



# Training Checklist

## Clinician setup

Please confirm you were able to:

- Set your password
- Access the clinician portal on [app.includehealth.com](https://app.includehealth.com)



## Navigate the clinician portal

- Create a test client account and enter the required information  
**Note:** Make sure to use a unique email that you can access. Your work email is reserved for your clinician account.
- Include 'DEMO' in your test patient's name
- Create a new plan using a protocol template
- Rename the plan
- Rearrange the order and set your desired reps and sets
- Add additional exercises
- Save the plan

## Get familiar with the patient experience

- Use either a laptop or tablet with front-facing camera and internet connection
- Follow the steps in the 'Welcome Email' sent to the the test client account or go to [includehealth.com](https://includehealth.com) and select 'Login as Patient'
- Place device as close to the floor as possible
- Set-up your exercise space and perform the activities

## Review clinical dashboard and session

- Log back into the the clinician portal
- Review the clinician dashboard
- Select your test client account and review the most recent session report
- Determine if you need to edit the plan and review the plan further



## To use IncludeHealth in-clinic (optional)

**Note:** This is a kiosk view and should only be managed by the clinician

- Login at [app.includehealth.com](https://app.includehealth.com)
- Select 'Perform In-Clinic'
- Select patient name and plan

### Need assistance?

## We're here to help!

Reach out to us directly or visit our help desk for tips and guides.

 [www.support.includehealth.com](https://www.support.includehealth.com)

 [customersupport@includehealth.com](mailto:customersupport@includehealth.com)

 888.599.5585