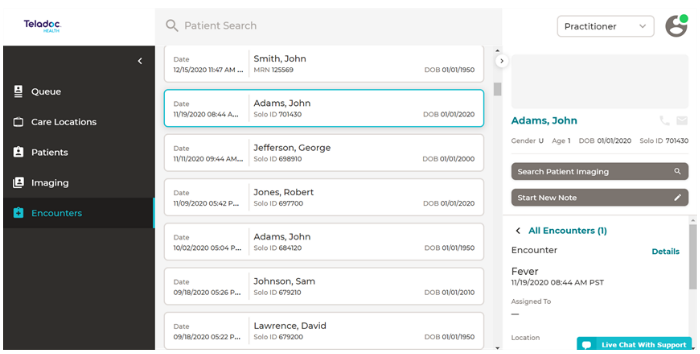
Teladoc Health™ Smart Notes Quick Reference Guide

Overview

Practitioner Admins are responsible for setting up Smart Notes. Practitioners and Nurse Roles can create, edit, sign, and transmit Smart Notes.

The Encounter Dashboard

The **Encounter** dashboard is divided into a **Patient Search** field, left navigation panel, middle encounter bars, and patient panel.



- **Patient Search:** Enter the patient's name in the **Patient Search** field.
- **Left Navigation Panel:** Select **Encounters** for a list.
- **Middle Panel:** Manage encounters, forms, consult note status, imaging status, audit logs, and fax status.
- **Right Patient Panel:** Select **Continue Notes** or **Start a new Note**, Reference form date and the linked patient studies to view patient virtual encounter form data.

Waiting Room Toggles

The Practice Admin is responsible for enabling the required **Smart Notes** toggle so practitioners can capture data during a virtual encounter.

Display Smart Notes

From User Settings, users can configure the **Screen to Launch After Scheduling Encounters** to auto-launch them into a virtual encounter Smart Notes form after an encounter is created.

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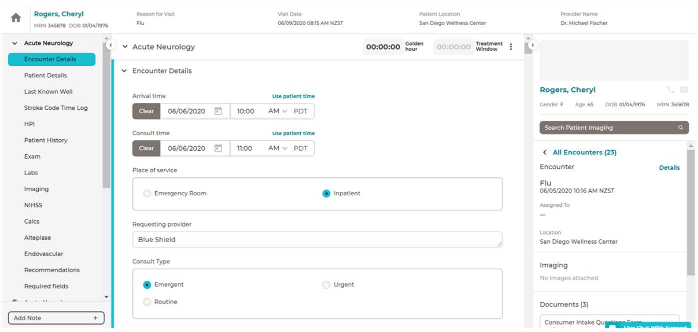
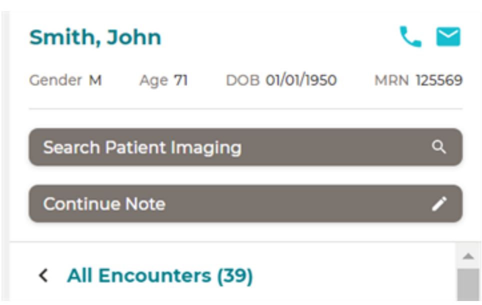
Smart Notes User Interface

The user interface is divided into a top patient banner header, a left form navigation panel, the Smart Notes form in the middle panel, and the right Patient Panel on the right.

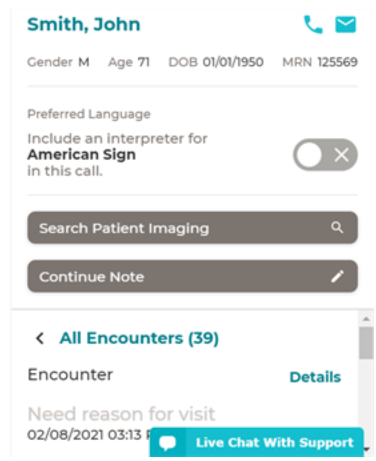


Select **Start a new note** or **Continue note** from the Patient Panel to open a Smart Notes form.



Select a Smart Notes Form

1. Select **Encounter** from the left navigation panel.
2. Select **Encounters** bar from the middle **Encounter** dashboard. and Patient Panel.
3. Select **Continue Note** or **Start new note**.



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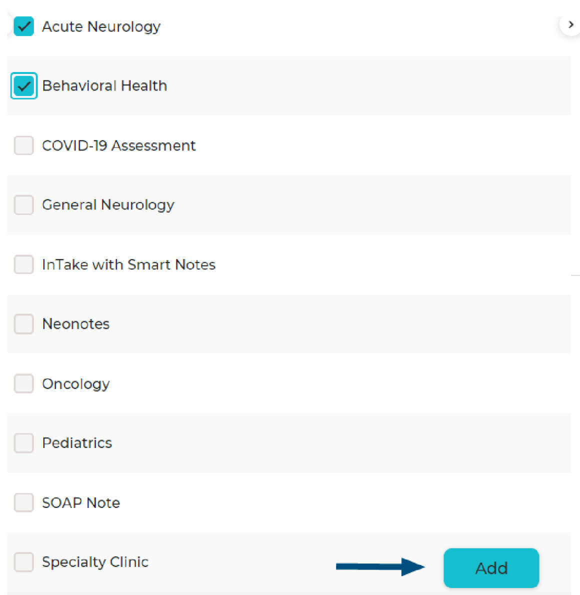
1. Select one or many forms.



2. When done, select **Add**.
3. Your Smart Notes forms (s) will open.
4. Select **Required fields**, which are marked with an orange asterisk (*) on the left navigation panel for a summary.

Smart Notes Fields

Select **Required fields,** which are indicated by an orange asterisk (*) to view. Smart Notes has a soft

and hard requirement for some fields. In soft mode, users can skip required fields and still sign a

note. In hard mode, users must complete prior to signing a note.

Field Type	Description
Text Area	Use an unlimited number of alpha numerical characters and/or expand the field hori-zontally].
Check Boxes	Toggle on or off to select one or several values.
Radio Buttons	Select one of multiple options.
Drop Downs	Select one or multiple options
Button Groups	Related buttons are grouped.
Tables	Organize data in tables.

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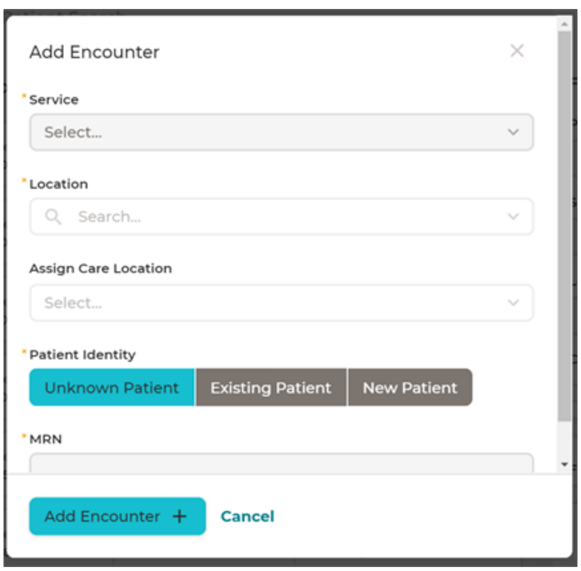
Multi-User Collaboration

An orange dot will displayed next to the form section on the left navigation panel when multiple users collaborate on the same Smart Note form.

Create Encounters

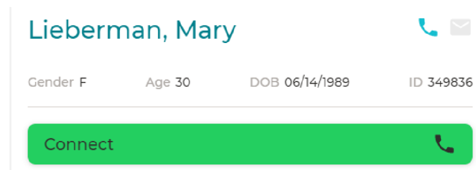
1. Create **Encounters** from the left navigation panel and then select on the **Encounter +** button.
2. Select a **Service**, **Location**, **Care Location**, **Patient Identity**, and **MRN** number from **Add Encounter**.



3. When done, select **Add Encounter +**.

Conduct a Virtual Encounter

Select the green **Connect** button from the Patient Panel to connect to the **Care Location** assigned to your virtual encounter.



Complete Smart Notes

Once you have completed all required fields and finished your clinical documentation, you can **Review & Sign** the encounter **Consultation Note**, add private comments to your administrator, add and addendum, update the patients demographics and more.

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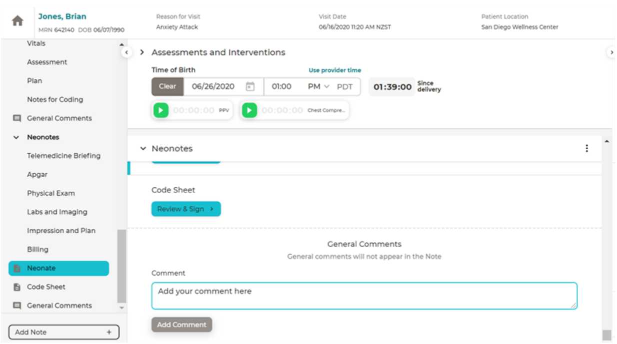
Add Comments

Add comments to any Smart Note.

1. Select **Add comment**.

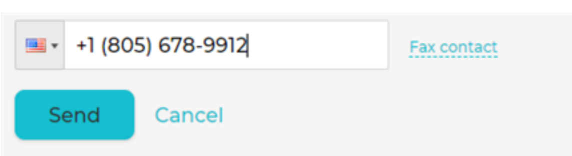


2. Enter your comments.
3. When done, select **Add Comment**.

Fax Signed Note

Once signed, you can fax your note.

1. Select **Choose Fax Destination**.

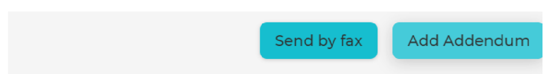


1. When ready, select **Send faxes**.

Add Addendum

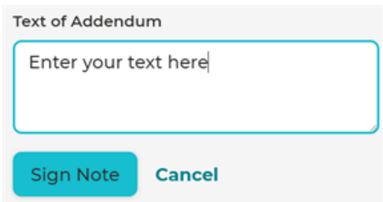
After a consult note is signed, the encounter form can be changed, but the changes will not reflect in the signed consult note. Only an addendum and demographics changes are added to a signed consult note. To add an addendum:

1. Populate the right Patient Panel with your patient's information
2. Select **All Encounters**.
3. Select the Smart Note you want to add or **Continue Note**.
4. When your Smart Note opens, scroll down and select **Add Addendum**.



5. Enter your information in the **Text of addendum** field.

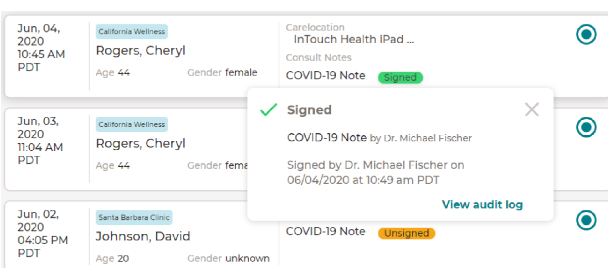
6. When done, select **Sign Note** or **Cancel**.



Audit Log

Practitioner Admins can view an audit log with a record of all clinical data input by users during an encounter.

1. Select **Encounters** from the left navigation panel and an Encounter bar.
2. Click on the colored for your Smart Note, to view its **Audit Log**.



iOS Basics

The following is a description of the controls for an iOS device.

> **NOTE:** The presence and locations of these ports and buttons vary depending on the iPad model and version.

iPhone Controls: Refer to https://www.apple.com/iphone/

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