email, and DOB. In the section marked “Associated Practitioners” use the drop-down menu to associate the client to at least one practitioner in your organization. Click the “Create” button. Another option is to direct your clients to your Virtual Office to register. View our [FAQ](#) for more details.
- **Customize your Virtual Office Portal** - Click the Organization top menu, click the Edit button, and review and update the available fields so that your Virtual Office best represents the branding of your practice. If you want clients to pay online for sessions from your Virtual Office, you can also integrate payment processing here. View our [FAQ](#) for more details.
- **Add Client Forms and Documents** – From the home page of your Virtual Office, click the link to View and Manage Client Forms and Documents. View our [FAQ](#) for more details.

☐ **Prepare for Virtual Care Sessions**

- **Install the VTConnect Care App** – Go to your Virtual Office Portal homepage or for Mac, iOS or Android go to your device's App store and search VTConnect Care. Or click [HERE](#).
- **Review requirements to Optimize Audio and Video in VTConnect Care Sessions** posted [HERE](#). *Note: A headset or earphones are recommended to insure optimal audio during sessions.*

- **Share the Quick Start Guide for VTConnect Enterprise Clients** with your clients to make sure they know how to connect with you! View [HERE](#).

☐ Connect for a Virtual Care Session

- **Launch the VTConnect Care App** from your device at the scheduled appointment time.
- **Test your Camera, Microphone, and Speakers** by clicking the “hamburger icon” in the upper left corner of the App, then click the test buttons and use the drop-down menus to switch devices if needed.
- **Sign In** with your VTC account credentials.
- **From the Appointment screen, choose the individual(s) in the list you with whom you have an appointment** and then click the Host button. You will then be sent to the Care Room to await the arrival of the participants.
- **Begin the Care Session** when you hear a ding and see a prompt to indicate that someone has entered the Waiting Room, you will then see and be able to click the Begin button.
- **Text Chat** with participants if desired by clicking the Chat icon in the bottom left to send a chat message. If a message is sent by a participant, it will pop up for you to see. To hide the chat window, click anywhere on the screen.
- **Adjust Audio and Video** by clicking the hamburger icon in the upper left corner. You can pause the audio and/or video or switch audio/video devices at any time during a session.
- **End the Care Session** by clicking anywhere on the screen to pull up the End button. Note, participants can only exit the session, you as the host are the only one that can end the session. If a client exits a session for any reason, they can choose to rejoin the session in progress.

Visit the VTConnect FAQ's for answers to other common questions!

<https://vtconnect.net/pages/faqs>

Want Help Getting Started from our team of experts?



Add the Professional Setup & On-boarding package! Only \$175

Let our team of experts help you get your Virtual Office Portal and Virtual Care App set up quickly and easily, so you can be ready to connect with clients in no time at all! Not only will we help you with setup, we will also run a practice Virtual Care session with you, so you have all the confidence you need to begin hosting sessions with your clients right away.

Click [HERE](#) to learn more about the Professional Setup & On-boarding package