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 autolaunch 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.

1	Rogers, Cheryl MRN 345678 DOB 0904/1976	Reason for Visit Flu		Visit Date o6/b9/2020 ce/t	5 AM NZST		atient Location an Diego Wellnes	s Center		Provider Name Dr. Michael Fisch	ier	
- A	ute Neurology	 Acute Neurology 				00:00:00 Golde	00:00:0	Treatment I	ĵ۵			
E	counter Details											
Pi	tient Details	✓ Encounter Details										
L	st Known Well	Arrival time		Use patient time						rs, Cheryl		
St	roke Code Time Log	Clear 06/06/2020	10:00	AM ~ PDT					Gender	F Age 45	DOB 00/04/1976	MRN 34
н	N								Searc	h Patient Imag	aing	
Pi	tient History	Consult time		Use patient time					_			_
Ð	am	Clear 06/06/2020	11:00	AM ~ PDT					< AI	Encounters	(23)	
La	bs	Place of service							Encou	inter		Detail
In	aging	Emergency Room			Inpatient				Flu 05/05/2	020 10:16 AM N	4ZST	
N	HSS	Considered agency agence			- sparren				Assigne	d To		
G	ics	Requesting provider										
A	teplase	Blue Shield							Location	n Ingo Wellness C		
Er	idovascular								San Di	ego weiness C	enter	
R	commendations	Consult Type							Imagi	ng		
R	quired fields	 Emergent 			Urgent				No ima	ges attached		
		Routine							Docur	ments (3)		
dd 1										umer Intake Qi		

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

Smith, J	ohn		ビ 🌙
Gender M	Age 71	DOB 01/01/1950	MRN 125569
Search Pa	atient Ima	ging	٩
Continue	Note		1
< All Er	counter	s (39)	

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.

V Acute Neurology		•
🛃 Behavioral Health		
COVID-19 Assessment		
General Neurology		
InTake with Smart Notes		
Neonotes		
Oncology		
Pediatrics		
SOAP Note		
Specialty Clinic	Add	

- 2. When done, select Add.
- 3. Your Smart Notes forms (s) will open.
- 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

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

		\sim
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		~
		~
Existing Patient	New Patient	
	Existing Patient	Existing Patient New Patient

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.

Lieberr	nan, Mar	У	ς Ξ
Gender F	Age 30	DOB 06/14/1989	ID 349836
Connect			<u> </u>

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.

ħ.	Jones, Brian MRN 642140 DOB 06/07/1990	Reason for Visit Anxiety Attack	Visit Date 06/16/2020 11:20 AM NZST	Patient Location San Diego Wellness Center	
A: PI N	itals Constant Consta	Assessments and Interventions Time of Birth Clear 06/26/2020	Use provider time PM ~ PDT 01:39:00 Since delivery Ones Compre.		
Te	eonotes elemedicine Briefing	Neonotes		I	1
u	hysical Exam abs and Imaging npression and Plan	Code Sheet Review & Sign >			
	iling		General Comments		
6 N	eonate	Comment	eral comments will not appear in the Note		
-	ode Sheet eneral Comments	Add your comment here			

- 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**.
- When your Smart Note opens, scroll down and select Add Addendum.



 Enter your information in the Text of addendum field.



Teladoc Health™ Smart Notes Quick Reference Guide

When done, select Sign Note or Cancel.

Text of Addendu	um				
Enter your text here					
Sign Note	Cancel				

Audit Log

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

- 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/

Contact Teladoc Health 24/7 Live Technical Support

<u>+1 (877) 484-9119</u>

