

Teladoc Health™
Solo™
Practitioner-Scheduler
User Guide

P/N: MA-20171-002

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Patent(s):

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

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Last updated: July, 2021

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.

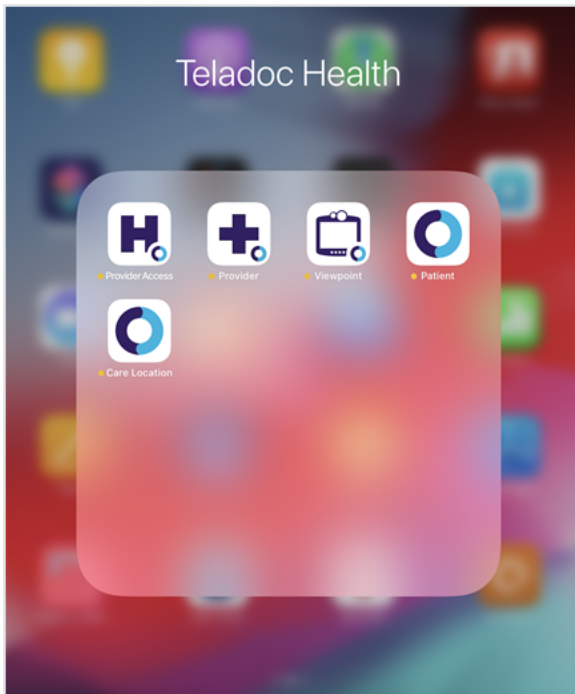
Within a single platform, users are in control of their virtual experience with a configurable dashboard to meet the unique set of preferences for every user. Layer Solo into your existing health information technology system investments, or use it as the foundation to close your workflow gaps with our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

Provider Overview

This guide is for the Practitioner, Scheduler, Nurse, and other medical professionals who use Solo™ by Teladoc Health™. The iOS Provider App provides the same functionality as the browser-based Solo platform.

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.

Requirements

Teladoc Health's Solo software is designed to run on a broad range of devices under a variety of network conditions for Windows, Mac, iOS, and Android

NOTE: Refer to MB-15513 Network Configuration for more information. For assistance, contact your Teladoc Health representative.

Browser

NOTE: Browsers more than a year old are not supported. Windows 7 is not supported as of 2021.

Browser	Version	OS
Chrome	76.0 and later	Mac OS 10.14 and later Windows 7 and 10 Android 7.0 and later
Safari	12.1 and later	Mac OS 10.14 and later iOS 12.1 and later
Firefox	68.0 and later	Windows 7 and 10
Edge	Currently not supported. Edge will be supported on Windows 10 in 2021.	N/A
IE	Not supported	N/A

iOS

For more information about the Provider App, refer to MA-20193 Provider App User Guide.

iPad

The following iPads are supported:

- iPad – 4th Generation and later
- iPad Air – iPad Air 2 and later

- iPad Pro – 2nd Generation and later
- iPad Mini – 3rd Generation and later

iPhone

The iPhone 5 and later models are supported.

Desktop

Windows

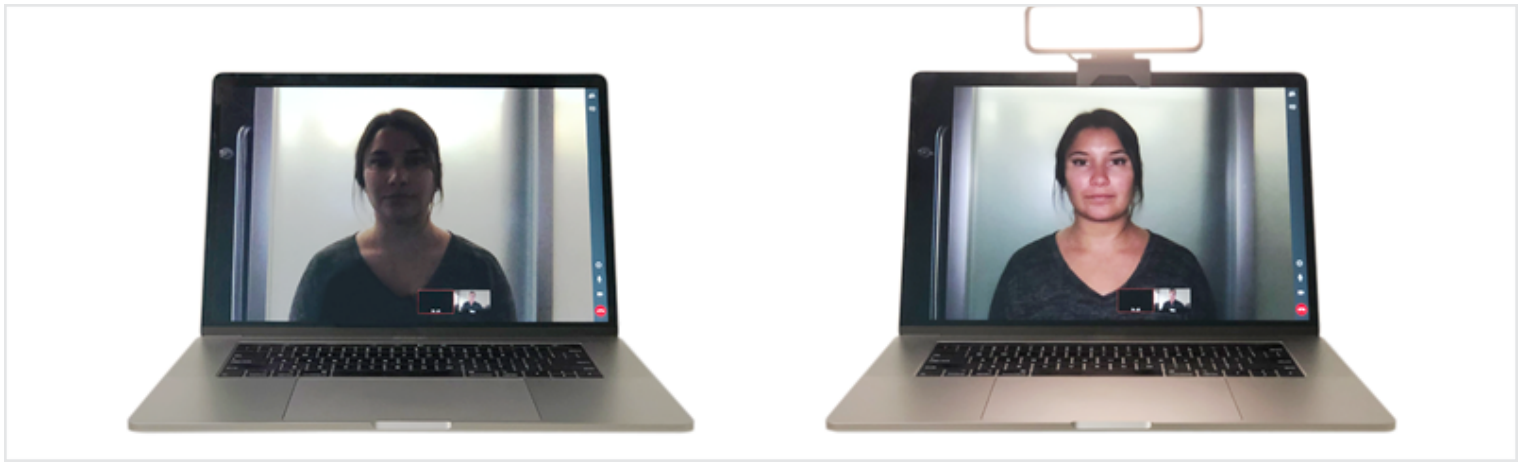
Hardware	Minimum Required
Processor	1.9 Ghz Intel dual processor (Second Generation)
RAM	6 GB
Microphone	Required
Speakers or head-sets	Required

Mac

Macs running Mac OS 10.13 and later are supported.

Lighting

During your Encounter, ensure good lighting so your provider can see you clearly. The following shows good lighting on the right and poor lighting on the left.



Without Good Lighting

With Good Lighting

Peripherals

Headsets

- Logitech headsets
- Sennheiser headsets
- Apple AirPods
- Apple EarPods

Monitors

You should use a monitor that lets you clearly see your provider during your Encounter.

Webcams

Teladoc Health Patient App supports most webcams. For devices without webcams, Teladoc Health recommends using Logitech cameras.

Customer Notification Systems

The following customer notification systems are supported:

- Homegrown systems
- Spok
- TigerConnect

On-Call Scheduling Systems

The following customer on-call systems are supported:

- On-Call
- Amion
- Qgenda

Getting Started

Install and verify the iOS Provider App.

1. Obtain an Apple ID to download from <https://appleid.apple.com>
2. Acquire the Teladoc Health Provider App from the Apple Store.
3. Use <https://apps.apple.com/us/app/intouch-provider/id1416079653> or search.
4. Select the Teladoc Health Provider App.
5. Select **GET** to download it.



6. Select the Teladoc Health Provider App.



The number in the top right corner of the screen represents how many updates are available. Visit the Apple App Store to download updates.

Verify Network, Camera, Microphone

Give permission to use your camera and microphone. Make sure your iPad or iPhone camera and microphone have been enabled.


Settings


Provider


 HHS Provider

 iMovie

 Keynote

 Numbers

 Okta Verify

 OneDrive

 Outlook


 PACSViewer


 Pages


 Patient


 Protect

 **Provider**

 Provider Access

 Quantum

 Slack

 TDH Providers

ALLOW PROVIDER TO ACCESS

 Local Network

 Microphone

 Camera

 Siri & Search >

 Notifications >

PROVIDER SETTINGS

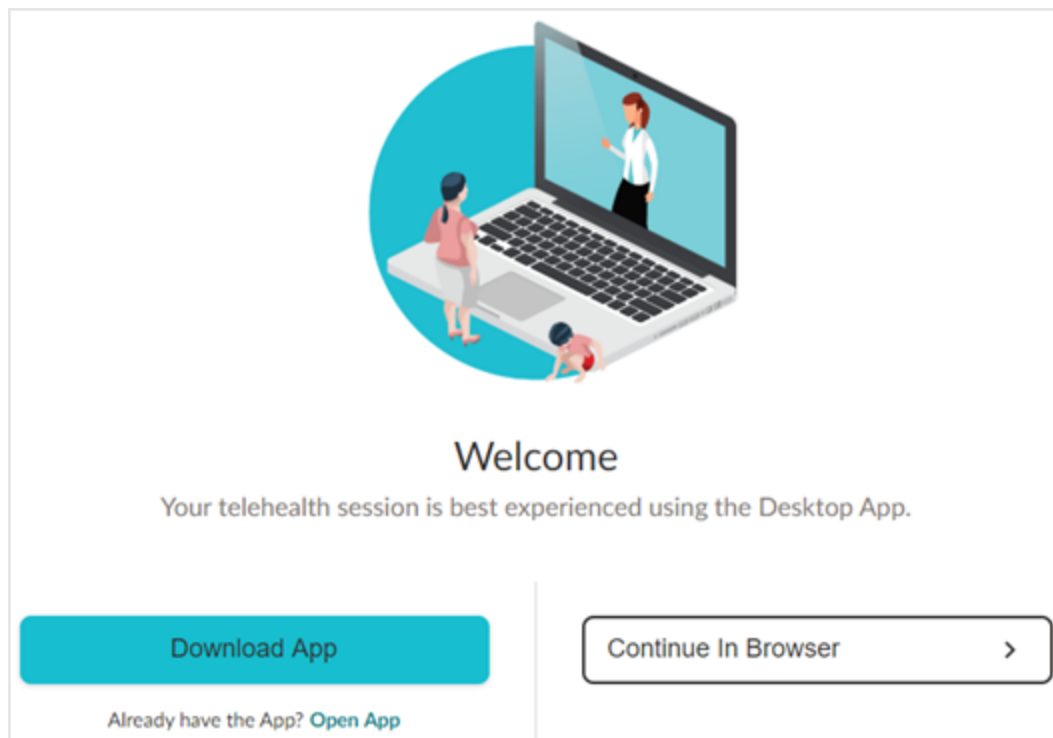
VERSIONS

App Version 42.0.0 (51)

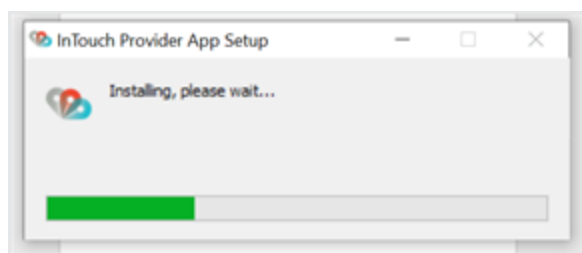
SDK Version 4.4.0 (37)

Install Desktop Provider App

1. Click the link in the email or text message from your provider.



2. Click **Download App**. The file will be downloaded.
3. Double click on the installed executable file (exe)
4. An install dialog will appear to download the Teladoc Health's Provider App.

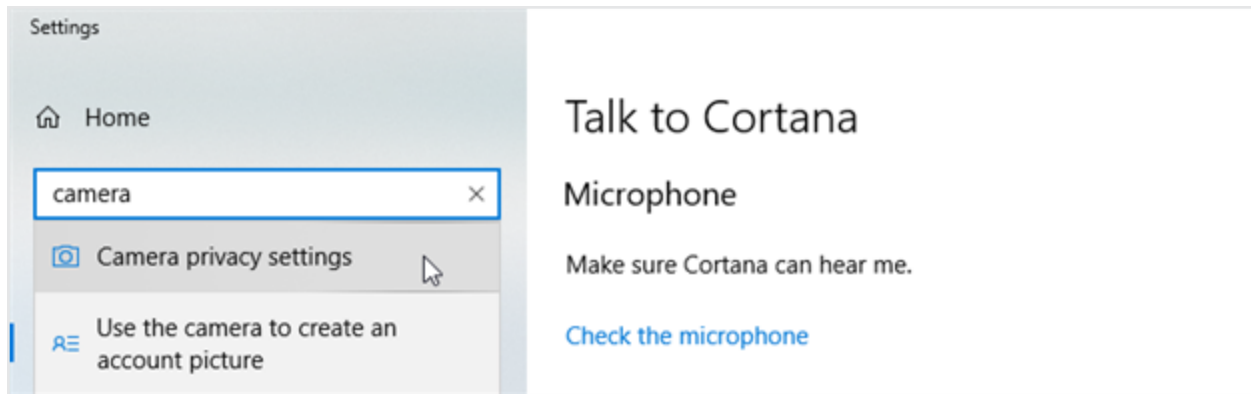


5. Once done, log in.

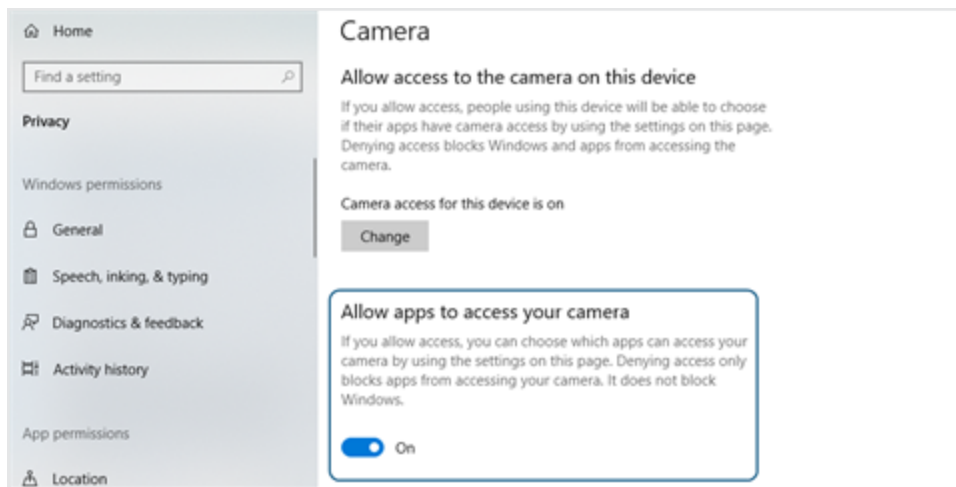
Verify Windows Camera and Audio

Camera

1. Click the Windows icon and select **Settings**.
2. Enter **camera** in the search window.



3. Click **Camera privacy settings**.



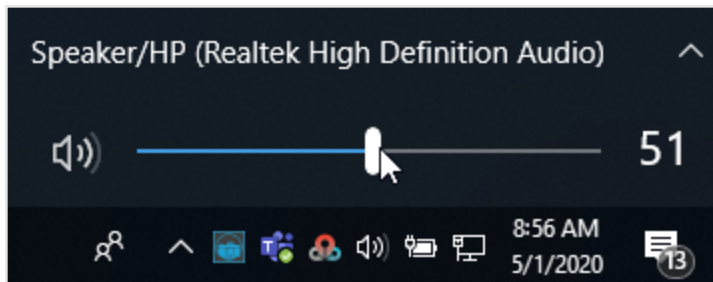
4. Make sure **Allow apps to access your camera** is set to **On**.

Audio

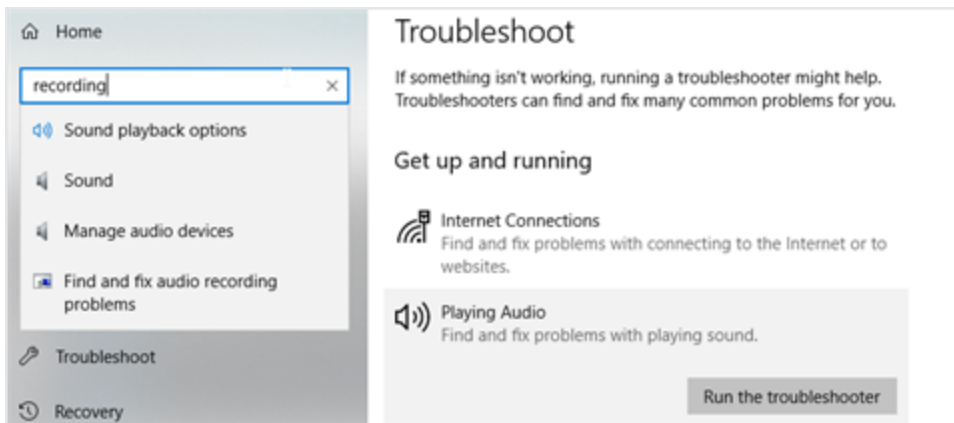
1. Click the speaker icon in the Task Bar.



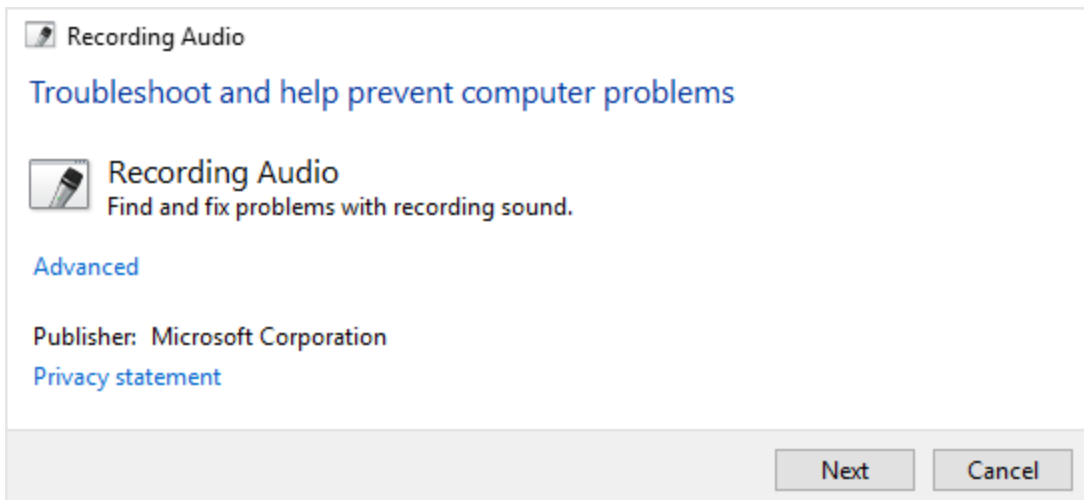
2. Adjust the slider so that the volume is loud enough for you to hear.



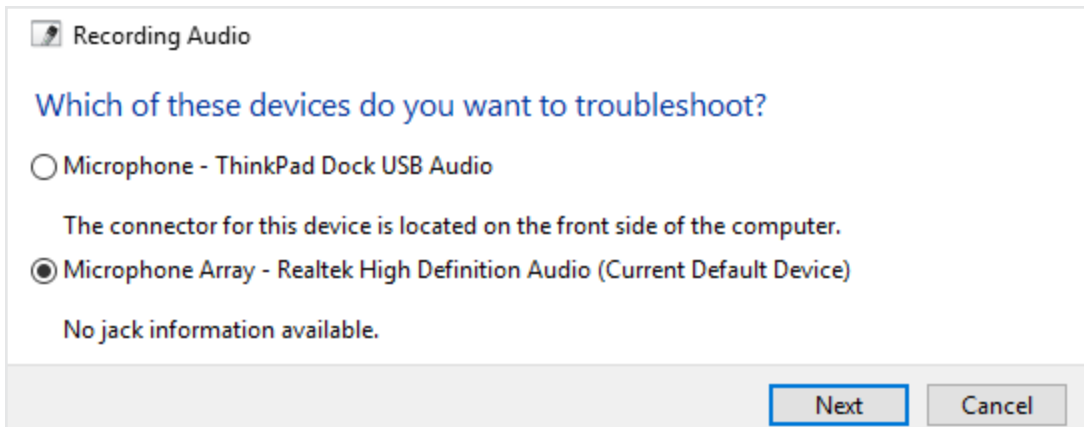
3. Click the Windows icon and select **Settings**.
4. Enter **recording** in the search window.



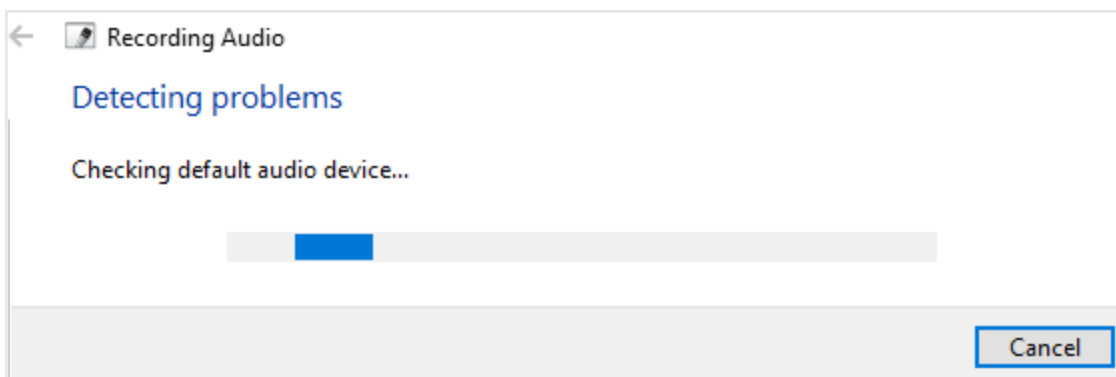
5. Select **Find and fix audio recording problems**.



6. Click **Next**.



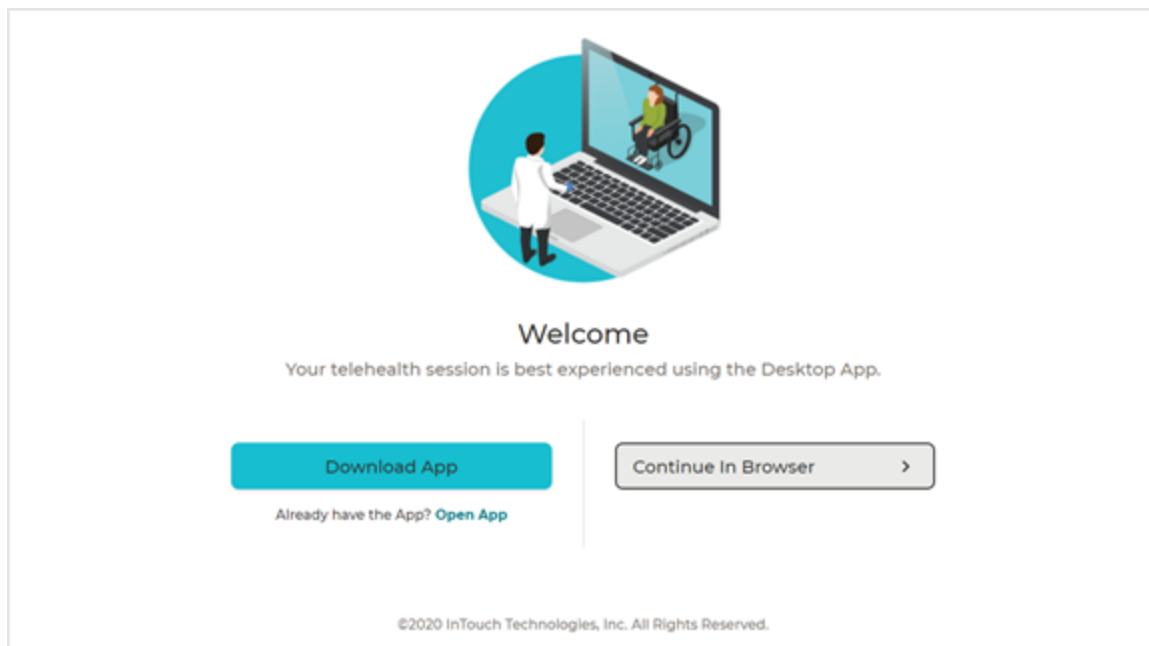
7. Make sure the correct microphone is selected and then click **Next**.



8. Follow any recommended steps.

Logging In (Browser)

1. Open your browser and enter the URL provided to you by your Teladoc Health representative.
2. When your Teladoc Health browser opens, select to either **Download App**, or **Open App** if you already have it, or **Continue in Browser**.



3. Enter your username and password, which was provided to you by Teladoc Health.

Teladoc
HEALTH

Email or Username

Password

Forgot your password?

Sign In

Enterprise Sign In

Create Account

Dark

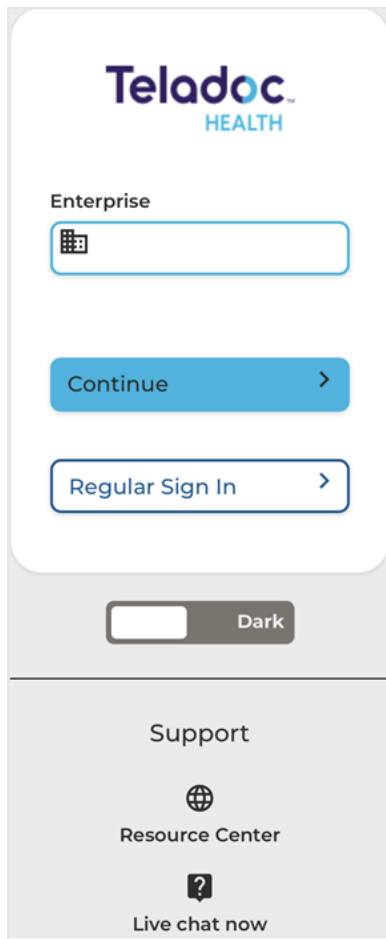
4. When done, select **Sign In**.

Enterprise Login

Enterprise login is for hospitals provisioned by Teladoc Health to use hospital credentials.

NOTE: iOS Provider Access authentication with Teladoc Health servers within the Teladoc Health telehealth network has been enhanced. Legacy enterprise login has been removed.

1. On the login page, click **Enterprise Sign in** near the bottom of the page.
2. Enter the domain name provided to you by Teladoc Health.



Select **Continue**

3. Sign in using your hospital credentials. If you forget your Enterprise user name or password, contact your institution.

Reset Password

To reset your password, follow the instructions below. For a new password, contact your Practice Admin.

1. If you forgot your **password**, click **Forgot Reset it**.
2. To recover your **Username**, call Technical Support or open chat by clicking the **Chat with a Live Agent** link.

Teladoc
HEALTH

Reset Password

User information

Username or Email

You must enter the username or the email address associated with your user account.

Required fields

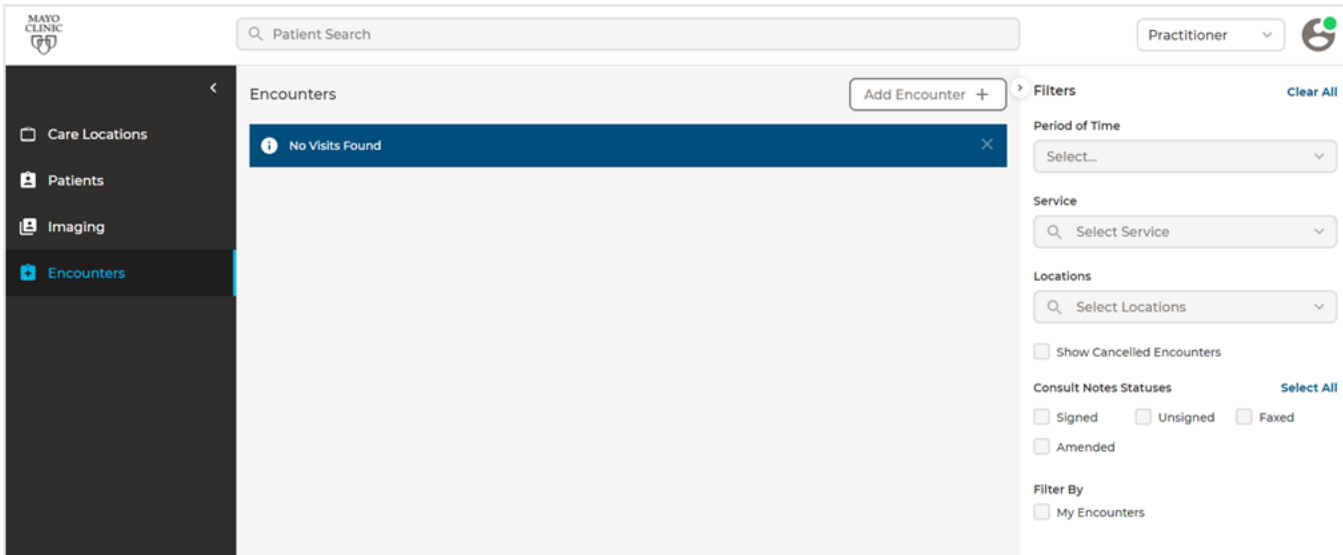
Continue

3. Enter your **Username** and email address.
4. Select **Log In** when done. You should receive an email to reset your password.
5. Select the link from your email.
6. **Enter your email.**
7. Select **Continue** when done.

Provider Dashboard

The **Provider Dashboard** provides information about news, your schedule for the day, activity statistics, and more. It is divided into four (4) sections; a left navigation, a middle, and right panel; and a tool bar on top of the page.

NOTE: See MA-20193 iOS Provider App User Guide for the iOS version for the iPhone and iPad.



The elements of the user interface are:

1. **Teladoc Health** logo: Click the logo to return to the start page from any page.
2. **Search:** Enter an existing or new patient's name, or ID to search for a patient. When a patient's name is selected, the middle panel will populate with a list of patient names that match your entry. An **Advanced search** option allows a list of ALL patients to populate the middle panel. The **Filter** feature on the right panel allows you to narrow your search.

NOTE: The filter parameters will change according to your selection on the left navigation panel and middle panel.

Q d

Advanced Search

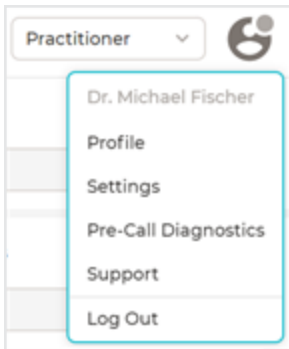
John Cole	01/01/1990	U	Solo ID: 642800
Fred Carpenter	09/12/2000	M	MRN: 238912
Cheryl Smith	03/03/1970	F	Solo ID: 614620
Cheryl Rogers	01/04/1976	F	MRN: 345678

+ C New Patient

3. **User Role:** Use the dropdown to select your role.

NOTE: Set the Practitioner Admin user role in Practice Settings.

4. **User Icon:** Select your user icon to activate a dropdown menu.



- **Profile:** All users can select this option to manage their user profile.
- **Settings:** View and configure your user settings.
- **Pre-call diagnostics:** Test and verify your audio and video connection.
- **Support:** Users can access Teladoc Health's online support page.
- **Log out:** Select to log out.

Online Status

A colored circle on the User Icon indicates your connection status. Manually change your status by clicking on it this colored circle. Your status will change to busy automatically when you are in a session.



The status colors are:

Color	Definition
Green	Online and Available
Magenta	Online and Busy
Gray	Offline

5. **Left Navigation Panel:** Select **Teladoc Health logo** from the upper, left corner of the screen. The following options are available from the Practice Admin's left navigation panel.

NOTE: The listed topics do not include the software modules of Smart Notes, Imaging, and Analytics.

- Queue
- Care Locations
- Encounters
- Services

NOTE: Services is only available for the Consumer workflow.

6. **Middle Panel:** The middle panel provides the content for the topic you selected from the left navigation panel. The default is a list of **Services**.

7. **Right Panel:** The right panel provides the content for the topic you selected from the left and middle navigation panels. It is referred to as the Patient panel when patient information is selected from the middle panel, Room Info when Services information is selected, and Filter when filtering functionality is available.
8. **Live Chat:** Select for live chat support.

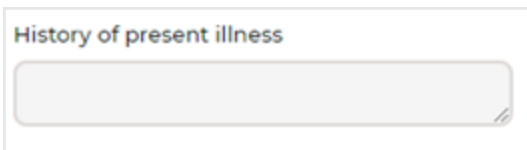
Generic Fields

The generic fields are configured by the Practice Admin or Practitioner Admin.

NOTE: Mandatory fields are indicated by an orange dot to the left of the fields. The Mandatory Fields for Encounters toggle must be enabled.

Text Area

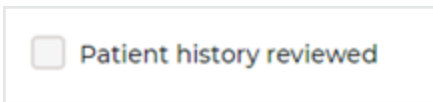
Enter an unlimited number of alpha numerical characters in the text field. Expand the text area by clicking and dragging its lower, right hand corner.



A screenshot of a text area field. The label "History of present illness" is positioned at the top left of the field. The text area itself is a light gray rectangle with rounded corners and a small handle in the bottom right corner for expansion.

Check Boxes

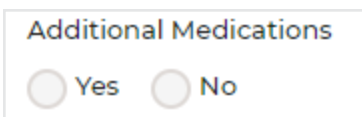
Toggle check boxes on or off to allow users to select one or several properties.



A screenshot of a check box field. The label "Patient history reviewed" is positioned to the right of an unchecked check box.

Radio Buttons

Select only one option from multiple options using radio buttons.



A screenshot of radio button fields. The label "Additional Medications" is positioned at the top left. Below it are two radio buttons, one labeled "Yes" and one labeled "No", both of which are currently unselected.

Drop Downs

Select one or many options using drop down menus.

Provider Roles

The various Provider roles are:

Practitioner	Interact with patients and document patient record (can access PHI);. Cannot perform admin tasks.
Scheduler	Interact with patients and access (i.e., read). Cannot document patient record or perform admin tasks.
Practice Admin + Practitioner	Perform both Practice Admin + Practitioner tasks (manually switch between roles).
Practice Admin + Scheduler = Practitioner	Perform both Practice Admin + Scheduler tasks (manually switch between roles).
Nurse	Enter or edit all fields. If field(s) are configured responses are display only, nurse cannot to enter, edit, or omit data. Cannot sign consult notes.

The table below describes the roles

Function	Practitioner	Practitioner Admin	Practitioner	Scheduler	Nurse
Edit vital practice settings		X			
Create or edit Services settings		X			
Create and search patients	X	X	X	X	X
Edit patient demographics	X	X	X	X	X
View patient demographics	X	X	X	X	X
View device readings	X	X	X	X	X
Create new appointment	X	X	X	X	X
Provider to provider call	X	X	X	X	X
Invite participant to virtual encounter	X	X	X	X	
Screen sharing during encounter	X	X	X	X	
Add a document to patient during encounter	X	X	X	X	
Call to care location	X	X	X	X	X
Edit appointment status and receive notifications	X	X	X	X	X
Create, edit, and comment on Smart Notes	X	X	X	X	X
Sign and add Addendum to Smart Notes	X	X	X		

Function	Practitioner	Practitioner Admin	Practitioner	Scheduler	Nurse
View Smart Notes	X	X	X	X	X
Fax	X	X			X
Visit Summary	X	X	X	X	X
Audit Log		X			
Provider Survey	X	X	X	X	X

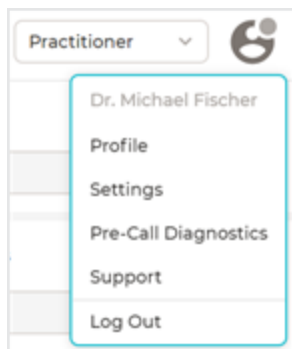
Provider User Icon

Select the User Icon, located in the upper, right corner, to set your profile and notifications.

Profile

Your patient's profile consists of basic contact information and provides for a nickname.

1. Select **Profile** from the User Icon dropdown.

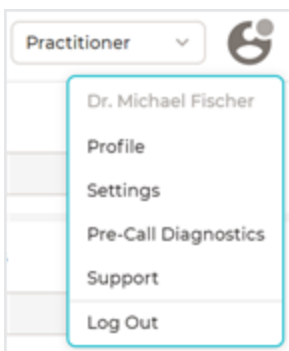


2. Enter your **Name, Phone number**, and a **Nickname**. Email cannot be edited.

Settings

The Practitioner and Scheduler can set their profile and notifications.

1. Select the User Icon.
2. Select **Settings** from the User icon dropdown.



3. The middle panel will populate with selections for **Do not disturb settings**, **Notifications**, **Start page**, **Screen to launch after scheduling** a virtual encounter, and **Video Session Settings**.

The screenshot displays a settings panel with the following sections:

- Do not disturb**: Includes a checkbox for "Automatically disable notifications from:" and a time range selector set to "10:00 PM to 08:00 AM".
- Notifications**: A table with columns for "Email", "SMS", and "Browser".
- Start Page**: A dropdown menu currently set to "Patient queue".
- Screen to launch after scheduling encounter**: A dropdown menu currently set to "Appointment S...".
- Video Session Settings**: A toggle switch for "Connect to InTouch device with desktop/mobile app", which is currently turned off.
- Save**: A blue button at the bottom left.

Notifications	Email	SMS	Browser
Patient arrived	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Patient waiting	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Patient's visit complete	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Patient's visit incomplete	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Patient LWBS	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

4. Select **Automatically disable notifications from** checkbox to block notifications between select hours.
5. Enter start and stop times.
6. Select the checkbox next to the **Notifications** you wish to create.
7. When one or more of the events are enabled, an **Email**, **SMS**, or **Browser** message will be sent when the event happens for anyone in your organization. All other **Notifications** will only be triggered for the Services you are assigned to.

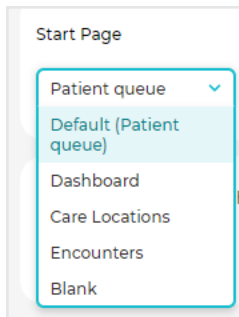
NOTE: The practice admin configures settings at a practice level. A practitioner can override those settings just for themselves.

8. To modify your notifications, select **Email**, **SMS**, or **Browser**. To disable notifications during set times, use the **Do not disturb** feature at the top of the **User Settings**.

NOTE: You must provide your phone number in your profile to receive SMS notifications and to have it appear in the header of Smart Notes templates (forms). Smart Notes must be purchased separately.

Start Page

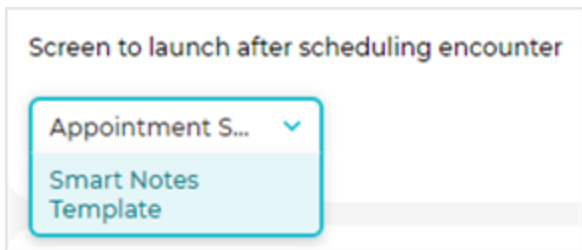
Select a **Start Page** using the drop down menu.



Screen to launch after scheduling

Use the dropdown menu to select a **Screen to launch after scheduling**. Choose to launch to the appointment summary page or automatically launch a smart notes template once you have scheduled a virtual encounter.

NOTE: Smart Notes is purchased separately.



Video Session Type

When you connect to a Care Location, your video session will open.

NOTE: If you have installed iOS Provider Access software App, start your virtual encounter with that application. See MA-16236 Provider Access Software for iOS User Guide for more information.

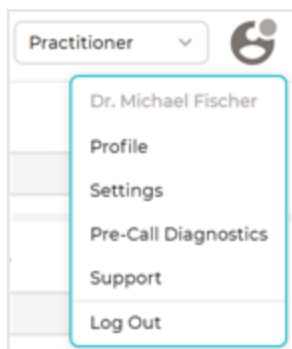
Pre-Call Diagnostics

Pre-Call Diagnostics provides a method to test your video connection and allows you to test the video connection for the browser version of Solo.

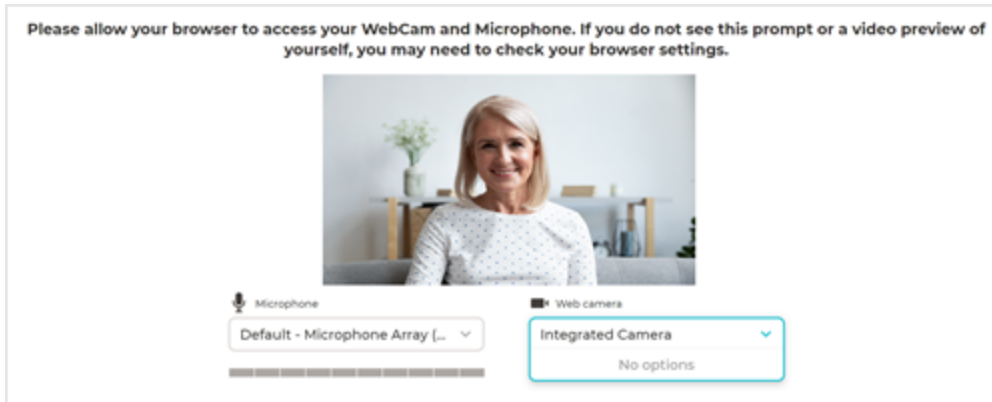
NOTE: Pre-call diagnostics is not available on iOS Provider app or any mobile phones (browser or iOS App).

1. Click the User icon and then **Pre-call Diagnostics**.

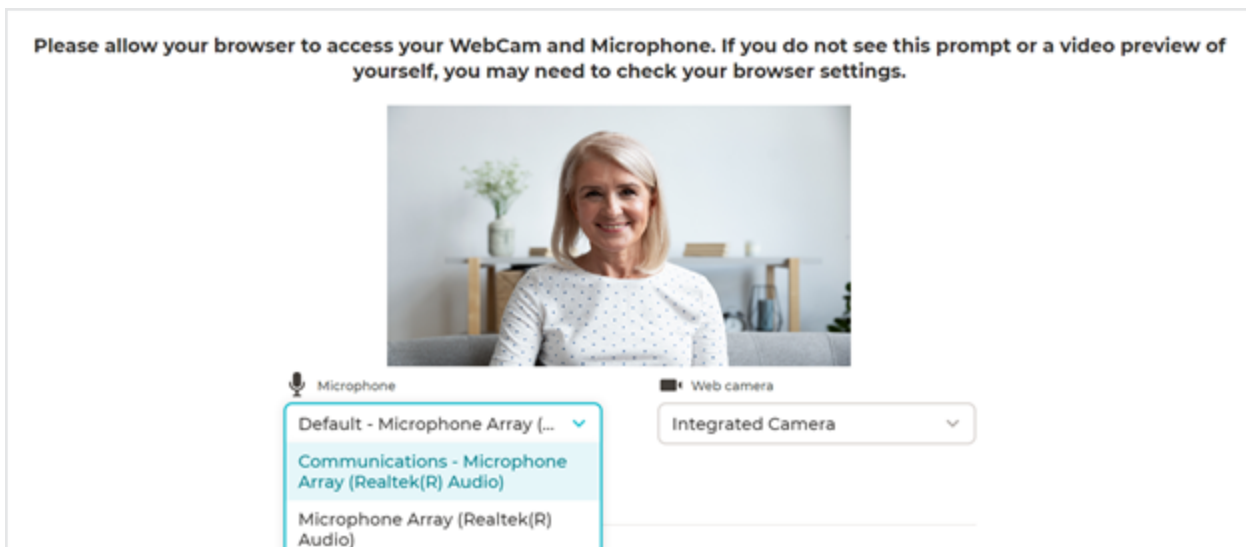
NOTE: Make sure permissions to use your camera and microphone are allowed.




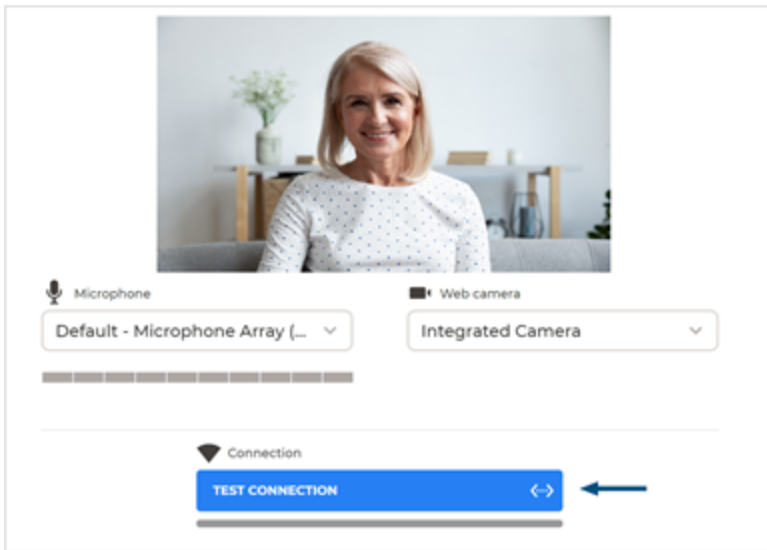
2. Select a camera using the **Web Camera**.



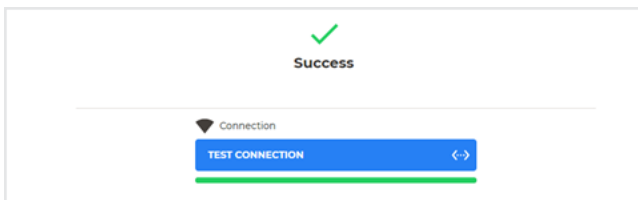
3. Use the **Microphone** drop down.



4. Select the test icon ()



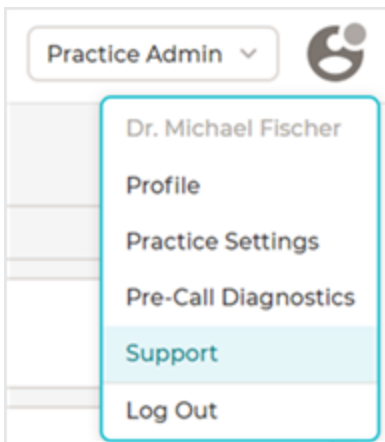
5. A green bar will display as your test progresses.
6. When done, a green **SUCCESS** checkmark will appear.



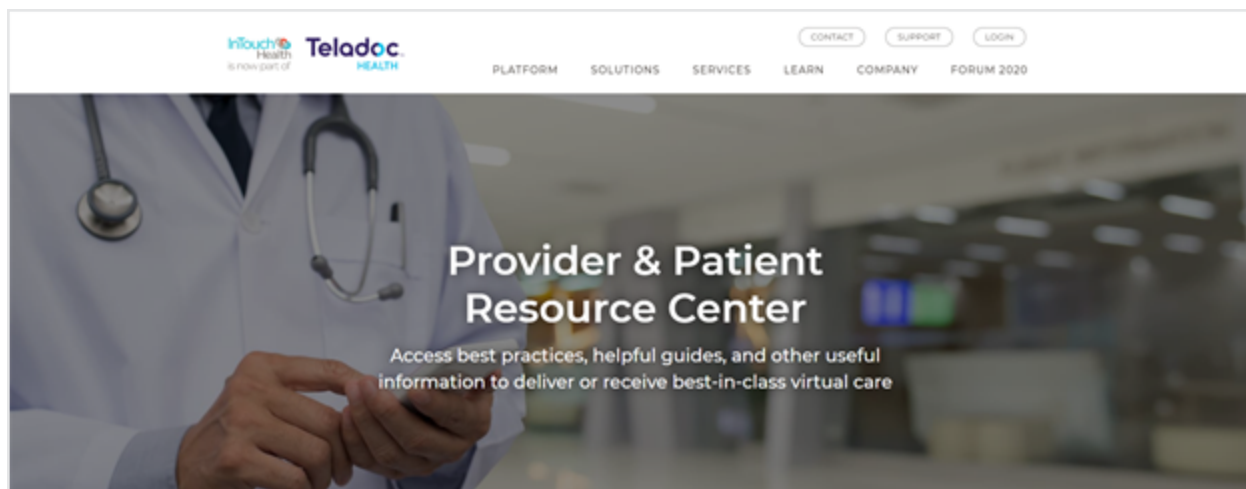
Support

Access Teladoc Health's easy to use online documentation for the Practice Admin and/or chat with a Teladoc Health representative..

1. Select **Support** from the right, top User Icon



2. Browse and select the Practice Admin documentation from the **Provider & Patient Resource Center** <https://intouchhealth.com/provider-patient-resource-center/>



Manage Patients

The Practitioner, Scheduler, and other medical personnel are responsible for managing the patient's information, data, scheduling, episodes of care, and status as they progress thru their patient journey.

The options are:

[Add Patients](#)

[Search Patients](#)

[View Patients](#)

[Edit Patient Profile](#)

[View Patient History](#)

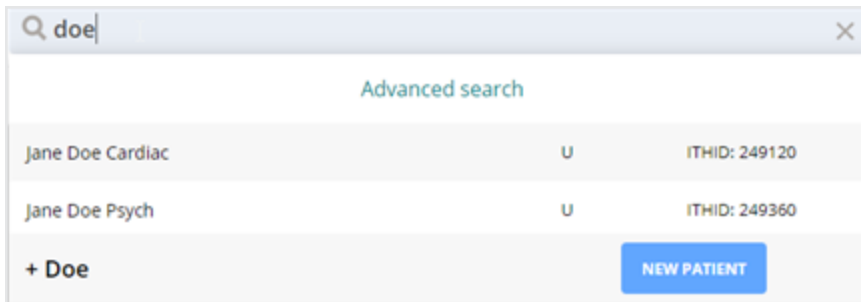
[Patient Status](#)

[Episodes of Care](#)

Add Patients

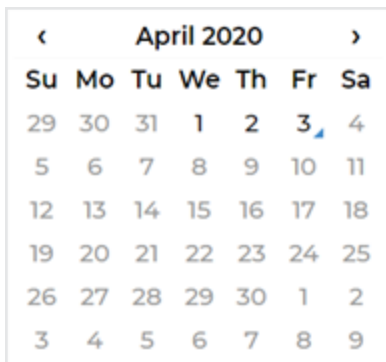
The search bar allows Practitioners and Schedulers to add patients.

1. Select the **Patient Search** bar at the top of the screen.
2. Enter your patient's name. As you type, results will appear in a dropdown.
3. Select the **New Patient** button to add your patient.



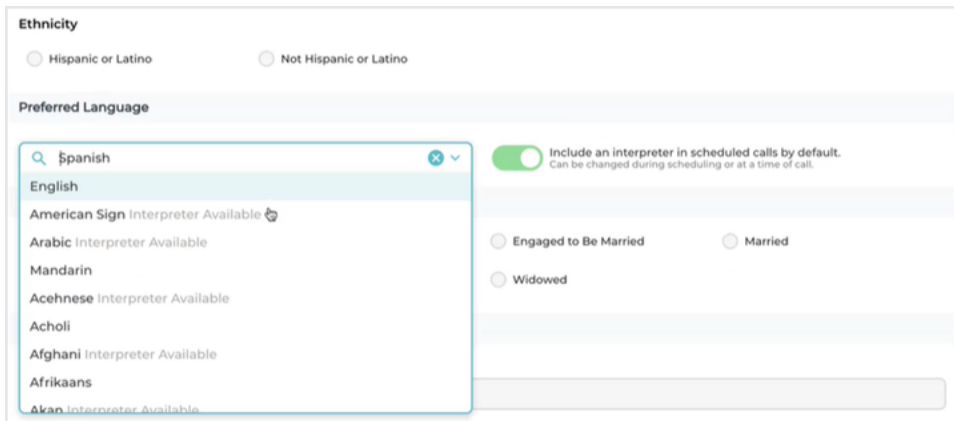
4. A **New Patient** screen will open in the middle panel.

5. Type in the patient's first and last name. Their middle name is optional.
6. Select the button next to the gender **Male**, **Female**, **Other**, and **Unknown**.
7. Select their **Date of birth** field using the dropdown menu.



8. Select the check box **Link to this patient** if this patient uses the same email address, such as a parent or guardian.
9. Enter the patient's **Email**.
10. Enter the patient's **Phone number**. You must enter a phone number for your patient to receive SMS notifications.
11. Select a country code using the dropdown menu.

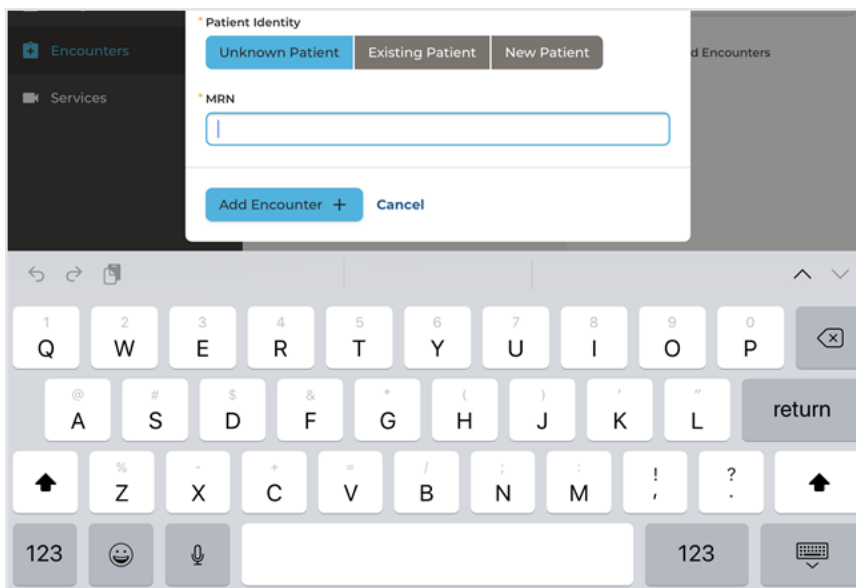
12. If the patient requires an interpreter, use the **Preferred Language** drop down menu. Use the slider to enable this feature as a default setting.



The screenshot shows a form with two main sections. The top section is titled 'Ethnicity' and has two radio buttons: 'Hispanic or Latino' and 'Not Hispanic or Latino'. The bottom section is titled 'Preferred Language' and features a dropdown menu with a search bar. The dropdown is open, showing a list of languages with 'Spanish' selected. To the right of the dropdown is a toggle switch labeled 'Include an interpreter in scheduled calls by default' which is turned on. Below the toggle are three radio buttons: 'Engaged to Be Married', 'Married', and 'Widowed'.

13. **Optional:** Enter the patient's **MRN** number. The MRN field can be relabeled.

NOTE: A customer's external account identifier can now be linked to the Solo encounter.



The screenshot shows a mobile application interface. At the top, there's a 'Patient Identity' section with three tabs: 'Unknown Patient' (selected), 'Existing Patient', and 'New Patient'. Below the tabs is an 'MRN' field with a text input box. At the bottom of the form are two buttons: 'Add Encounter +' and 'Cancel'. Below the form, a virtual keyboard is visible, showing the letters Q through P on the first row, A through L on the second row, and Z through M on the third row.

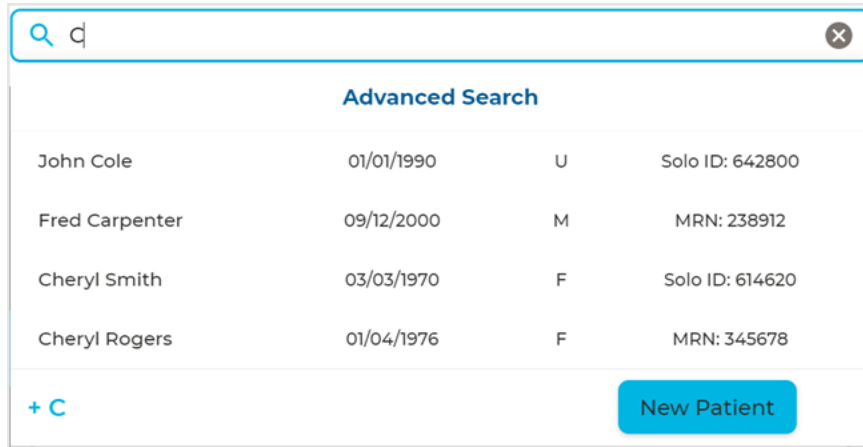
14. When done, select **Save**.

15. A green bar will slide from the right to notify you that your patient was created.

Search Patients

The search bar allows practitioners and schedulers to search for existing patients.

1. Enter an existing patient's name, or ID to search for a patient.



The screenshot shows a search interface with a search bar containing the letter 'd'. Below the search bar, a dropdown menu is open, displaying the text 'Advanced Search'. Underneath the dropdown, a table lists patient search results. The table has four columns: Patient Name, Date of Birth, Gender, and ID. The results are as follows:

Patient Name	DOB	Gender	ID
John Cole	01/01/1990	U	Solo ID: 642800
Fred Carpenter	09/12/2000	M	MRN: 238912
Cheryl Smith	03/03/1970	F	Solo ID: 614620
Cheryl Rogers	01/04/1976	F	MRN: 345678

At the bottom left of the search area is a '+ C' button, and at the bottom right is a 'New Patient' button.

2. As you type, matching results will appear in a dropdown menu.
3. Select one of the patients from the **Search Patient** dropdown.
4. The middle panel will populate with the patient names that match your entry.
5. Select the **Advanced Search** button that will appear under the **Patient Search** field when you begin to type in your patient's name, to populate the middle panel with all patient names.
6. Refine your search using the **Filters** options that open up in the right panel. Search on **patient name, DOB, MRN, visit date, Waiting Room**, and **Care Location**

Filters

Patient Name

DOB

MRN

Visit Date

Waiting Room

Care Location

Include Deceased Status

Filter Results: 1,547 Patients

7. Select your patient from one of the patient bars from the middle Patient panel.

Patients Patient + >

Smith, Brian
Age 30 Gender m

Jones, Brian
Age 30 Gender m

Johnson, Larry
Age 20 Gender u

Davis, Brian
Age 70 Gender u

Davis, Brian 📞 ✉️

Gender u Age 70 DOB 01/01/1950 Solo ID 707350

All Visits +

Visits (1) Upcoming Episodes

Headache, Fever
12/18/2020 10:30 AM >

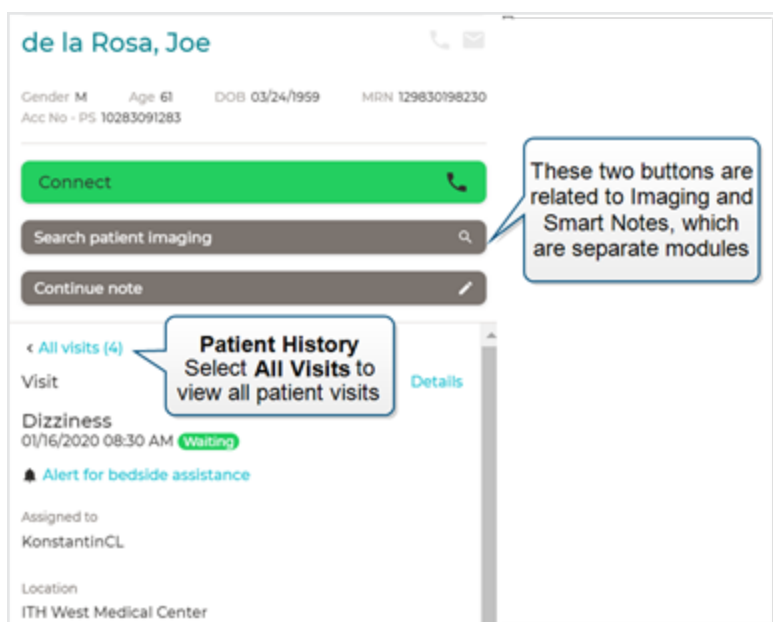
Documents (8)

8. Once you locate your patient, the right panel will open to display your patient's information in the Patient Panel.

View Patients

View your patient's upon check-in, scheduling, and before a virtual encounter.

1. Use the search bar to search and view existing patients. [Search Patients](#)
2. Once you select a patient, their information will display in the right Patient panel.
3. You can view **Visits**, **Upcoming** Visit, **Episodes** of Care, **Documents**, and more.
4. Select **Upcoming** to see your patient's upcoming visits.



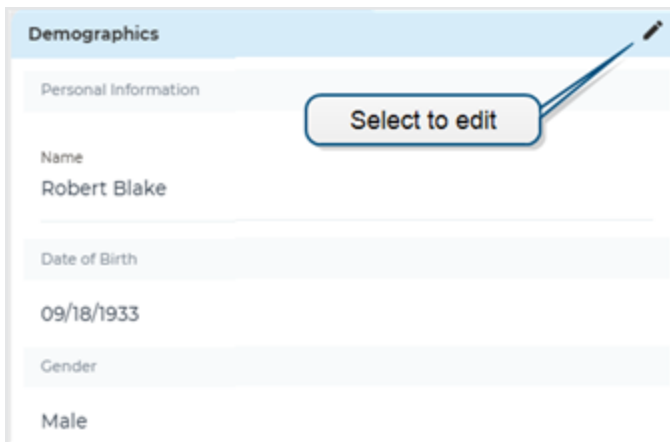
Edit Profile

Your patient's profile is comprised of demographic, billing, and medical information. Edit patient **Demographics**, **Insurance**, and more.

1. Use the **Patient Search** bar to find and select your patient. [Search Patient](#)
2. Select your patient's name from the right Patient Panel.



3. To edit a category, such as demographic information, select the edit icon in the upper, right corner of the **Demographics** dialog.



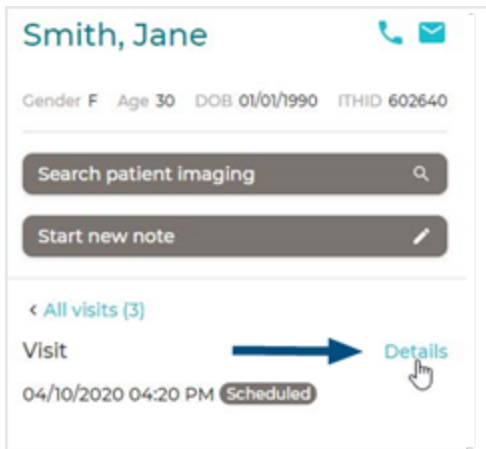
View History

View your patient's history upon check-in, scheduling, and before a virtual encounter.

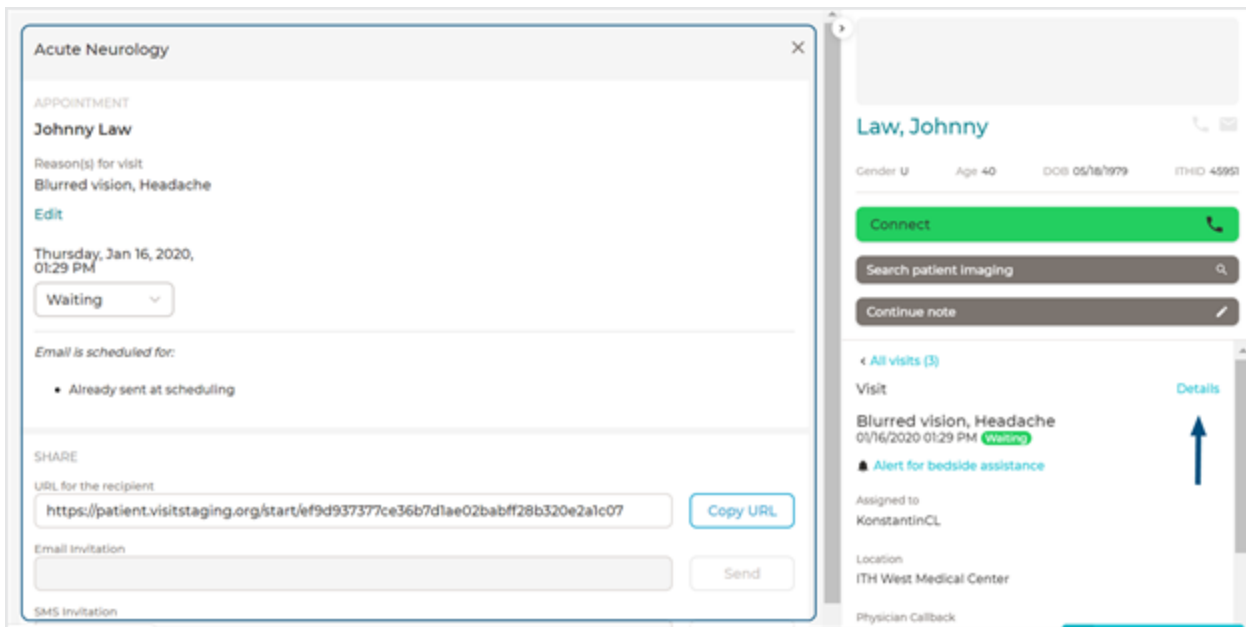
1. Use the **Patient Search** bar to find and select your patient. See [Search Patients](#).
2. Your patient's history will populate the Patient Panel.
3. Select your patient's name.

NOTE: The bars labeled Search patient imaging and Start new note are only available for the Teladoc Health separate modules for Imaging and Smart Notes.

4. Select **Details**.



5. Summary information for your patient's appointment will display in the middle panel.



6. Select **All Visits** to see all your patient's visits.

7. The right panel will refresh with a list of all visits along with three (3) new options - **Visits**, **Upcoming**, and **Episodes of Care**.

Status

The patient's status changes throughout their journey as follows.

Scheduled	Patient schedules appointment
Arrived	Patient at location of appointment
Canceled	Patient cancels appointment
No Show	Patient doesn't show
Waiting	Patient using Services
Away	Waiting patient has navigated away or lost connection
Left Without Being Seen	Patient leaves before a virtual encounter begins (LWBS)
On Call	Patient enters virtual encounter
Completed	Provider ends virtual encounter
Incomplete	Patient virtual encounter ends, but is incomplete
On Hold	Patient placed back to Services

Episodes of Care

Episodes of care allows you to organize patient visits or encounters together for one payment.

NOTE: Your Practice Admin must enable episodes of care for your practice.

Add

1. Search for your patient to configure an Episode of Care. See [Search Patients](#).
2. Select their name from the right Patient Panel.
3. Scroll down to **Episode of Care** from the middle panel and select the + sign in the upper right corner.

The screenshot shows a patient record interface. At the top, there is a 'Status' section with two rows: 'Active' with the value 'Yes' and 'Deceased' with the value 'N/A'. Below this is an 'Insurance' section with a blue header and a pencil icon on the right. At the bottom is an 'Episodes of Care' section with a blue header, a right-pointing arrow, and a plus sign icon in a circle.

4. Enter a description in the **ID field**.

The screenshot shows the 'Add Episode of Care' form. It has a title bar 'Add Episode of Care'. Below the title bar are three input fields: 'ID' with the value 'HAU1233', 'From' with the date '8/26/2019' and a 'Set current' link, and 'To' with the date '8/26/2019' and a 'Set current' link. At the bottom are two buttons: 'Cancel' and 'Save'. A blue arrow points to the 'Save' button.

5. Configure **From** and **To** dates using the date picker or select **Set current** for today's date
6. When done, select **Save**.


View



1. Search for your patient. [Search Patients](#)
2. Select their name from the Patient Panel
3. From the middle panel, scroll down to **Episode of Care** and select the edit icon in the upper right corner to view.

Status

Active
Yes

Deceased
N/A

Insurance 

Episodes of Care  

Schedule

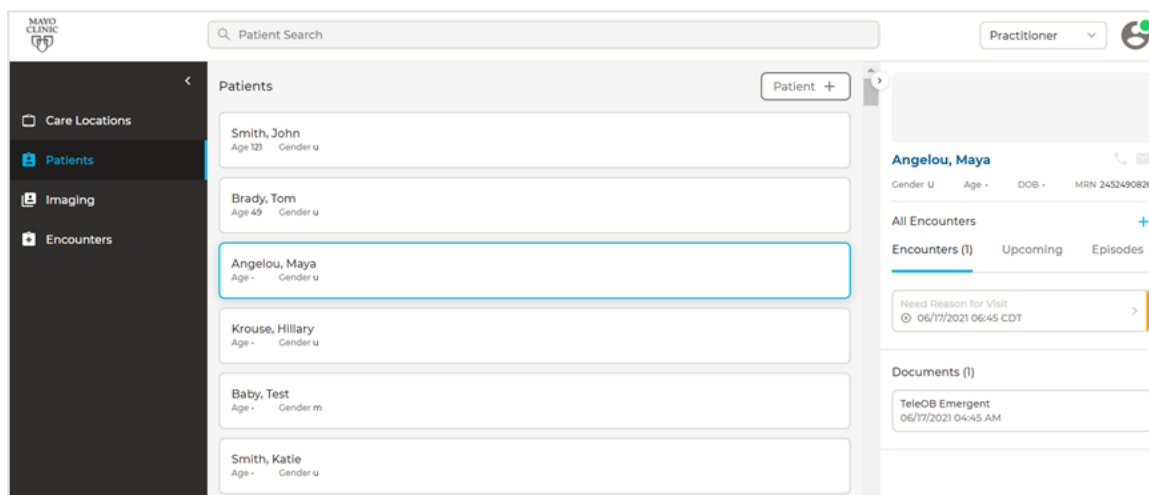
You can schedule a virtual encounter with your patient using **Schedule** from the left navigation panel or by inviting your patient.

Left Panel

Schedule an appointment from the left navigation panel .

1. Select **Teladoc Health's logo** from the upper, left section of the window.
2. Select **Patients** from the left navigation panel.
3. Select a patient bar from the middle panel.
4. Select the + icon next to **All Encounters** from the right Patient panel.

NOTE: If your practice is configured for the Consumer, the term All Visits will be replaced with All Encounters.



5. A **New Visit** form will populate the middle panel

New Visit Form

Enter your information in the **New Visit** form.

1. Enter the information requested for your patient.

New Visit

Patient

Name / ID

Henry Jones

Visit

Service

Select Service

Date Start Time End Time

01/13/2021 05:35 PM 05:50 PM

More Options

> View More

Jones, Henry

Gender U Age 21 DOB 01/01/2000 Solo ID 640530

All Encounters

Encounters (5) Upcoming Episodes

Fever; Headache
06/11/2020 01:21 PM NZST

Fever; Headache
06/12/2020 03:27 AM NZST

Fever; Headache
06/12/2020 03:26 AM NZST

2. Select a **date** using a date picker.

Date Start Time End Time

01/27/2020 11:45 AM 11:50 AM

< Jan, 2020 > Duration: 5 m

Su	Mo	Tu	We	Th	Fr	Sa
			01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

3. Select the **Start Time** field from the selection menu.

Date: 01/27/2020 Start Time: 11:55 AM End Time: 12:00 PM

< 01/27/2020 > Duration: 5 m

	00	10	20	30	40	50
06a						
07a						
08a						
09a						
10a						
11a						
12p						
01p						

Confirm >

\\document\ConcentForm\7bc4f8da-dca1-4040-bfb5-dfa68fr-84540

4. When done, select **Confirm**.

Appointments

Manage your patient's schedule by resending patient or group invitations during a virtual encounter, modify your patient's appointment status, and cancel appointments.

Note: You can't change the time and date for an existing appointment.

The options are:

[Interpreter Services](#)

[Resend Patient Invitation](#)

[Modify Appointment Status](#)

[Cancel Appointments](#)

Interpreter Service

Teladoc Health Interpretive Services let providers invite certified interpreters to encounters to help patients communicate in their preferred language. A provider can configure patient demographics with their preferred languages or invite an interpreter during a live encounter.

NOTE: Interpretive Services are not supported on Teladoc Health Provider Access software, Teladoc Health Devices, iPhone Provider App, or Solo on iPhone devices.

Features:

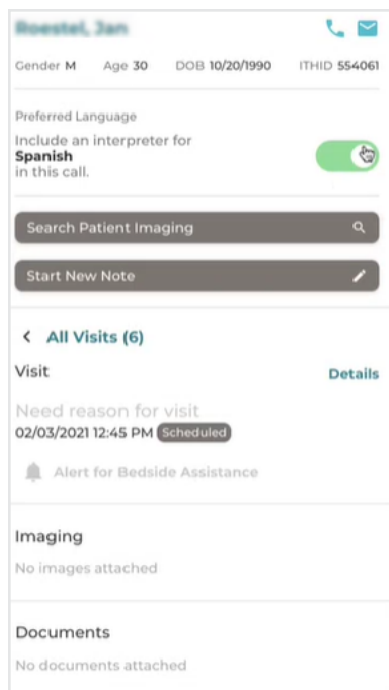
- Integrated into Solo
- Available in 65 languages
- Integrated billing for customer usage on a per minute basis
- Provider wait time estimates: A certified Voyce interpreter should be available within 60 seconds or less. No individual hours are required.
- Track customer basis
- Supported on DAS, Solo, WebView points, Connect Embedded and iPad Provider App. Patient iPhone and iPad Apps.
- Not supported on PAS, Teladoc Health Devices, iPhone Provider, Solo on Mobile devices.
- Audio is only support for the Teladoc Health Solo platform..

- A practitioner can request an Interpreter and allow them to join a virtual encounter.
- Enables the selection of a patient’s preferred language when creating a new patient.
- Enables a scheduler/practitioner to indicate that a patient will require an interpreter for a visit while scheduling an appointment.
- Allow the selection of their preferred language during intake and the ability to send a link for the virtual encounter to an interpreter.

Enable from Patient Panel

If interpreter services were not set up when your patient was created. Interpreter services are enabled from the right Patient panel using the green toggle. Once the virtual encounter starts the preferred language toggle in the right panel is disabled.

NOTE: This feature is available on the iPad and not the iPhone.



Set a Language

Set the preferred language on your iPad following the steps below:

1. Search for or select the patient demographics.
2. Select the pencil icon to edit the demographics.
3. Scroll down to Preferred Language.

The screenshot shows a patient profile for John Smith. The 'Preferred Language' section is active, with a dropdown menu open. The dropdown contains a search bar and a list of languages: English, Spanish Interpreter Available, American Sign Interpreter Available (highlighted with a hand cursor), Arabic Interpreter Available, Chinese, Hindi, French, Korean, and Vietnamese Interpreter Available. To the right, the patient's name 'Smith, John' is displayed along with contact icons. Below the name, patient details are shown: Gender M, Age 71, DOB 01/01/1950, and MRN 125569. The 'All Encounters' section is also visible, showing a list of encounters with columns for 'Encounters (38)', 'Upcoming', and 'Episodes (1)'. Several encounter cards are listed, such as 'Headache; Fever' on 12/28/2020 and 'Need Reason for Visit' on 12/15/2020.

4. Select the preferred language from the dropdown or enter it. Matching names will be displayed as you type.
5. When done, select **Save**.

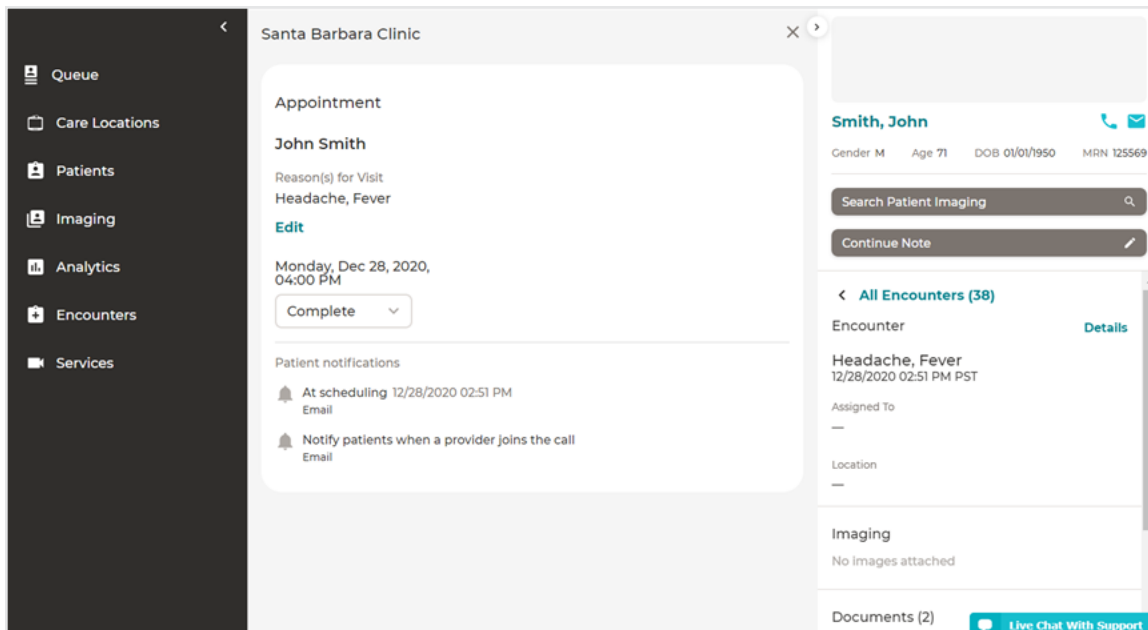
Resend Invitation

You can resend your patient an invite for their virtual encounter, if needed.

1. Use the **Patient Search** bar to find and select your patient. [Search Patients](#)
2. Select the appointment you wish to modify from the right Patient panel.
3. If this appointment occurs in the future, select **All Visits** and then **Upcoming**.

NOTE: If your practice is set up for Emergent care, the term **All Visits** will be replaced with **All Encounters**.

- When you select an appointment, the Patient Panel will refresh.
- Select **Details** from the Patient Panel.

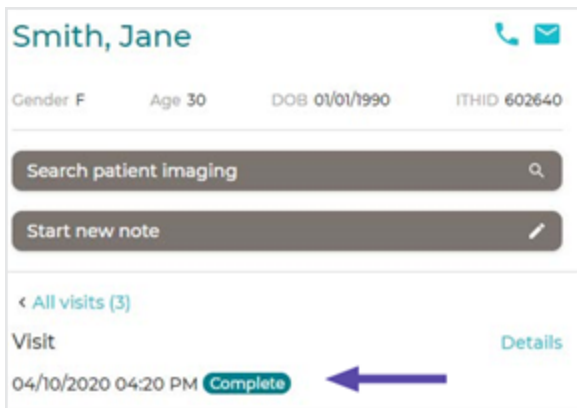


- Resend the invitation by selecting **Copy URL** from the middle **Appointment** panel.
- Send this URL to your patient using email or text (SMS).

Modify

The Practitioner or other medical personnel can modify patient appointments.

- Use the **Patient Search** bar to find and select your patient. [Search Patients](#)
- Select the appointment you wish to modify from the right Patient panel.



3. If this appointment occurs in the future. select **All Visits** and then **Upcoming**.

NOTE: If your practice is set up for Emergent care, the term All Visits will be replaced with All Encounters.

4. When you select an appointment, the Patient Panel will refresh.
5. Select **Details** from the middle Patient Panel.
6. Select **Arrived**, **Complete**, or **Incomplete** to change the appointment status using the drop down from the middle **Appointment** panel.

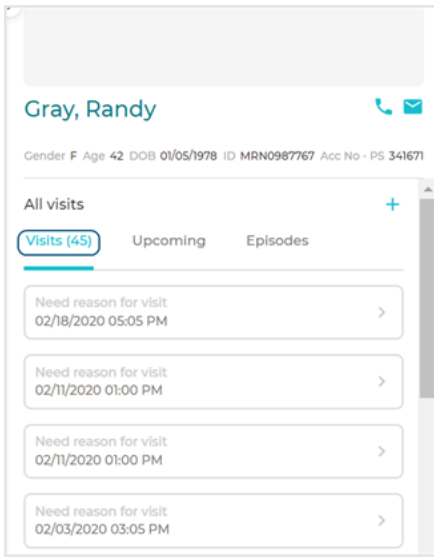
7. Your change will take effect immediately.

Cancel

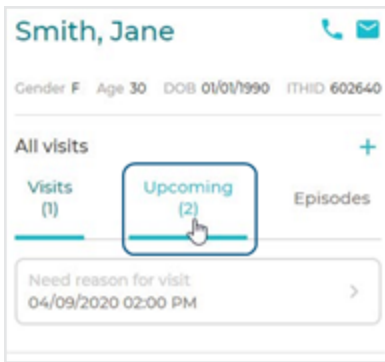
You can cancel a patient appointment at any time and for any reason.

1. Use the **Patient Search** bar to find and select your patient. [Search Patients](#)
2. Your patient's history and information will populate the Patient Panel.
3. If the appointment is today, your patient's name will appear in **Services** and **Queue**.
4. If the appointment is not displayed, select **All Visits**.

NOTE: If your practice is setup for Emergent Care, the term All Visits will be replaced with All Encounters.



5. If your appointment is in the future, select **Upcoming**.



6. View a summary of your patient's appointment from the middle **Appointment** panel.

7. Select **Cancel** button from the middle panel.

Santa Barbara Clinic

APPOINTMENT

Jane Smith

Reason(s) for visit

Wednesday, Apr 15, 2020,
01:00 PM

Scheduled



The Virtual Encounter

A virtual encounter is a virtual visit between a patient and their physician or medical professional. Practitioners can connect to their encounters immediately after they have been created; prior to the patient checking in, which is useful in high-acuity and emergent situations when a practitioner may need to quickly connect. You can connect to an encounter as many times as you like, but a reconnection changes your call status.

NOTE: If a virtual encounter ends because of a technical problem, contact your Practice Admin.

The options are:

[Preparation](#)

[Urgent Care](#)

[Practitioner to Practitioner Connection](#)

[Virtual Encounter with Teladoc Health Devices](#)

[Virtual Encounter without Teladoc Health Devices](#)

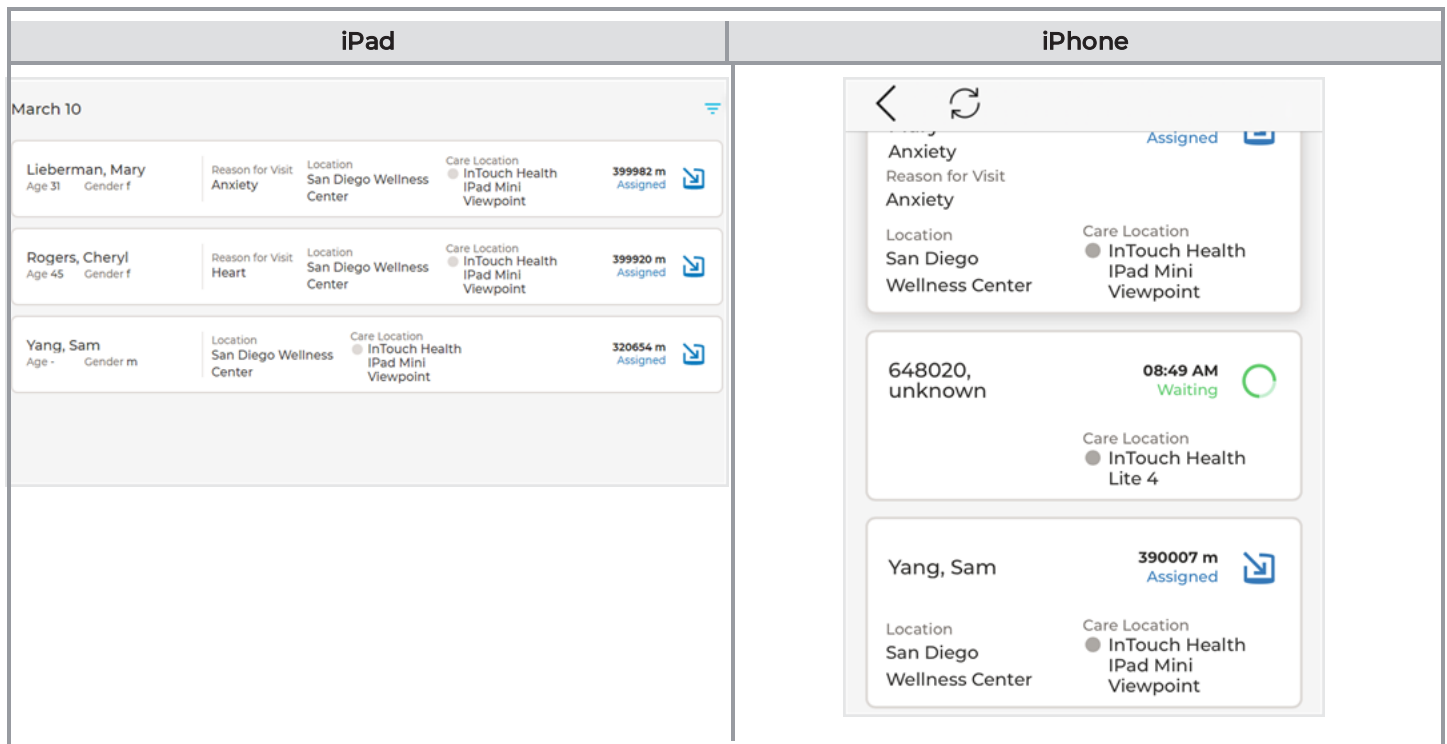
Encounter Preparation

A Nurse or Scheduler prepares a virtual encounter by reviewing the patient's history, checking a patient in, inviting an interpreter, and transferring the patient to Services.

View Queue

Your Queue contains all patient appointments for the day for all Services

1. Select **Queue** from the left navigation panel.
2. The middle panel will populate with scheduled appointments for the day. Patient appointment bars display your patient's name, age, sex, wait status, and either wait time or appointment time for the current 24-hour period.



3. Filter the Queue by **Status**, **Location**, and **Care Location**.

View History

View patient's information before starting a virtual encounter.

1. Select **Encounters** from the left navigation panel.
2. A list of your Encounters will display in the middle panel.
3. Select an Encounter bar that represents your patient.
4. Information for your patient will populate the right Patient Panel.

Encounters						Add Encounter +
Date	Smith, Johnny	Reason for Visit	Location	Provider		
02/11/2021 04:41 PM...	Solo ID 723210 DOB 01/01/1950	Headache, Fever, A...	—	—		
Date	Smith, Johnny	Reason for Visit	Location	Provider		
02/11/2021 04:38 PM...	Solo ID 723200 DOB 01/01/1950	Headache, Fever	—	—		
Date	Smith, Debbie	Reason for Visit	Location	Provider		
02/11/2021 04:22 PM...	Solo ID 723130 DOB 01/01/2001	Headache, Fever	—	—		
Date	Smith, Bobby	Reason for Visit	Location	Provider		
02/11/2021 03:39 PM...	Solo ID 722990 DOB 01/01/2011	Headache, Fever	—	—		
Date	Smith, Jane	Reason for Visit	Location	Provider		
02/11/2021 02:48 PM...	Solo ID 722620 DOB 01/01/1960	Headache, Fever, A...	—	—		

- Click on your patient's name from the Patient panel.
- The middle panel will populate with past appointments, demographics, completed documents, and more.

Demographics

Personal Information

Name
Cheryl Rogers

Date of Birth
01/04/1976

Gender
Female

Patient Identifier

Health system ID
N/A

MRN
345678

Address
1210 Calgary Avenue Santa Barbara California 93109 USA

Phone

Rogers, Cheryl

Gender F Age 44 DOB 01/04/1976 MRN 345678

All Visits +

Visits (23) Upcoming Episodes

Flu
06/08/2020 02:10 PM >

Flu
06/08/2020 01:15 PM >

Need Reason for Visit
06/08/2020 11:00 AM >

Headache
06/07/2020 05:15 PM >

Heart
06/05/2020 05:12 PM >

Show All

Documents (23)

Test Consent For Care
06/08/2020 02:10 PM

Check-In

Schedulers or Attendants assist patients checking in at medical or wellness facilities, or at a Care Station. Patient authentication must be done thru **Email** or **SMS** confirmation.

NOTE: A nurse can select unknown to auto-record answers when filling out questionnaires.

Authentication

Once logged in, new patient's Scheduler will be prompted to select to authenticate thru an **Email** or **SMS** confirmation. When done, select **CONFIRM**.



If the patient selects **SMS** as their delivery method, a text message will be sent to them.

Information

1. For new patients, enter their **Demographics** and **EMERGENCY CONTACT** information.

NOTE: Nurses can enter the Mayo MRN ("Health System ID") when entering demographics.

2. When done, select **CONFIRM**.
3. Select the **Reasons** for the patient's visit.

4. When done, select **CONFIRM**.

Self Schedule

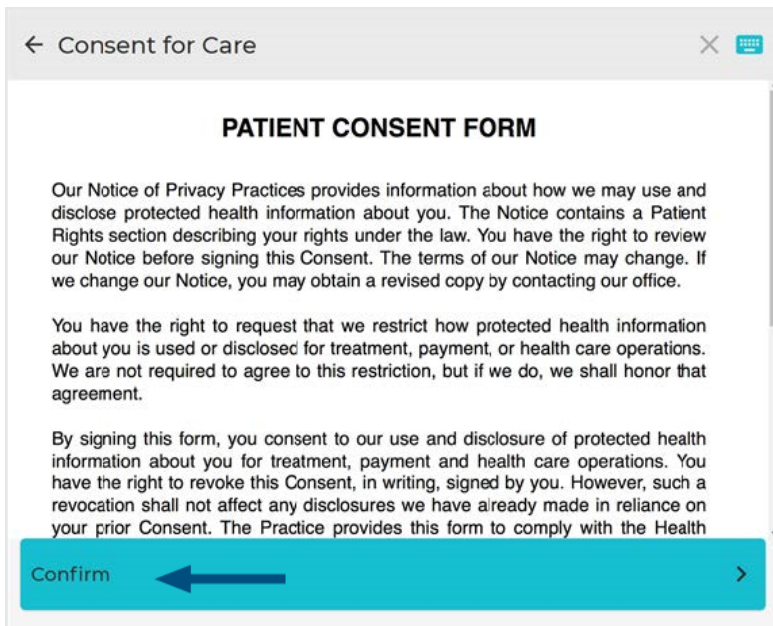
1. Patients can schedule their virtual encounter from a list of available time slots.
2. Once a time is chosen, the time slot will be highlighted.

The screenshot shows a 'Scheduling' window for 'TODAY DECEMBER 30, 2019'. It displays a grid of time slots in 15-minute increments. The slots are arranged in a grid with 4 columns and 8 rows. The first row contains 4:00 pm, 6:15 pm, 8:30 pm, and 10:45 pm. The second row contains 4:15 pm, 6:30 pm, 8:45 pm, and 11:00 pm. The third row contains 4:30 pm, 6:45 pm, 9:00 pm, and 11:15 pm. The fourth row contains 4:45 pm, 7:00 pm, 9:15 pm, and a 'more' button. The fifth row contains 5:00 pm, 7:15 pm, and 9:30 pm. The sixth row contains 5:15 pm, 7:30 pm, and 9:45 pm. The seventh row contains 5:30 pm, 7:45 pm, and 10:00 pm. The eighth row contains 5:45 pm, 8:00 pm, and 10:15 pm. The ninth row contains 6:00 pm, 8:15 pm, and 10:30 pm. At the bottom of the window is a 'Confirm' button with a right-pointing arrow.

TODAY DECEMBER 30, 2019 >			
4:00 pm	6:15 pm	8:30 pm	10:45 pm
4:15 pm	6:30 pm	8:45 pm	11:00 pm
4:30 pm	6:45 pm	9:00 pm	11:15 pm
4:45 pm	7:00 pm	9:15 pm	more
5:00 pm	7:15 pm	9:30 pm	
5:15 pm	7:30 pm	9:45 pm	
5:30 pm	7:45 pm	10:00 pm	
5:45 pm	8:00 pm	10:15 pm	
6:00 pm	8:15 pm	10:30 pm	

Confirm >

3. When done, select **CONFIRM**.
4. Ask your patient to read the **PATIENT CONSENT FORM** they are required to sign before their virtual encounter.



5. When done, select **CONFIRM**.
6. Instruct the patient to sign the form on the screen using their mouse or a touch screen.



7. Verify your patient by responding yes to the prompt **Are you the patient?**

Symptoms

Help your patient describe their symptoms using screen prompts and select **CONFIRM**.

Are you experiencing pain?

← Symptoms/Complaints

ARE YOU EXPERIENCING ANY PAIN TODAY?

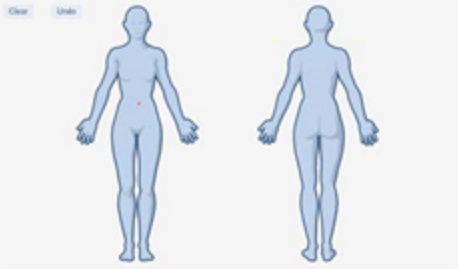
No Yes

Confirm

Pain location

← Where do you have pain or discomfort?

Clear Unk



Confirm

How long has it been bothering you?

← Symptoms/Complaints

How long has it been bothering you?

2 weeks

123 Confirm

What is the level of pain?

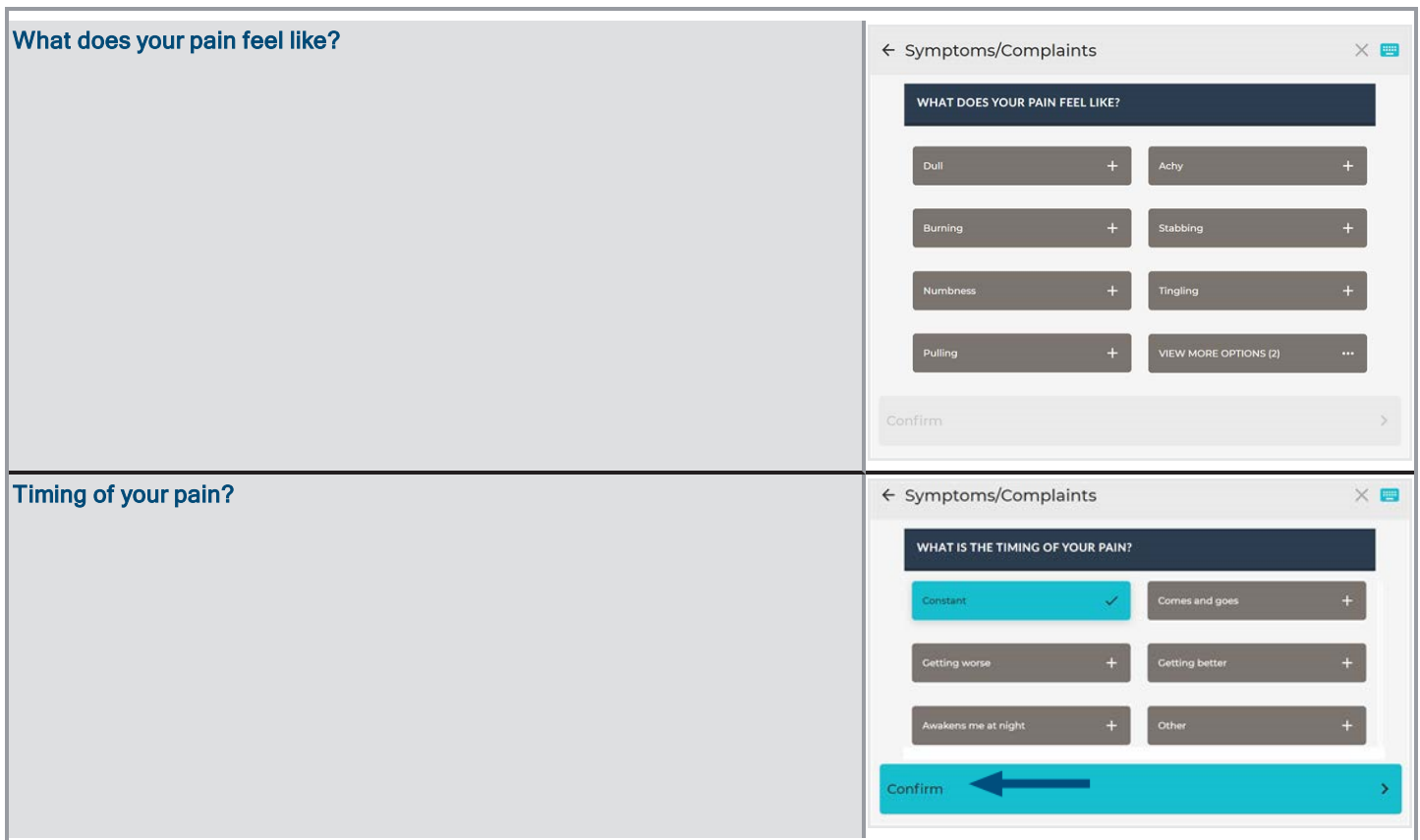
← Symptoms/Complaints

What is the level of pain / discomfort are you having today?

LEVEL OF DISCOMFORT | PAIN

NO PAIN 0 1 2 3 4 5 6 7 8 9 WORST PAIN 10

Confirm

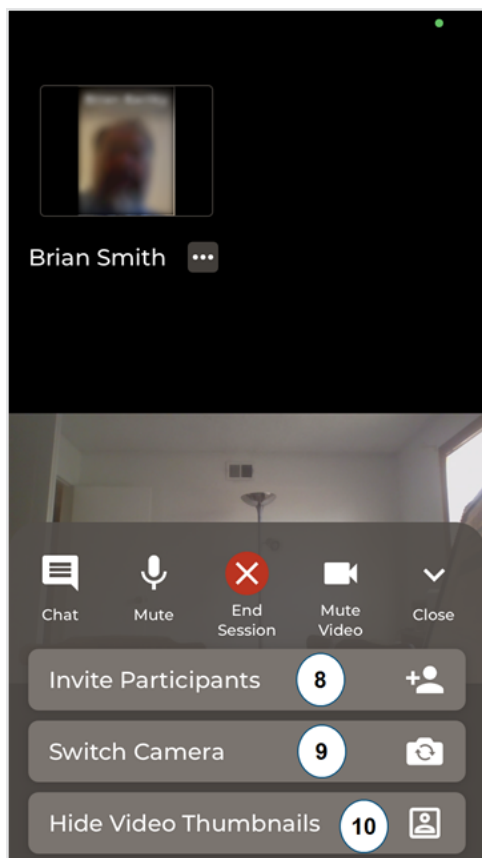


1. When finished, a **Thank You** screen will be displayed.
2. Make sure your patient receives an email or text message of their appointment.
3. Your patient's status will then change to **Assigned**.

Transfer to Services

Prepare your virtual encounter by transferring your patient or other participants to Services.

NOTE: To transfer a patient, the patient's name, mayo ID, requesting provider name, transfer needed, and call back.



Notify the Practitioner that the virtual encounter is ready to begin.

Interpreter Workflow

Generally, the medical assistant and/or scheduler invites the interpreter to the virtual encounter before the provider, and while the patient is on hold in Services. The scheduler and provider can put both the interpreter and patient on hold in Services versus having to re-invite them.

Flow 1: Interpreter requested for **Add Patient**

Select a patient's preferred language while creating or editing a patient.

1. Create a new patient using the patient search bar or scheduling form
2. Scheduler fills out the patient information
3. When done, select **Confirm**
4. Select the patient appointment
5. The **Preferred Language** should be displayed in the right panel above appointment details.

Flow 2: Interpreter requested during scheduling

1. When the practitioner logs into a Solo practice, they see their patient waiting in their queue. Practitioner should see that a translator was requested for the visit on the patient panel.
2. Select your patient and the green **Connect** button to start the virtual encounter with your patient and translator added as participants.
3. Practitioner completes consult and clicks **end for all**.

NOTE: If the translator gets disconnected during scheduling mid-session the Provider must resend an invitation link.

- Translator gets disconnected (network, accident, etc.) Provider clicks "Resend Interpreter link"
- Invitation link is resent to the previous translator (if possible)
- OR: New translator is requested via API and sent an invitation
- Translator is added as a participant

Flow 3: Interpreter requested by provider

1. When the practitioner logs into a Solo practice, they see their patient waiting in their queue.
2. Practitioner clicks on the patient and the green **Connect** button.
3. Video call starts and the provider determines that a preferred language or Sign language translator will be required for the visit.

4. Provider opens the **Invite** tab in the right panel.
5. The provider sees the preferred language of the patient from a drop down and selects an available interpreter.
6. When the language Interpreter selects the link provided, they join the call
7. When done, select **end for all**.

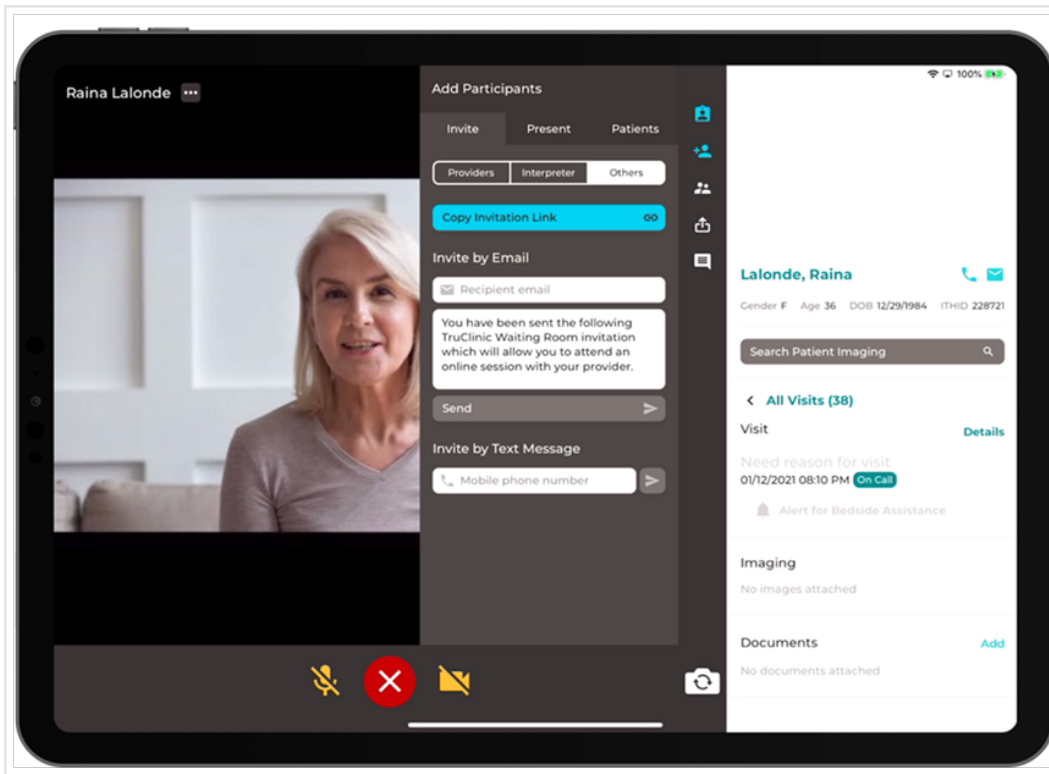
Flow 4: Interpreter requested for provider after Connection to Web Care Location.

1. The practitioner selects **Care Location** tab from the queue.
2. Select **Web Viewpoint** and **Connect** to start the virtual encounter video.
3. Provider opens the **Invite** tab in the right panel
4. The provider selects the language of the patient from a dropdown
5. When guests click on the link in their email/SMS, they are added as participants and can see the patient
6. When done, select **end for all**.

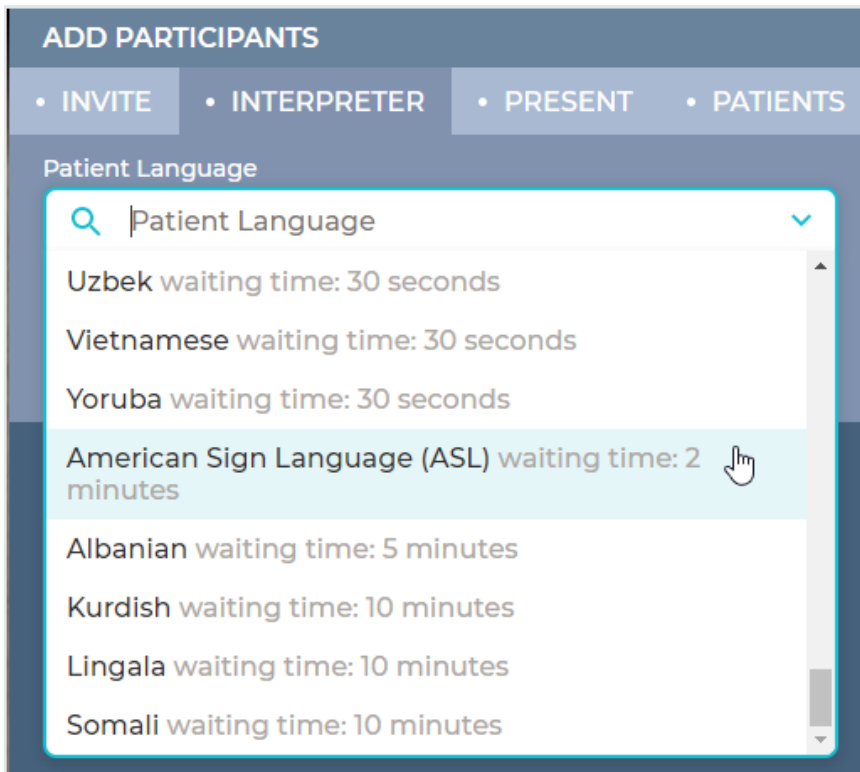
Interpreter Connection

A practitioner can make an interpreter request during a virtual encounter. Interpreters are randomly assigned.

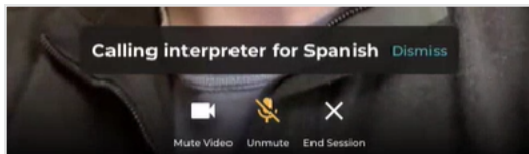
1. Select the Invite () button.



2. Select your **Interpreter**.

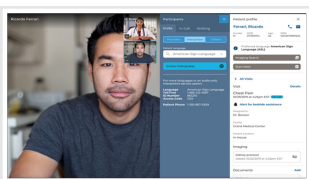


3. The scheduler or practitioner will receive a message that the Interpreter is being called.



Navigation

The Practitioner moves between the interpreter and patient by selecting their thumbnail in the upper, right corner of the screen. The right patient panel opens with language information for your patient.



WebView Point

If logging into an On Demand Session, or virtual encounter, this feature is greyed out if the interpreter is already on the call.

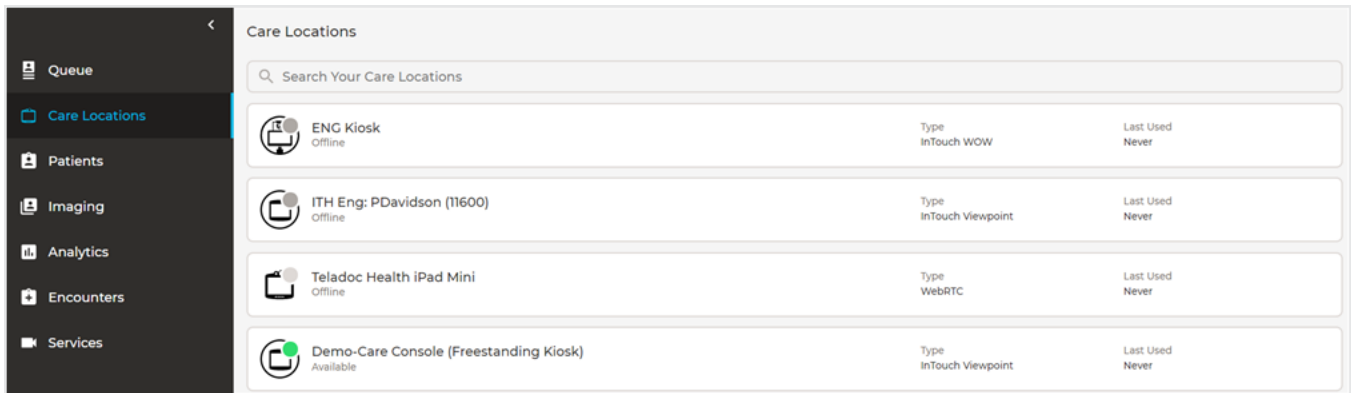
NOTE: On Demand in Session view is only available for Connect Embedded.

Emergent Care Request

Emergent Care patients are not required to have an appointment.

NOTE: Your practice should be configured for Emergent Care by your Practice Admin.

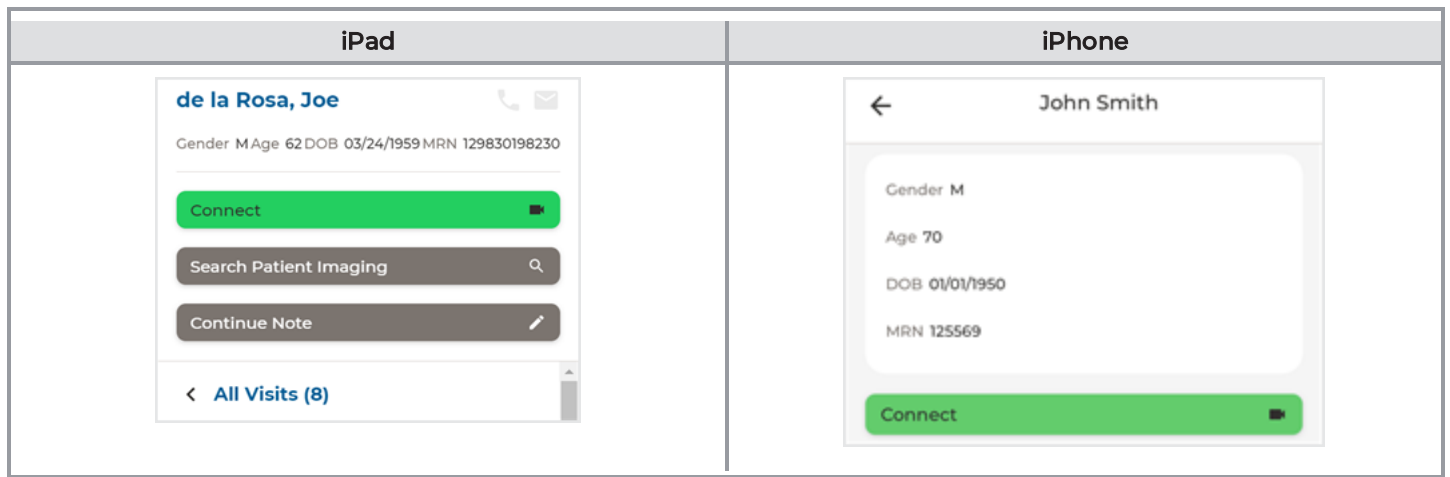
1. Select **Care Location** from the left navigation panel



2. Select a device or Care Location with a status of ready by clicking on its name. The status is displayed on the right of the device name.

Device Status Icon	Description
	Device is ready
	Device is busy
	Device is off-line

3. The right panel will populate with device information and a **Connect** button.



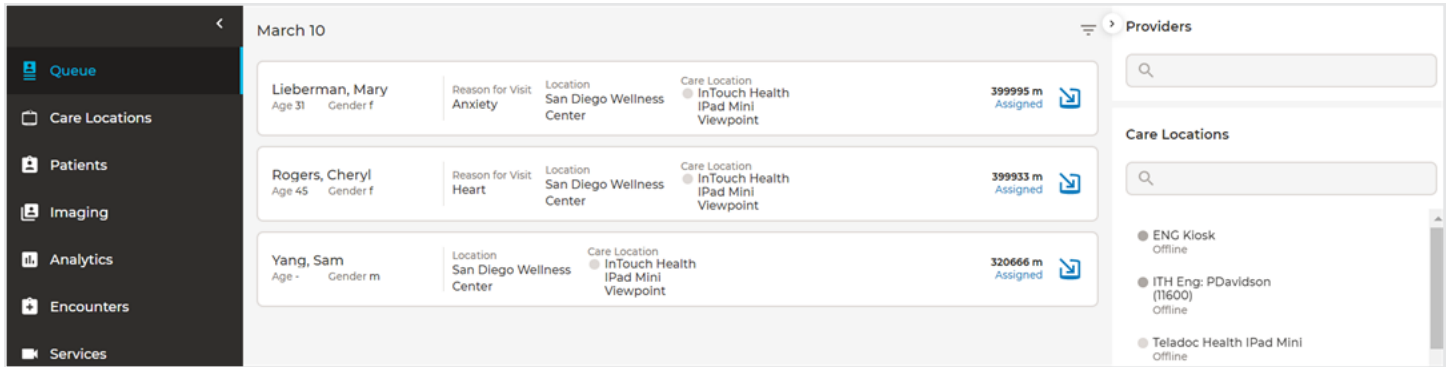
4. Your virtual encounter view opens.

Practitioner to Practitioner

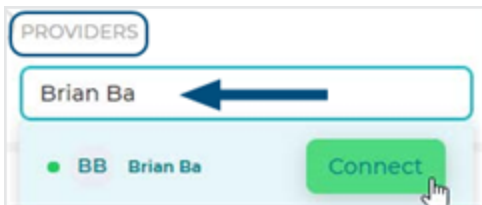
Connect to collaborate with experts during your virtual encounter.

iPad

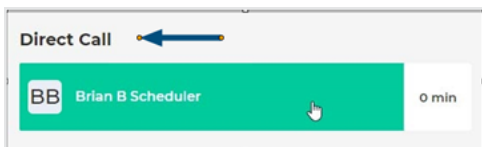
1. Select **Queue** from the left navigation panel.



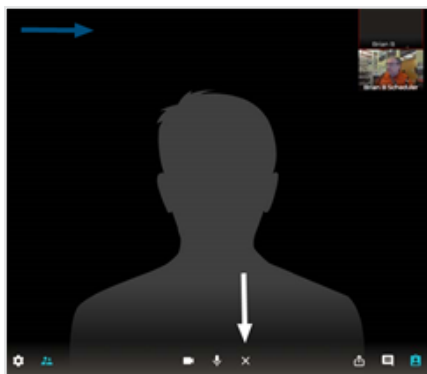
2. **Caller:** Enter the Practitioner or Scheduler's name in the **PROVIDERS** text box from the right panel.
3. Use the search bar to location another practitioner.



4. When done, select **Connect**
5. **Receiver:** Select the bar with your name from the **Direct Call** dialog.

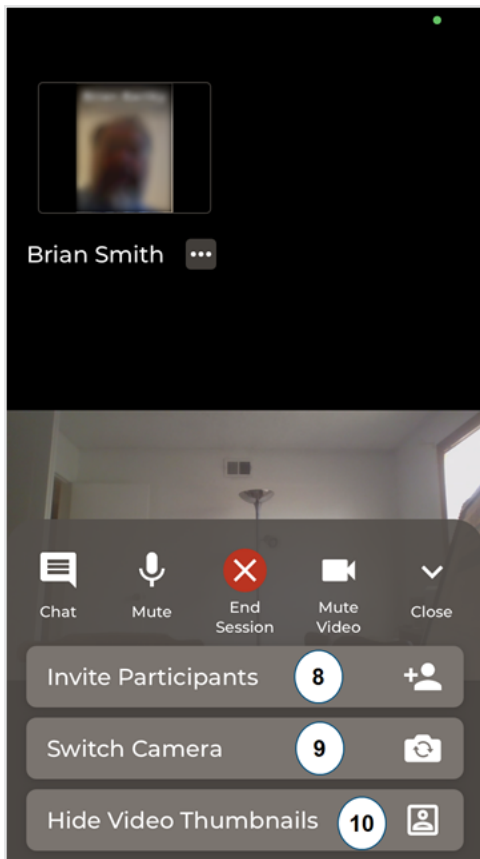


6. Then, select **Connect** to begin your virtual encounter.
7. Your direct call will begin



iPhone

1. Select **Invite Participants**



2. When done, **End Call** by selecting the **X** at the bottom of the viewing screen.

Encounters with Teladoc Health Devices

When a participant arrives and is ready for their virtual encounter, the Practitioner Admin uses the Care Location App. to send a virtual encounter request.

NOTE: The Practice Admin or Practice Administrator configures a Teladoc Health device (i.e. Care Location).

The options are:

[Encounter View](#)

[Options](#)

Encounter View

Connect to Teladoc Health devices (i.e. Care Locations).

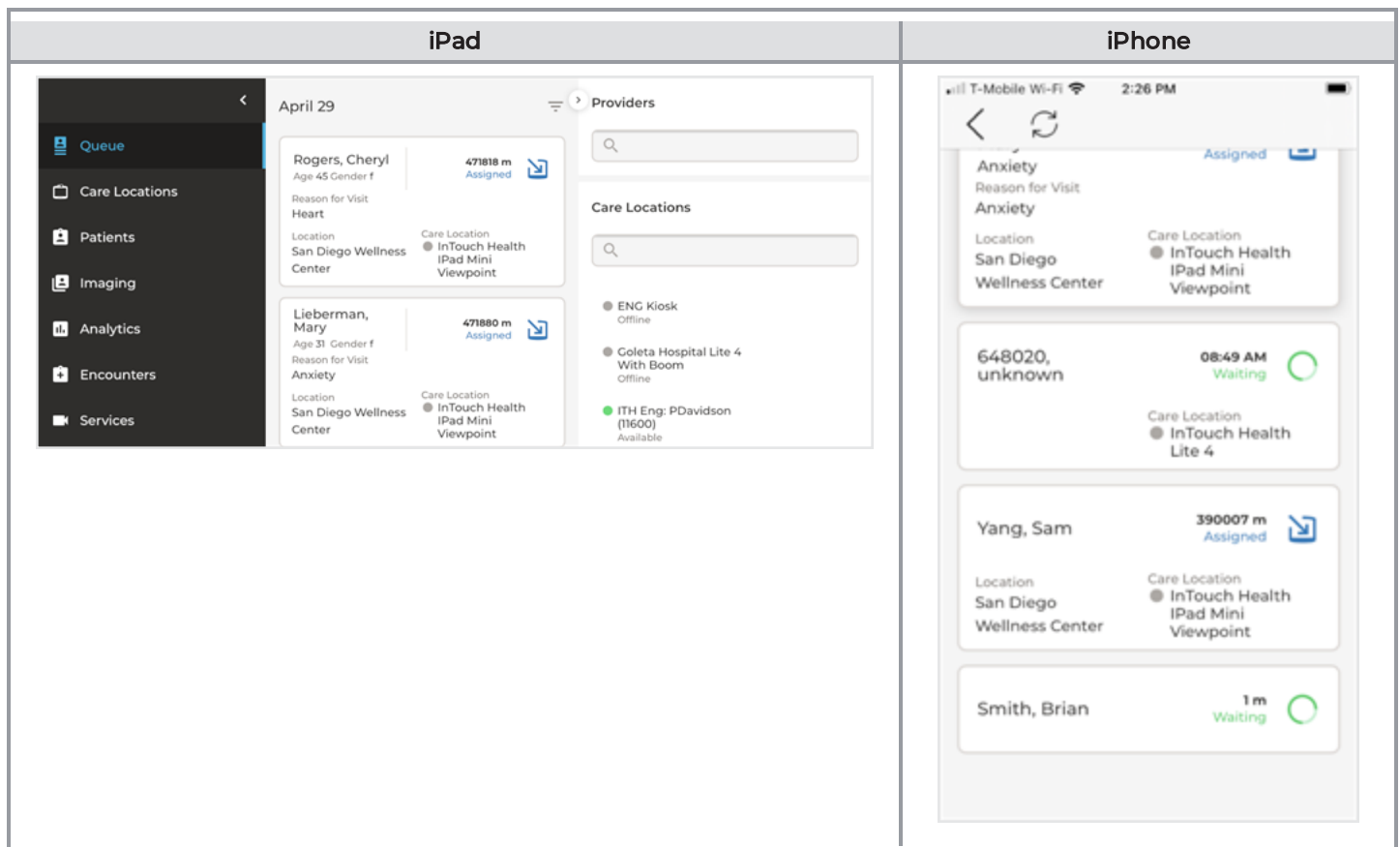
NOTE: See MA-16236 Provider Access Software for iOS User Guide for more connection options.

CAUTION: A backup method of communication should be available in case network communication is lost.

1. Select **Queue** or **Encounter** from the left navigation panel to connect.

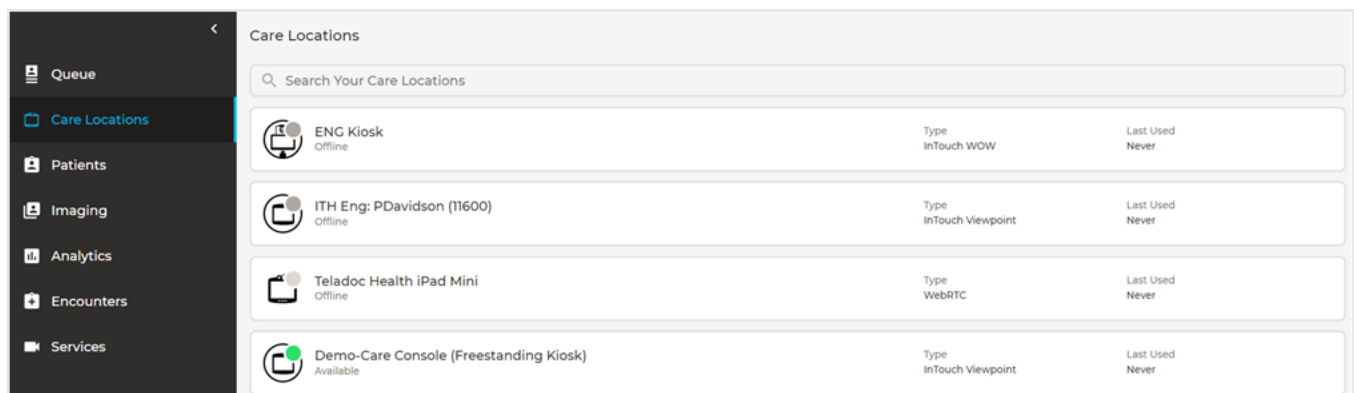
Queue

1. Select your patient from a list of patients waiting for an appointment today from the middle Queue Patient panel.



Encounter

1. Select **Encounter** from the left navigation panel.

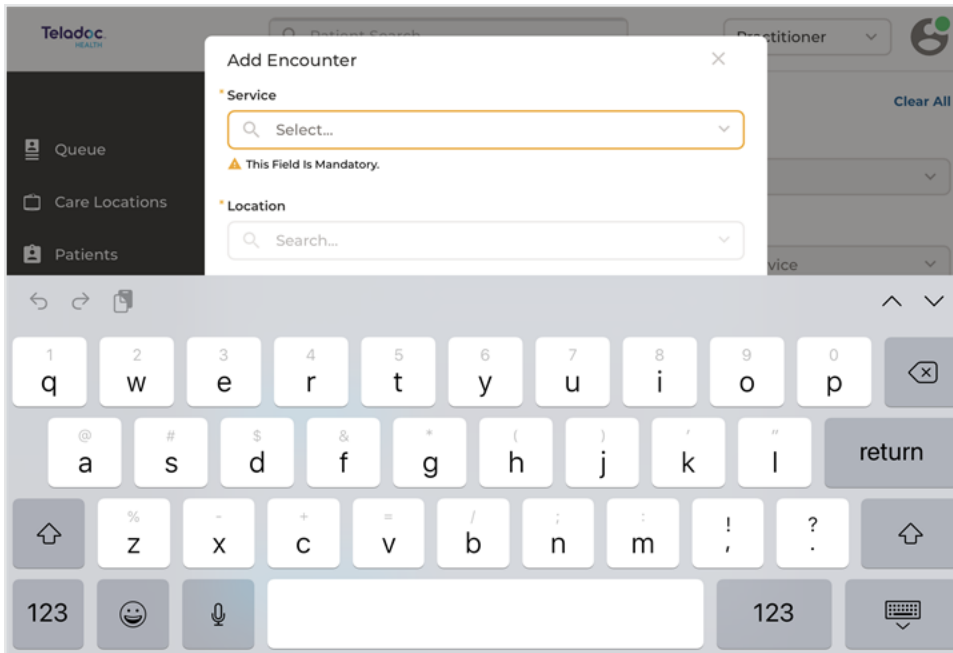


2. Or create a new encounter by selecting the **New Encounter+** button.

Encounters						Add Encounter +
Date	New, Vince Test Solo ID 603231	DOB	Reason for Visit	Location	Provider	Vince Practitioner
Date	02/17/2021 09:38 A...					
Date	Solo ID 603121	DOB	Reason for Visit	Location	Provider	
Date	02/17/2021 09:37 AM...					
Date	Test 1 Solo ID 594961	DOB	Reason for Visit	Location	Provider	
Date	02/16/2021 08:02 A...					
Date	Kuppamala, Vince Solo ID 277591 DOB 04/30/1990	DOB	Reason for Visit	Location	Provider	Ashwin Srihari
Date	02/12/2021 08:05 A...					
Date	Kuppamala, Vince Solo ID 277591 DOB 04/30/1990	DOB	Reason for Visit	Location	Provider	
Date	02/12/2021 08:01 AM...					
Date	567581, unknown	DOB	Reason for Visit	Location	Provider	
Date						

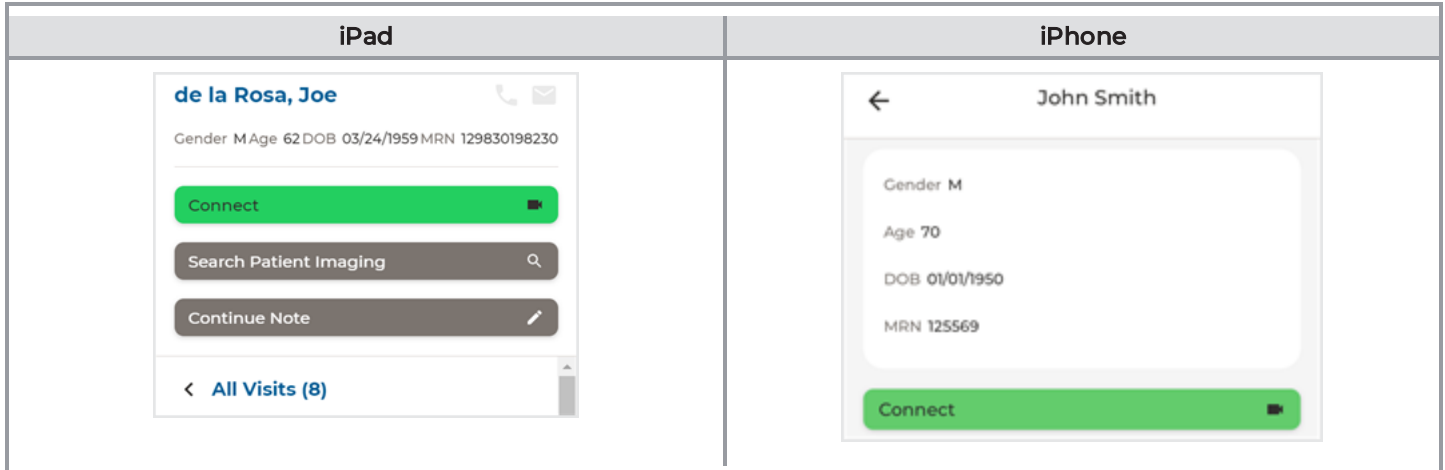
3. Enter the fields in the **Add Encounter** dialog.

- You can change the 'Reason(s) for visit' at any time.
- Ability to Yes, Cancel Encounter or No Keep Encounter.
- Automatically connects to PAS.

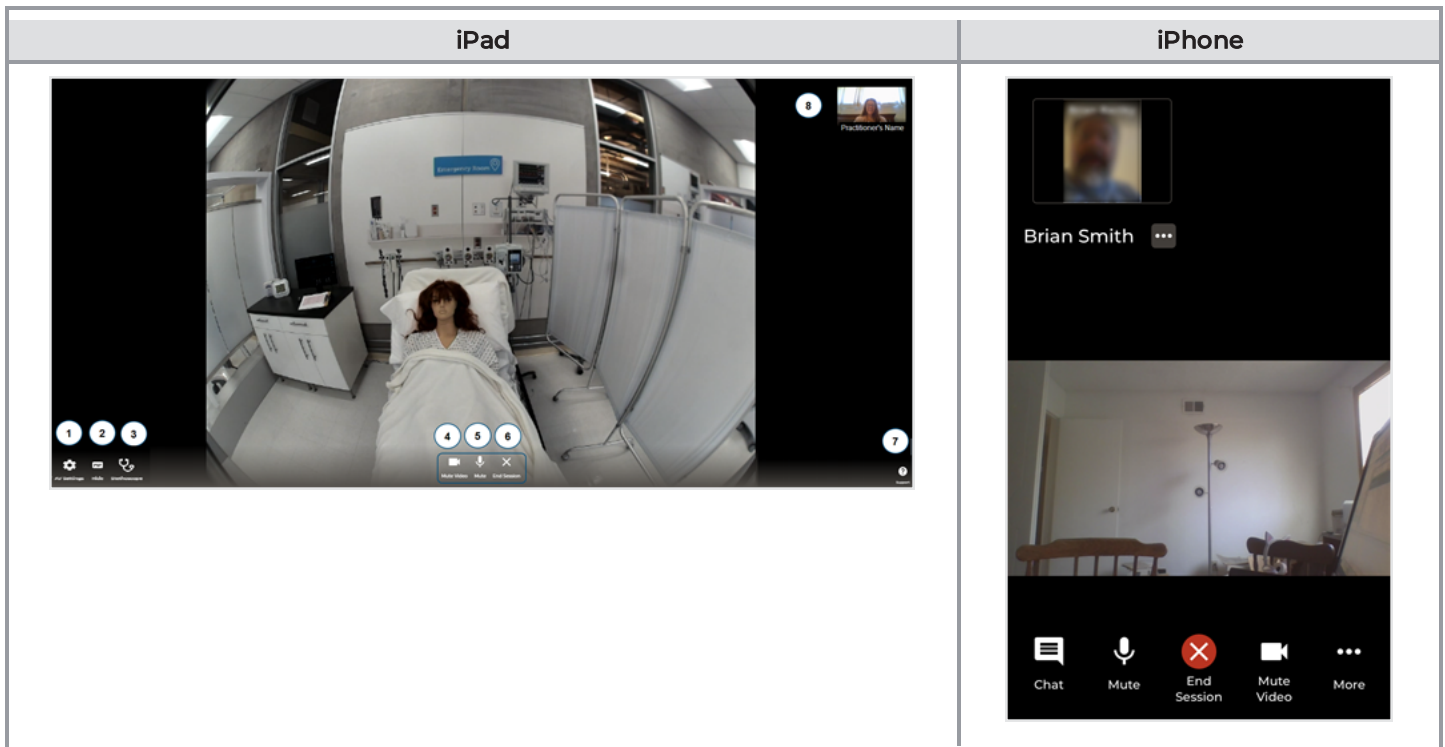


Connect

1. Select the **Connect** button to begin.



2. Your virtual encounter will begin.



Options

A variety of options are available from the video viewing screen.

The options are:

[Adjust Audio and Video](#)

[Use Stethoscope](#)

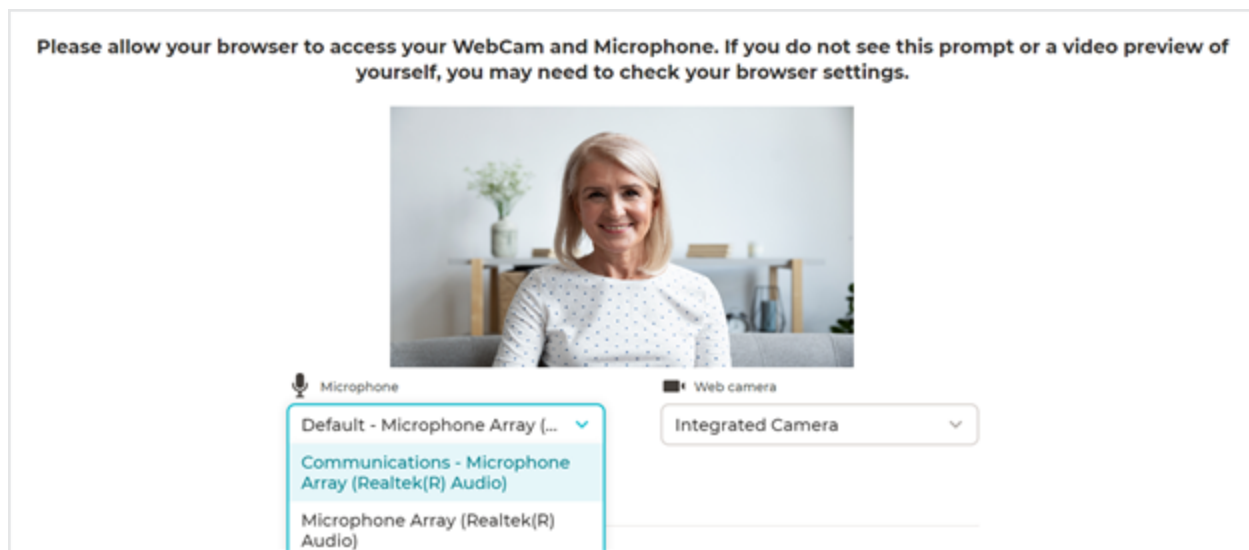
[End Encounter](#)

[Share Your Screen](#)

[Chat](#)

Audio/Video

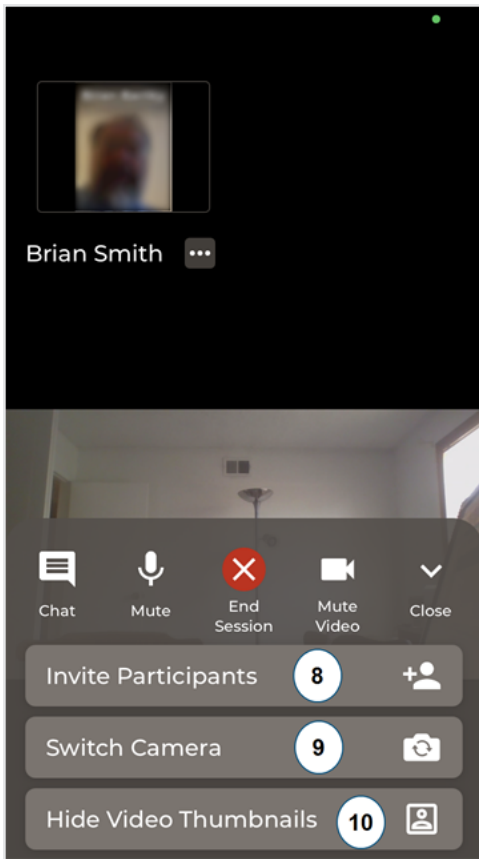
Adjust your audio and video settings



Remote Camera

You can adjust the device's remote camera view to interact with patients most efficiently using the remote camera functionality of Teladoc Health devices or Care Locations.

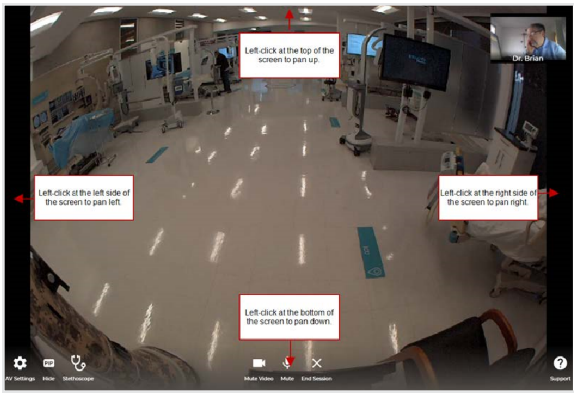
Select **Switch Camera** if using the iPhone.



Pan

Modify your view using the Panning feature.

1. Pan the remote camera view with a single left mouse click at the top, right, bottom, and left sides of the screen.
2. To pan left, left-click on the left side of the remote camera view screen.



Zoom In and Out

Zoom in and out on all devices to enhance your remote camera view of your patient.

1. Use the mouse wheel to zoom in and out.
2. Left-click and drag to zoom within a selected area.
3. Zoom straight out by clicking the right mouse button to return you to the default remote camera view.
4. Zoom in by rolling the mouse wheel forward.
5. Zoom out by rolling the mouse wheel back.
6. Use Box Zoom by left-clicking at the center of where you want to view, then hold and drag the mouse cursor over the area to be enlarged.



7. Zoom into the area you selected and release the left mouse button.




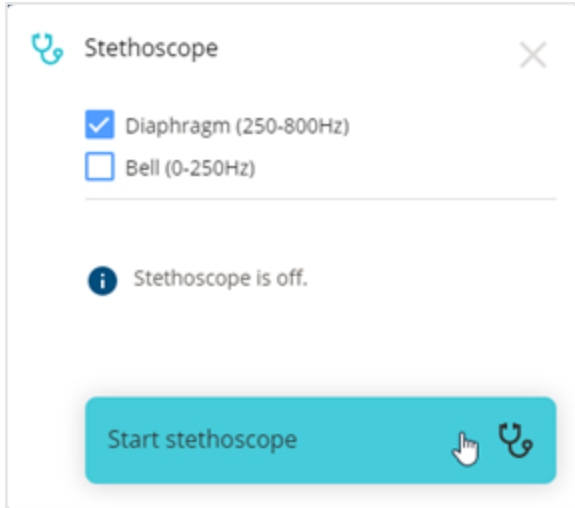
Stethoscope

You have four Stethoscope configurations to choose from depending on your Patient Access device. While an optional Stethoscope is in operation, the remote location will hear you, while you will only hear the Stethoscope.

CAUTION : Practitioners must wear headsets to listen to auscultations.

NOTE: Please test before use. Contact Technical Service or refer to the Stethoscope manual for more information.

1. Select the **Stethoscope** icon ().
2. From the open **Stethoscope** dialog, select either **Diaphragm** or **Bell** type.



3. When done, select **Start Stethoscope**.
4. Stop the stethoscope by selecting **Stop the Stethoscope**.

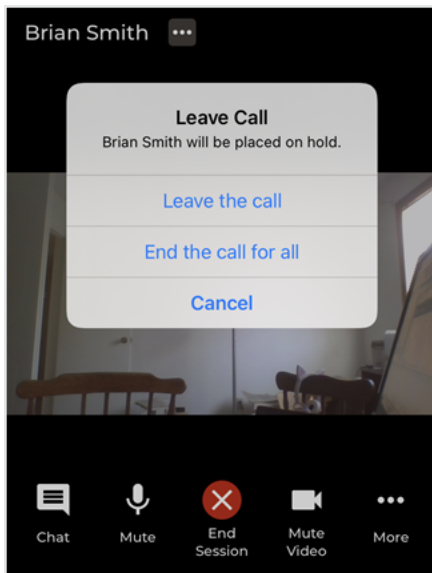


5. When done, select the **X** in the upper, right corner.
6. The remote audio will be enabled and the Stethoscope audio disabled.

End Session

Once you complete your virtual encounter, **End the Session**.

1. Select the **X** from the bottom of the screen.
2. Select **Leave the Call, End the call for All**, or **Cancel** from the dialog that opens and to remove your patient from Services.



3. Prompts will inquire about your virtual encounter.



- If your Practice Admin enabled provider surveys, a provider survey will be provided automatically.
- Fill out all the fields in the survey.

The screenshot shows a 'Provider Survey' form with the following sections:

- Video Quality:** Radio buttons for 5 (Excellent), 4 (Good), 3 (Average), 2 (Below Average), and 1 (Poor).
- Audio Quality:** Radio buttons for 5 (Excellent), 4 (Good), 3 (Average), 2 (Below Average), and 1 (Poor).
- Ease of use:** Radio buttons for 5 (Excellent), 4 (Good), 3 (Average), 2 (Below Average), and 1 (Poor).
- Connect on First Call:** Radio buttons for Yes and No.
- Overall Satisfaction rate:** Radio buttons for 5 (Extremely Satisfied), 4 (Very Satisfied), 3 (Neutral), 2 (Slightly Satisfied), and 1 (Not at all Satisfied).
- Time requirement for entire visit in minutes:** A text input field.

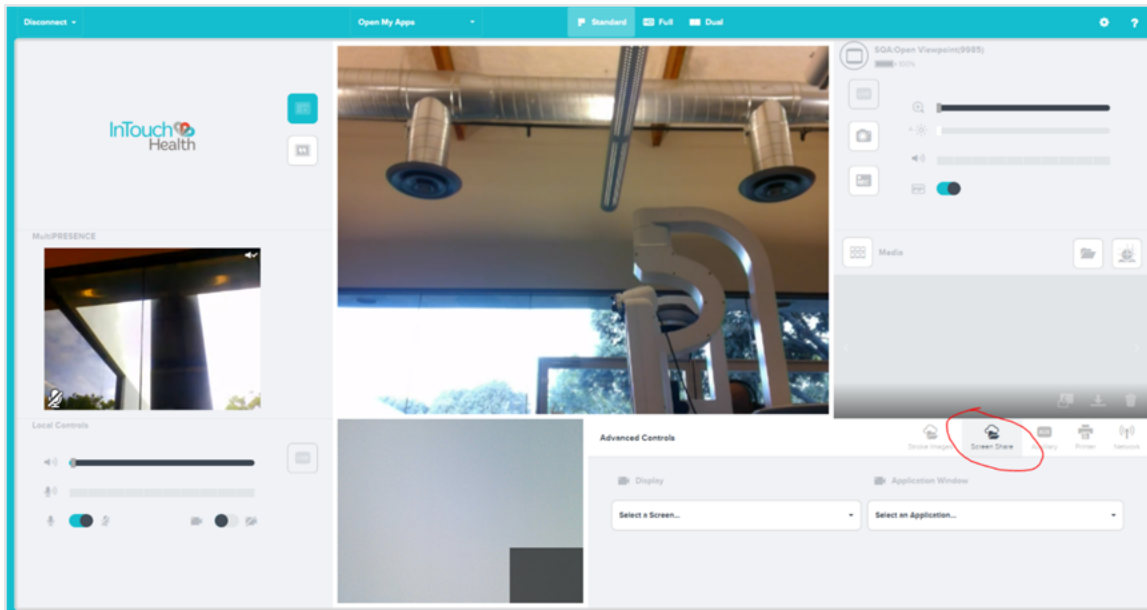
A blue box at the top right contains the text 'Answer all questions and select Save'. A blue arrow points to the 'Save' button at the bottom right of the form.

- When complete, select **Save**.
- Once your call ends, your patient's status will change to **Complete** and their name removed from Services.

Share Screen

Share your screen during a virtual encounter with other experts and your patient.

1. Select the screen **Sharing** icon.

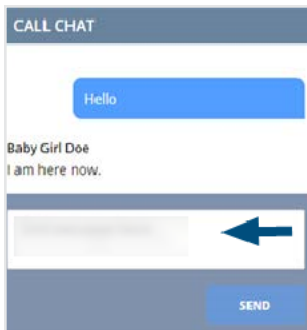


2. Select the screen you want to share
3. When done, select **Share**.
4. Select the **Sharing** icon again to end screen sharing.

Chat

Chat with any participant during your virtual encounter. The chat icon will flash between blue and white when you receive a chat message. Any participant can initiate chat.

1. Select the **Chat** icon.
2. Enter your message in the text area of the dialog.

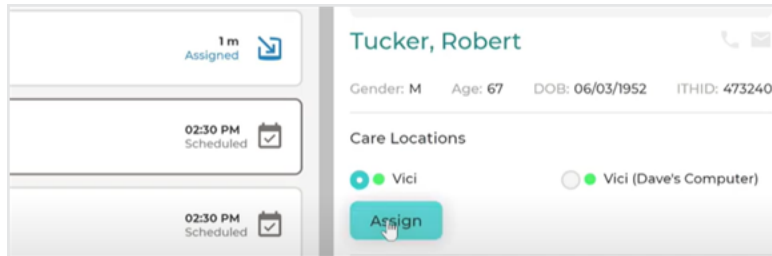


3. When done, select **Send**.

Encounters without Teladoc Health Device

Practitioners, Schedulers, and other medical professionals can use the Provider App without a Solo device using an iPad, or iPhone.

1. When a patient is ready for their appointment, they can be manually assigned to a Care Location or device.



2. A notification is then sent to their Practitioner.

The options are:

[Invite Patient](#)

[Options](#)

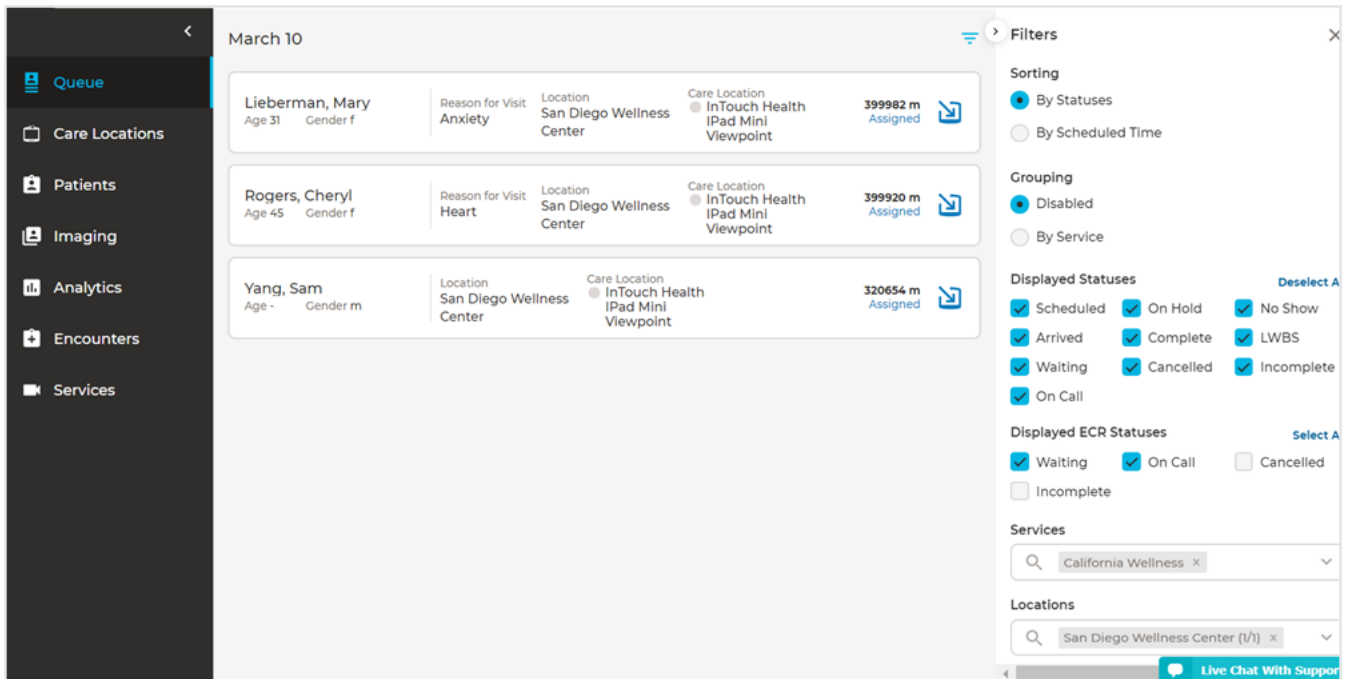
Invite Patient

Queue

You can invite a patient to a virtual encounter by copying a URL from Services

iPad

1. Select a **Queue** from the left navigation panel.

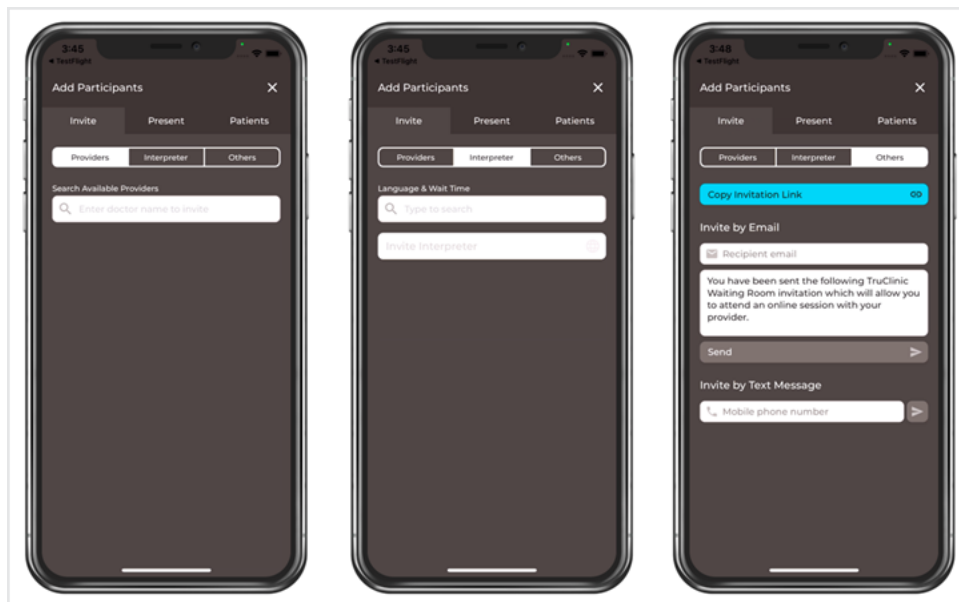
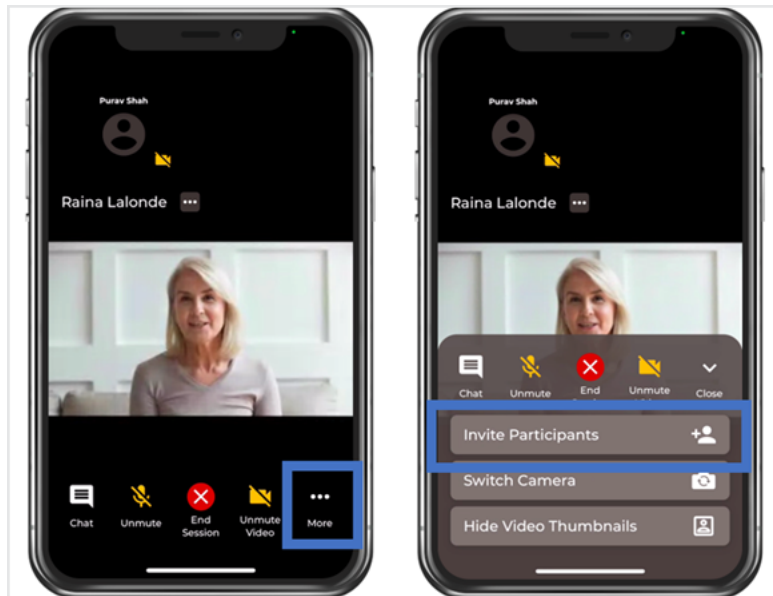


2. Select a patient for the virtual encounter from the middle Queue panel
3. Select **Details** from the right Patient Panel.
4. Copy the **URL** from the middle Appointment panel to send it to the patient, resend the invite email, or send a text (**SMS**)

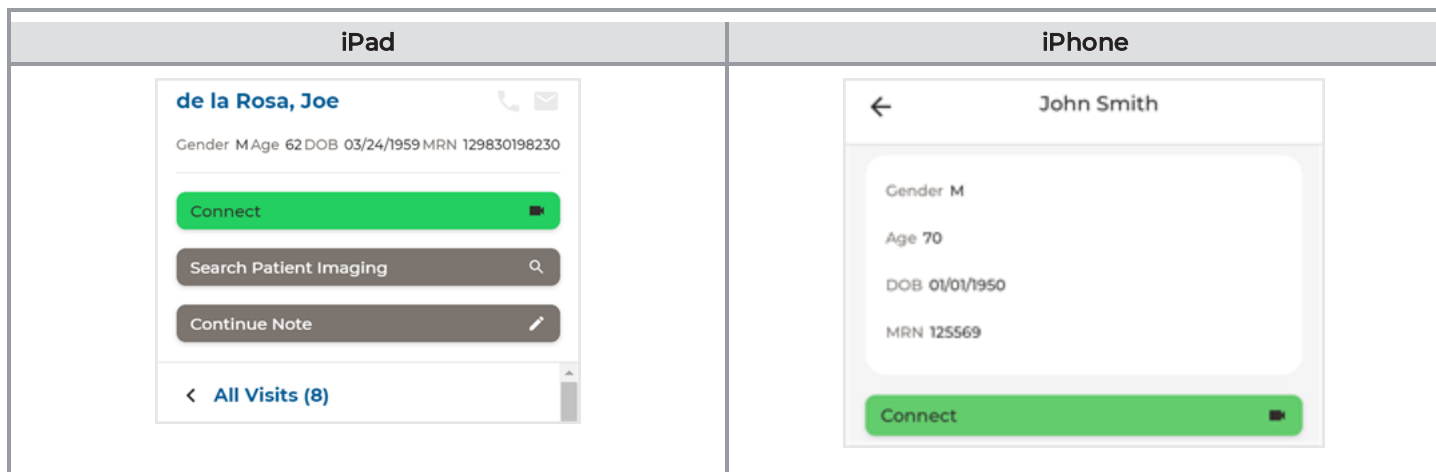


iPhone

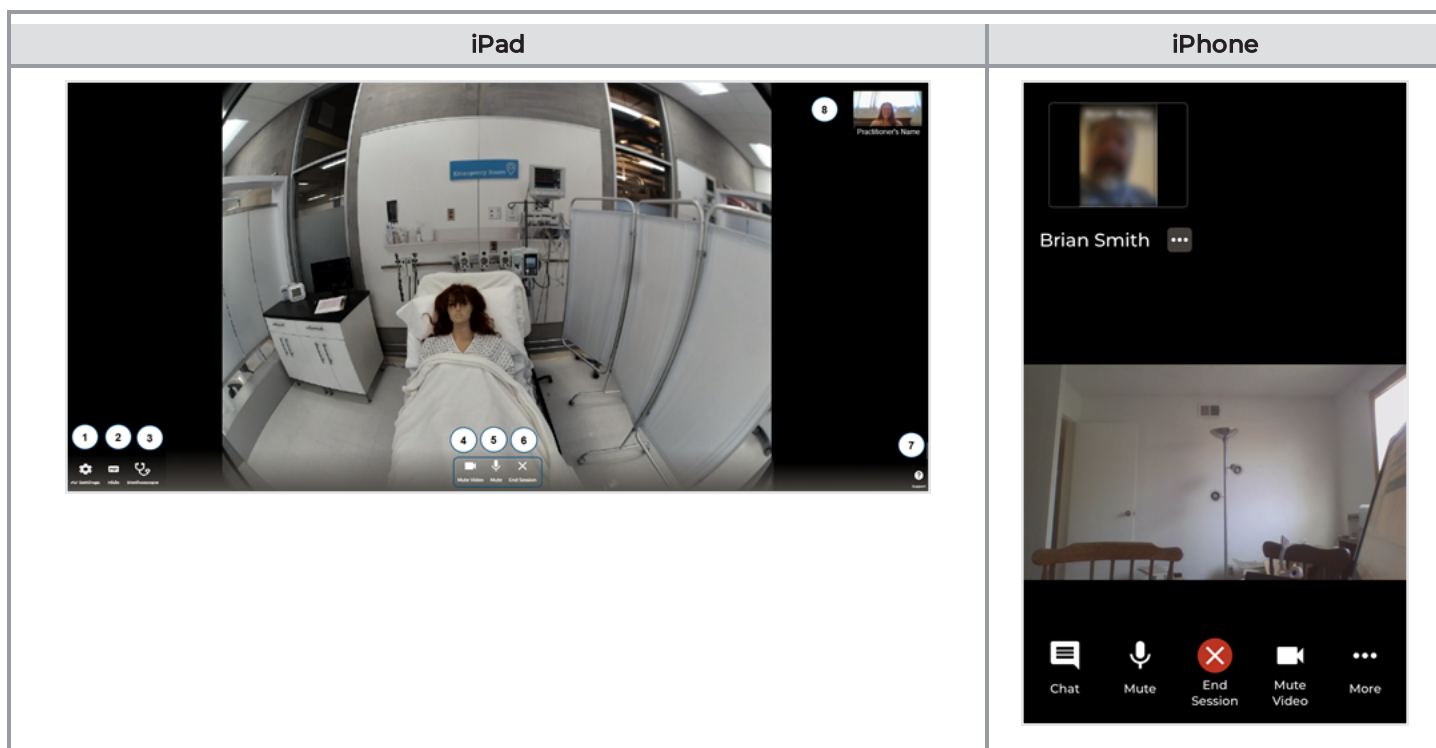
1. Select **Invite Participants** if using the iPhone.



2. An invite email will be sent to your patient automatically.
3. Once the patient checks in, a **Connect** button will appear automatically in the right Patient panel.
4. Select the **Connect** button to begin.



5. Your virtual encounter will begin.



Options

A variety of options are available from the video viewing screen once your patient virtual encounter begins.

The options are:

[Adjust Audio and Video](#)

[Hide Thumbnails](#)

[End Encounter](#)

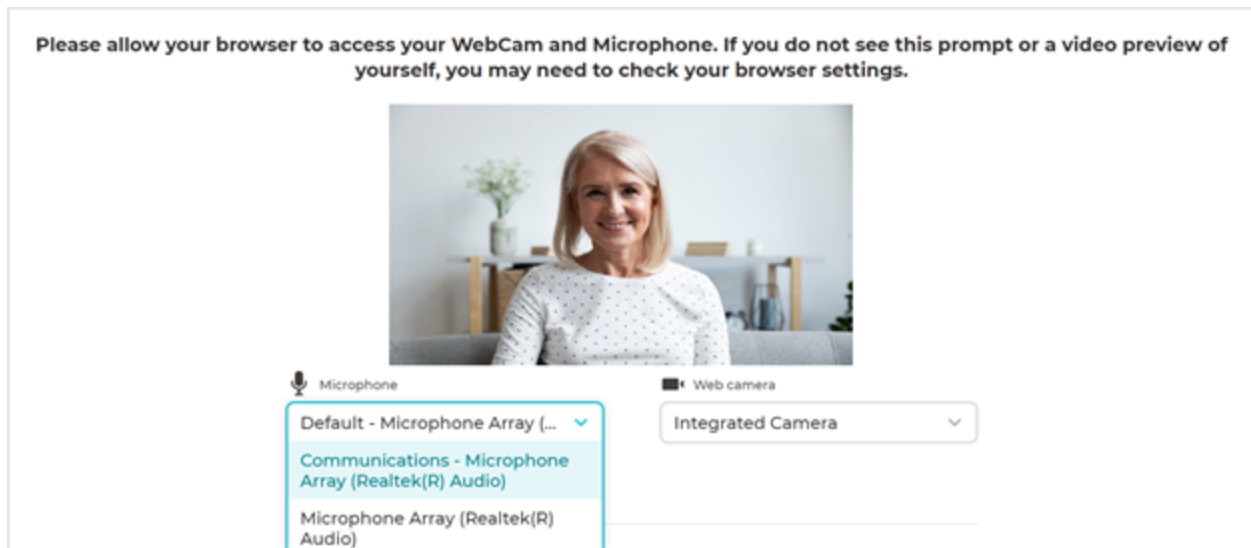
[Add Users](#)

[Thumbnail](#)

[Send Forms During an Encounter](#)

Audio/Video

During a virtual encounter you can modify the source of your audio or video.

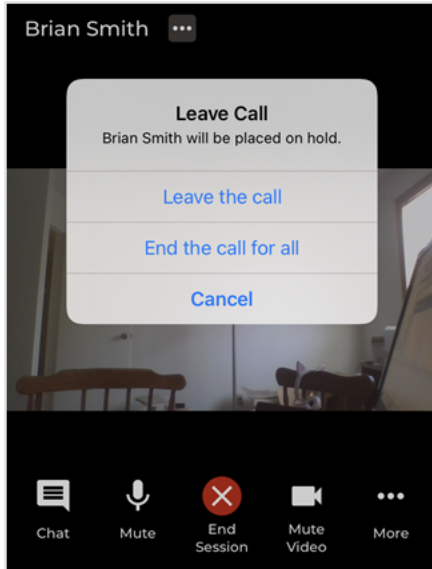


End Session

Once you complete your virtual encounter, [End the Session](#).

End

1. Select the **X** in the toolbar on the bottom of the screen.
2. Select **Leave the Call, End the call for All**, or **Cancel** from the dialog that opens to end the call and remove your patient from Services.



3. Prompts will inquire about your virtual encounter.

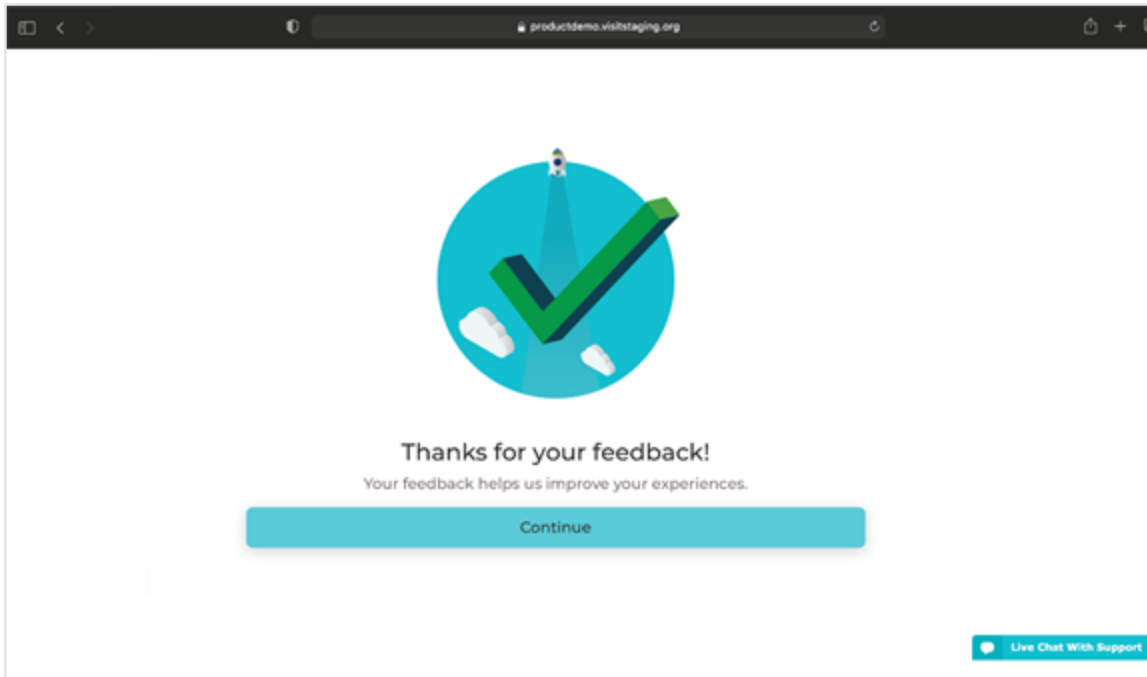


What went wrong?

Audio <input type="checkbox"/> I Could Not Hear Them <input type="checkbox"/> They Could Not Hear Me <input type="checkbox"/> Audio Quality Was Poor	Video <input type="checkbox"/> I Could Not See Them <input type="checkbox"/> They Could Not See Me <input type="checkbox"/> Video Quality Was Poor
--	--

Please describe any other issues

[Submit](#)



4. If your Practice Admin enabled provider surveys, your provider survey will populate the middle panel automatically.
5. Fill out all the fields in the survey.

Provider Survey

Answer all questions and select Save

Video Quality

5 (Excellent) 4 (Good) 3 (Average)

2 (Below Average) 1 (Poor)

Audio Quality

5 (Excellent) 4 (Good) 3 (Average)

2 (Below Average) 1 (Poor)

Ease of use

5 (Excellent) 4 (Good) 3 (Average)

2 (Below Average) 1 (Poor)

Connect on First Call

Yes No

Overall Satisfaction rate

5 (Extremely Satisfied) 4 (Very Satisfied) 3 (Neutral)

2 (Slightly Satisfied) 1 (Not at all Satisfied)

Time requirement for entire visit in minutes

Save

- When complete, select **Save**.
- Once your call ends, your patient's status will change to **Complete** and their name removed from Services.
- A message will slide onto your screen temporarily from the right.

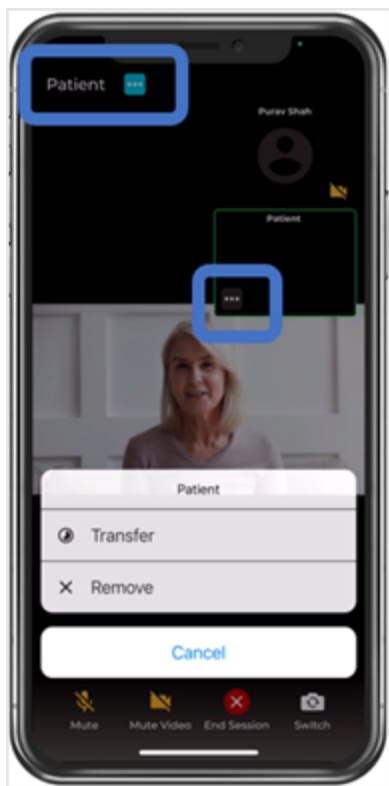
Rumble, Barney Age 50 Gender m	Reason for Visit Blurred vision	Location New York test clinic	Carelocation + NewCarelocation...	140773 m Waiting
Gray, Randy Age 42 Gender f	Reason for Visit Headache	Location ITH West Medical Center	A notification that your Encounter is complete	
Gray, Randy Age 42 Gender f	Reason for Visit Dizziness	Location New York test clinic	Carelocation + NewCarelocation...	136624 m Waiting

Visit complete for Joe de la Rosa
intouch.visitsstaging.org

- To return to the Encounter, select **Connect** from the Patient Panel.

On Hold

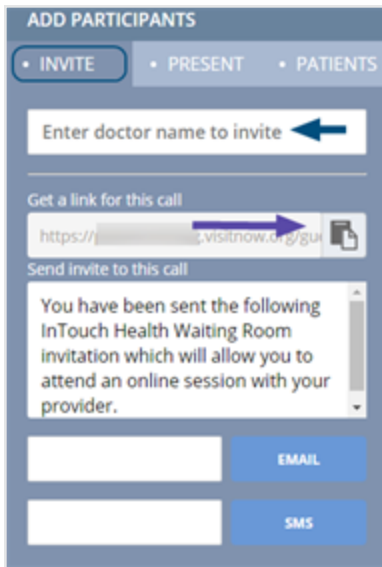
Practitioners are presented with a control menu (three dots) that allows them to remove patients or guests from a call or to transfer the patient back to Services. Practitioners can then rejoin the call for the "waiting" patient.



Add Users

You can add additional participants if group calling must be enabled

1. Select the **Add Participants** icon (.
2. Select the **Invite** tab from the **ADD PARTICIPANTS** dialog that opens.



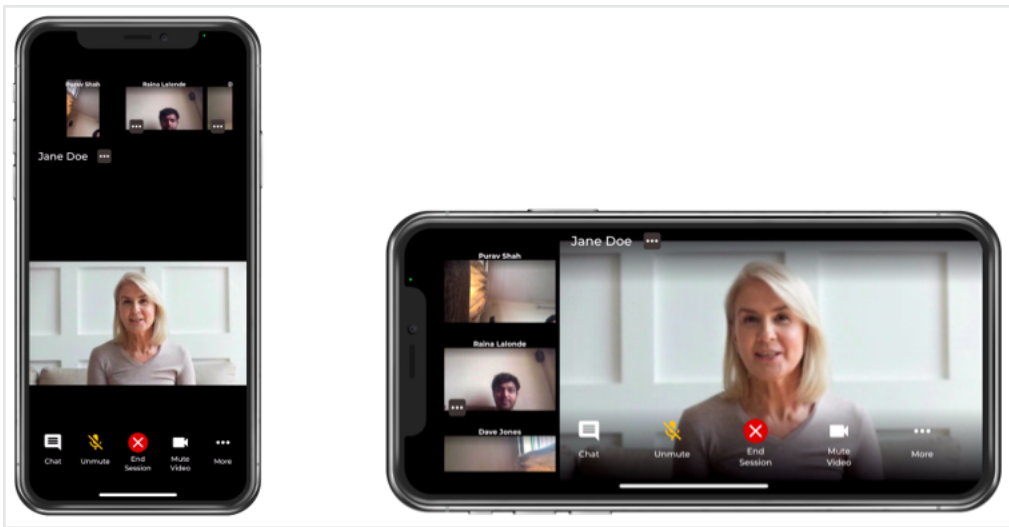
3. Select one of the three options to send an invitation to your patient or another to join the virtual encounter.
 - Use this link to email the invitee using a 3rd party email program.
 - Enter the invitee's email, and select **Email**. The system will send them an email with an access URL.
 - Enter the invitee's phone number, and select **SMS**. The system will send them a text message with the access URL.
4. **Enter doctor name to invite**. Matching results will appear as you type.
5. Select the **clipboard** icon to copy the access URL.

Invite a patient who lost connection

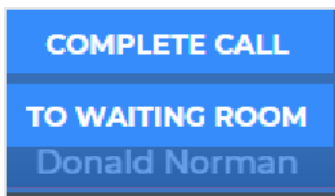
If a participant loses connection during a virtual encounter, invite them back using the steps described in the section [Invite to a Scheduled Appointment](#). When you invite your patient to a virtual encounter, they will not appear in Services.

Thumbnail

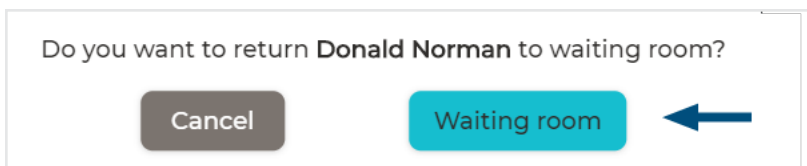
Thumbnails are used to view all participants in a virtual encounter. During multi-party calls, select a thumbnail to send a participant back to Services.



1. Select the three dots in the upper, right corner of a Thumbnail to open a drop down.



2. Select **COMPLETE CALL** to end. Your patient will be removed from Services and their status will change to Complete.
3. Select **TO SERVICES** to send your patient back to Services with the status of On Hold. When you select **TO SERVICES**, a dialog will appear to ask if you want to return your participant to Services. If you do, select Services.



4. A message will slide from the right to notify you that your participant was sent back to Services with the On Hold status.



Donald Norman male 0 entered #Acute
Neurology with

intouch.visitstaging.org

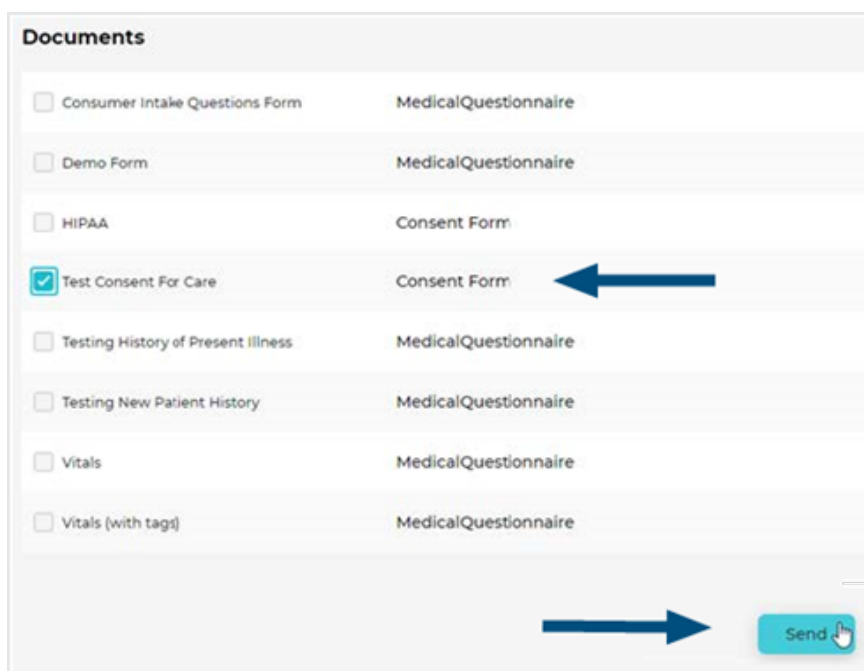
Send Forms

Send forms to patients during a virtual encounter. Generally, these forms require a signature. This option gives you the convenience of answering any questions your patient may have.

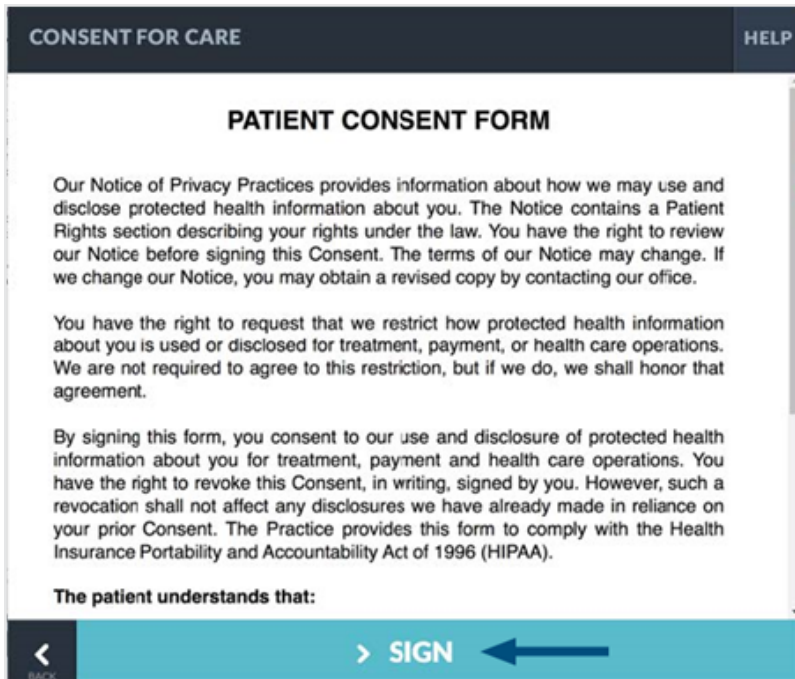
1. Select the plus sign from the **Document** section of the right Patient Panel.



2. Select a form to send from the middle **Document** panel.



- When done, select **Send**.
- Your patient will be presented with the forms you selected in the preview window.



The screenshot shows a digital form titled "CONSENT FOR CARE" with a "HELP" button in the top right corner. The main heading is "PATIENT CONSENT FORM". The text on the form includes:

Our Notice of Privacy Practices provides information about how we may use and disclose protected health information about you. The Notice contains a Patient Rights section describing your rights under the law. You have the right to review our Notice before signing this Consent. The terms of our Notice may change. If we change our Notice, you may obtain a revised copy by contacting our office.

You have the right to request that we restrict how protected health information about you is used or disclosed for treatment, payment, or health care operations. We are not required to agree to this restriction, but if we do, we shall honor that agreement.

By signing this form, you consent to our use and disclosure of protected health information about you for treatment, payment and health care operations. You have the right to revoke this Consent, in writing, signed by you. However, such a revocation shall not affect any disclosures we have already made in reliance on your prior Consent. The Practice provides this form to comply with the Health Insurance Portability and Accountability Act of 1996 (HIPAA).

The patient understands that:

At the bottom of the form is a teal navigation bar with a left arrow, the text "> SIGN", and a right arrow.

- When complete, the documents will appear in your Documents tab.

Resources

A variety of resources assist you in your use of Teladoc Health's telehealth platform.

The options are:

[Audit Log](#)

[Connect with Multiple Devices](#)

[Download PAS iOS](#)

[The iPad App](#)

[iPad Controls](#)

[Navigating PAS iOS](#)

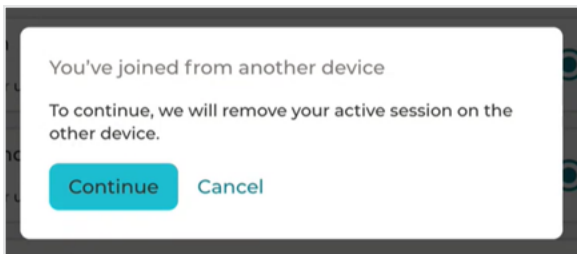
[Troubleshoot Browser](#)

[Recharging](#)

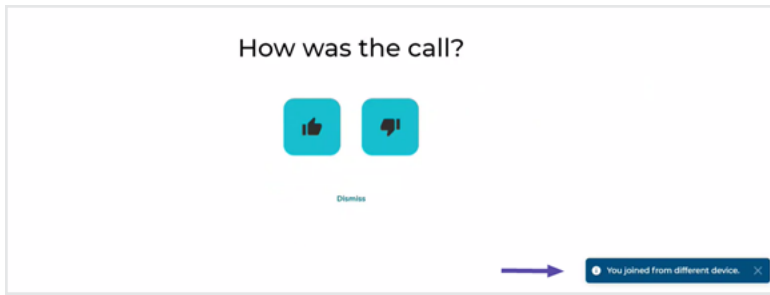
Multiple Devices and Browsers

A user can only be connected for a virtual encounter with one device. When you are connected to one device, but then try to connect with another, you will receive a message that your first virtual encounter is being removed. Select **Continue** if you want to leave one encounter and connect with another.

Devices

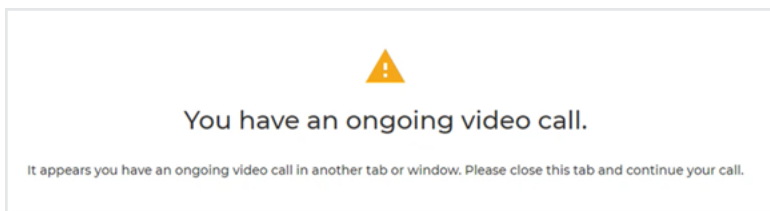


Once you are connected to the new device, you will receive the message <You joined from different device>.



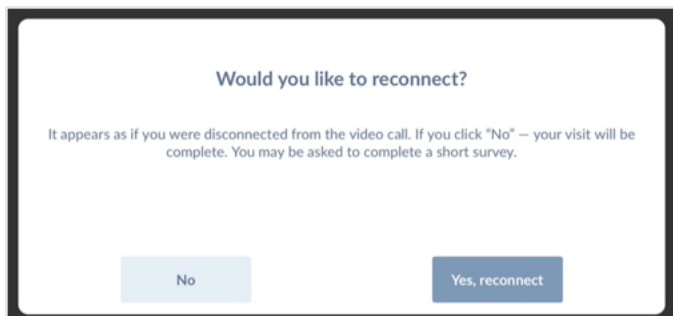
Browsers

When a provider attempts to join the same session on the same browser, they will be asked to close one of the tabs on their browser.



Devices and Browsers

When you as a provider, use many different devices and browsers, you may be inadvertently disconnected. If you are disconnected, you will be asked to reconnect. Select **Yes, reconnect** if you want to reconnect.

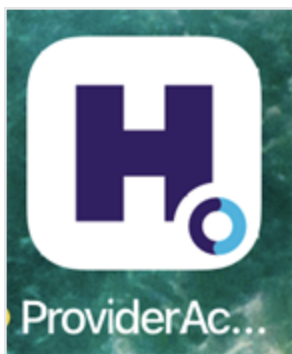


iOS Provider Access Download

Teladoc Health's Provider Access for iOS is available from the Apple App store.

Note: Teladoc Health recommends using their iOS Provider Access software for increased functionality, such as the ability to drive a Teladoc Health Vita device. See the Teladoc Health Provider Access software User Guide (MA-16236-022).

1. Obtain an Apple ID to download from <https://appleid.apple.com>
2. Acquire the Teladoc Health app from the Apple Store.
3. Use <https://apps.apple.com/us/app/intouchhealth/id566427448> to search.
4. Select the Teladoc Health app.
5. Select **GET** to download it.



6. Request a username and password from <https://www.intouchcustomer.com/UserReg/>.

- An email will be sent with instructions on how to create a password once your account has been approved.



Download Updates

A number in the top right corner of the Teladoc Health Provider Access screen represents how many updates are available. Visit the Apple App Store to download updates.

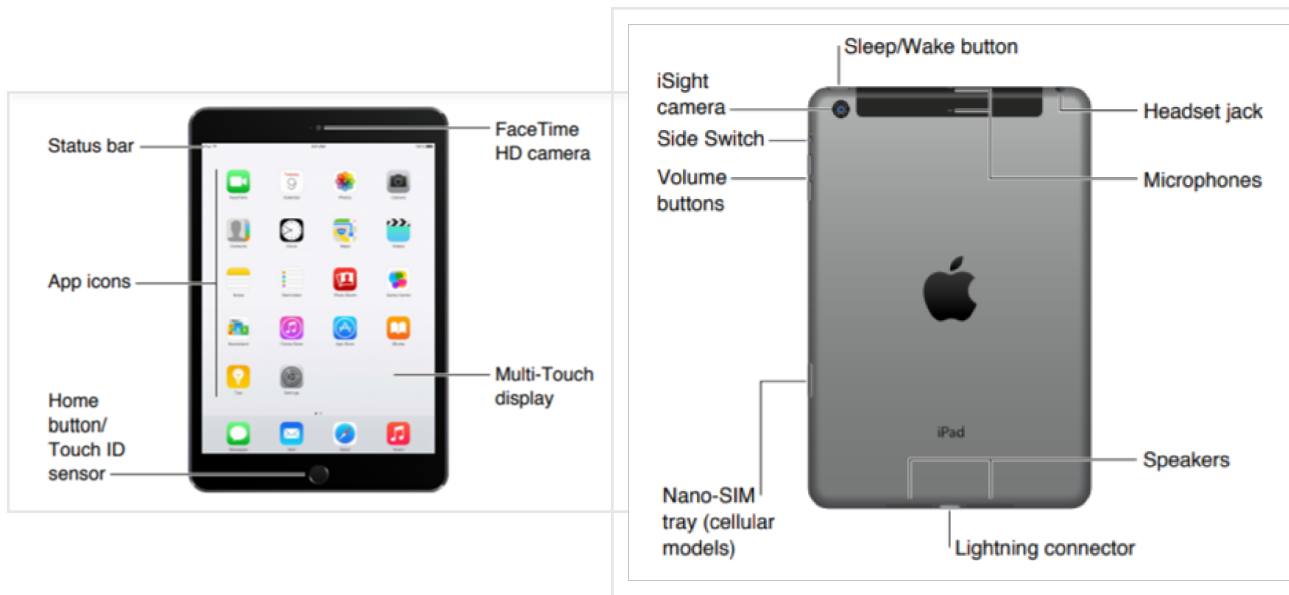
The iPad App

Download the Patient Access Device software. The Teladoc Health OS PAS for the iPad is available for download at the Apple App store. Obtain your Apple ID directly from Apple at: <https://appleid.apple.com>.

iPad Controls

The basic controls for the iPad are depicted below:

NOTE: All iPads (iPad, iPad Mini, and iPad Air) have a Lightning connector, but the iPad Pro has a USB-C connector instead. Refer to <https://www.apple.com/ipad/>.



Navigate Provider App

The Provider iOS App. provides the same functionality as the web version. At the top, the following buttons help you navigate and view pages:

- **Back** (⏪). Click this button to view the previous page.
- **Refresh** (🔄): Click this button to reload the current page.

Verify Up-to-Date

Visit the App Store occasionally to ensure that your applications are up to date.

1. Tap the **App Store** app.
2. Tap **Updates**.
3. If shown, tap **Update** next to the Solo icon.

Audio and Video Settings

Verify your iOS A/V settings.

1. Select the **Settings** icon.
2. Make sure the **Microphone** and **Camera** toggle switches on the right are enabled.

Troubleshooting Browser

Always run the latest browser version to avoid problems. Only Google Chrome, Apple Safari, and Mozilla Firefox are supported. Microsoft Edge and Microsoft Internet. Some resources to update your browser are provided below. Note, that clicking on one of the links will navigate you away for Teladoc Health Health's software.

HIPAA Procedures

As a business associate, Teladoc Health is subject to compliance of the law under §164.308 (Administrative Safeguards), under §164.310 (Physical Safeguards), and under §164.312 (Technical Safeguards) to 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 be in compliance with HIPAA regulations. Teladoc Health is providing the following 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, but they 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 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 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



Website

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

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