# Phreesia

# PhreesiaPad Configuration Guide

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For additional help or to address any technical issues, please call our Support Line at **(888) 654-7473** 



### **Step 1:** PhreesiaPad Configuration

#### 1.0 The PhreesiaPad: Front and Back



#### 1.1 Starting up the PhreesiaPad

1.1.1 Turn on the PhreesiaPad by pressing the power button (on top of the Pad).

#### **1.2 Wireless Network Configuration**

1.2.1 Once the Pad has booted, press GET STARTED.



1.2.2 If your SSID *is* broadcasting on the available networks display, follow Step 1.2.3 (a). If your SSID is *not* broadcasting, follow Step 1.2.3 (b).

ᅙ Select a network								
2WIRE966	in. 🔒							
Cisco_9624D091	hı. 🖴							
CANCEL	ADD NETWORK.							



1.2.3 (a) Select the network you would like to connect to, input the password and press JOIN.

Ę	Configure N	etwork	
Gso	_9624D091		
WPA	WPA2/FT PSK		
Enter			
_ <b>c</b>	INCEL	NIOL	

The Pad will now connect to the wireless network, and you can proceed to Step 1.2.4.

	ᅙ Select a netv	vork
_		
	Checking registration	

1.2.3 (b) Press ADD NETWORK on bottom right corner of screen.

奈 Select a i	network	
2WIRE966	in 🔒	
Cisco_9624D091	hı. 🖴	
CANCEL	ADD NETWORK_	

Input the Network name, select the Security type associated with the SSID, input the password and press JOIN. You can now proceed to Step 1.2.4.

奈 Configure Network
Network name
Security
Please, select
CANCEL JOIN

1.2.4 You should see the screen below. The Pad is connected to the wireless network and is ready to be registered to the practice location.

To register your PhreesiaPad, gener	P Devie rate a PIN from your D assistance, pl [Inter PIN	tration screen in the Phreesia Dashboard. If yo 654-7473	u need additional	
	CANCEL		REGISTER	
	1	2	3 DEF	
	4 сня	5	б мио	
	7 PORS	8 TUV	9 wxxyz	
	a	0	0	

#### 1.3 Register the PhreesiaPad

- 1.3.1 Log in to the Phreesia Dashboard.
- 1.3.2 Navigate to Reports & Settings and click Device Management. **NOTE:** User must have "Administrator" role to access this page.

Phreesia	Payments 🔹	Communications	▪ An	alytics 🔹	Reports & Settings 🔹	Support 🔸
Pre-registered	0 7 9				Patients	
Patient Name		DOB		Provider	Registration Log	Pre Insurance
					Reports	
					Notifications	
					Practice Info	
					View Practice Interview	for today. Please add patients using the link below
					View Security Logs	
Add a Patient					Role Management	
					User Management	
Registration in Pro	ogress 🕕				Device Management	
Patient Name		DOB		Provider	Locations	Pre Insurance
					Providers	
					Insurance Providers	

1.3.3 Select + Add a New Device

Phreesia	Payments +			Reports & Settings +	Support +			
Device Man	agement							Get Her
Control Device manager Device list	& Assign De nent allows you to contro Filter	VICES Lassigned devices and	registers new de	wices.			Device Set	tings + Add a New Device
Appendix	Centre Tope		Nate Serial Northeet			Loosten	Date Assignment	
	March .		17.4×14.4×14.4×	-		Contraction and the second	A second second second second	

1.3.4 Select the location where the PhreesiaPad will be used.



#### 1.3.5 Click Generate PIN.

A Device Registration PIN code will display.

Device Registration Pin	×
Device will be registered at:	
My Main Office	
Device Registration Pin:	
760198	
This code will expire in 5 mins	
Add another device Done	

1.3.6 On the PhreesiaPad Device Registration screen, enter the Registration PIN and press REGISTER.

To register your PhreesiaPad, gener	Device Registration  ate a PIN from your Device Management screen in the Phreesia Dashboard. If you need additional     assistance, please contact 1-888-654-7473						
	CANCEL		REGISTER				
	1	2 ABC	3				
	4 <sub>GHI</sub>	5	б ыно				
	7 PORS	8 <sub>TUV</sub>	9 waryz				
	G	0	ø				

1.3.7 Press CONTINUE on the Congratulations screen.

Congratulations!
CONTINUE

1.3.8 The PhreesiaPad will check for both Application and OS updates. If any updates are found, the PhreesiaPad will download and install them. The Pad may restart on its own if required. Please allow the Pad to complete updates without interruption during this process.



1.3.9 Once all updates are downloaded and installed, you will see the screen below. The registration process is now complete, and the PhreesiaPad is ready for use.

Phreesia Family Med	ical				all m
			×	ENTER	
	1	2	3		
	4	5	6		
	7	8	9		
	(	D			
Please ente	er the PIN from	n the dashbo	oard to start	the interview	



### Step 2: Device Management

#### 2.0 To Change Locations

- 2.0.1 Locate the serial number of the device that will be moved to a new location. This number can be found on a white sticker on the back of the PhreesiaPad, near the top, and should begin with **P6D**.
- 2.0.2 Log in to the Phreesia Dashboard.
- 2.0.3 Navigate to Reports & Settings and click Device Management.

Phreesia	Payments +	Communications	- Anal	ytics 👻	Reports & Settings 👻	Support -	•	
Pre-registered					Patients			
Patient Name		DOB		Provider	Registration Log		Pre Insurance	
					Reports			
					Notifications			
					Practice Info			
					View Practice Interview	for today. Pleas	e add patients using the link below.	
					View Security Logs			
Add a Patient	Arid a Patient				Role Management			
					User Management			
Registration in Pro	gress 🕕				Device Management			
Patient Name		DOB		Provider	Locations		Pre Insurance	
					Providers			
					Insurance Providers			
					E&B Transaction History	no patients usin	a the PhreesiaPad.	

2.0.4 In the list of devices, locate the PhreesiaPad to be moved. Click the Edit (pencil) icon under the corresponding Location section.

	Device Settings	+
Location	Date A	ssignment
Main Office	e 📝 1/12/20	)16 7:50:36
Main Office	2/16/20	)16 3:54:32

2.0.5 Select the new location for the device and press Save.

Edit Device			×
Select new location for device:	Lofton Office	•	
	Save Close		

#### 2.1 Device Settings

2.1.1 To change the Idle Timeout and Warning Message Timeout values, click Device Settings on the Device Management page under Reports and Settings.

Idle Timeout controls how long the PhreesiaPad will stay on with no user activity before ending the session. Warning Message Idle Timeout controls how long a warning message will be displayed stating that the session is about to end due to inactivity.

Device Settings		$\times$
Idle Timeout:	B00 seconds (Min 0, Max 300)	
Warning Message Idle Timeout:	10 seconds (Min 0, Max 60)	
	Save Cancel	

#### **RECOMMENDED SETTINGS (DEFAULT SETTINGS)**

Idle Timeout: 300 seconds Warning Message Idle Timeout: 10 seconds

#### **Federal Communication Commission Statement**

This equipment has been tested and found to comply with the limits for a Class B digital device, pursuant to Part 15 of the FCC Rules. These limits are designed to provide reasonable protection against harmful interference in a residential installation. This equipment generates, uses and can radiate radio frequency energy and, if not installed and used in accordance with the instructions, may cause harmful interference to radio communications. However, there is no guarantee that interference will not occur in a particular installation. If this equipment does cause harmful interference to radio or television reception, which can be determined by turning the equipment off and on, the user is encouraged to try to correct the interference by one or more of the following measures:

- Reorient or relocate the receiving antenna.
- Increase the separation between the equipment and receiver.
- Connect the equipment into an outlet on a circuit different from that to which the receiver is connected.
- Consult the dealer or an experienced radio/TV technician for help.

Only use approved accessories, batteries, antennas, and chargers. Any changes or modifications to this device could void the warranty and authority to operate this equipment.

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