

**Teladoc Health™**  
**Solo™ Practice Admin Services**  
**User Guide**

P/N: MA-20166-002

© Copyright, 2021 Teladoc Health™



# Table of Contents

COPYRIGHTS .....	4
SAFETY .....	5
VIRTUAL CARE SYSTEM .....	6
SERVICES OVERVIEW .....	8
Intended Use .....	8
Indications for Use .....	8
SERVICES .....	9
Add Services .....	9
Service Toggles .....	11
Care Location .....	12
Welcome Page .....	12
Patient Authorization .....	12
Instructions .....	13
Demographics .....	13
Eligibility .....	14
Reasons .....	14
Smart Vitals .....	15
Scheduling .....	15
Insurance .....	15
Consent Forms .....	15
Medical Questionnaires .....	16
Telehealth .....	16
Survey .....	16
Thank You Page .....	17
Emergent .....	17
Hours of Operation .....	17

Reasons .....	19
Visit Window .....	19
Patient Notifications .....	20
Permission to Enter .....	21
Group Calling .....	21
EHR Mapping .....	22
Select a Service Page .....	23
Mandatory Fields for Encounters .....	23
Share Services .....	23
Only New Patients .....	24
Set Max Video Resolution .....	24
Save Services .....	25
Edit Services .....	25
Add Users .....	26
Remove Users .....	27
Archive Services .....	28
HIPAA PROCEDURES .....	30
Access to Provider Access .....	30
Discussion and Display of PHI .....	31
Images and Video .....	31
Disclosure of PHI .....	32
CONTACT INFORMATION .....	33

# Copyrights

© 2021 Teladoc Health. All rights reserved. This manual contains information including, but not limited to, instructions, descriptions, definitions, firmware and software, which are proprietary to Teladoc Health. Copyright information is protected under Title 17 of the United States Code. This information shall not be copied, modified, or used in any manner that violate any rights of Teladoc Health. We will strictly enforce all of our rights.

## Patent(s):

<http://www.intouchhealth.com/patents>

THIS SOFTWARE IS PROVIDED BY THE COPYRIGHT HOLDERS AND CONTRIBUTORS “AS IS” AND ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE FOUNDATION OR CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Microsoft® and Windows® are either registered trademarks or trademarks of Microsoft Corporation in the U.S. and/or other countries.

Last updated: April, 2021

# Safety

Trained professionals are the intended users. Users require clinical experience to review and interpret the patient data transmitted. The equipment is not suitable for use in locations where children are likely to be present.

## Notes, Cautions, and Warnings

Notes, Cautions, and Warnings provide the users with valuable information and alerts.

**NOTE:** This is a Note box. A Note is used to notify you of operational settings and standards.

**CAUTION:** This is a Caution box. A Caution is used to notify you to avoid mistakes.

**WARNING:** This is a Warning box. A Warning is used to notify you to avoid problems that could cause significant issues.

# 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.

The Teladoc Health Convenient Care products consist of the Teladoc Health's telehealth platform software stack on a multi-screen telehealth device. The client for the Teladoc Health Convenient Care product is responsible for managing the PC(s), information technology (IT) stack, and tier-one support.

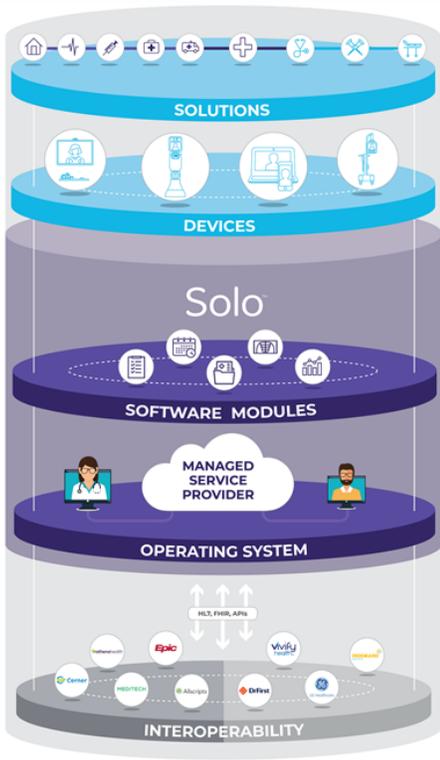
Enabling healthcare's only integrated virtual care platform, Teladoc Health powers virtual encounters at clinics, healthcare facilities, and patient homes for an integrated experience across a multitude of use cases. Built on our cloud-based network, Solo™ is the backbone to delivering care anywhere 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 HIT 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, health information technology (HIT) systems, devices, and third-party applications to enable telehealth solutions across patient journeys. Whether launching a scheduled visit from your EMR, 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.



## Services Overview

Each Waiting Room for Services can be configured to meet the specific needs of your health system's patient intake requirements. Only Practice Admins using can add, configure, edit, and add users. Once saved, Services cannot be deleted, only edited.

**NOTE:** See Teladoc Health's MA-20165 Practice Admin User Guide for more information. All names used are only used to provide instructional screen shots. They do not represent true persons.

### Intended Use

The Solo™ software platform is intended to provide high quality, HIPAA compliant audio and video sessions between a provider and a patient over the Teladoc Health Telehealth Network.

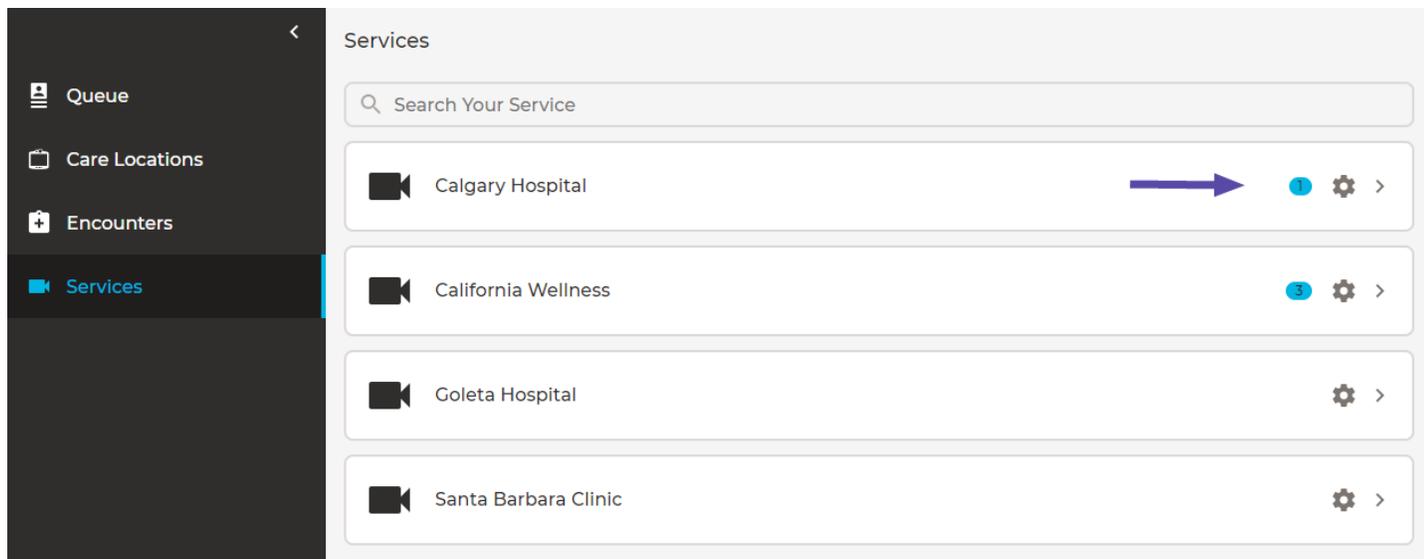
### Indications for Use

Teladoc Health's Solo platform is HIPAA compliant and can be used for audio and video telecommunications in a variety of clinical environments.

# Services

A Practice Admin can add, edit, and configure Services for different patient journeys, questionnaires, data capture, and surveys.

1. Select **Teladoc Health's logo** from the upper, left section of the window.
2. Select **Services** from the left navigation panel.
3. The middle panel will populate with a list of Services.
4. The blue circle provides the number of patients for each Service.



## Add Services

1. From the left navigation panel, select the plus sign icon next to **Add Services**.



2. Enter a **Service Name**, **Service Line**, and **Service Type**.

Create Service

Service Name  
Service Waiting Room Save

Service Line  
Select a Service Line ▼  
This field is required

Service Type  
Select a Service Type ▼  
This field is required

**Patient Journey 1**

Care Locations

Welcome Page

Patient Authorization

Instructions

Demographics

Demographics Extra

3. Use the drop down menu for the Service Line and Type.

**NOTE:** You must first select the Service Line before the Type becomes active.



4. Enable the toggle switches by holding the mouse down and moving them to the right.
5. When enabled, the color of the toggle switch will turn green.



6. Scroll down to **Patient Journey** to configure the patient's InTake process.

## Service Toggles

Toggles are broken up into **Patient Journey** and **General Settings**.

Toggle Categories	Toggles
<b>Patient Journeys</b>	<ul style="list-style-type: none"> <li>• <a href="#">Care Locations</a></li> <li>• <a href="#">Welcome Page</a></li> <li>• <a href="#">Patient Authorization</a></li> <li>• <a href="#">Instructions</a></li> <li>• <a href="#">Demographics</a></li> <li>• <a href="#">Demographics Extra</a></li> <li>• <a href="#">Eligibility</a></li> <li>• <a href="#">Reasons for a Visit</a></li> <li>• <a href="#">Smart Vitals</a></li> <li>• <a href="#">Scheduling</a></li> <li>• <a href="#">Insurance</a></li> <li>• <a href="#">Consent Forms</a></li> <li>• <a href="#">Medical Questionnaires</a></li> <li>• <a href="#">Telehealth</a></li> </ul>

Toggle Categories	Toggles
	<ul style="list-style-type: none"> <li>• <a href="#">Survey</a></li> <li>• <a href="#">Thank you</a></li> <li>• <a href="#">Emergent</a></li> </ul>
<b>General Settings</b>	<ul style="list-style-type: none"> <li>• <a href="#">Hours of Operation</a></li> <li>• <a href="#">Reasons</a></li> <li>• <a href="#">Visit Window</a></li> <li>• <a href="#">Patient Notifications</a></li> <li>• <a href="#">Permissions to Enter</a></li> <li>• <a href="#">Group Calling</a></li> <li>• <a href="#">EHR Mapping</a></li> <li>• <a href="#">Select a Service Page</a></li> <li>• <a href="#">Share Services</a></li> <li>• <a href="#">Mandatory Fields Encounter</a></li> <li>• <a href="#">Allow Only New Patients</a></li> <li>• <a href="#">Set Max Video Resollution</a></li> </ul>

## Care Location

The **Care Location** toggle must be enabled for Services.

1. Click on the **Care Location** toggle to enable a selection of Care Locations
2. As you type, a list of available **Care Locations** will populate the dropdown menu.
3. Select a **Care Location** to enable the toggle.

## Welcome Page

The **Welcome Page** toggle enables patients to view virtual encounters after they check-in. This is a default toggle and will always be on.

## Patient Authorization

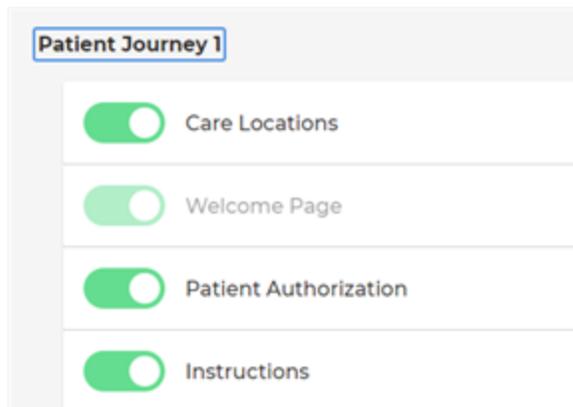
The **Patient Authorization** toggle enables on-demand encounters when a patient is not invited.

1. Select the **Patient Authorization** toggle to enable options for patient authorization codes.
2. Select the radio button for **By email** or **By member ID** to enable the toggle.

## Instructions

The **Instructions** toggle enable a configurable page to allow the practice to present instructions or information to patients at the beginning of the intake process for any reason. Generally, they are instructions about how to complete the intake process or what to do if they are experiencing an emergency.

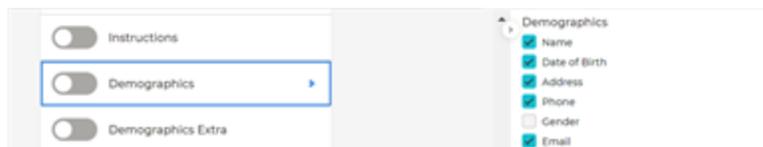
1. Click on the **Instructions** toggle to enable it



## Demographics

The **Demographics** toggle enables information to be collected during the check-in process. Choose one or more types.

1. Select **Demographics** to enable a list of demographic information.
2. Click on each radio button for each piece of demographic information your practice will require or select **Select All**.



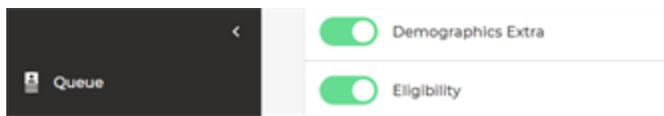
- When done, select and slide the **Demographics** toggle to the right.
- Select the **Demographics Extra** toggle to use electronic medical record (EMR)s.

## Eligibility

The **Eligibility** toggle is a specific feature developed for clients to enable eligibility requirements for the Teladoc Health Intake module.

**NOTE:** Contact your Teladoc Health representative for more information.

- Click on the **Eligibility** toggle to enable it.



## Reasons

The **Reasons** toggle enables up to 10 reasons for a patient's visit, including the option **Other**.

- Type your practice's reasons.
- As you type, matching results will populate the dropdown.

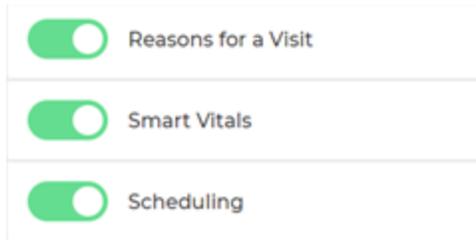


- Once done, click and slide the **Reasons** toggle to the right.

## Smart Vitals

The **Smart Vitals** toggle enables collection of vital from patients using a variety of approved peripheral devices.

1. Click on the **Smart Vitals** toggle to enable it.



## Scheduling

The **Scheduling** toggle enables patients the ability to select their appointment time during the intake process.

## Insurance

The **Insurance** toggle enables patients to enter their insurance plan and member ID during the InTake process.

**NOTE:** This module is only available if your organization purchased Teladoc Health's InTake module.

## Consent Forms

The **Consent forms** toggle enables patients to receive specific forms used during the InTake process. These questionnaires are customizable. If you need other forms, contact your telehealth administrator.

1. Select the **Consent Forms** toggle to enable a selection of forms to choose from..

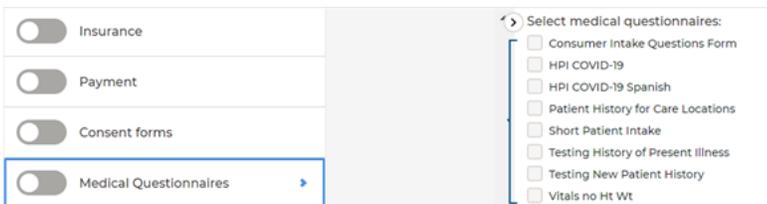


2. Select a form by clicking on the checkbox next to each form.
3. When done, the **Consent forms** toggle will be enabled.

## Medical Questionnaires

The **Medical Questionnaires** toggle enables a variety of available medical questionnaires for your practice. These questionnaires are customizable.

1. Select the **Medical Questionnaire** toggle to enable a selection of medical questionnaires.
2. Select one or more of them by clicking on the checkbox next to each medical questionnaire.



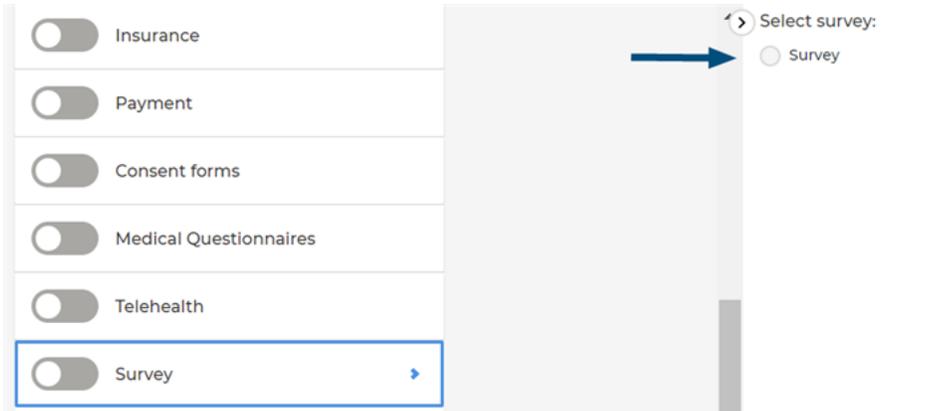
## Telehealth

The **Telehealth** toggle enables the ability for a patient and Practitioner to have a virtual encounter.

## Survey

The **Survey** toggle enables a variety of surveys to help patients evaluate their Practitioner. They may opt out. These questionnaires are customizable. If you need other forms, contact your telehealth administrator.

1. Click on the **Survey** toggle to enable a selection of surveys.



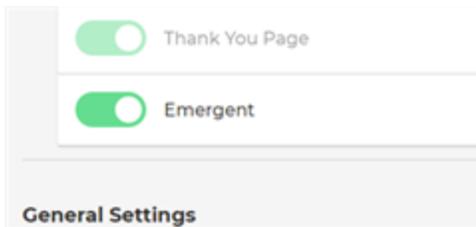
2. Select the default survey box to enable the toggle.

## Thank You Page

By default a **Thank You Page** toggle enables patients to view when a virtual encounter has ended.

## Emergent

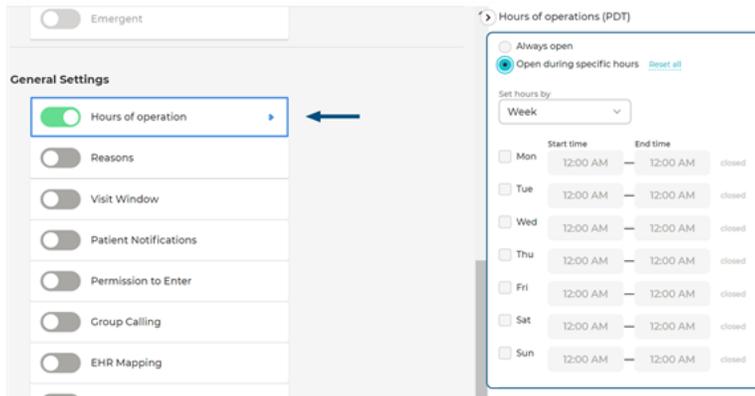
The **Emergent** toggle enables the emergent care workflow.



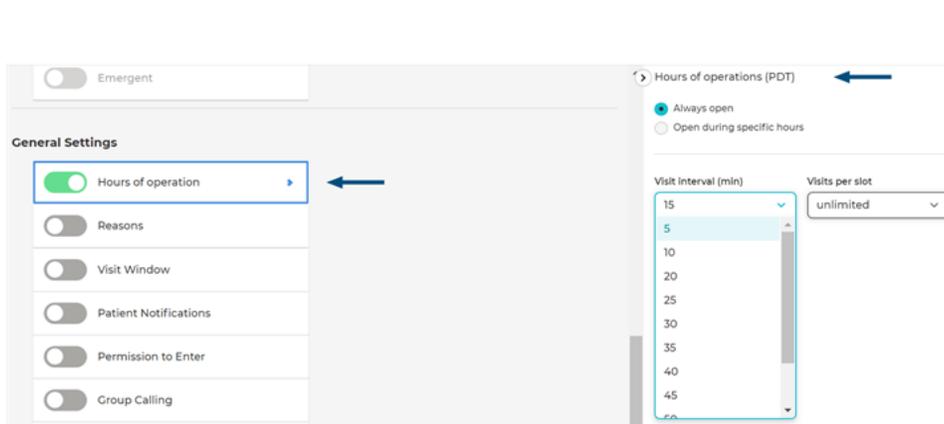
## Hours of Operation

The **Hours of Operation** toggle enables hours to be configured for your Services.

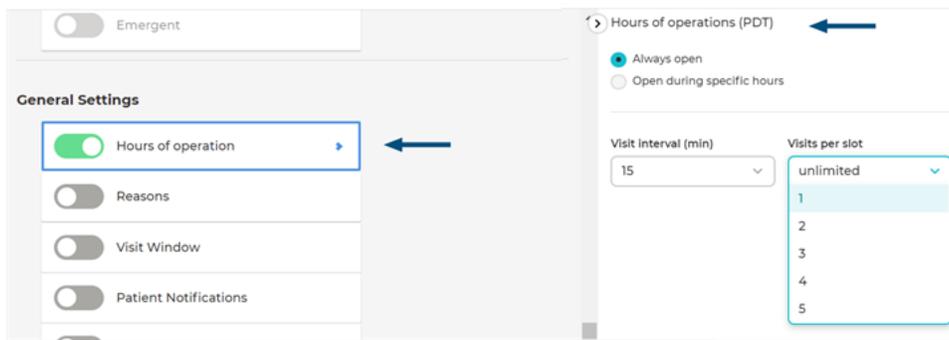
1. Click on the **Hours of Operation** toggle to enable a selection.
2. Click on the radio button to choose either **Always open** or **Open during specific hours**.  
By default, hours of operation are configured on a weekly basis.
3. To configure hours of operation for specific dates, select
4. **Individual Dates** from the dropdown.



5. Use the dropdown menu to configure the length of time for each virtual encounter.



6. Use the **Visits per slot** dropdown to configure the number of visits per slot for your practice.



## Reasons

The **Reasons** toggle enables up to 10 reasons for a patient's visit, including the option **Other**.

1. Type your practice's reasons.
2. As you type, matching results will populate the dropdown.



3. Once done, click and slide the **Reasons** toggle to the right.

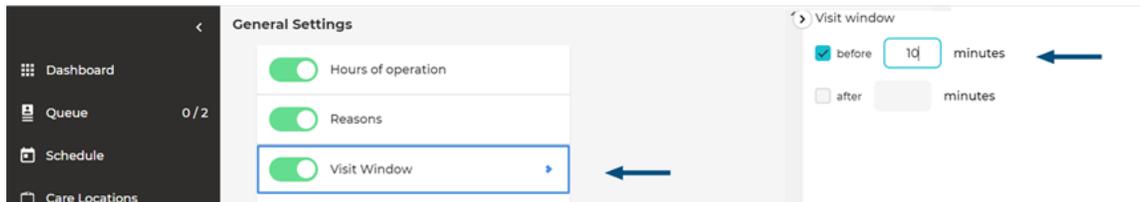
## Visit Window

The **Visit Window** toggle sets the time a patient can enter the virtual waiting room. It also defines how long after the designated appointment time the patient can use the appointment link.

1. Select the **Visit Window** toggle.



2. When done, the **Visit Window** toggle will be enabled.



## Patient Notifications

The **Patient Notifications** toggle enables a variety of notifications configured for Practitioners.

1. Select **At scheduling**.
2. Select **Notify Patients when Provider Joins** the Call box.



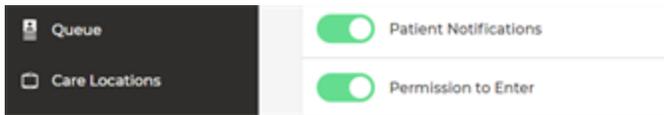
3. Select to **Add notifications**
4. Enter the interval in the text box.
5. Select **minute**, **hour**, or **day**.

- Repeat steps 2 through 4 to add additional notifications.
- Select the method of notifications; email or SMS



### Permission to Enter

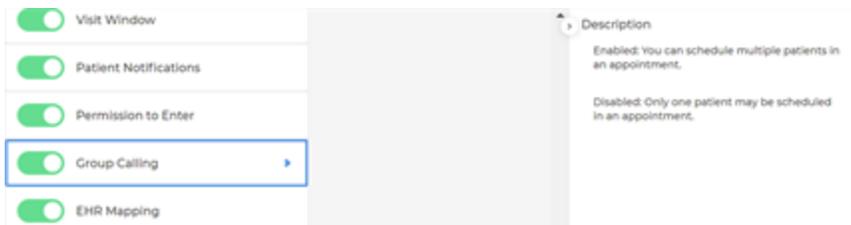
The **Permission to Enter** toggle enables practitioners to require participants to request permission before entering an encounter.



### Group Calling

The **Group Calling** toggle enables Practitioners with the ability to invite and remove Practitioners and patients from a virtual encounter. Users can schedule an encounter with more than 2 participants.

**TIP:** This setting optimizes the patient's video quality and experience.

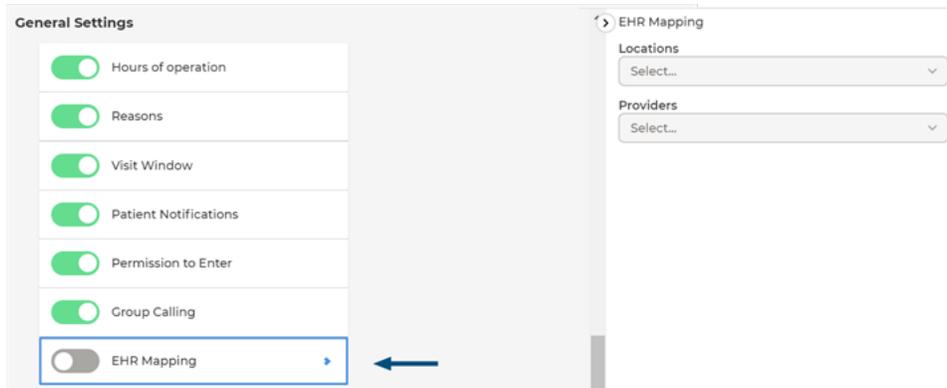


## EHR Mapping

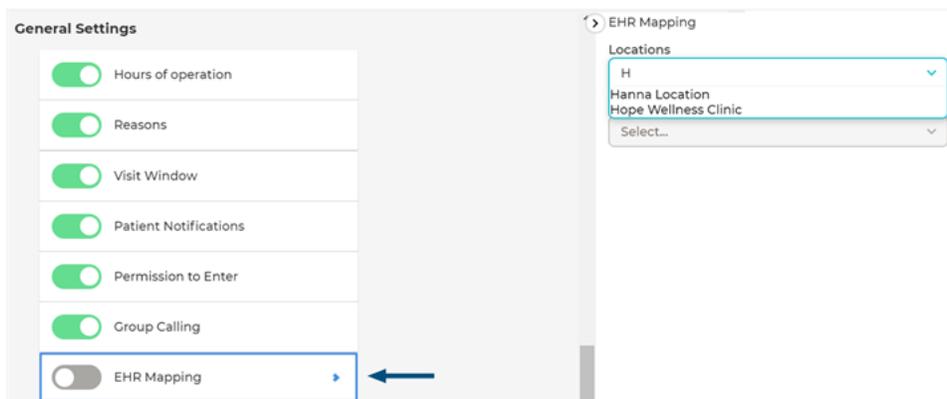
The **Electronic Health Record Mapping** toggle enables EHR mapping.

**NOTE:** Contact your Teladoc Health administrator before enabling this.

1. Click on the **EHR Mapping** toggle to enable a selection of Locations and Providers.



2. Type in the **Location** for your practice.
3. A dropdown menu will open as you type to provide you with matching options.

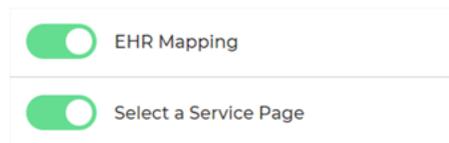


4. Add **Providers** to the list by typing them into the field.
5. The **EHR Mapping** toggle will automatically be enabled when you fill in these fields.

## Select a Service Page

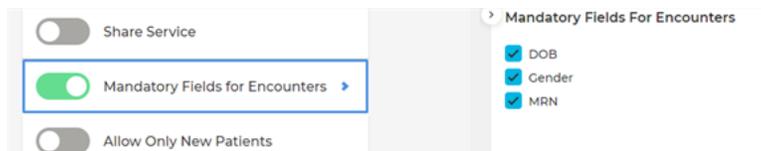
The **Select a Service** toggle enables a service page to be customized. The selection of service pages must be configured at the practice level.

**NOTE:** This toggle can only be enabled if your organization purchased Teladoc Health's InTake Module.



## Mandatory Fields for Encounters

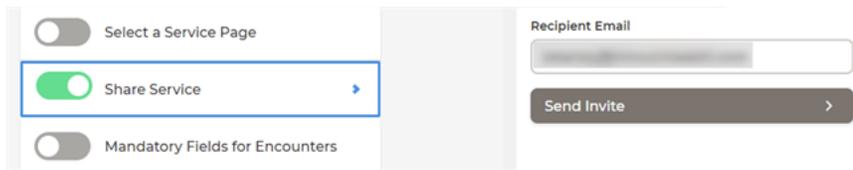
The **Mandatory Fields for Encounters** toggle enables the Practice Admin to configure the date of birth (DOB), Gender, and MRN fields to be mandatory.



## Share Services

**Share Services** toggle enables users in another practice to have access to Services in another practice.

1. Select the **Share Services** toggle.



2. Type in the **Recipient email** .
3. Select an option from the dropdown menu that opens as you type or add a **Recipient email** to the list by typing it into the field.
4. When done, select **Send Invite**.

## Only New Patients

The **Only New Patient** toggle ensures that patients will be created as new.

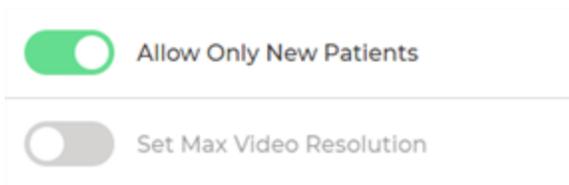
**NOTE:** The **Care Locations** and **Demographics** toggles must be enabled. The patient search page will not be displayed when both are enabled.

**CAUTION:** Users of emergent services cannot search for existing patients.



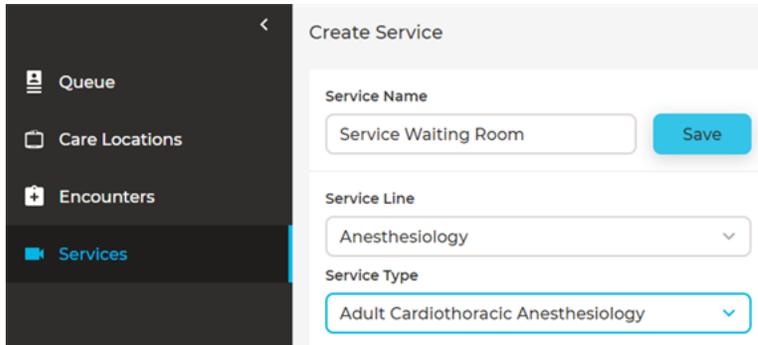
## Set Max Video Resolution

The **Set Max Video Resolution** toggle enables maximum video resolution.



## Save Services

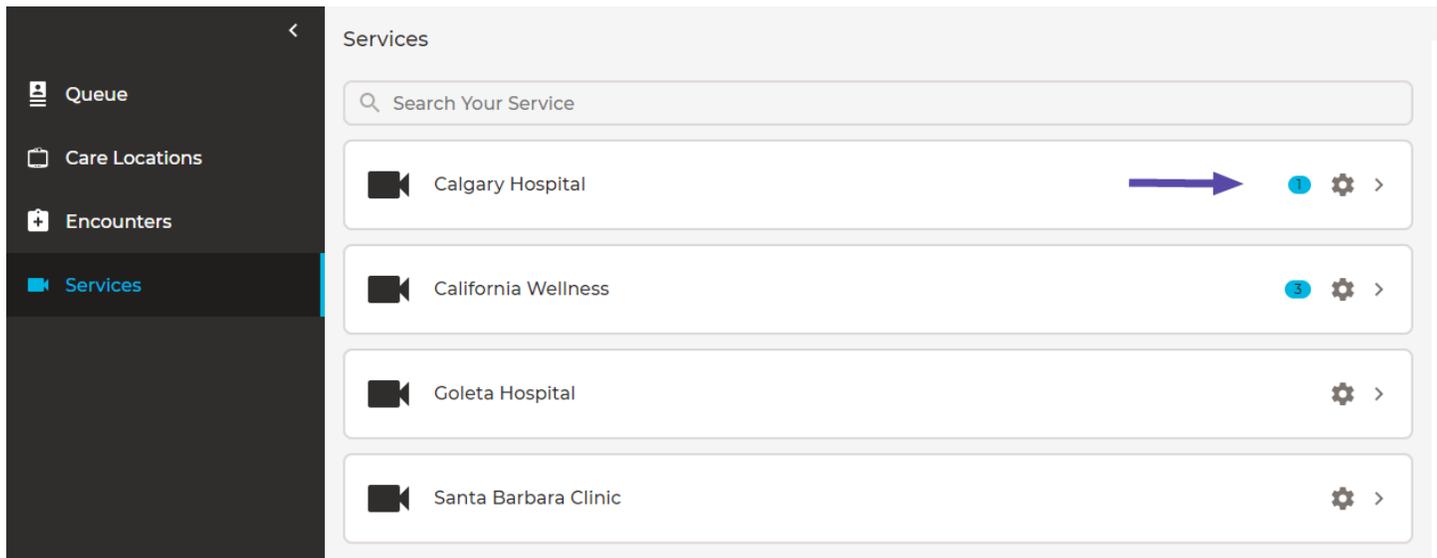
Once you configure Services, scroll to the top and select **Save**. Services will be created immediately.



The screenshot shows the 'Create Service' form. On the left is a dark sidebar with navigation options: Queue, Care Locations, Encounters, and Services (highlighted in blue). The main form area has a title 'Create Service' and a back arrow. It contains three input fields: 'Service Name' with the text 'Service Waiting Room' and a blue 'Save' button; 'Service Line' with a dropdown menu showing 'Anesthesiology'; and 'Service Type' with a dropdown menu showing 'Adult Cardiothoracic Anesthesiology'.

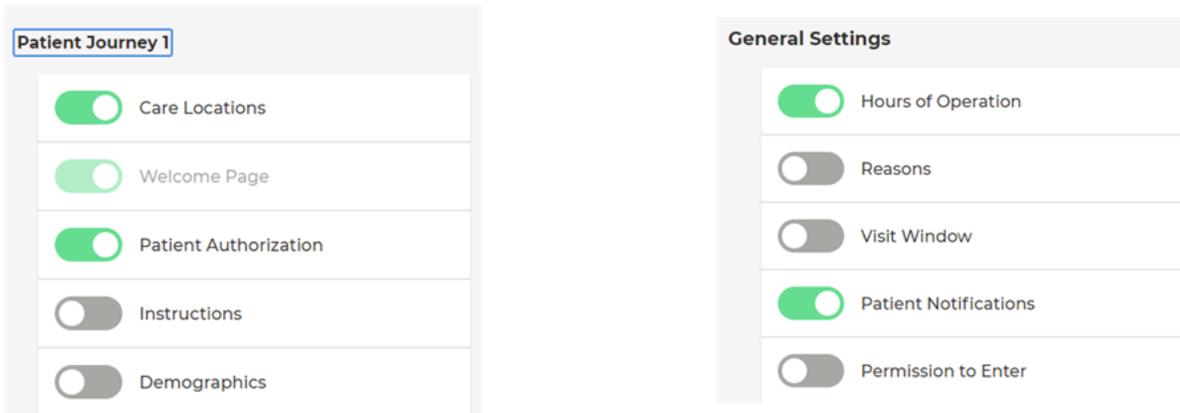
## Edit Services

1. Select the gear icon from the **Services** bar in the middle panel.

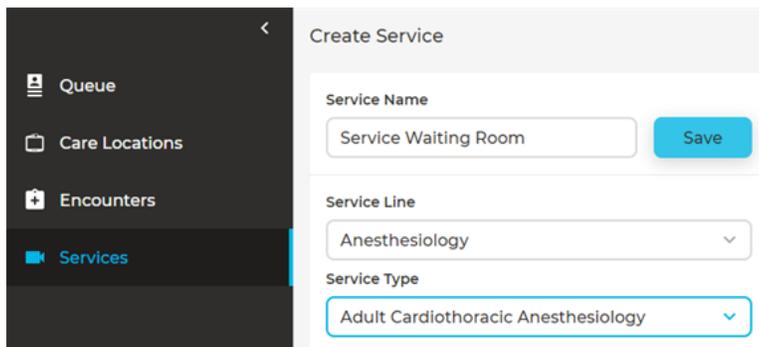


The screenshot shows the 'Services' list. On the left is the same dark sidebar as in the previous image. The main panel has a title 'Services' and a search bar labeled 'Search Your Service'. Below the search bar is a list of four service entries, each with a camera icon, a name, and a set of icons (a blue circle with a number, a gear icon, and a chevron icon). A blue arrow points to the gear icon for 'Calgary Hospital'. The entries are: 'Calgary Hospital' (1), 'California Wellness' (5), 'Goleta Hospital', and 'Santa Barbara Clinic'.

2. Or double click on the Services bar in the middle panel to open the **Services Info** panel on the right to access the gear icon.
3. Modify the feature toggles under **Patient Journey** and **General Settings**.



4. Scroll to the top of the window and select **Save**.



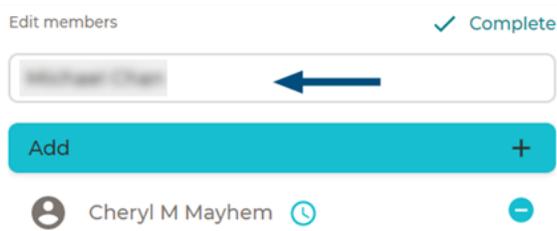
5. Your changes will take effect immediately.

## Add Users

Practitioner and other medical personnel must be added as members for access.

**NOTE:** Select **Complete** at any time to exit edit mode.

1. Select **Services** from the left navigation panel.
2. Select Services from the middle panel.
3. Services information will appear in the right panel
4. Select the pencil icon next to **Edit**.
5. Search for the new member in the **Search new member** box or in the text box, type the name of your user in **Members**. Matching names will appear as you type.
6. Select your user and **Add**.



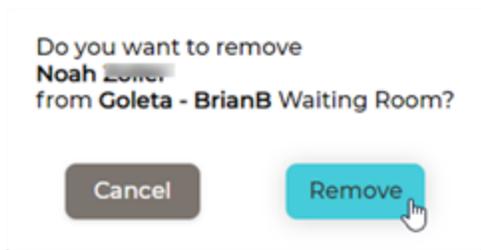
7. The new user will be added immediately.

## Remove Users

1. Click the desired **Services** from the left navigation bar.
2. Services information will appear in the Patient Panel.
3. Select **Edit** from the Patient Panel.

**NOTE:** You can click **Complete** at any time to exit edit mode.

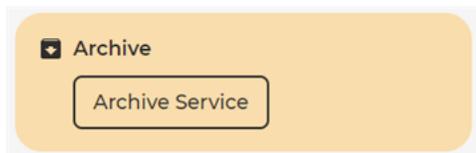
4. Click the **X** next to the name of the user to remove from a Services.
5. Select **Remove**.



## Archive Services

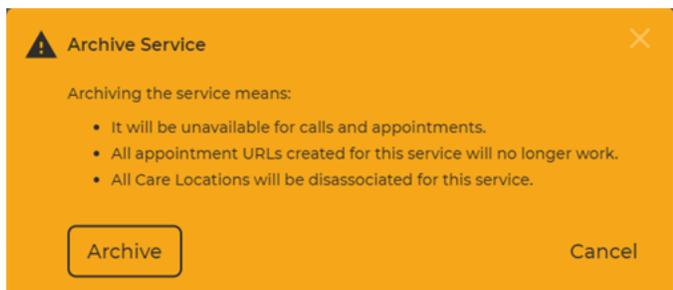
Practice Admins can archive Services without outstanding appointments or active calls.

1. Select **Archive Service** from the orange dialog box.

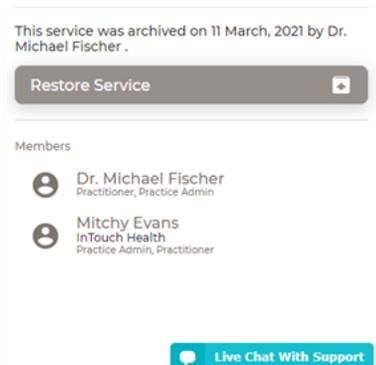


2. Select to **Archive** from the archival dialog box that opens.

**NOTE:** Placing a service in an archived state will make it unavailable for calls and appointments.



3. When done, Select **Confirm** or select to **Cancel**.
4. The right panel will reflect the date Services were archived and by whom.
5. Select **Restore Service** to access an archived service at any time in the future.



# HIPAA Procedures

As a business associate, Teladoc Health is subject to the compliance of the law under §164.308 (Administrative Safeguards), under §164.310 (Physical Safeguards), and under §164.312 (Technical Safeguards) in that we maintain and transmit 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 to violate 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 that ensure that it 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 allows hospitals and medical professionals to remain in compliance with HIPAA privacy regulations. Teladoc Health is providing the following information to assist with HIPAA privacy regulations as they pertain to the telehealth system.

HIPAA requires all healthcare organizations to have policies and procedures, and the guidelines below may not cover all situations as they apply to a specific organization. Further, from time to time, automatic software upgrades may be downloaded which may contain new features. Teladoc Health will inform users of significant features as they are added, and the impact of these features and how they may affect HIPAA policies, procedures, and safeguards should be considered.

## 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 passersby.

## Images and Video

By default when saved, all captured images and video files are stored as encrypted files viewable only by the Provider Access user who captured them. All files whether encrypted or not should also be saved in the user's Teladoc Health Media Vault (folder) 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 to disk 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

## 24/7 Live Technical Support

[+1 \(877\) 484-9119](tel:+18774849119)

+1 (877) 484-9119

## 24/7 Live Remote Technical Support & Live Chat

<https://intouchhealth.com/contact-us/>



## Email Support

[ITHSupport@intouchhealth.com](mailto:ITHSupport@intouchhealth.com)



## Website

[www.InTouchHealth.com](http://www.InTouchHealth.com)



## Teladoc Health User Manuals

<https://intouchhealth.com/manuals/>

Please contact your Teladoc Health Account Representative for product User Manuals



## Sales & Product Demos

(805) 562-8686

 InTouch Technologies, Inc.

7402 Hollister Avenue Goleta, CA 93117

Ph: +1.805.562.8686 • Fax: +1.805.562.8663

[www.intouchhealth.com](http://www.intouchhealth.com)

©2021 Teladoc Health, Inc.

InTouch Health and InTouch Technologies are now a Teladoc Health company, and InTouch Health is a registered trademark of Teladoc Health.