Teladoc Health™

Smart Notes Module

User Guide

P/N: MA-20075-006

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Patent(s):

https://teladochealth.com/patents/

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Last updated: October 2022

Virtual Care System

Health systems view virtual care as an extension of their services; relying on a combination of software, hardware, networks, systems, and people to work together to deliver improved access and care to their patients.

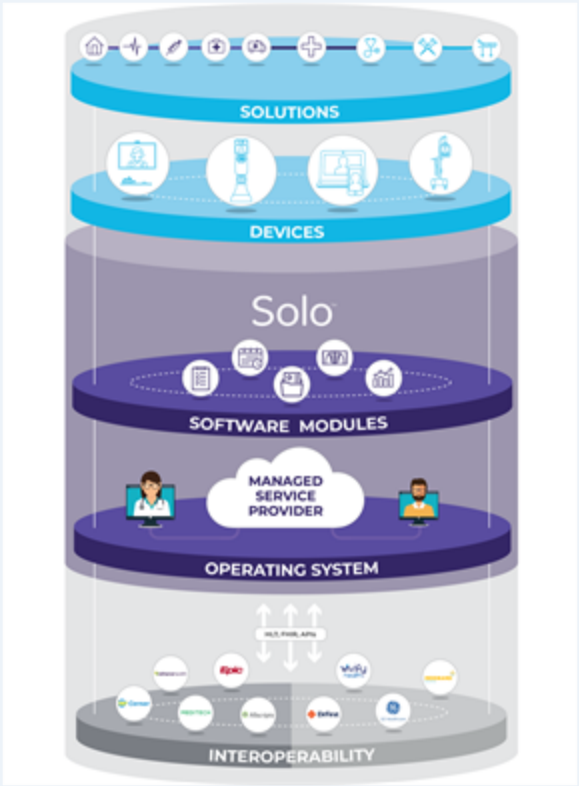
Enabling healthcare's only integrated virtual care platform, Teladoc Health powers virtual encounters at clinics, healthcare facilities, and patient homes for an integrated experience across a multitude of use cases. Built on our cloud-based network, Solo™ is the backbone to delivering care anywhere at anytime. It provides users with everything they need to streamline their telehealth needs for fast user adoption.

Designed for healthcare, security, and reliability

Our cloud-based, patented network ensures the industry's highest standards for protecting and securing sensitive healthcare information. Our downloadable and web-based platform allows users to access virtual care across a broad range of consumer and telehealth devices in a variety of clinical environments.

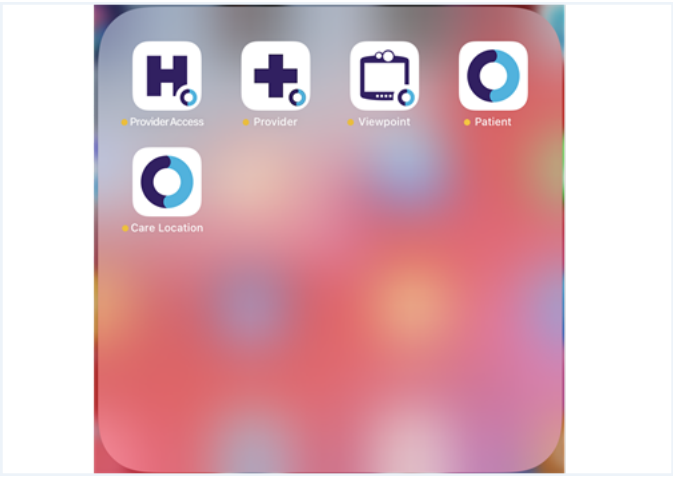
Within a single platform, users are in control of their virtual experience with a configurable dashboard to meet the unique set of preferences for every user. Layer Solo into your existing health information technology system investments, or use it as the foundation to close your workflow gaps with our software modules; creating a solution unique to you.

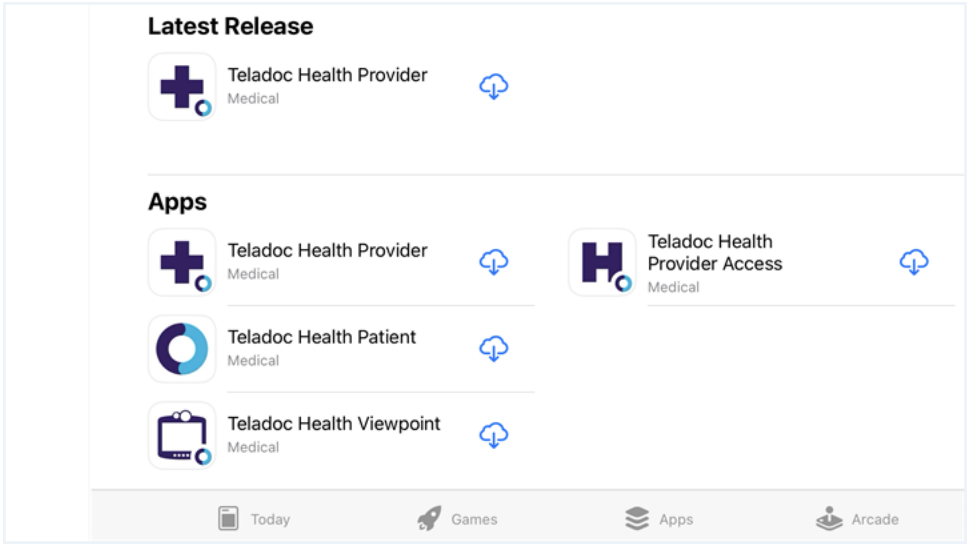
With Solo, you can connect people, systems, information technology systems, devices, and third-party applications to enable telehealth solutions across patient journeys. Whether launching a scheduled visit, providing care for patients, Solo provides a core set of tools to deliver virtual care to users with an immersive, patient-centric view of their clinical work flows.



Mobile Applications

Teladoc Health provides several mobile applications for our users, as indicated below:



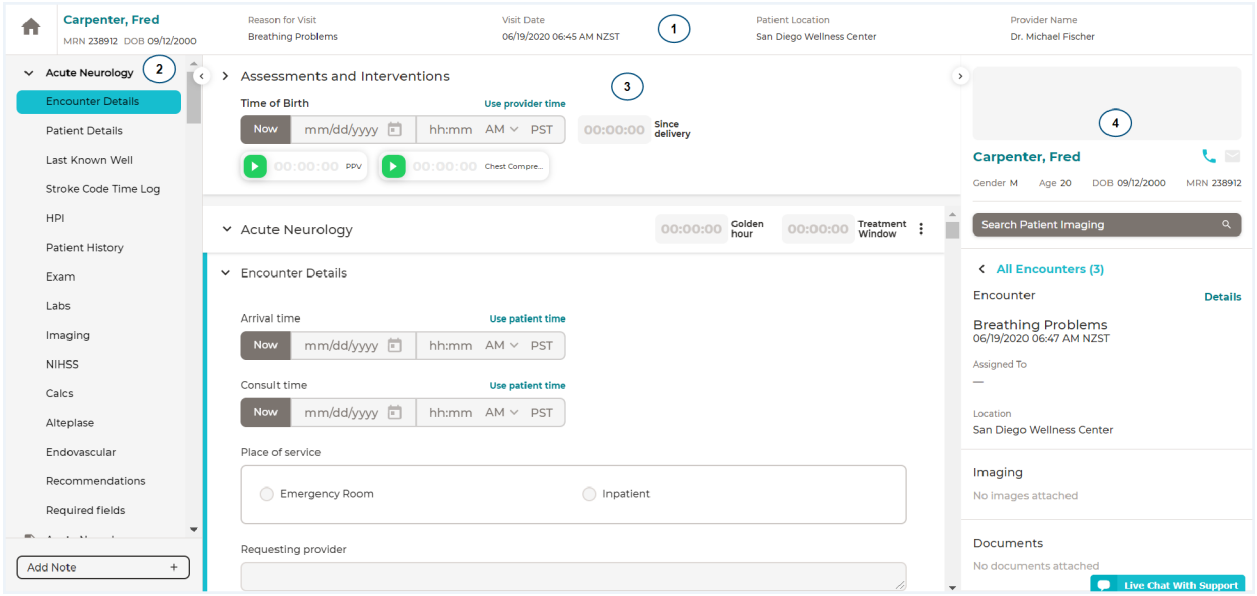

Latest Release
Teladoc Health Provider
Medical
Apps
Teladoc Health Provider
Medical
Teladoc Health
Provider Access
Medical
Teladoc Health Patient
Medical
Teladoc Health Viewpoint
Medical
Today
Games
Apps
Arcade

Overview

Smart Notes 4 is a documentation tool used to document measurable results that can be leveraged across points of care.

NOTE: The term session means call, virtual encounter, consult, and appointment.

NOTE: Customers can deactivate Smart Notes. See the MA-20165 Practitioner Admin User Guide.



Requirements

Smart Notes is designed to run under the Teladoc Health Solo platform.

NOTE: Refer to Teladoc Health MA - 20171 Provider User Guide for more information.

Browser

Browsers make it easier for customers to get the latest solutions without the burden of pushing updates to individual computers.

NOTE: Android users must use Chrome.

Browser	Version	Support as of 4/2022	iOS
Chrome	91.0 and later	91.0	Mac OS 10.14 and later Windows 10 & 11 Android v 7.0 and later
Safari	14.0 and later	14.0	Mac OS 10.14 and later OS 12.1 and later
Firefox	88.0 and later	88.0	Windows 10 & 11
Edge	88 and later	88.0	Windows 10 & 11
Internet Explorer	Not supported	N/A	N/A

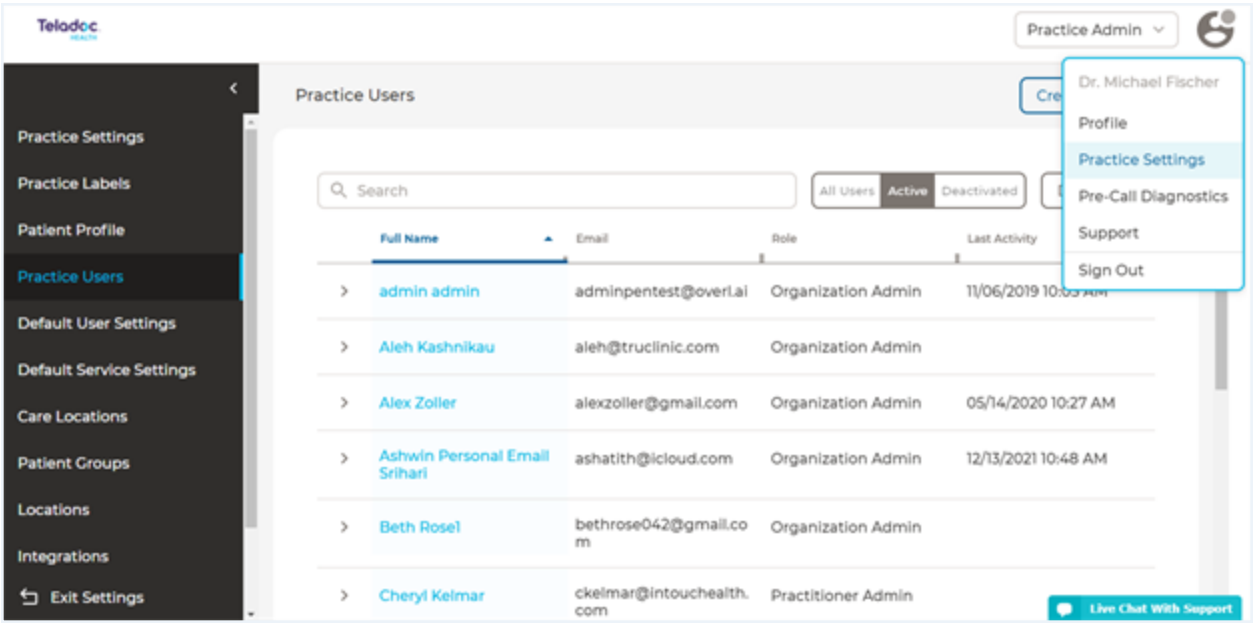
Set Up

For a comprehensive discussion about setting up Teladoc Health's Solo™ telehealth platform, refer to MA-20165 Practice Admin User Guide.

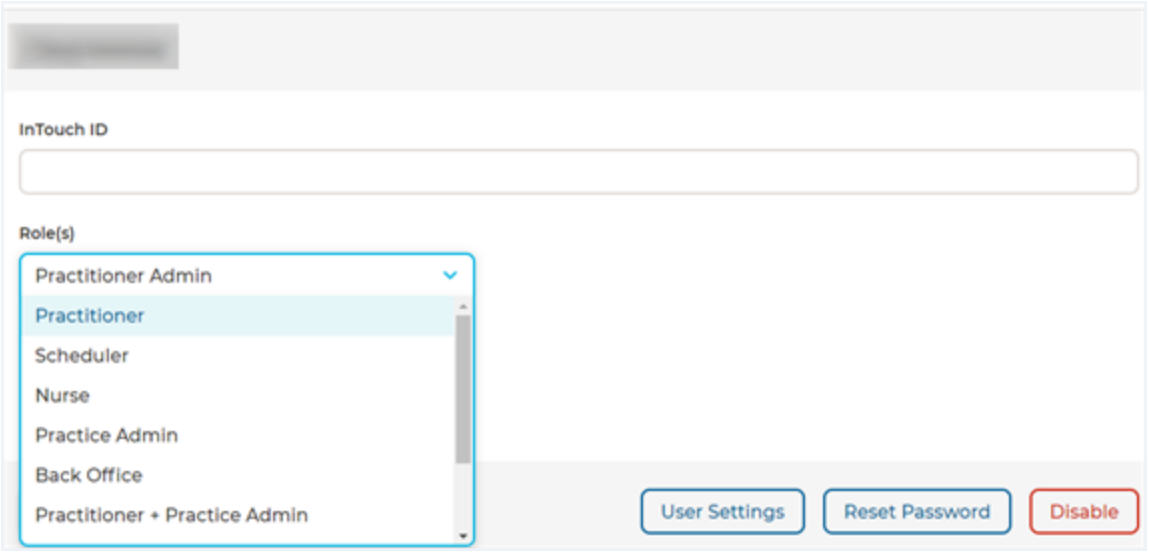
Permissions

The Practice Admin can setup set up default permission settings for users in their practice to sign-off on a Smart Notes consultation notes

1. Select **Practice Settings** from the User icon as a Practice Admin or Practitioner Admin.
2. Select **Practice Users** from the left navigation panel. The middle panel will populate with a list of users.
3. Select the name of a user from your practice.



4. Under **Permissions**, select the check box next to **Sign off consultant note**.

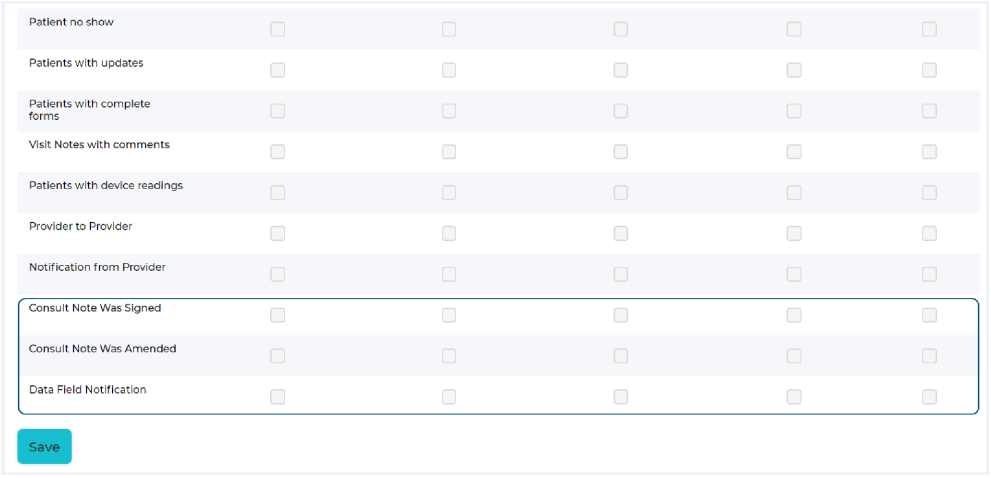


Default User Settings

Practice Admins are responsible for setting up default user settings for users, which includes notifications. A notification is sent to users when an encounter is created, a consult note signed, an addendum added, or demographic information updated.

1. Scroll down and select the Consult Notes check box for email, SMS, Pager, Browser, or TigerConnect from the Notifications Settings middle panel. Select one of the following from below:
   - Consult Note Was Signed
   - Consult Note Was Amended
   - Data Field Notification

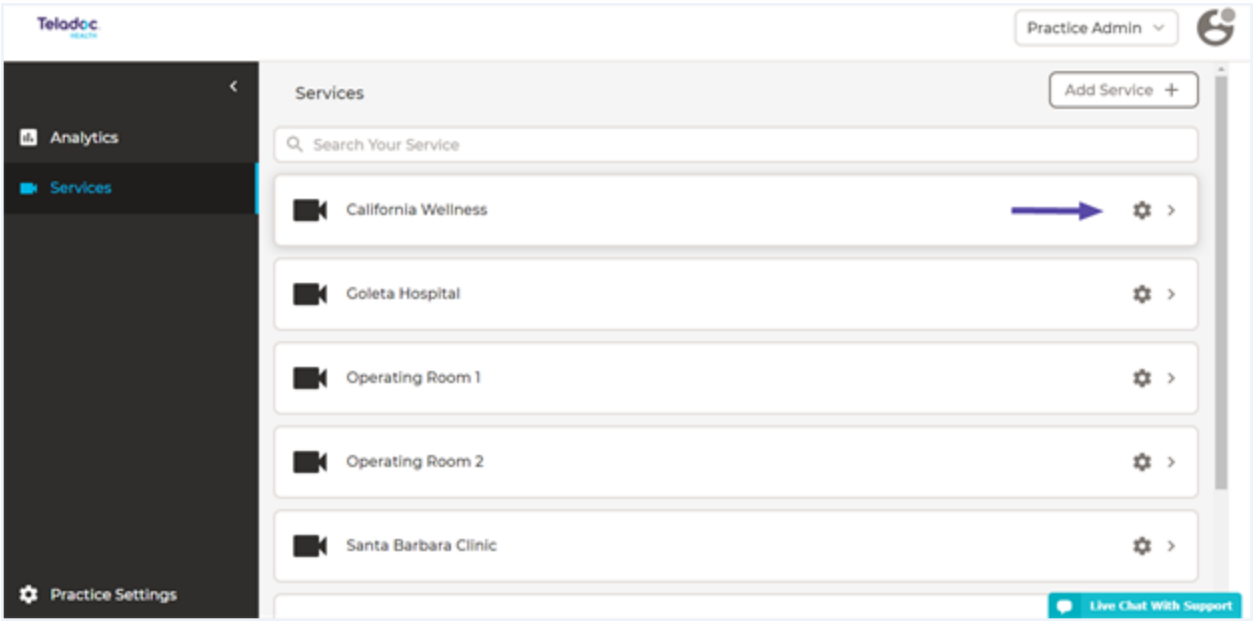
2. When done, Select Save.



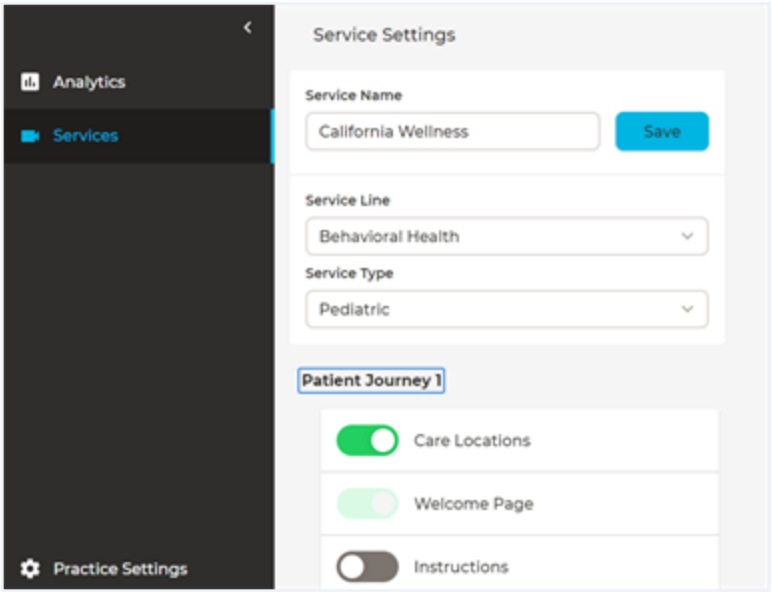
Smart Notes Toggle

The Practice Admin must enable the Smart Notes toggle under Services. Assign one or multiple templates based on the services provided.

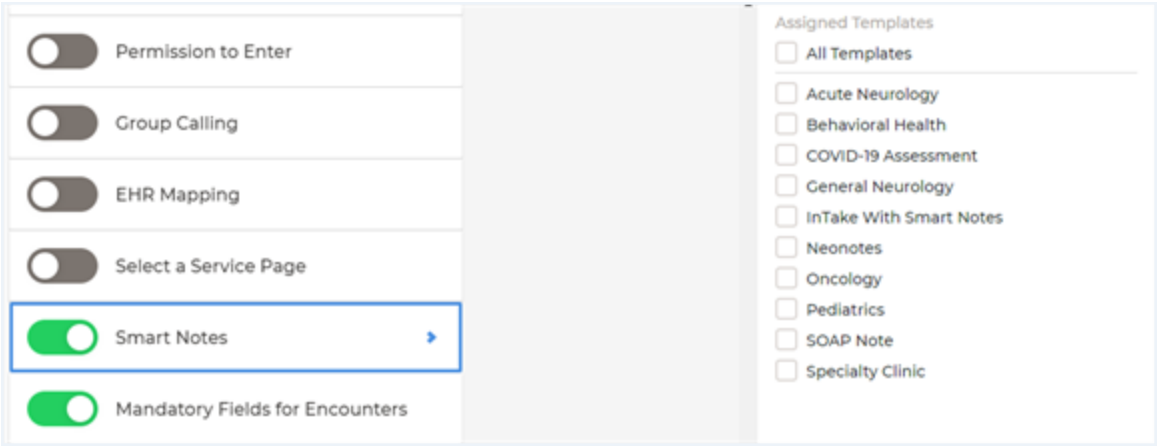
1. Select Services from the left navigation panel. A list of Services for your practice will populate the middle panel.
2. Click on the gear icon, located within your Service bar, in the middle panel.



3. The Services dialog will open.

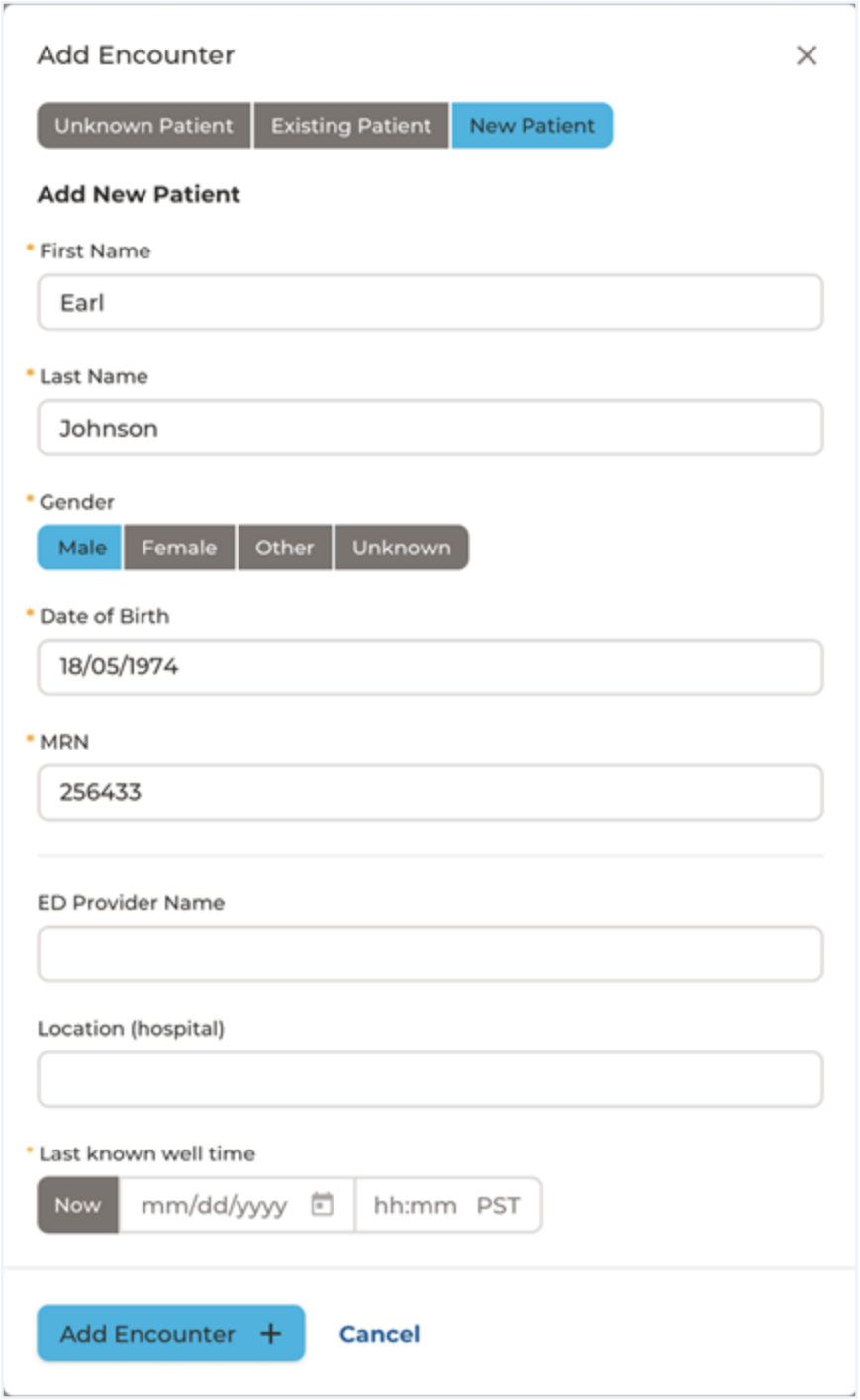


4. Scroll down to enable the Smart Notes toggle. Once the toggle is enabled, a list of templates for your practice will display in the upper, right corner.
5. Select All or individual templates.



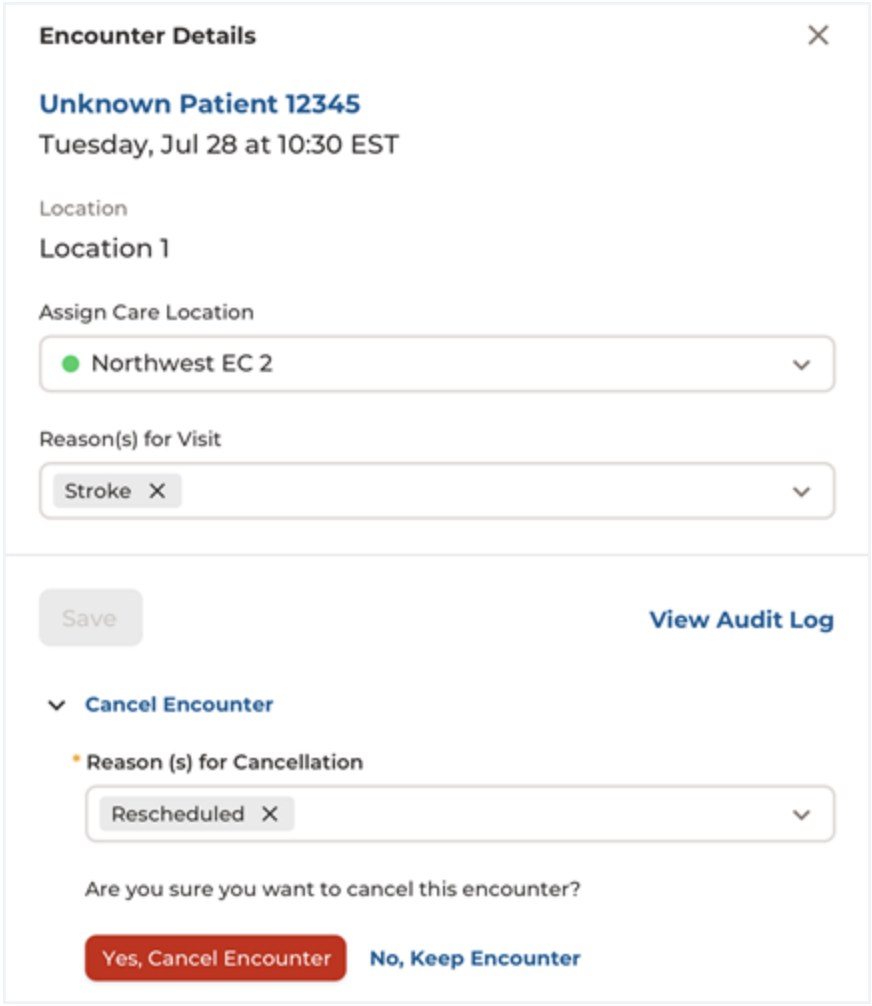
Configure Encounter Screen

The encounter creation screen can be configured to include input fields from Smart Notes for the purpose of easily capturing information at the time of creating of the encounter. Please contact a Teladoc administrator to enable this functionality.

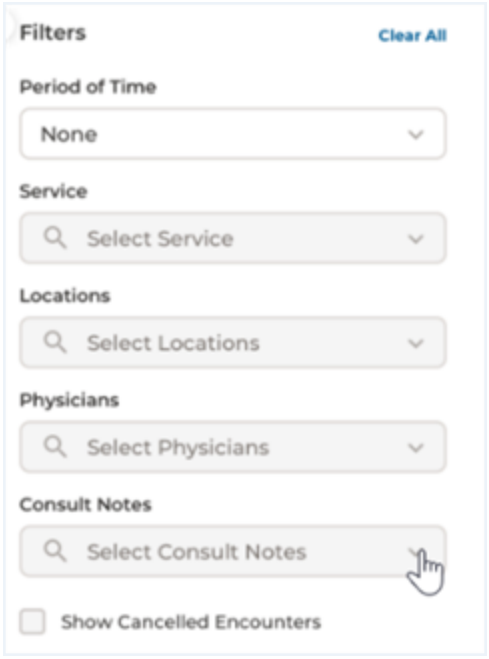


Reason to Cancel

A practitioner can record the reason an encounter is cancelled, for administrators.



Use the filter panel on the Encounter dashboard to filter for amended notes and addendum notes.


Filters
Clear All
Period of Time
None
Service
Select Service
Locations
Select Locations
Physicians
Select Physicians
Consult Notes
Select Consult Notes
Show Cancelled Encounters

Consult Note

The Practitioner's connection or visit with their patient remotely is referred to as a session. Smart Notes can be accessed before, during, and after a session.

> **NOTE:** Refer to the MA-20171 Practitioner-Scheduler User Guide for information about how to create and implement a session.

> **NOTE:** For work flows with Teladoc Health devices, session start time are included in the consultation note so that Stroke customers can be compliant. Teladoc Health devices are not classified medical devices.

Templates

Smart Notes templates offer field types and calculators tailored for each work flow. Two modes are available for emergent care versus consumer care. In each respective mode, **Visits** or **Encounters** will display in the right patient panel.

> **NOTE:** The **Delete** icon for a template is not visible when the Service contains only one Smart Notes template.

The following templates are available:

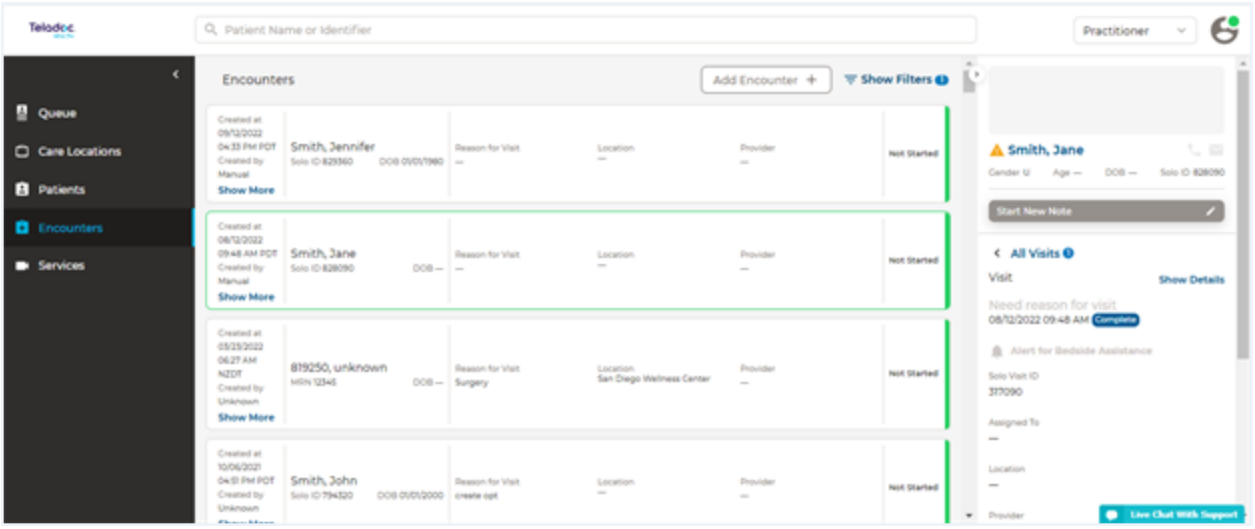
- Covid 19
- Acute Neurology
- Behavioral Health
- General Neurology
- Neonatology
- Oncology
- Pediatrics
- Specialty Clinic

Select Note

1. Select **Encounter**s from the left navigation panel. The middle panel will populate with a list of encounters.

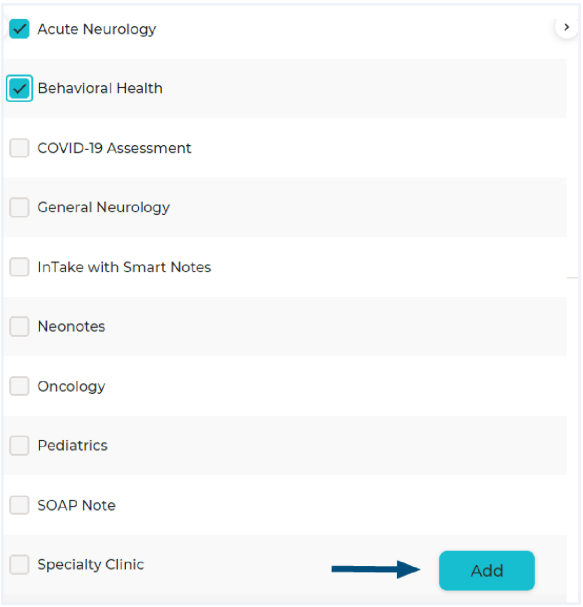
2. Select your Encounter bar from the middle panel. A Patient panel will open on the right.
3. Click on the **Start new note** or **Continue note** button from the right Patient panel.

> **NOTE:** Once a user starts a new Note it will change to Continue Note.

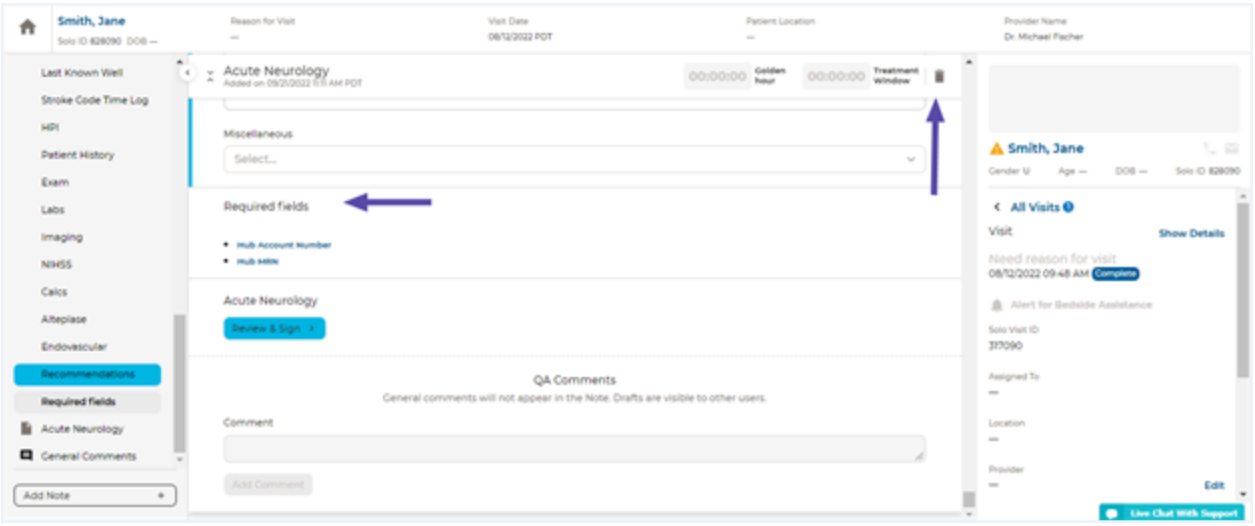


Select Template

1. A list of available templates will appear in the middle panel. Select one or many templates.
2. When done, click on the **Add** button.



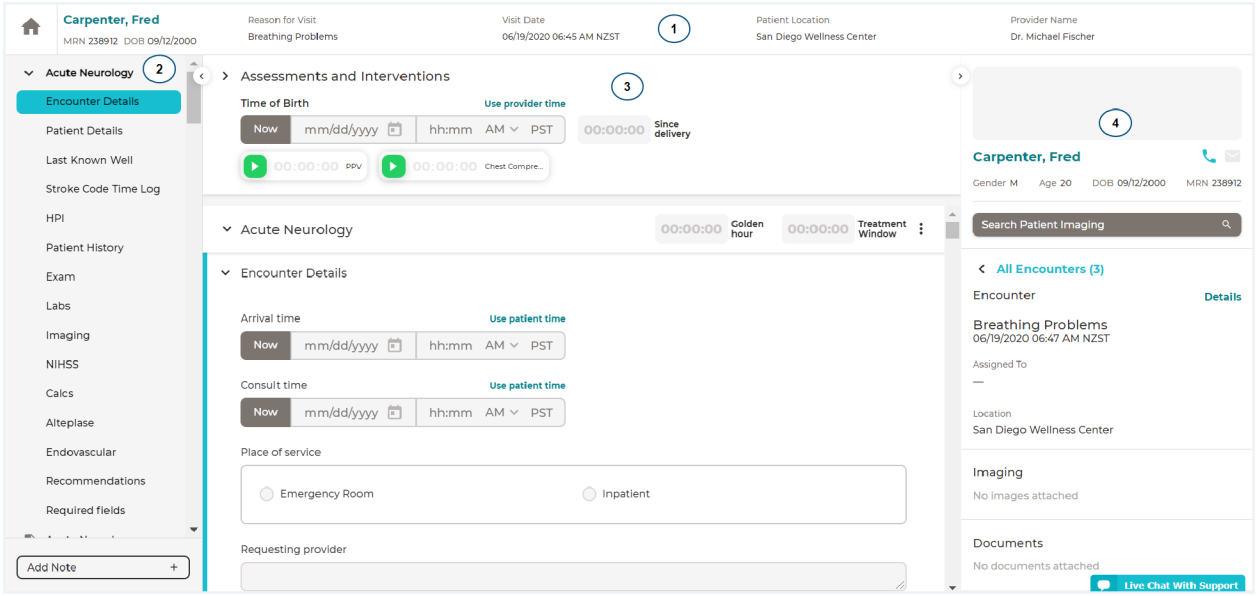
3. When your template opens, select **Required fields** to view a summary of the required, minimum information.
4. Select the Delete icon in the upper, right corner to delete a template.



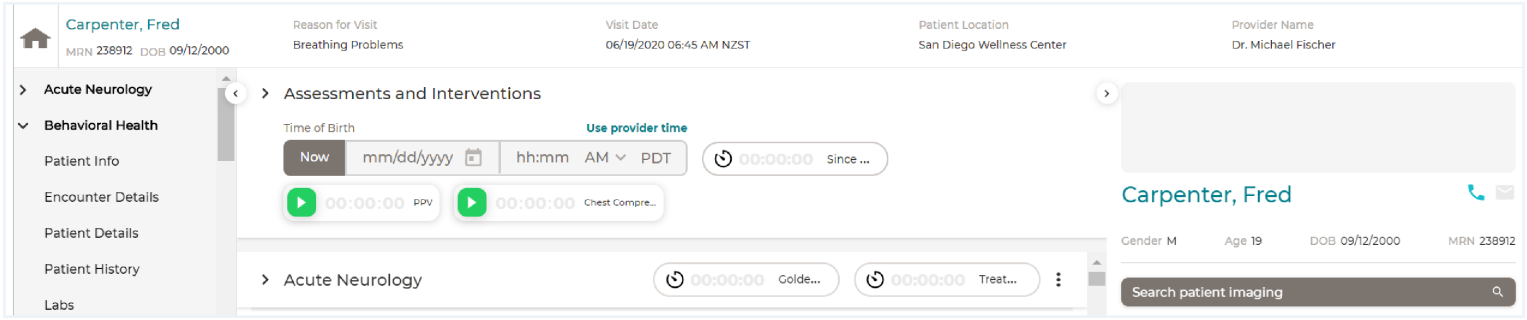
Interface

The Smart Notes interface for the Consult and Addendum note is divided into a:

1. configurable header
2. left navigation panel
3. form or template (i.e.: consult note) in the middle panel
4. right Patient Panel



Smart Notes forms are listed chronologically. Newly added forms are at the top of the page.

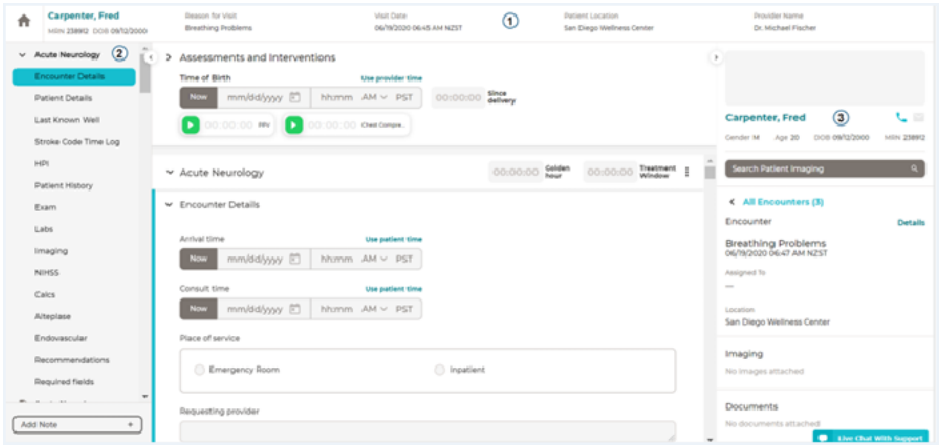


Main Elements

The main elements are:

1. **Configurable Header:** Headers are responsive with associated timers and patient information so users know which form they are editing at all times. Care Locations, Locations, Services, and Name can be configured to appear in the header or body of a Consultation Note.

   > **NOTE:** The Practice Admin must associate a Location and Care Location with their Services for the information to appear.



Footers include electronic signatures.

> Electronic Signature: Bruner, Dan on 07/28/2020 at 05:00 PM PST Consultation Note Pg 1 of 3

2. **Left Navigation Panel**: The sections vary depending on your template(s).
3. **Template or Form:** The middle panel opens with the template you selected.
4. **Patient Panel**: The right panel contacts patient information.

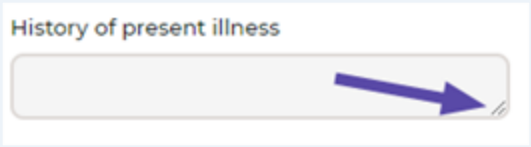
Generic Fields

Generic Fields are commonly used throughout the Teladoc Health Solo platform. A Practice Admin can assign one or multiple templates to the Service of their practice.

NOTE: Mandatory fields are indicated by an orange dot to the left of each field.

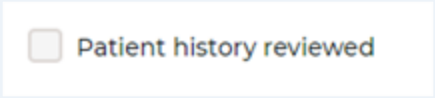
Text Area

Enter an unlimited number of alpha numerical characters in the text field. Expand the text area by clicking and dragging its lower, right hand corner.



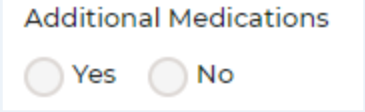
Check Boxes

Users can select one or several properties by toggling check boxes on or off.



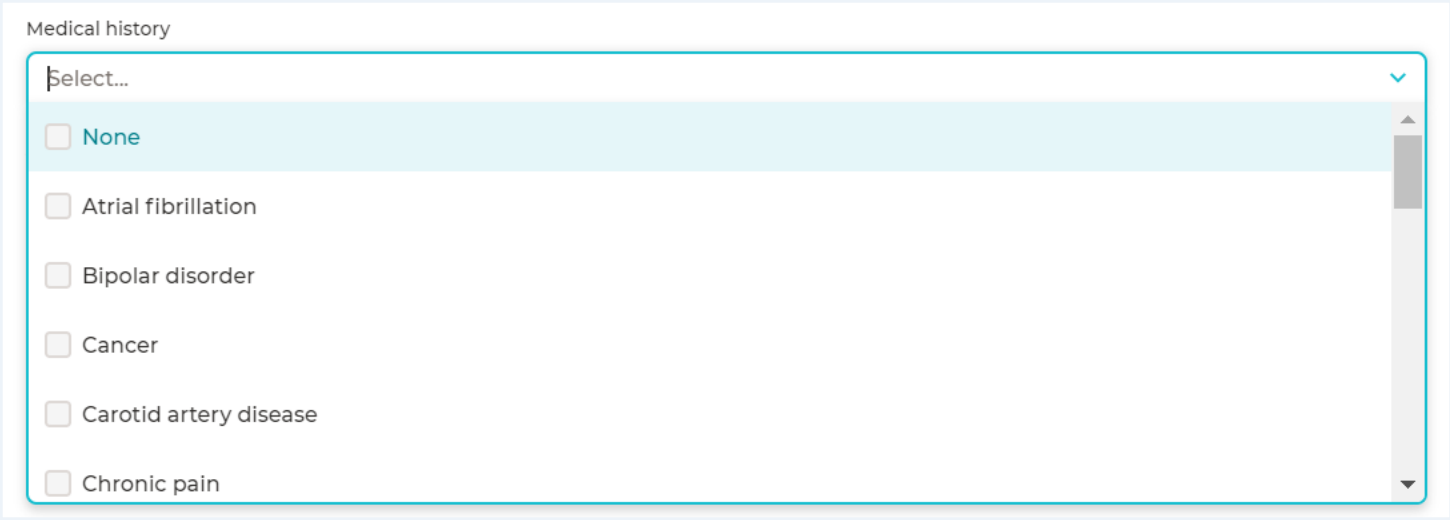
Radio Buttons

Users can select only one option from multiple options with radio buttons.



Dropdowns

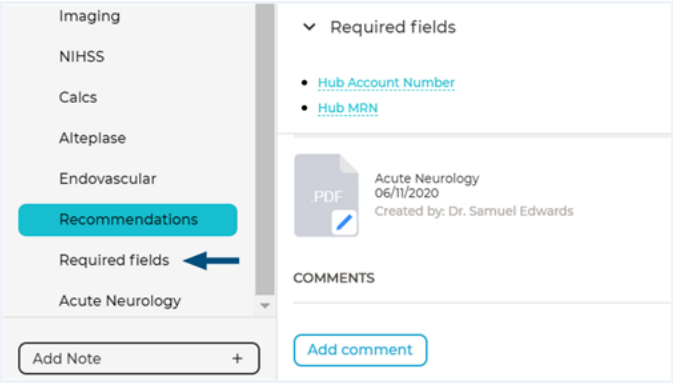
Users can select one or many options using dropdown menus.



Smart Notes Fields

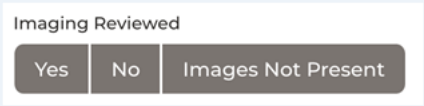
The following fields are specific to Smart Notes. Smart Notes has a soft and hard requirement for some fields. In soft-stop mode, users can skip required fields and still sign a consult note. In hard-stop mode, users must complete all required fields prior to signing a note.

Select **Required fields** on the left navigation panel to view all fields



Button Groups

Button groups consist of related buttons that are grouped together to allow you to make one selection with a single click.



Value Insertion

Users can insert text and other data in the consult note.

> I have personally provided **120** min (recorded below) of critical care time for this unstable patient in both direct patient care and coordination of care. Time includes review of laboratory data, radiology results, discussion with consultants, and monitoring for potential decompensation.

Field Grouping

Fields can be grouped together to save space and improve readability.

> Coagulation - **PT: 55.5** seconds, **PTT: 55** seconds, **INR: 5.5**
> Hematology - **WBC: 55.5** KmcL, **Hgb: 55.5** g/dL, **Hct: 55%**
> Chemistry - **BUN: 1.05** mg/dL, **Creatinine**: 125.08 mg/dL, **CO2:** 2 mmol/L, **Cl: 2** mmol/L, **K: 2.0** mmol/L, **Na: 2** mmol/L

Features

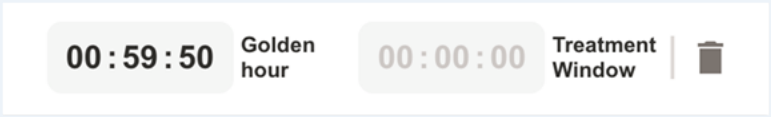
The following features help to make the Teladoc Health Smart Notes module interactive and user friendly.

The features are:

- Timers and Clocks
- Calculator
- Measurement Field
- Date Time Stamp
- Table Formats
- Conditional Logic
- Multi-User

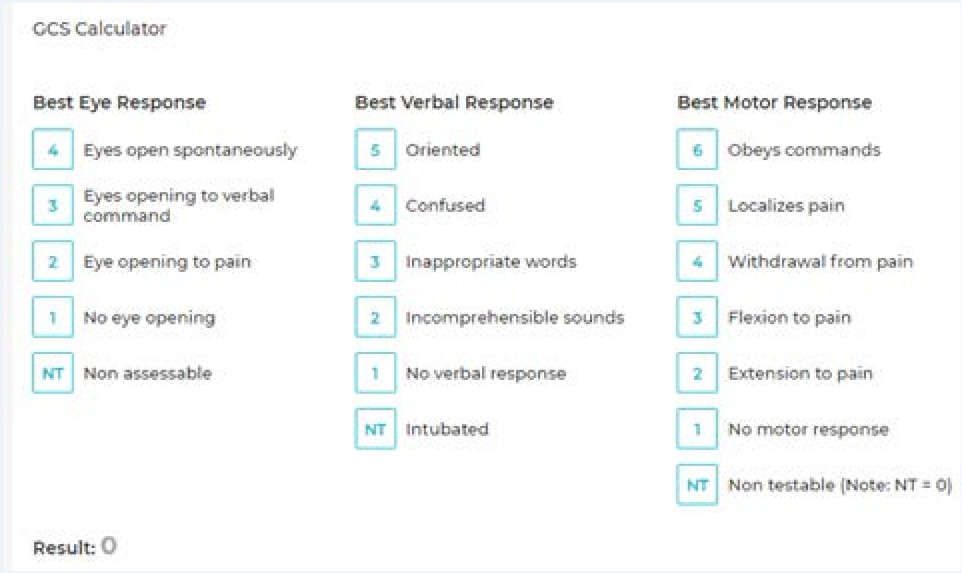
Timers and Clocks

Smart Notes offers configurable timers and clocks to assist practitioners during a session. The clocks count up or down in hours, minutes, and seconds depending on the trigger event. They are configured with visual cue's, such as changing colors at predefined time intervals.



Calculator

Calculator results are displayed based on the total score. Calculator information is included in the Report Generator.



Tenecteplase Dose Calculator

The Tenecteplase Dose Calculator is a tool that is available after a physician decides that Tenecteplase is the right prescription. It is the responsibility of the practitioner to independently choose the best recommendation for treatment of the specific clinical scenario after consideration of published safety and efficacy data.

See below for references to some published data:

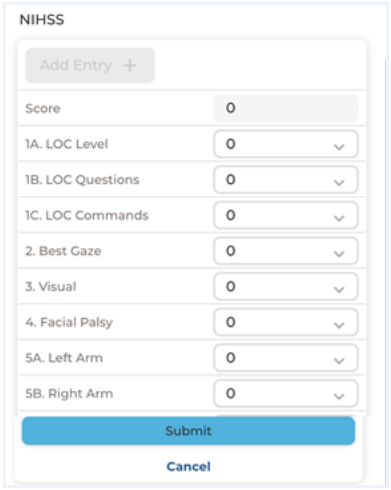
- Powers WJ, Rabinstein AA, Ackerson T, Adeoye, OM, Bambakidis NC, Becker K, et. Al. Guidelines for the Early Management of Patients with Acute Ischemic Stroke: 2019 Update to the 2018 Guidelines for the Early Management of Acute Ischemic Stroke: A Guideline for Healthcare Professionals from the American Heart Association/American Stroke Association: Stroke Dec 2019: Vol 50 Issue 12, Pages e344-e418. Doi.org/10.1161/STR.0000000000000211.

- Campbell BCV, Mitchell PJ, Churilov L, Yassi N, Kleinig TJ, Dowling RJ, et al. Effect of Intravenous Dose on Cerebral Reperfusion Before Thrombectomy in Patients with Large Vessel Occlusion Ischemic Stroke: The EXTEN-IA TNK Part 2 Randomized Clinical Trial. JAMA 2020;323(13):1257-1265. doi: 10.1001/jama.2020.1511.
- Burgos AM, Saver JL. Evidence that Tenecteplase Is Noninferior to Alteplase for Acute Ischemic Stroke. Stroke 2019: 2156-2162. doi: 10.1161/STROKEAHA.119.025080.
- Zitek T, Atay R., Brea I. Using Tenecteplase for Acute Ischemic Stroke: What Is the Hold Up? WESTJEM 2020: 199-202. doi: 10.5811/westjem.2020.1.45279.

The Tenecteplase Dose Calculator is limited to U.S.-based customers.

Calculator Support

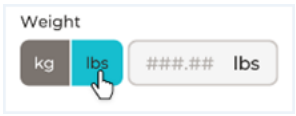
Table support for calculators with automatically selected default values is provided in a vertical layout to work with calculators with 10+ scores. See the following NIHSS example below.



Measurement Field

The measurement field has built-in functionality to convert an entered numeric value from one form to another by selecting the field.

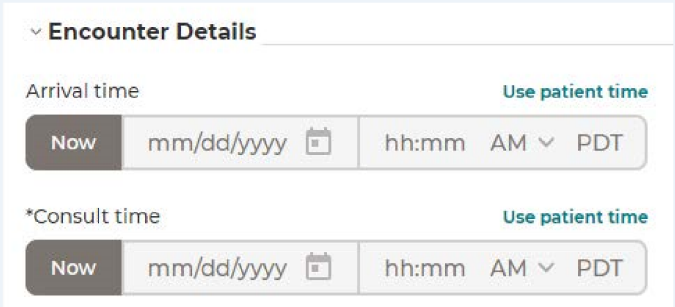
1. Select the units button (**lbs**), to display the units of measurement in pounds.



2. Select the units button (**kg**) to display the measurement field in kilograms.

Date Time Stamp

A date time stamp can be added to a Consult note. Select **Use patient time** button to display the date time stamp fields in the patients' time zone.



Select the **Use provider time** button to set the time to the provider's time zone.

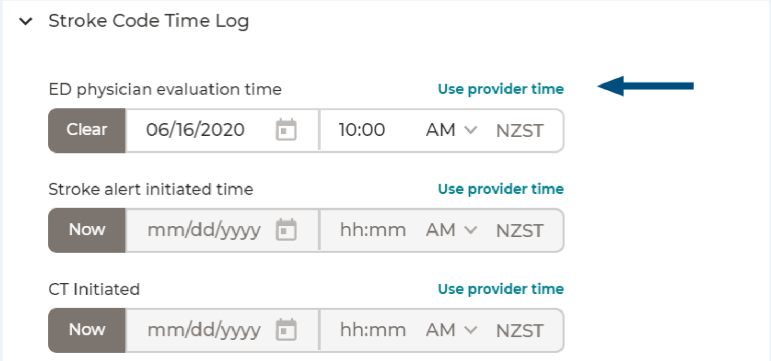
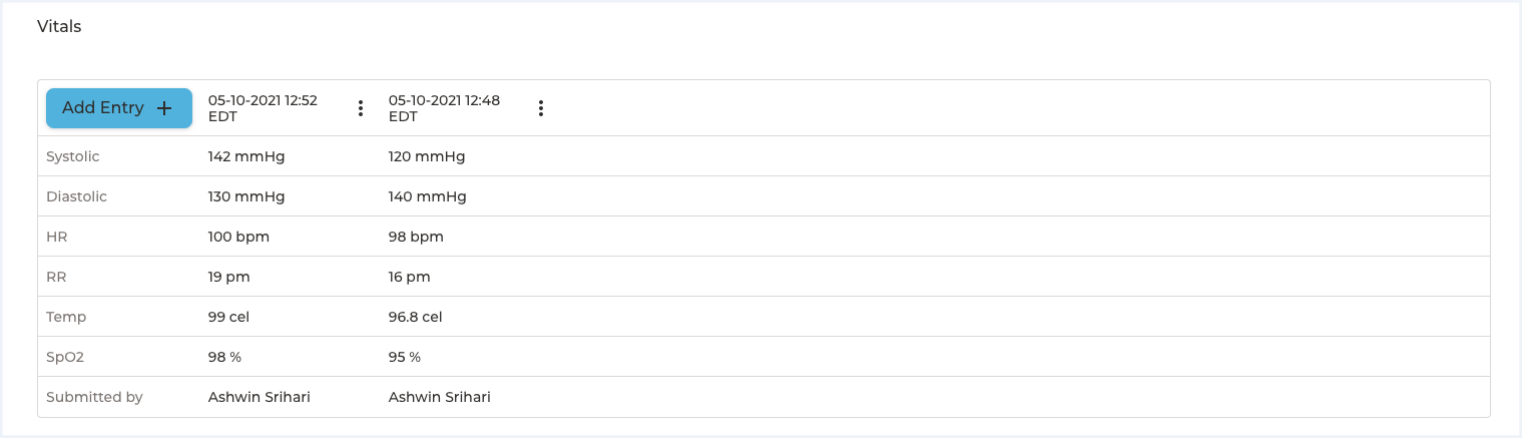
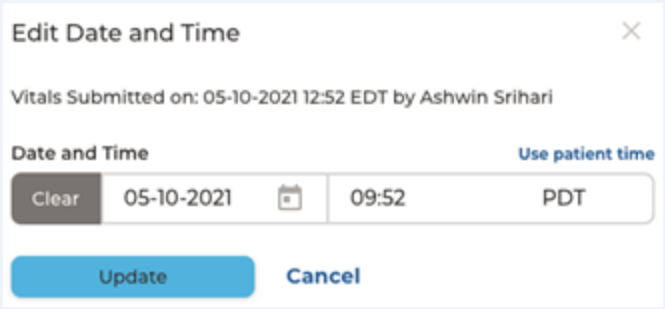


Table Format

Table entries are represented in a vertical layout to improve usability.



Tables automatically capture the date and time of submission, along with the name of the user that submitted the entry. Users can edit the values by selecting the **Edit**, **Date**, and **Time** options from the **More** menu.



Tables and calculators are presented in either a narrative or table format.

NIHSS - **LOC level: 2** Note alert; requires repeated stimulation, **LOC question: 0** Both questions correctly, **LOC commands: 0** Both questions correctly, **Best gaze: 0** Normal, **Visual: 0** Partial hemianophia, **Facial palsy: 0** Normal symmetrical, **Left arm: 2** Some effort against gravity, **Right arm: UN** Amputation or joint fusion, **Left leg: 2** Some effort against gravity, **Right leg: 2** Some effort against gravity, **Limb ataxia: 2** Present in 2 limbs, **Sensory: 1** Mild-to-moderate sensory loss, **Best language: 2** Severe aphasia, **Dysarthria: 2** Severe-to-total dysarthria, **Extinction and inattention: 2** Profound hemi-attention, **Score: 17**, **Submitted Date:** 02/11/2020 3:38 PM PST, **Submitted by:** Dan Bruner

Vitals

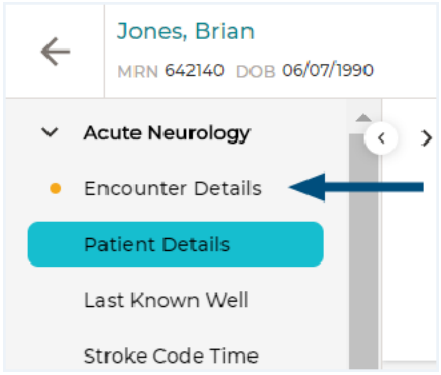
Systolic	Diastolic	HR	RR	Temp	SpO2	Time	Submitted by
120 mmhg	**120** mmhg	**000** bpm	**00** pm	**99.0** °C	**90** %	02/11/2020 12:45 PM PST	Dan Bruner
120 mmhg	**120** mmhg	**000** bpm	**00** pm	**99.0** °C	**90** %	02/11/2020 12:45 PM PST	Dan Bruner

Conditional Logic

Conditional logic is used to create templates that change based on data input. Smart Notes fields can be hidden based on a user's response.

Multi-User

Multiple users can use a Smart Note in collaboration. An orange dot will be displayed next to the section on the left navigation panel when in collaboration.



Manage Notes

Practitioners manage consult notes using the options described below. Clicking on the Amended badge displays the details and a list of all of your consult notes. Expand to view further details, such as time, name of practitioner, note ,and fax status.

> **NOTE:** Users who navigate away from a consult note, can easily return back using the **Back to Note** button.

The options are:

- Add Comments
- Sign a Note
- Fax a Note
- Update a Note
- Add Amendments and Addendums

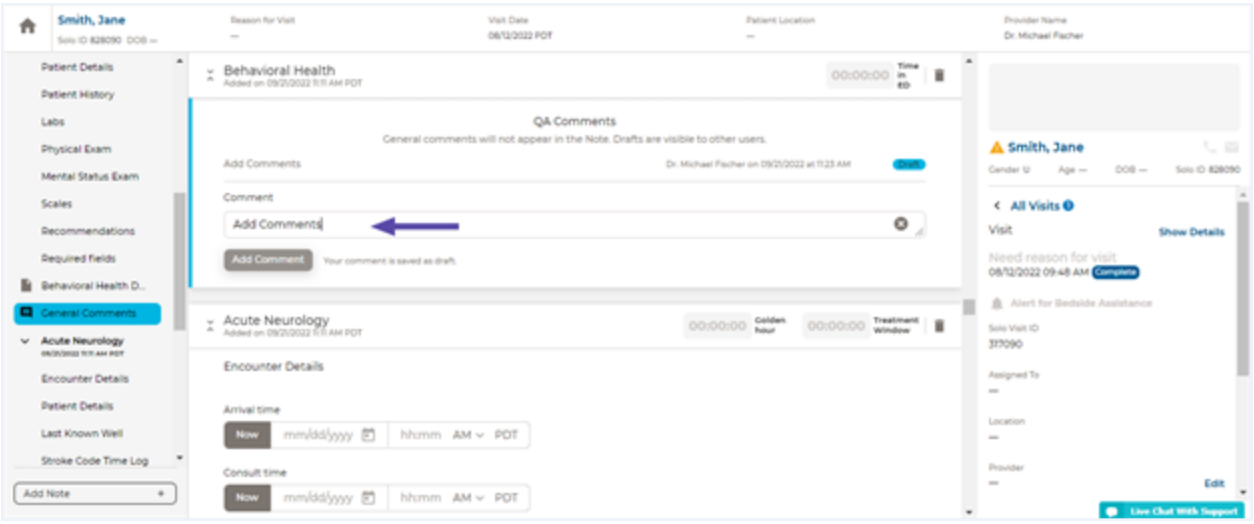
Add Comments

Users can add comments to any Smart Notes template. Drafts are indicated by the **Draft** badge. Comments are saved automatically.

> **NOTE:** The Comments section at the bottom of the interface can be hidden and removed with a simple configuration to the template. Please contact a Teladoc administrator to configure your template(s) with this functionality.

To add a comment:

1. Select your Consult Note. See the Select Note section.
2. Select **General Comments** from the left navigation panel.
3. Enter your comment in the **Comment** field.
4. Select the **Add Comment** button.

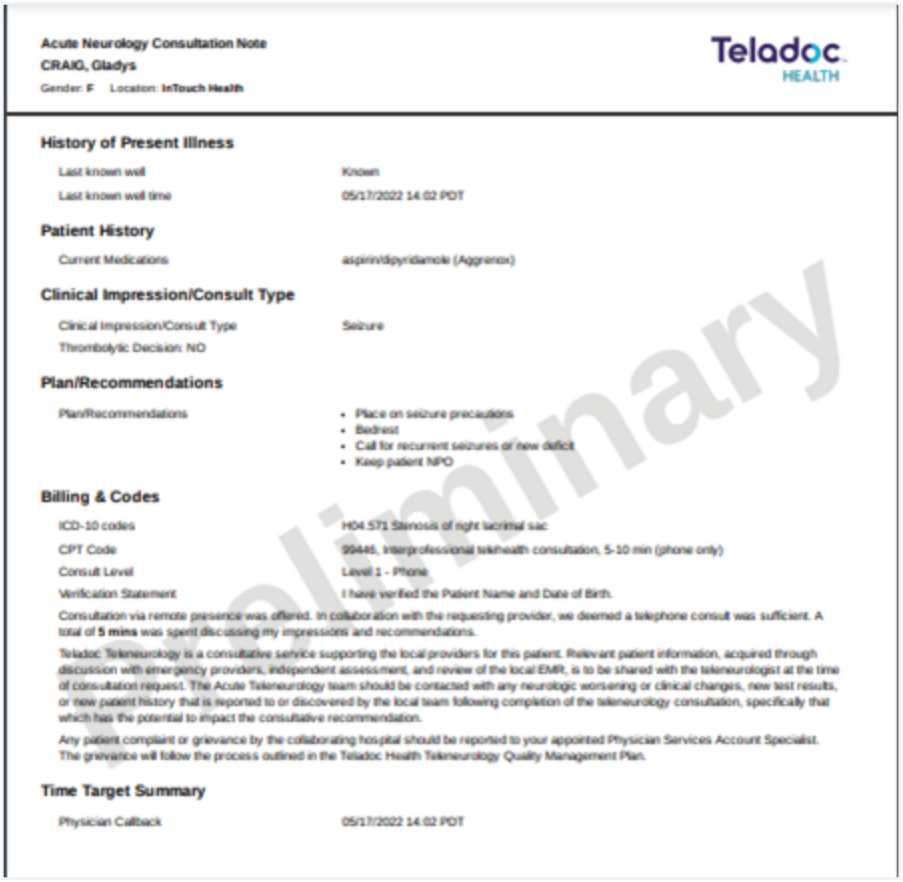


Sign Note

Sign your Smart Notes form once complete. The last practitioner is the final practitioner. Once signed, it cannot be changed and notifications are immediately delivered. Consult Notes can then be automatically faxed, downloaded, printed, or delivered to the patient's practitioner with an HL7 integration message, medical records, billing, and the location where patient care was delivered. Practitioners can retain captured data with a time stamped Consultation Note.

NOTE: Unsigned Smart Notes are indicated by a watermark.

NOTE: The Encounters dashboard prevents users from cancelling any encounter that contains one or more signed consultation note. Users are alerted from the Encounter details screen.



Acute Neurology Consultation Note
CRAIG, Gladys
Gender: F Location: InTouch Health

Teladoc HEALTH

History of Present Illness

Last known well	Known
Last known well time	05/17/2022 14:02 PDT

Patient History

Current Medications	aspirin/dipyridamole (Aggrenox)

Clinical Impression/Consult Type

Clinical Impression/Consult Type	Seizure

Thrombolytic Decision: NO

Plan/Recommendations

Plan/Recommendations

- Place on seizure precautions
- Bedrest
- Call for recurrent seizures or new deficit
- Keep patient NPO

Billing & Codes

ICD-10 codes	H04.571 Stenosis of right lacrimal sac
CPT Code	99446, Interprofessional telehealth consultation, 5-10 min (phone only)
Consult Level	Level 1 - Phone
Verification Statement	I have verified the Patient Name and Date of Birth.

Consultation via remote presence was offered. In collaboration with the requesting provider, we deemed a telephone consult was sufficient. A total of **5 mins** was spent discussing my impressions and recommendations.

Teladoc Teleneurology is a consultative service supporting the local providers for this patient. Relevant patient information, acquired through discussion with emergency providers, independent assessment, and review of the local EMR, is to be shared with the teleneurologist at the time of consultation request. The Acute Teleneurology team should be contacted with any neurologic worsening or clinical changes, new test results, or new patient history that is reported to or discovered by the local team following completion of the teleneurology consultation, specifically that which has the potential to impact the consultative recommendation.

Any patient complaint or grievance by the collaborating hospital should be reported to your appointed Physician Services Account Specialist. The grievance will follow the process outlined in the Teladoc Health Teleneurology Quality Management Plan.

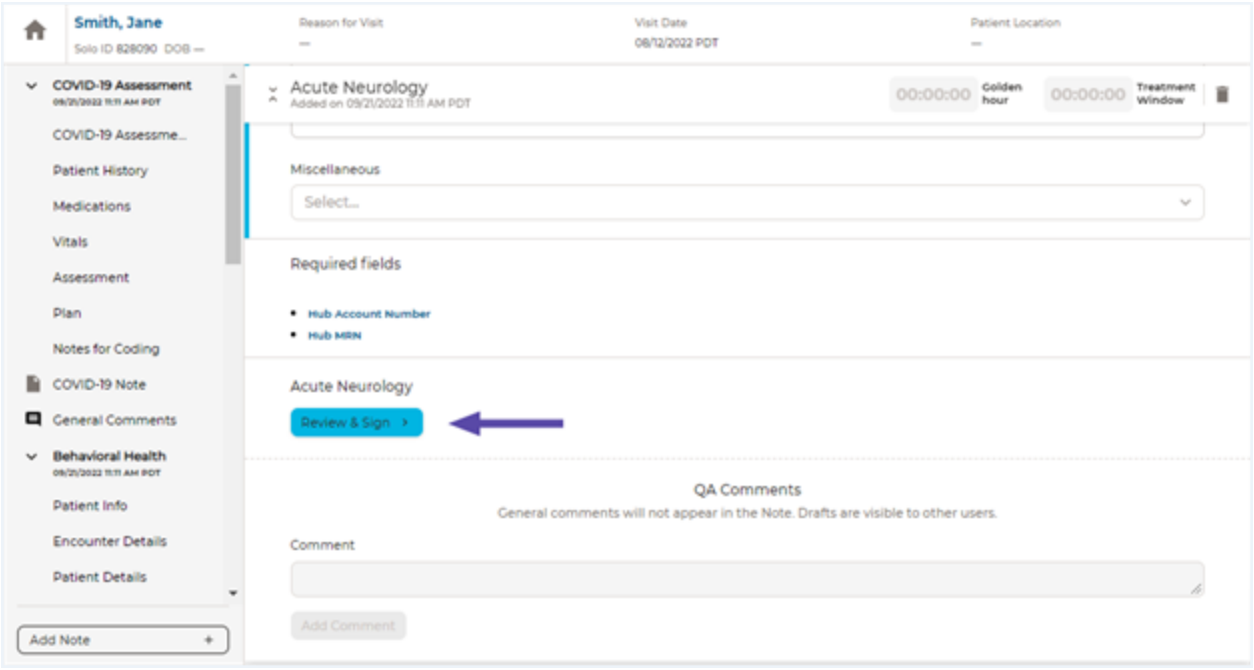
Time Target Summary

Physician Callback	05/17/2022 14:02 PDT

Preliminary

To sign a Note, follow the steps below.

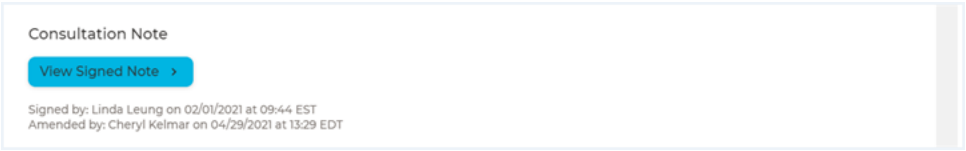
1. Select your Consult Note. See the Select Note section.
2. Scroll down to select your template from the left navigation panel. In the example below, it's Behavioral Health.
3. Click on the **Review and Sign** button.



4. Sign your Smart Notes by selecting **Sign Note**. The documented practitioner will be the last one who documented an encounter or signed a consult note. The consult note is locked after it has been signed.

> **NOTE:** After a consult note is signed, the form can be locked and is no longer accessible.

5. Once signed, you can view your Consult note.



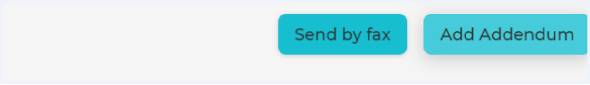
6. The icon for your note will change with the designation of **Sign Note**

Fax Note

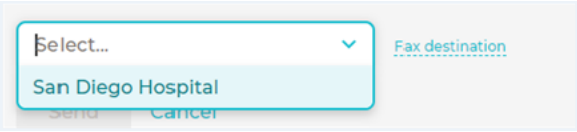
The Practice Admin can send a consult note manually or configure auto-faxing for signed notes.

> **NOTE:** See the MA-20165 Practice Admin User Guide for information about auto-faxing.

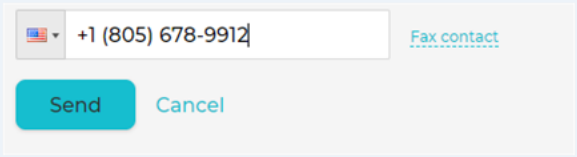
1. Select your Consult Note. See the Select Note section.
2. When your Smart Note opens, select the **Send by fax** button.



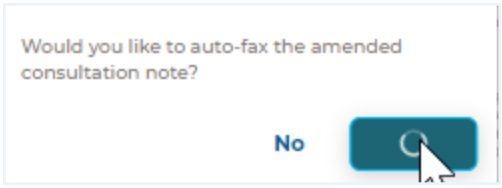
3. Use the **Fax destination** dropdown to select a previously configured fax contacts.



4. Select the **Fax Destination** hyperlink to enter a fax number in the dialog that opens.
5. When done, select the **Send** or **Cancel** button.

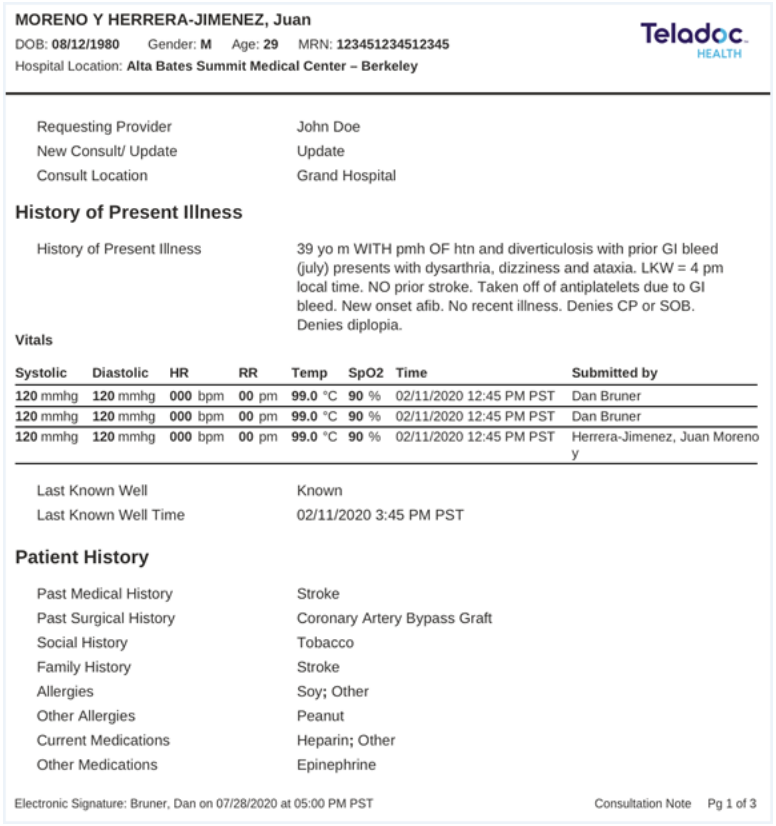


6. Click the **Yes** button for the message <Would you like to auto-fax the amended consultation note?> modal.



Note Update

The consultation note in Smart Notes 4 has been updated with a brand new design with a focus on readability and features a minimal and clean layout.



MORENO Y HERRERA-JIMENEZ, Juan
DOB: **08/12/1980** Gender: **M** Age: **29** MRN: **123451234512345**
Hospital Location: **Alta Bates Summit Medical Center – Berkeley**

Teladoc HEALTH

Requesting Provider	John Doe
New Consult/ Update	Update
Consult Location	Grand Hospital

History of Present Illness

History of Present Illness	39 yo m WITH pmh OF htn and diverticulosis with prior GI bleed (july) presents with dysarthria, dizziness and ataxia. LKW = 4 pm local time. NO prior stroke. Taken off of antiplatelets due to GI bleed. New onset afib. No recent illness. Denies CP or SOB. Denies diplopia.

Vitals

Systolic	Diastolic	HR	RR	Temp	SpO2	Time	Submitted by
120 mmhg	120 mmhg	000 bpm	00 pm	99.0 °C	90 %	02/11/2020 12:45 PM PST	Dan Bruner
120 mmhg	120 mmhg	000 bpm	00 pm	99.0 °C	90 %	02/11/2020 12:45 PM PST	Dan Bruner
120 mmhg	120 mmhg	000 bpm	00 pm	99.0 °C	90 %	02/11/2020 12:45 PM PST	Herrera-Jimenez, Juan Moreno y

Last Known Well	Known
Last Known Well Time	02/11/2020 3:45 PM PST

Patient History

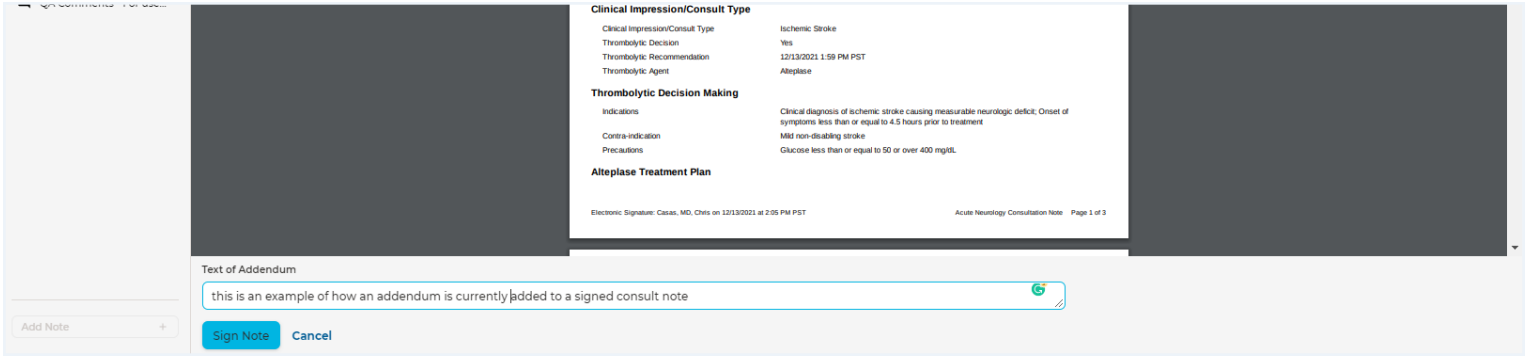
Past Medical History	Stroke
Past Surgical History	Coronary Artery Bypass Graft
Social History	Tobacco
Family History	Stroke
Allergies	Soy; Other
Other Allergies	Peanut
Current Medications	Heparin; Other
Other Medications	Epinephrine

Electronic Signature: Bruner, Dan on 07/28/2020 at 05:00 PM PST Consultation Note Pg 1 of 3

Add Amendments and Addendums

Users can add amendments and addendums to signed consult notes.

NOTE: Only the originating practitioner can add amendments to their own signed consultation notes.

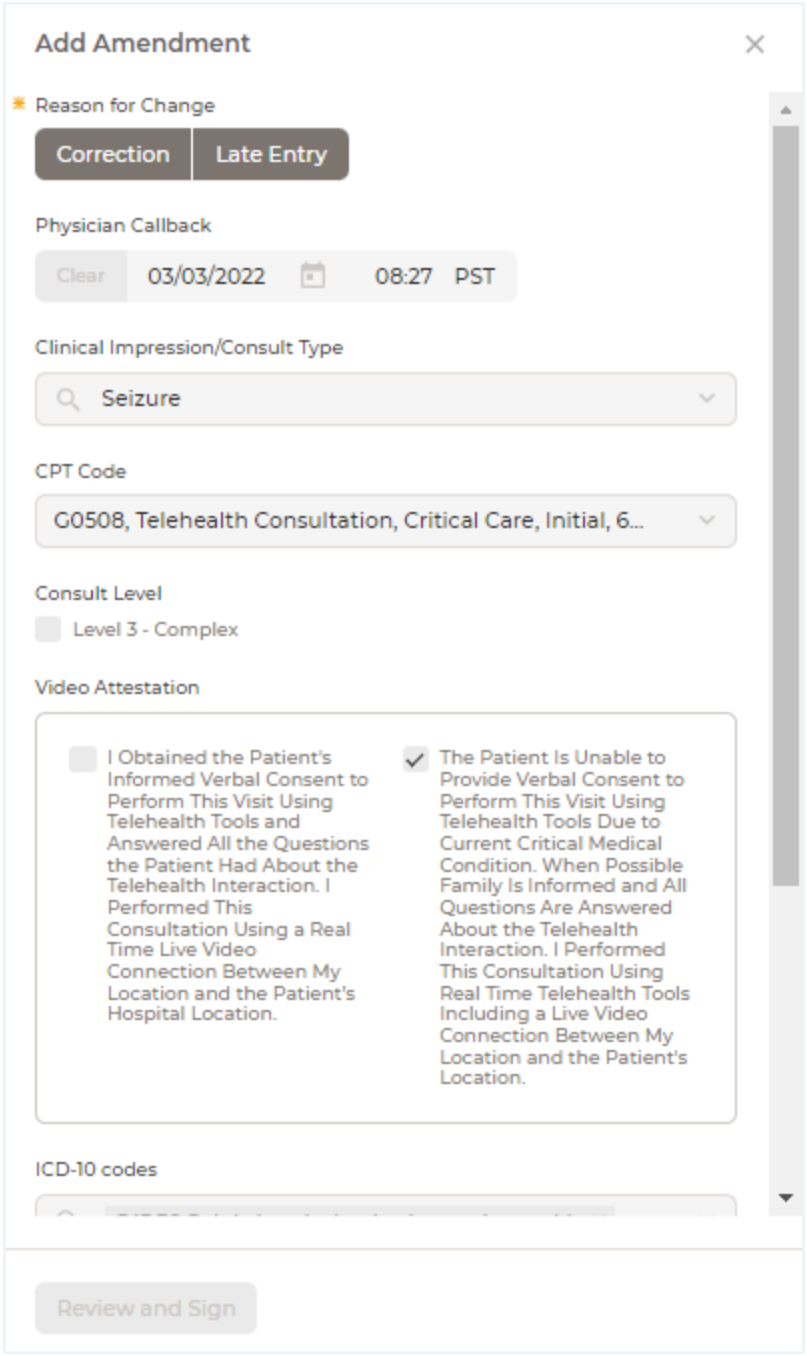


Amend a Signed Note

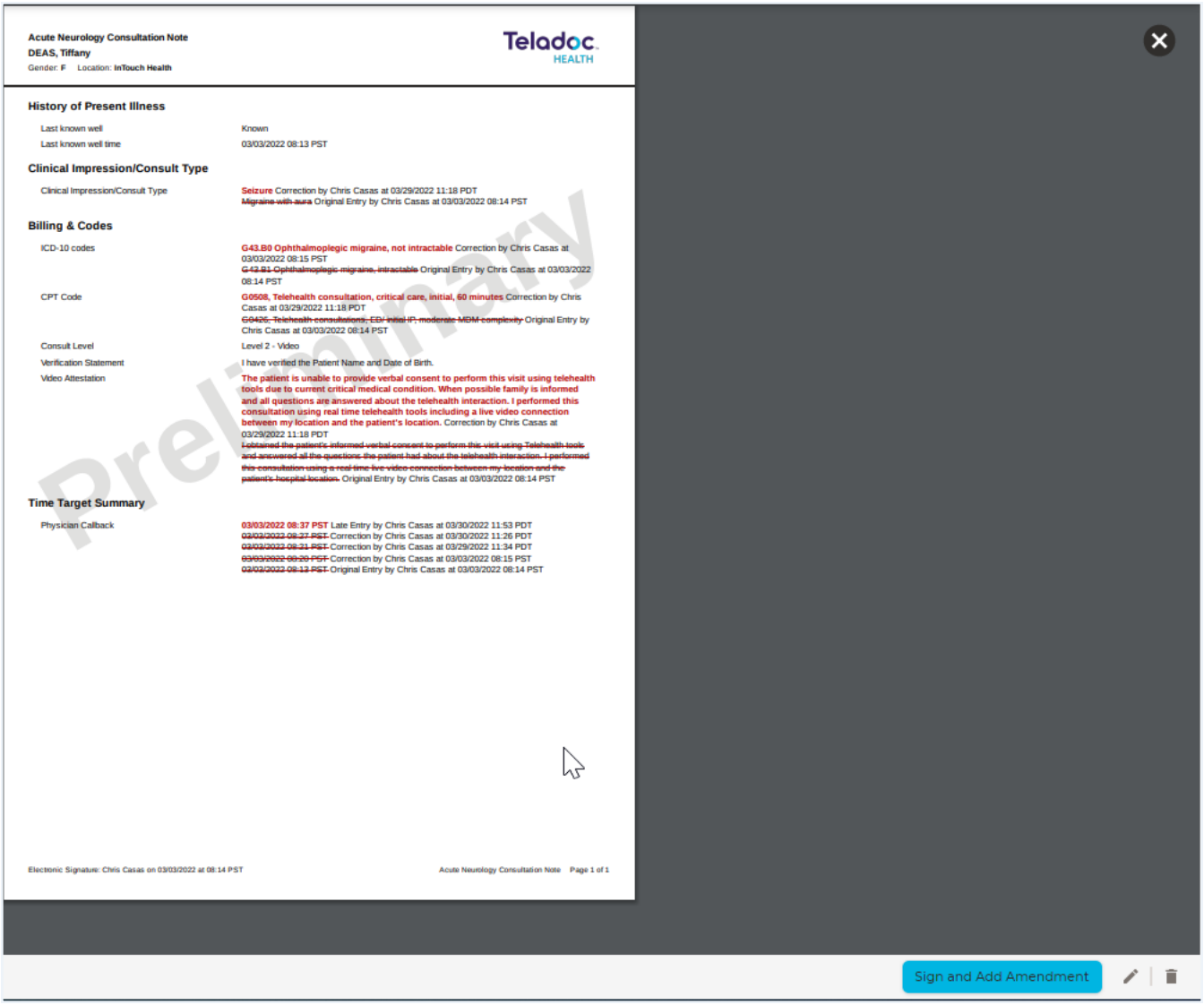
Make a Correction or Late Entry to amend a consult note.

NOTE: A practitioner can later overwrite what is displayed and review to signed amendment.

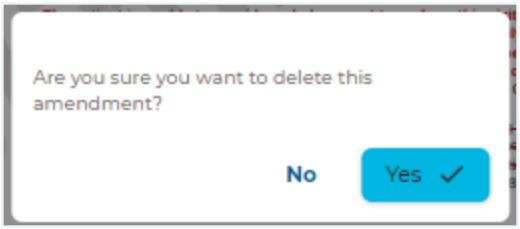
1. Select Add Amendment +. When the amendment modal is displayed, it is pre-populated with the most recent updated data.
2. Choose between Correction or Late Entry.



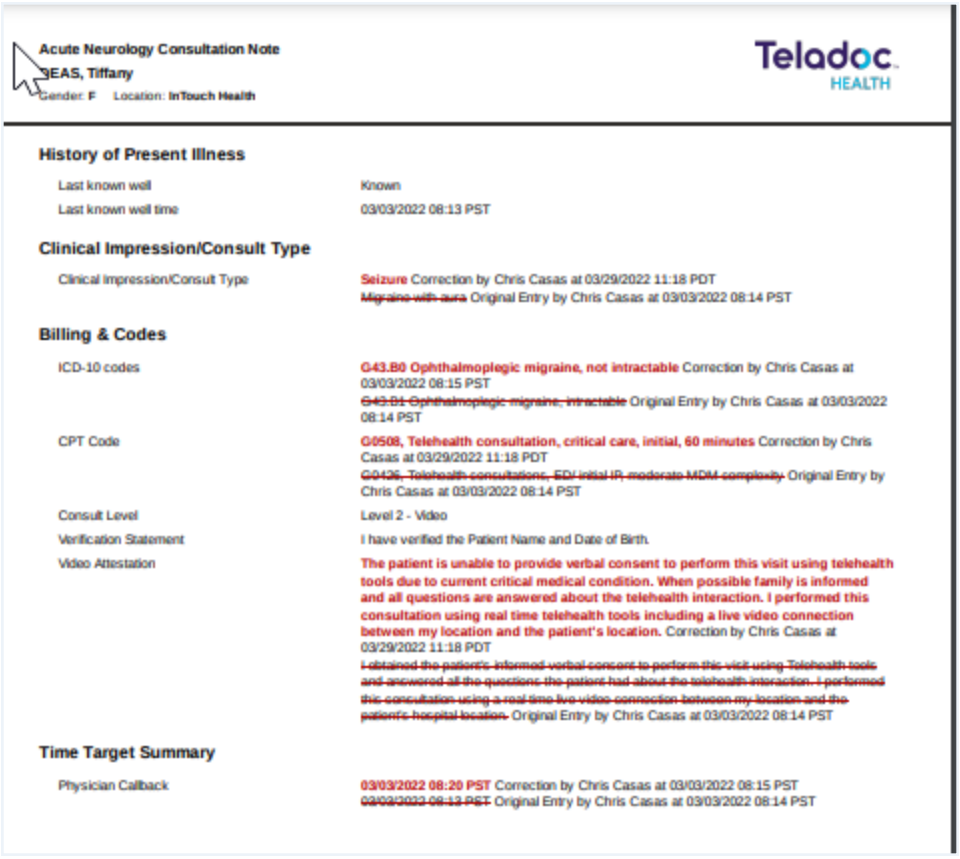
3. Click on the **Sign and Add Amendment** button when done.



4. Click on the **Yes** button for the message <Are you sure you want to delete this amendment?>.



5. Once electronically signed, changes to the amendment appear inline with the red strike through the previous data on the PDF.



Acute Neurology Consultation Note
SEAS, Tiffany
Gender: F Location: InTouch Health

Teladoc HEALTH

History of Present Illness

Last known well	Known
Last known well time	03/03/2022 08:13 PST

Clinical Impression/Consult Type

Clinical Impression/Consult Type	Seizure Correction by Chris Casas at 03/29/2022 11:18 PDT ~~Migraine with aura~~ Original Entry by Chris Casas at 03/03/2022 08:14 PST

Billing & Codes

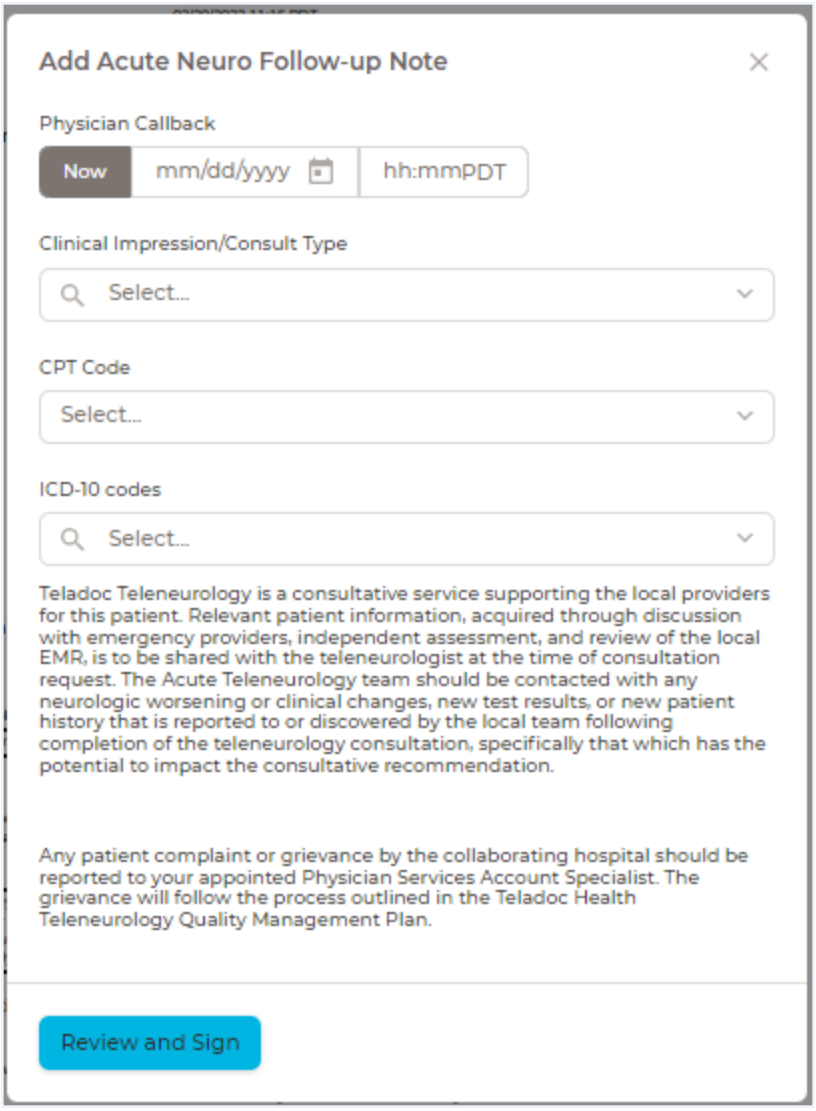
ICD-10 codes	G43.B0 Ophthalmoplegic migraine, not intractable Correction by Chris Casas at 03/03/2022 08:15 PST ~~G43.B1 Ophthalmoplegic migraine, intractable~~ Original Entry by Chris Casas at 03/03/2022 08:14 PST
CPT Code	G0508, Telehealth consultation, critical care, initial, 60 minutes Correction by Chris Casas at 03/29/2022 11:18 PDT ~~G0426, Telehealth consultations, ED/ initial IP, moderate MDM complexity~~ Original Entry by Chris Casas at 03/03/2022 08:14 PST
Consult Level	Level 2 - Video
Verification Statement	I have verified the Patient Name and Date of Birth.
Video Attestation	The patient is unable to provide verbal consent to perform this visit using telehealth tools due to current critical medical condition. When possible family is informed and all questions are answered about the telehealth interaction. I performed this consultation using real time telehealth tools including a live video connection between my location and the patient's location. Correction by Chris Casas at 03/29/2022 11:18 PDT ~~I obtained the patient's informed verbal consent to perform this visit using Telehealth tools and answered all the questions the patient had about the telehealth interaction. I performed this consultation using a real time live video connection between my location and the patient's hospital location.~~ Original Entry by Chris Casas at 03/03/2022 08:14 PST

Time Target Summary

Physician Callback	03/03/2022 08:20 PST Correction by Chris Casas at 03/03/2022 08:15 PST ~~03/03/2022 08:13 PST~~ Original Entry by Chris Casas at 03/03/2022 08:14 PST

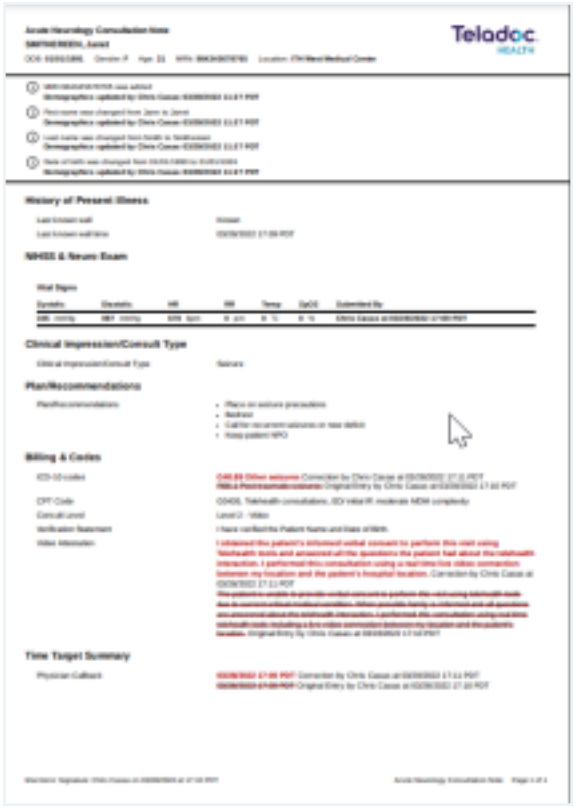
Add Addendums to Signed Notes

Practitioners can add up to 5 addendums, which is an additional PDF document. After an addendum is signed, a PDF document is created and automatically saved as a draft that can be accessed at a later time. Select **Review and Sign** when done.



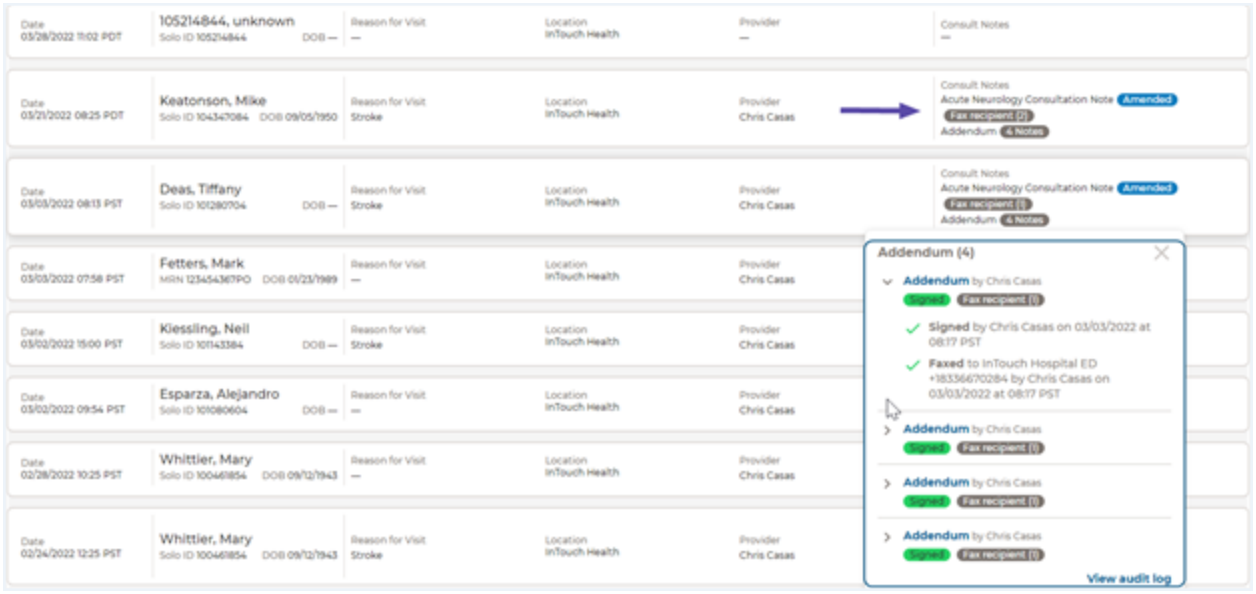
Demographic Updates

Users can update patient demographic information for both Amendments and Addendums once a consult note is signed.



Addendum Label

The name of the Addendum label can be configured to display throughout the application and in the headers of the consultation note.

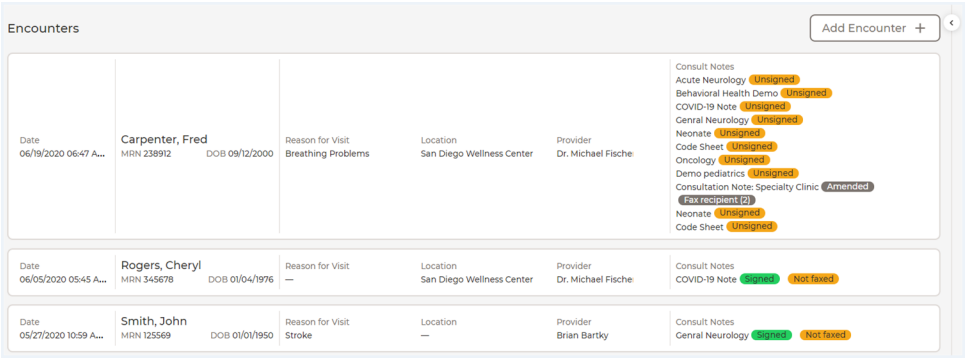


Audit Log

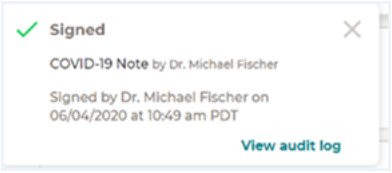
The encounter Audit Log captures amendments and addendum activity. The Audit log tracks history information, such as additions, changes, and removals; imaging events, such as search, study linked, study, unlinked, and study viewed; dosage information; and cancellation information.

1. Select **Encounters** from the left navigation panel to populate the middle panel with a list of your scheduled sessions.
2. Select an **Encounter** bar from the middle **Encounters** screen.

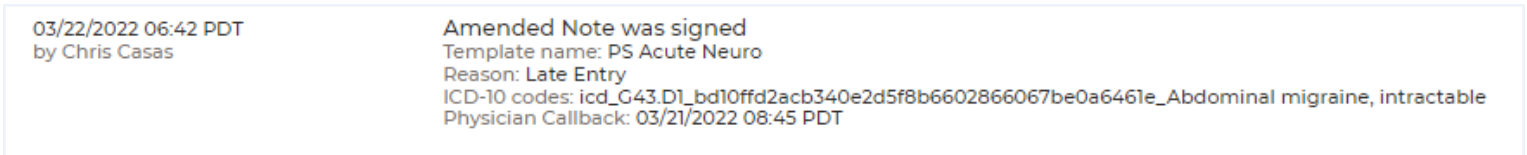
> **NOTE:** You must close the right and left panels for the Consult Note status to display.



3. Select a Consult Note from one of the session bars from the middle panel. A pop-up will open with the **audit log** button..



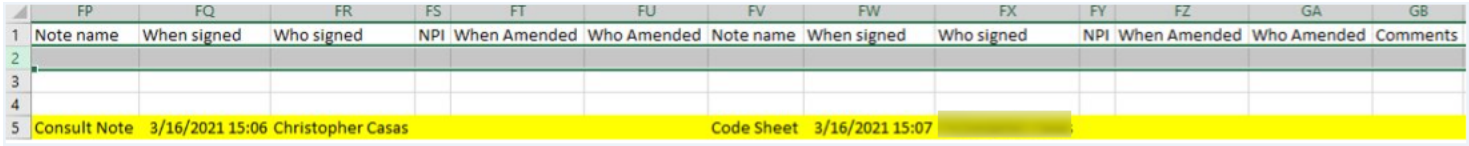
The Audit Log captures amendments and addendum activity.



Report Generator

A Report Generator is available from the left navigation panel for the role of Practitioner Admin. They have the power to generate easy to use reports with information, such as the date and time a session was created, the name of the consultation note, the patients' location and timezone (e.g., PST, EST-displayed as MM/DD/YYYY and hh:mm), and calculator information.

> **NOTE:** Users no longer need to select a template field prior to generating a report. Back Office users can generate reports in both workflows consumer and emergent.



	FP	FQ	FR	FS	FT	FU	FV	FW	FX	FY	FZ	GA	GB
1	Note name	When signed	Who signed	NPI	When Amended	Who Amended	Note name	When signed	Who signed	NPI	When Amended	Who Amended	Comments
2													
3													
4													
5	Consult Note	3/16/2021 15:06	Christopher Casas				Code Sheet	3/16/2021 15:07	[redacted]				

Reports display only the most recent entries for an encounter including patient and provider survey data, and an appointment status. Addendums labels numeration and addendum signer NPI data is displayed per encounter; following the addendum documentation data fields.

HIPAA

As a business associate, Teladoc Health is subject to compliance of the law under 45 CFR §164.308 (Administrative Safeguards), under 45 CFR §164.310 (Physical Safeguards), and under 45 CFR §164.312 (Technical Safeguards) to maintain and transmit protected health information in electronic form in connection with transactions performed by the customer (covered entity).

The policy of this organization is to ensure, to the greatest extent possible, that Protected Health Information (PHI) is not intentionally or unintentionally used or disclosed in violation of the HIPAA Privacy Rule or any other federal or state regulations governing confidentiality and privacy of health information.

There are a number of safeguards implemented into the telehealth system to ensure that the system complies with the latest HIPAA regulations. One of the key requirements is Teladoc Health's ongoing implementation and updating of its HIPAA security policies and procedures to ensure for the availability, security, and privacy of telehealth connections and ePHI (electronic protected health information). Teladoc Health maintains a policy to ensure workforce HIPAA compliance and training. Teladoc Health additionally maintains HIPAA security policies and procedures, a data destruction policy, and security incident response procedures.

Guidelines for Compliance

The telehealth system helps hospitals and medical professionals comply with HIPAA regulations. The tabs to the left describe some of the ways the telehealth system supports HIPAA compliance.

HIPAA requires all healthcare organizations to have policies and procedures, and the guidelines to the left. However, these may not cover all situations for a specific organization. For example, from time to time, automatic software upgrades may be downloaded which may contain new features. Teladoc Health will inform users of significant features added, their impact and how they may affect HIPAA policies, procedures, and safeguards.

Access to Provider Access

The computer using the Provider Access should be placed in a location that is only accessible to individuals who have authorized access to Protected Health Information (PHI). It is recommended that Provider Access be password protected via a Windows or iOS user account.

Only authorized users should have passwords, and users should safeguard passwords according to hospital policies and procedures. Passwords should be treated as highly confidential information. If you believe your password may have been compromised, it should be changed as soon as possible. Change your password by clicking on the "Forgot Password" link on the login screen of the Teladoc Health Provider Access.

The Auto Logout feature is set to log out of the Teladoc Health Provider Access when the system is inactive for 30 minutes. Also, all users should be trained to log out of Windows, iOS or the Virtual Private Network

(VPN), when away from the system for any period of time. This is important for security reasons, so that any person attempting access to the Provider Access will be required to enter a password for secure access.

Discussion and Display of PHI

From time to time a physician will likely engage in remote communications with patients and medical staff in which patient information (records, images and video) will be discussed or displayed. In general, the same care should be exercised as though the physician were physically present. For example:

- Use Head rotation to look around and see who else is nearby and might see or hear the sensitive information, and use appropriate discretion.
- Use the microphone mute button when conversing with someone alongside the Teladoc Health Provider Access to avoid the inadvertent conferencing of patient-related conversation.
- The Teladoc Health Provider Access screen should be positioned to point away from public areas, so as not to be visible to a passersby.

Images and Video

By default when saved, all captured images and video files are stored encrypted files; viewable only by the Provider Access user who captured them. All files are saved in the user's Teladoc Health Media Vault to provide added protection.

For convenience, these files may be saved in common formats, e.g., JPEG for still images. These files are no longer encrypted and therefore are viewable by any user who can access them. As such, there are a few recommended techniques for safeguarding PHI contained in these images and video:

- Ensure all personnel who have access to the Provider Access Software also have full permission to access stored images and videos under the hospital's policies and procedures;
- Make sure to store captured images and videos only on removable media (e.g., recordable CD-ROMs) which can be taken with each user or on secure network drives;
- Do not save any captured images and video clips. Use these images and video segments only while logged in for a virtual encounter.

Disclosure of PHI

If the physician plans to transmit or copy stored images or video to other individuals or organizations, e.g., to a healthcare operator, the physician needs to abide by standard HIPAA codes governing who may receive PHI and under what conditions. The hospital's HIPAA compliance officer should be consulted for details.

Contact Information

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24/7 Live Remote Technical Support & Live Chat

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