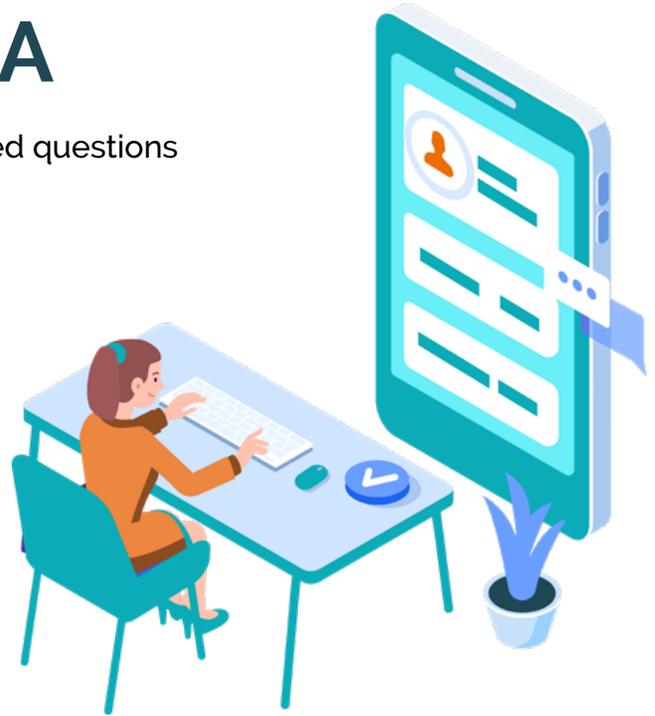


# Telecounseling Q&A

Below you will find a list of our most commonly asked questions about our Telecounseling product.

- [Your Telecounseling Account](#)
- [Billing](#)
- [Client Information](#)
- [Client Sessions](#)
- [Forms](#)
- [HIPAA](#)
- [Messaging](#)
- [Notes](#)
- [Technology](#)
- [Additional Resources](#)



## Your Telecounseling Account

By now, you should have received a welcome email with your username and temporary password. Please change your password once you have logged into your account.

### Accessing Your Account

#### Q: HOW DO I ACCESS MY TELECOUNSELING ACCOUNT?

A: Please click on the link below to access the HIPAA compliant portal:

[https://pms.therapysites.com/users/sign\\_in](https://pms.therapysites.com/users/sign_in)

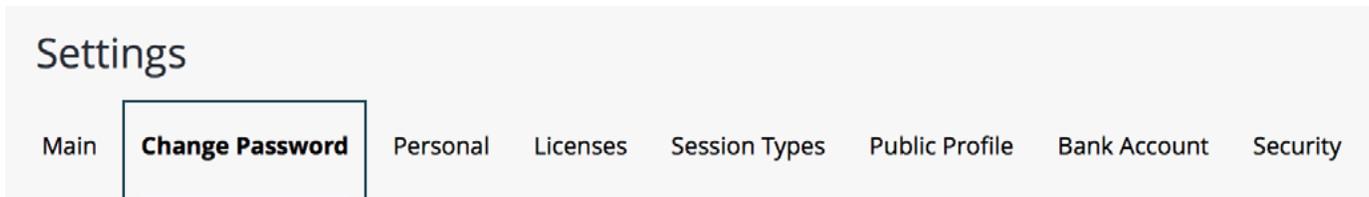
### Password

#### Q. HOW DO I CHANGE MY TEMPORARY PASSWORD?

A: Once you have logged into your account, click on the Setting gear located at the top right corner of your screen.



Next, click on the Change Password tab.



Enter your new password and click save.

## Profile Set-up

### **Q: WHY DO I HAVE TO ADD MY LICENSE NUMBER TO MY PROFILE? IS IT USED FOR BILLING PURPOSES OR FOR SOMETHING ELSE?**

A: In order to offer TeleHealth services, you **MUST** include your license for each state you're licensed to practice in, and these are the only areas that you can service. If you want to service other states, you would need to attain a license to do so in that state. There are federal and state level laws that require this.

### **Q: DO I NEED TO ADD A PHOTO?**

A: For your personal account, you do not need to add a photo. However, if you choose to create a public profile for the WeCounsel directory then you will have to add a profile photo.

### **Q: I AM TRYING TO UPLOAD A PHOTO BUT THE SYSTEM WON'T LET ME.**

A. If the platform will not allow you to add a photo, send it in to [support@therapysites.com](mailto:support@therapysites.com) and specify that you'd like it uploaded into your Telecounseling account. We'll work with the developers to make sure it gets added.

## Calendar

### Q. HOW DO I SYNC MY PROVIDER CALENDAR WITH MY GOOGLE CALENDAR?

- A. Under **Settings > Main**, scroll down and select to turn Calendar Sync On. You will then be prompted to choose a Google account of yours to sync to. However, at this time there is a known issue that prevents the two calendars from syncing. WeCounsel is aware and has been working to fix it, but the issue lies on Google's end. We do apologize for the inconvenience.

## General Account Questions

### Q: MY MESSAGE RECIPIENT HAS AN OPTION OF AN ADMINISTRATOR NAMED "DEANNE PIPITONE". WHO IS THIS AND WHY IS THIS SHOWING UP ON MY ACCOUNT?

- A. Deanne Pipitone is an administrator with TherapySites in the event that we need to correct information on your account via your request.

### Q. WHAT HAPPENS TO MY INFORMATION SHOULD I CANCEL MY ACCOUNT?

- A. Once the account is deactivated, any information in your Telecounseling account is archived and stored within the HIPAA Compliant platform. In the event that you reactivate your account, much, if not all of this will be accessible to you again.

## Billing

### Q. DOES THE CLIENT PAY THE ADDITIONAL PROCESSING FEE OR IS THIS TAKEN OFF THE FEE BY STRIPE?

- A. Stripe will take this fee off of what amount you bill your client. Some providers will include this in the price of their services in order to cover the fee as well as their rendered services.

### Q: WHERE CAN I FIND TELEHEALTH CPT CODES?

- A. [The Centers for Medicare and Medicaid Services](#) offer a comprehensive list of CPT Codes, which can be found by clicking on the link below:

[CMS CPT Codes](#)

**Q. WHEN ASKED FOR THE CPT CODE, DO I ALWAYS USE THE TELEHEALTH CODE OR THE USUAL CPT CODE?**

A. This can depend on you or your client's needs. You would also potentially be able to use codes for general Therapy/Counseling services, but you will need to do some research to check what restrictions might be in place on a state-by-state basis.

**Q: IF I HAVE A GROUP PRACTICE, HOW DOES BILLING WORK?**

A. Each provider needs to have their own separate Telecounseling account and will be able to bill clients through their account.

**Q: HOW DO I BILL CLIENTS WHO ARE IN-NETWORK?**

A. You can disable the billing from within your Settings, and bill through the insurance.

**Q. DUE TO COVID-19, WILL INSURANCE COVER TELECOUNSELING?**

A. It is best to work with your insurance provider to determine what is covered.

**Q. IS TELECOUNSELING COVERED THE SAME AS AN IN PERSON SESSION?**

A. Each insurance plan has different rules and considerations. Please check with your plan to determine coverage.

**Client Information**

**Q. HOW DO I EDIT A CLIENT'S INFORMATION?**

A. As a provider, you are not able to edit any information the client enters on their account. If there are errors, the client must update their information.

The TherapySites Support team can update a client's email. Please contact our team on your client's behalf to request assistance.

**Q. WHAT IS THE "MEDICAL PURPOSE" FOR CLIENTS TO SELECT THEIR GENDER? WHO HAS ACCESS TO THIS INFORMATION?**

A. This mainly relates to the coverage offered on a state by state basis as legislation is a little different on who or what is covered under Telehealth. The client selects 'male' or 'female', whichever gender they were assigned at birth, to ensure that they are covered should there be an insurance or state restriction based on gender identity.

**Q. HOW DOES THIS PLATFORM WORK WITH CLIENTS WHO ARE MINORS?**

A. Minors would need permission from their parent(s) or legal guardian in order to use the platform.

**Q. HOW DO I REMOVE/HIDE SOME OF THE TABS ON THE CLIENT SIDE?**

A. At this time, the tabs cannot be removed or edited.

## Client Sessions

**Q. CAN MY CLIENTS USE FACETIME?**

A. Facetime cannot be used for Telecounseling as it is not a HIPAA compliant app/platform. However, clients can use their phones or tablets to log in to the Telecounseling platform.

Please direct your client to [pms.therapysites.com](https://pms.therapysites.com) to login to attend a session.

**Q. HOW DO I SEE MORE THAN ONE CLIENT IN A SESSION?  
(EX. I AM COUNSELING A HUSBAND AND WIFE, PARENT AND CHILD, ETC.)**

A. You are able to invite multiple clients/attendees when creating a session; it's the first step to set up a session. You can also invite attendees from within a session and this option appears in the right hand menu. If adding an attendee this way, just keep in mind that they will not be added as a client in your network.

**Q. IS A CLIENT CONSIDERED A USER?**

A. Yes

**Q. IS THERE A WAY TO TRACK HOW LONG I'VE BEEN IN A SESSION?**

A. If you click **Manage Schedule** and then select the session, it will tell you the length of the session from the time both parties started the session to when it was completed. The platform itself doesn't track the time while in session.

**Q. HOW LONG BEFORE A SESSION SHOULD I CLICK "CHECK-IN"?**

A. We recommend providers first starting out should check into their sessions as early as possible, in the event that there are any technical issues on your end or with your client.

## Forms

### Q. CAN FORMS BE CREATED THAT ALLOWS CLIENTS TO SIGN ELECTRONICALLY?

A. If you have signed up for the Telecounseling Preferred Plus package, then the PDF forms you upload into your library, in the documents center, will have the e-sign feature!

### Q. CAN I UPLOAD MY OWN FORMS? HOW DO I UPLOAD THEM?

A. You can! Simply go to your document center.

**Telecounseling Preferred Plus Accounts** - Use the Library tab primarily, as this is where PDF forms can be uploaded that will offer a client the e-sign option.

**Telecounseling Preferred Accounts** - Use the Personal tab to upload all PDF documents. From both Library and Personal, you can send, upload and delete documents.

### Q. I HAVE FORMS THAT I WOULD LIKE TO UPLOAD AND HAVE THE CLIENT FILL OUT WHILE ONLINE. HOW DO I DO THAT?

A. After ensuring that the forms are formatted as a PDF, login to your account and go to the Document Center.

**If you have the Preferred Plus package:**

Click the Library section. Click Upload Templates, Select File, and then select the file/form from your computer. Then click Upload. Remember to upload any forms at least 45 min- 1 hour prior to the start of a session, as the system needs time to encrypt the form.

### Q. HOW DOES A CLIENT SEND BACK A COMPLETED FORM TO ME?

A. If it is a form that they have electronically signed, the system will then attach that form to a message that the client can then send to the provider.

B. If it is a form that cannot be electronically signed, the client must download and then print out the form to fill it out. Afterwards, they can either upload it back to the platform and attach it as a message to send to their provider, or they can take it to an in-person session.

**Q. WHAT FORMS ARE AVAILABLE?**

- A. The following forms are available:
- a. GAD 7
  - b. Therapy Note (*a template for note taking*)
  - c. WHO 5 Well-Being Index
  - d. Client Intake Form
  - e. Client Health Questionnaire.

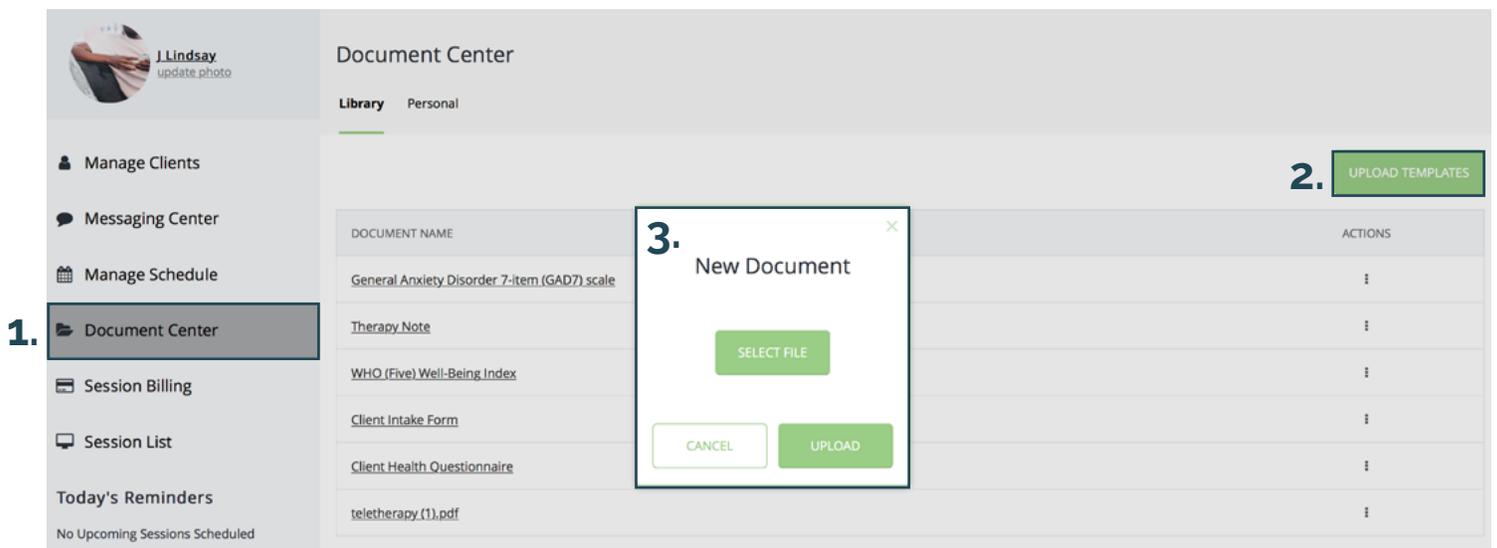
**Q. DO YOU HAVE ANY FORMS IN SPANISH?**

- A. At this time we do not have any forms in a language other than English. You are encouraged to provide your own and upload those to the platform!

**Q. HOW TO UPLOAD AND THEN SEND A DOCUMENT TO A CLIENT?**

- A. Navigate to the Document Center located on the left-hand side of the main screen. A green button located to the right says '**UPLOAD TEMPLATES**'. This is where you can upload your pdf. Click '**SELECT FILE**' and choose your file, then click '**UPLOAD**'.

If the file was successfully uploaded it will now appear under the '**DOCUMENT NAME**' area.



**Q. HOW DOES E-SIGNATURE WORK?**

A. Please refer to 'How to upload and then send a document to a client?' first

After successful upload, you can hover your mouse over the three dots in the '**ACTIONS**' column in the Document Center. Select '**Send**' (little paper airplane icon). Select your desired recipients, write a subject and body. The message will already have the document attached. Then hit '**SEND**'.

*\*NOTE: If you have Teleplus the user will have the option to sign/write on the document. This will be great for onboarding and HIPAA compliance documents. Standard Tele that are interested in this feature, give our associates a call to upgrade!*

**HIPAA****Q. I UNDERSTAND THAT THE MESSAGING COMPONENT IS HIPAA COMPLIANT. ARE MY NOTES AND CLIENT'S INFORMATION SECURE?**

A. Yes, all information that is stored within the platform is secure as the platform itself is HIPAA Compliant. This includes client information, notes, documents, billing information, etc.

**Q. ARE TEXTS SENT THROUGH THE PLATFORM HIPAA COMPLIANT?**

A. Yes, text messages sent from the platform are HIPAA Compliant.

**Q. WILL I RECEIVE A BAA FOR THIS SERVICE?**

A. The BAA is in the terms and conditions. After reading through the terms and clicking the 'I agree' box when setting up your provider account, you've essentially 'signed' the BAA.

**Messaging****Q. HOW ARE MESSAGES STORED AND SENT?**

A. If you click Manage Clients and then select the name of a specific client, it will bring up their client file. From here, you can select Message History, and this will show all the messages that you and your client have exchanged with one another.

**Q. CAN THE MESSAGING SERVICE BE TURNED OFF?**

A. If you do not wish to use the messaging service within the platform, you can go to the message center and click on 'settings'. This is where you can set a temporary or permanent away message as well as customize the actual messaging. You can include information on how to best get a hold of you beyond using the messaging center within the platform. This way the client will receive an auto-respond with your custom message and will know what to do next.

**Q. CAN I USE THE PLATFORM TO SEND CLIENTS MESSAGES EVEN IF THEY ARE NOT UTILIZING TELEHEALTH VISITS?**

A. They would need to be added as clients in your account to do so, but yes, this is an option.

**Notes****Q. CAN MY CLIENTS SEE MY NOTES DURING A SESSION?**

A. No, only the provider can see the notes being taken during a session. The only way a client would be able to see any notes is if you are posting them on the whiteboard function.

**Technology****Q. CAN I OR A CLIENT USE A SMARTPHONE OR TABLET INSTEAD OF A COMPUTER?**

A. Yes, mobile devices can be used for this platform. Just be sure not to use the PMS Telecounseling app. They should use their internet browsing app of choice to then visit [pms.therapysites.com](https://pms.therapysites.com) directly.

**Q. IS IT IMPORTANT FOR BOTH THE CLIENT AND PROVIDER TO BE ON LOW BANDWIDTH?**

A. It can be. Many of our providers have noted a vast improvement on the quality of the video, sound, and connection in their sessions when toggling to the low bandwidth setting.

## Q. WHAT SHOULD I DO IF I'M UNABLE TO HEAR/SEE MY CLIENT?

- Refresh browser, or exit the session and re-enter it.  
We recommend using Chrome or Firefox whenever possible.
- If you're on a phone or tablet, use the internet browsing app and go to [pms.therapysites.com](https://pms.therapysites.com). Do not use the PMS Telecounseling app.
- Make sure both your devices and browser as well as the client's are as up to date as possible.
- Make sure your internet speed is AT LEAST 3mbps.
  - Click [here](#) to check your internet speed.
- Finally, to ensure your video and microphone are set-up properly, click on this link [Tokbox Test](#) to run a few diagnostics.
  - As soon as you click on the link, Tokbox will automatically begin scanning and testing your equipment.
  - Once complete, scroll down to the bottom of the page and click on the 'save this data as simple text' link.
  - Copy and paste this text and send it to [support@therapysites.com](mailto:support@therapysites.com) and our team will work with the developers to resolve the issue.

## Q. HOW TO TURN ON A CAMERA AND A MIC (BOTH PC AND MAC)?

A. Check to see webcam status here: <https://www.onlinemictest.com/webcam-test/>

If your camera didn't pass the test, follow these steps:

- If you're using Safari as your web browser you'll need to try with a different browser or a different test.
- Check that the webcam is connected to the USB socket. You should see some thing pop up on your computer screen, or hear a sound when you connect the webcam again.
- Some webcam models have an "ON/OFF" switch - make sure that if yours has one - it is set to "ON".

- Try downloading the latest drivers for your webcam. Search the box or the camera itself for the name/number of the model, and then search google for "**NAME OF MODEL driver**". That should take you to a page where you can download and install new drivers.

**Check to see microphone status here:** <https://www.onlinemictest.com/>

- If you're using Safari as your web browser you'll need to try a different browser or a different test.
- Check that your microphone is connected to the correct (*normally pink*) socket on your computer. If it's a mic with a USB connector just make sure it is properly connected to the USB socket (*you will not use the pink microphone in this case*).
- Check that your microphone is not muted - sometimes the mic has a mute button on it or on the wire that is connected to it.
- Check that the volume on the microphone is not turned all the way down.

## **Q. HOW TO ADJUST THE VOLUME ON A PC AND MAC?**

### **Windows:**

- Click the *Start* button, and type **MMSYS.CPL** in the Start Search box, and then press the **ENTER** key.
- The **Sound** dialog box is displayed

**To adjust the loudness of all sound from your speakers, select the Playback tab.**

- Click the Properties button. The Speakers Properties dialog is displayed.
- Select the Levels tab.

**To adjust the volume of your microphone, select the Recording tab.**

- Click **Microphone**, and then click **Properties**.  
*Note: Make sure that Working appears under Microphone. If Working does not appear, click Microphone, and then click Set Default.*
- In the Microphone Properties dialog box, click the **Custom tab**.
- Select or clear the Microphone Boost checkbox.  
*Selecting it makes the microphone more sensitive (louder).*
- Click the **Levels tab**.

- Adjust the volume slider to the level that you want, and then click **OK**.
- Click **OK** to close the Sound dialog box.

**MAC:**

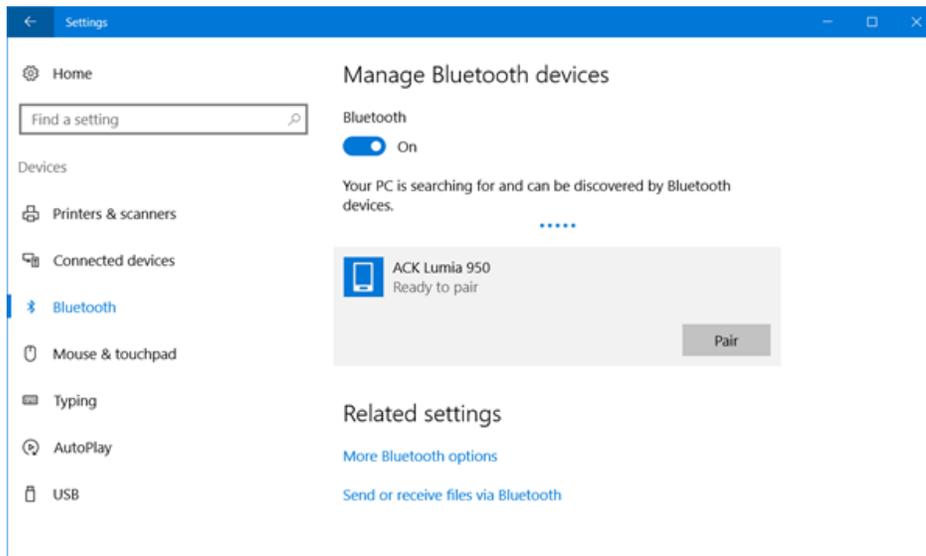
- Click the gray **"System Preferences"** icon in your MacBook's Dock. Click **"Sound"** in the Hardware group.
- Click the **"Input"** tab to access microphone settings. Click **"Internal Microphone"** in the devices list to adjust the microphone settings for your Mac's internal mic, or click the name of any external USB microphone you have installed.
- Slide the **"Input Volume"** slider to the right to increase the microphone's volume, or slide the slider to the left to decrease the volume. Click the **"Use Ambient Noise Reduction"** checkbox to help reduce background noise when using your mic.
- Close the sound settings window after you adjust your microphone.

**Q. HOW TO USE COMPUTERS THAT ARE CONNECTED TO BLUETOOTH HEADSETS AND SPEAKERS?**

*IE: When the session starts the audio is being transmitted to this Bluetooth device and not through the computer speaker.*

**Windows:**

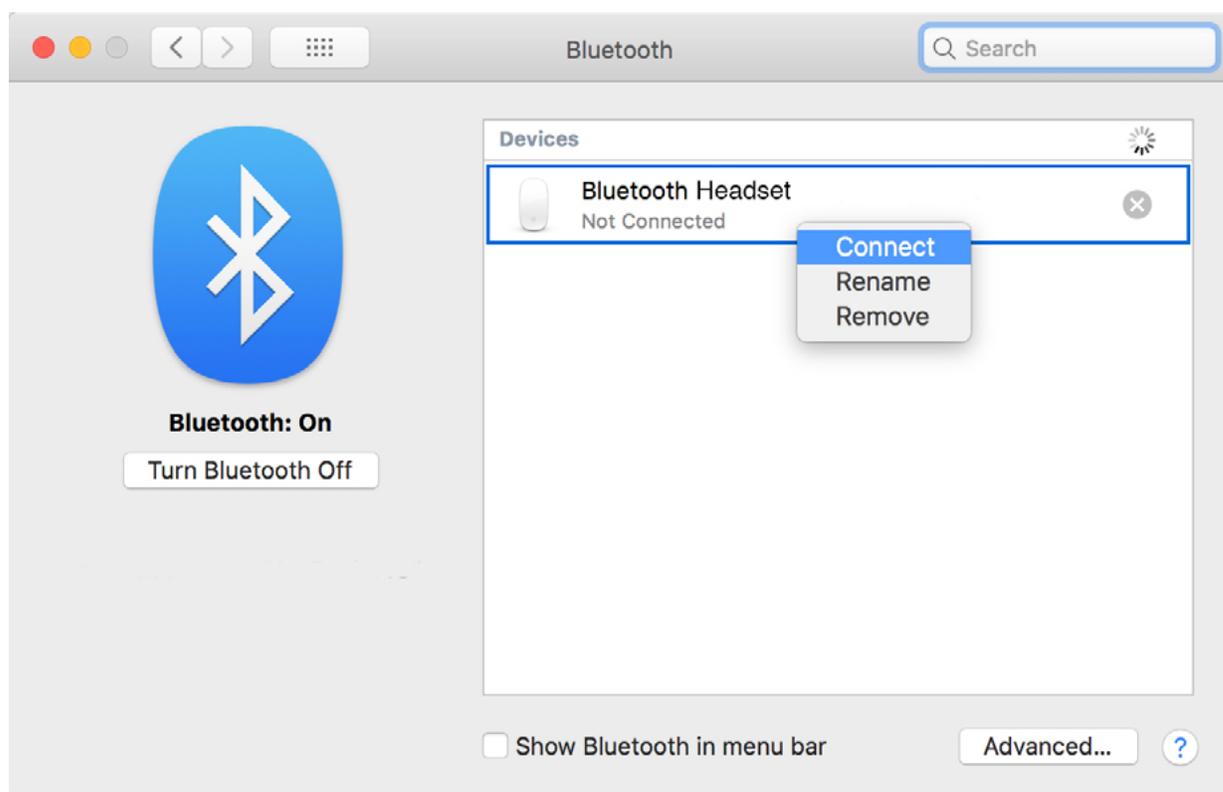
- Click open the **Start Menu**.
- Open **Settings** and select **Devices** to open the Windows 10 Devices Settings. Now in the left panel, you will see Bluetooth. Click on it to open the following settings.



- To disable Bluetooth, toggle the Bluetooth slider to the Off position.
- A setting to turn it off is also available via **Settings > Network & Internet > Airplane mode > Wireless devices > Turn Bluetooth On or Off.**

**MAC:**

- Open System Preferences (click on the **Apple logo > System Preferences**).
- Click on **Bluetooth**.
- Click on **Turn Bluetooth On** (if it isn't already).
- You will see a list of Devices that are available to connect to. Find the Bluetooth device you want to connect to in this list (as long as the device is turned on).
- Click **Connect**.



## Additional Resources

For additional help, be sure to visit our online resource section where you can find topics on:

### SOFTWARE NAVIGATION

- [Settings](#)
- [Journaling](#)
- [Transfers](#)
- [Superbill](#)
- [Provider Plans and Subscriptions](#)
- [Making a Referral](#)
- [Payment Methods/Whiteboard](#)
- [Session Billing](#)
- [Billing and Payments](#)
- [eSign and Custom Form Templates](#)
- [Instant Chat](#)
- [Secure Messaging](#)
- [Video/Audio Troubleshooting](#)

### GENERAL INFORMATION

- [About TeleMedicine](#)
- [Device Requirements](#)
- [Internet Connectivity Requirements and Firewall Settings](#)