

Teladoc Health™
Solo™
Provider App
User Guide

P/N: MA-20193-001

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Patent(s):

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

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Last updated: June, 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.

The Teladoc Health Convenient Care products consist of the Teladoc Health's telehealth platform software stack on a multi-screen telehealth device.

NOTE: The client for the Teladoc Health Convenient Care product is responsible for managing the PC(s), information technology stack, and tier-one support.

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

Designed for healthcare, security, and reliability

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

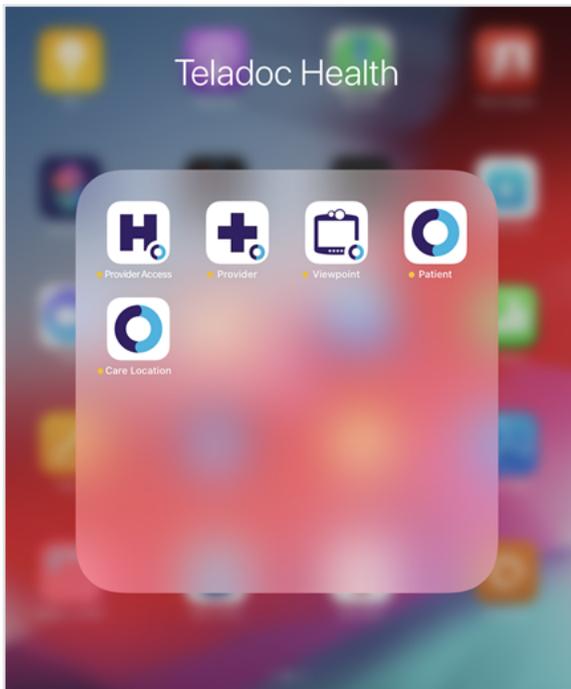
Within a single platform, users are in control of their virtual experience with a configurable dashboard to meet the unique set of preferences for every user. Layer Solo into your existing health information technology system investments, or use it as the foundation to close your workflow gaps with our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

With Solo, you can connect people, systems, health 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 

Overview

This guide is for the Practitioner, Scheduler, Nurse, and other medical professionals who use the Solo™ software by Teladoc Health™. The iOS Provider App provides the same functionality as the browser-based Solo platform on the iPad. On the iPhone, providers can view their queue and conduct virtual encounters. Both are available through the Public App Store.

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.

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

Supported Devices

- iPad – 4th Generation or newer
- iPad Air 2 – or newer
- iPad Pro – 2nd Generation or newer
- iPad Mini – 3rd Generation or newer
- iPhone 5 or newer

Supported Operating Systems:

- iPad: iOS 12 and above
- iPhone: iOS 12 and above

Refer to the iPad User Guide: <http://support.apple.com/manuals/ipad>

Refer to the iPhone User Guide: <http://support.apple.com.manuals/iphone>

Lighting

During your Encounter, you should be in a place with good lighting that lets your provider see you clearly. The following shows good lighting on the right and poor lighting on the left.

Provider Roles

The various Provider roles are described in the MA-20171 Practitioner-Scheduler User Guide to learn how to add, search, view patients, and review status, edit patient profile, patient status, and episodes of care.

| | |
|--|--|
| 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, nursc cannot to enter, edit, or omit data. Cannot sign consult notes. |

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.

Logging In (iOS)

1. Select the practice.
2. Log in by entering the **Practice URL** or select to **continue with** an available URL from the bottom of the screen, which is provided to you by your Practice Admin.

Teladoc Health Provider

Teladoc
HEALTH

Practice URL

myhealthsystem.visitnow.org

Sign in >

Or continue with

solohealth.demo.visitnow.org

intouch.visitstaging.org

3. Enter your user name and password that wer provided to you by Teladoc Health.

Teladoc
HEALTH

Email or Username

Enterprise@teladochealth.com

Password

.....

Forgot your password?

Sign In >

Enterprise Sign In >

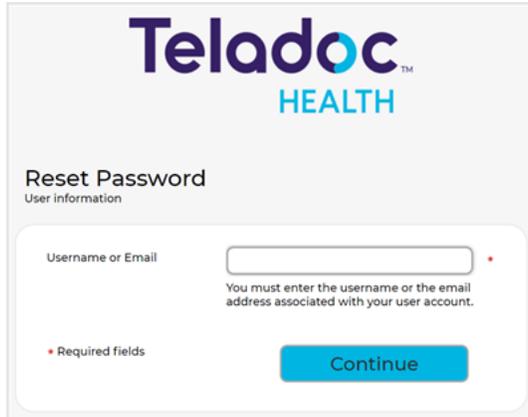
Create Account >

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

Reset Password

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

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.



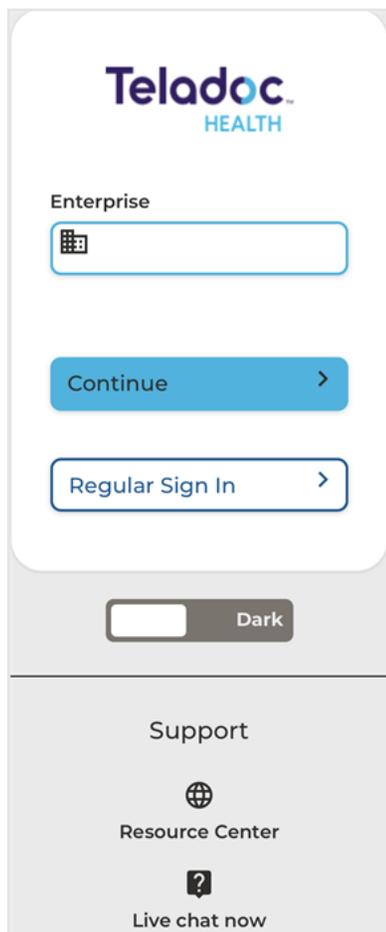
3. Enter your **Username** and email address.
4. Select **Log In** when done. You should receive an email to reset your password.
5. Select the link from your email.
6. **Enter your email**.
7. Select **Continue** when done.

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.

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 >

Badges

PROVIDER SETTINGS

VERSIONS

App Version 42.0.0 (51)

SDK Version 4.4.0 (37)

Provider Dashboard

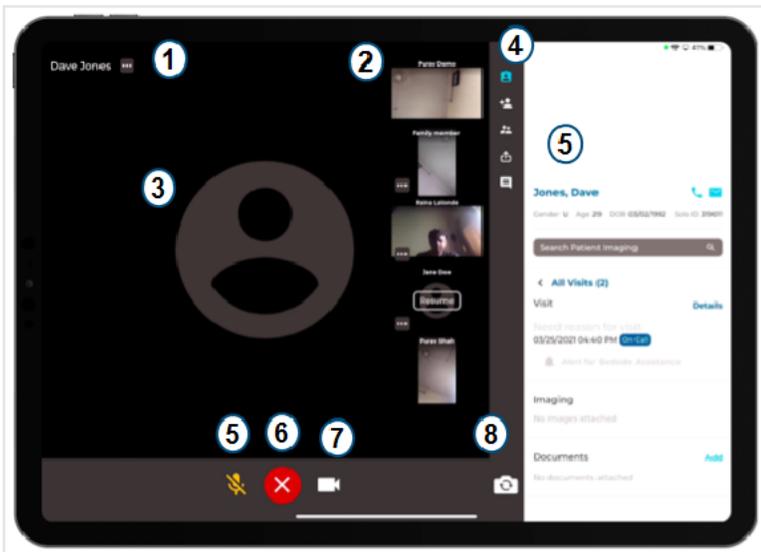
The Provider iOS App dashboard provides information about news, your schedule for the day, and activity statistics. It uses the same functionality as the web version. See the tables below for a description of the elements of the iPad and iPhone.

NOTE: Review the MA-20171 Practitioner-Scheduler User Guide to about generic fields and the dashboard for the Teladoc Health Solo soft platform.

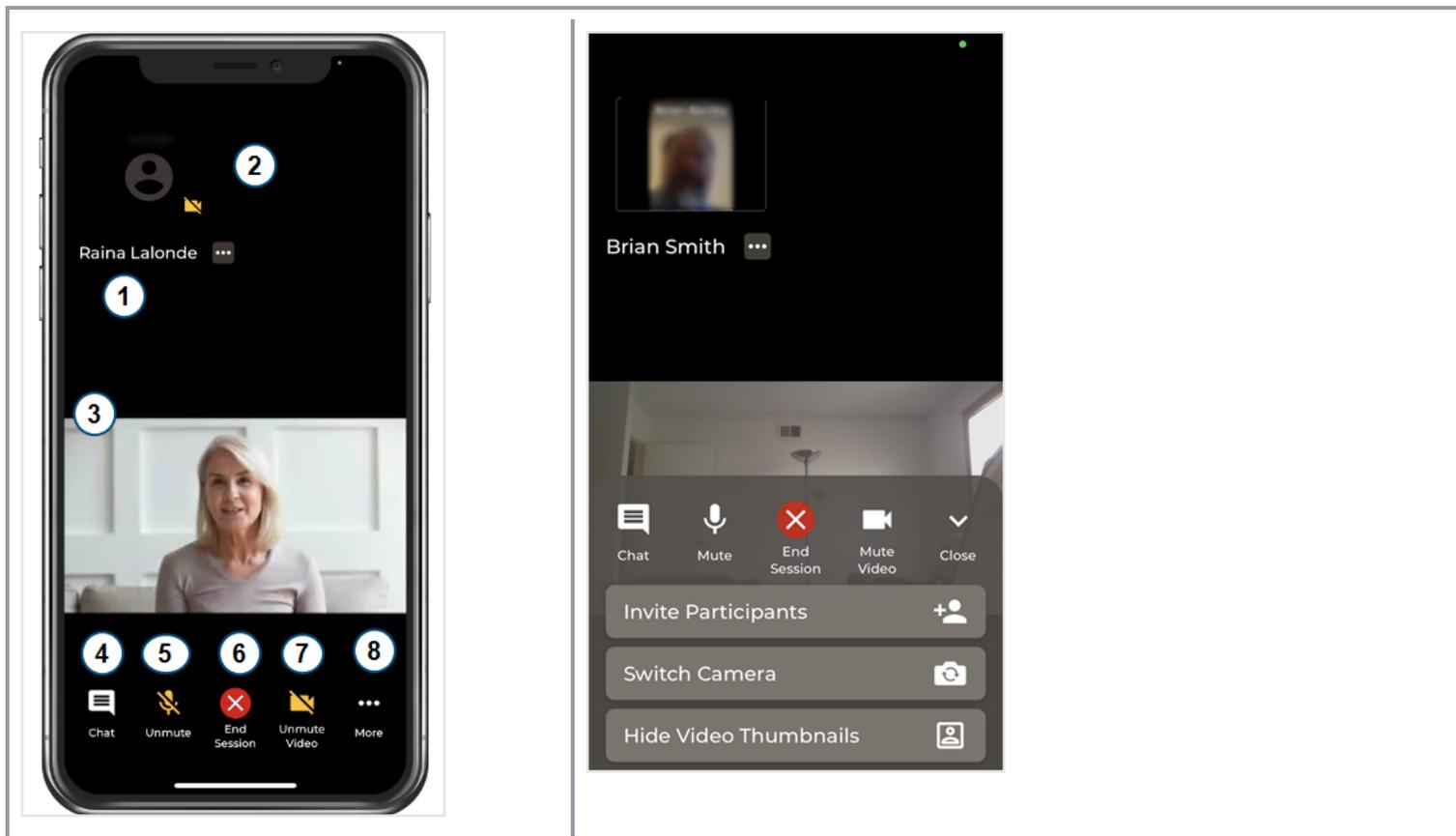
Use the buttons at the top of the screen to navigate and view pages.

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

iPad



iPhone



| Key | Icon | Description |
|-----|------|--|
| 1 | | Name: Name of User. |
| 2 | | Thumbnail: Picture in Picture: The video taken by the selected camera of your iPhone or iPad will be displayed in a Picture In Picture (PIP) box at the upper right corner. |
| 3 | | Main Screen The main screen of practitioner |
| 4 | | Chat: Select to chat with Teladoc Health Technical Assistance Center. Under More on the iPad. |

| Key | Icon | Description |
|-----|---|--|
| 5 |  | Mute Audio: Microphone: Tap the Microphone icon to mute the microphone. When muted you will not be heard on the device. iPhone displays  |
| 6 |  | End Session: Tap the End button to disconnect from a virtual encounter. You will be prompted to confirm that you wish to disconnect. Tap, Yes to disconnect. |
| 7 |  | Mute Video: Tap the Mute Video icon to stop displaying your image on the Patient Access Device. |
| 8 |  | More: On iPhone, more includes camera options. |

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. Go to the Manage section of the MA-20171 Practitioner-Scheduler User Guide.

User Icon

Select the User Icon, located in the upper, right corner, to set your profile and notifications. Go to the User Icon section of the MA-20171 Practitioner-Scheduler User Guide.

Schedule

You can schedule a virtual encounter with your patient using **Schedule** from the left navigation panel or by inviting your patient. Go to the Schedule section of the MA-20171 Practitioner-Scheduler User Guide.

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. Go to the Appointments section of the MA-20171 Practitioner-Scheduler User Guide.

Modify

The Practitioner or other medical personnel can modify patient appointments.

NOTE: Review the MA-20171 Practitioner-Scheduler User Guide to learn how to add, search and view patients, status, edit patient profile, and episodes of care. You can't change the time and date for an existing appointment.

The Virtual Encounter

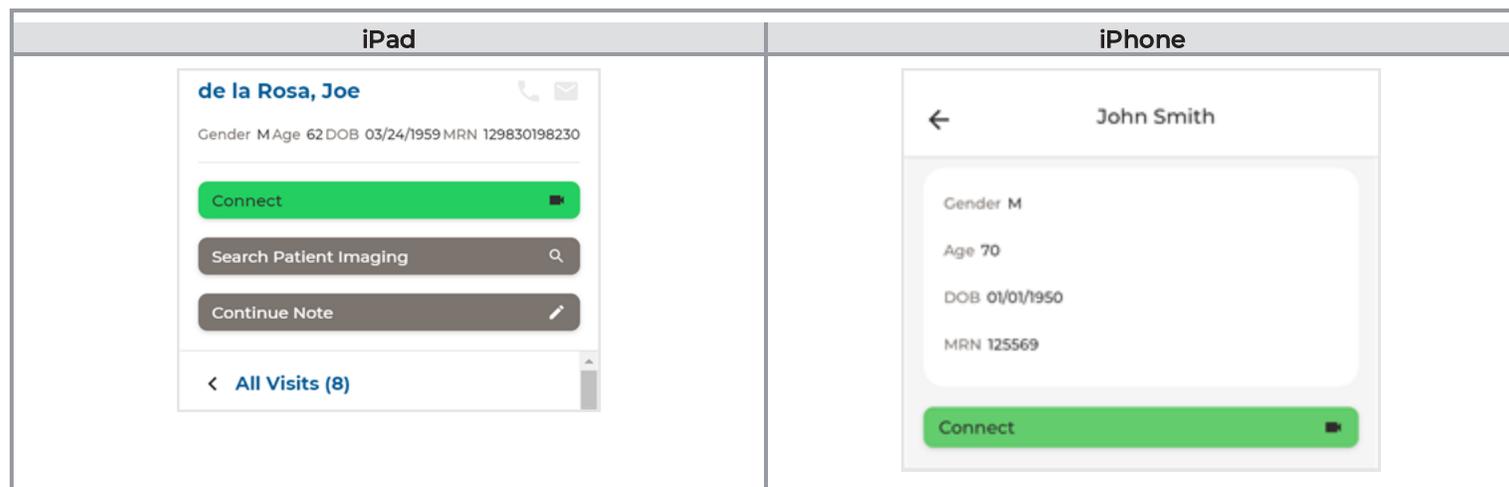
A virtual encounter is a virtual visit between a patient and their physician or medical professional. Practitioners can connect to their encounters immediately after they have been created, prior to the patient checking in. This is useful in high-acuity and emergent situations when a practitioner needs to quickly connect. A reconnection changes your call status.

Preparation

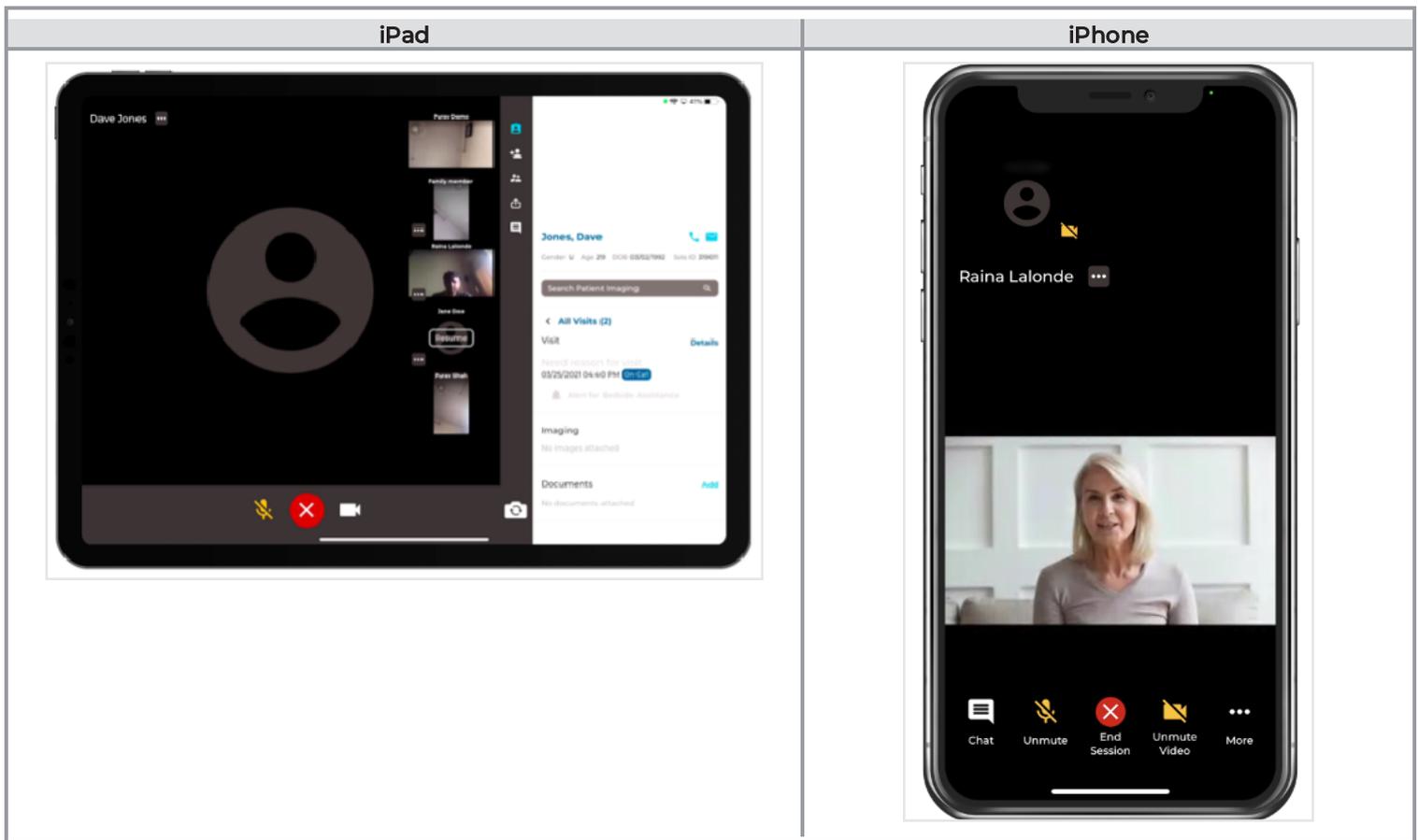
Prepare by reviewing your patient's history, queues, and appointment details, and by selecting and inviting an interpreter if one is requested. Review the Encounter Preparation section in the MA-20171 Practitioner-Scheduler User Guide.

Connect

Once your patient checks in, a **Connect** button will appear automatically. Select it to begin.



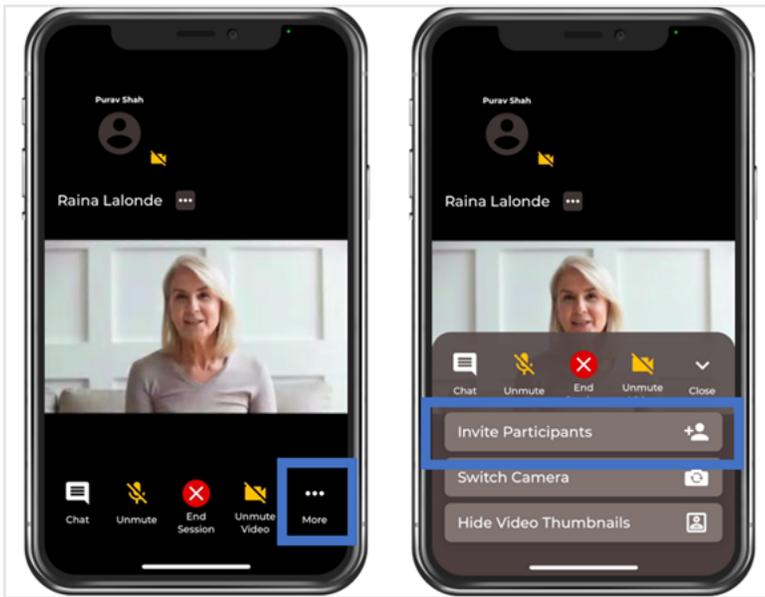
Your virtual encounter will begin.



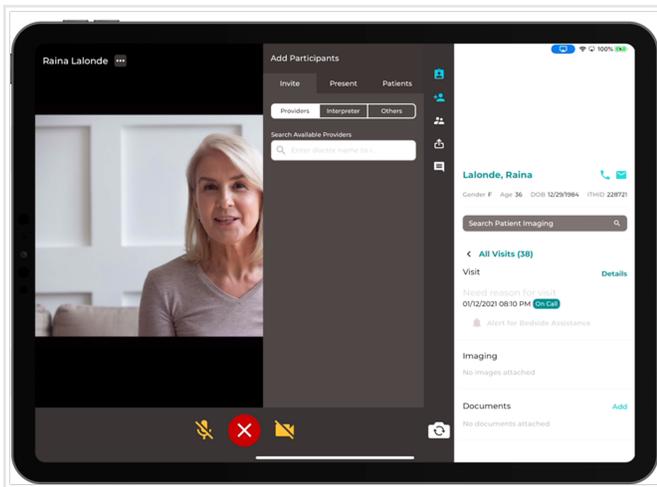
Invite Participants

Invite your patient, an interpreter, other practitioner or expert.

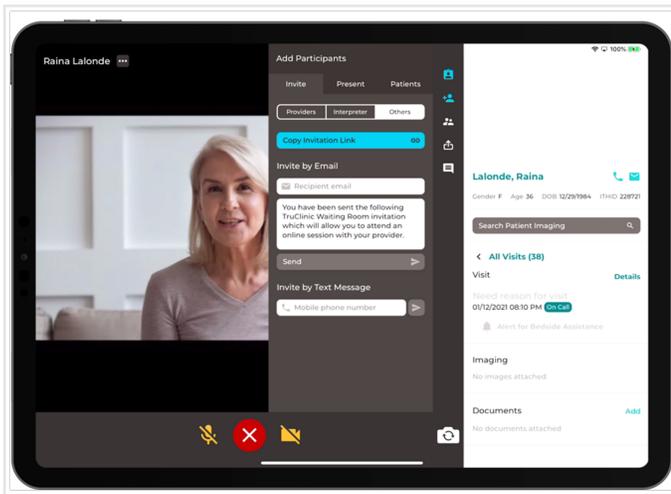
1. Select **Invite Participants**.



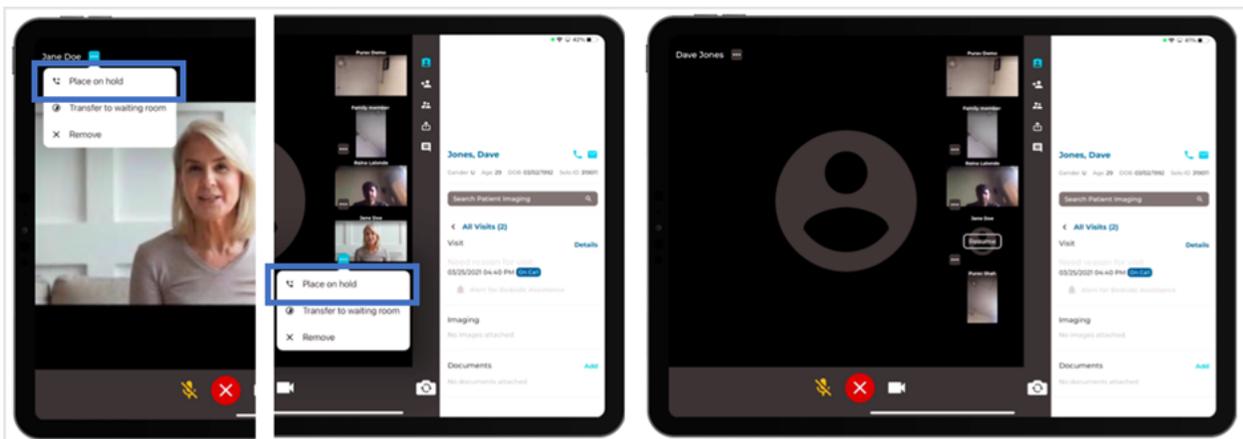
2. Select **to Add** a participant from the top of the screen.

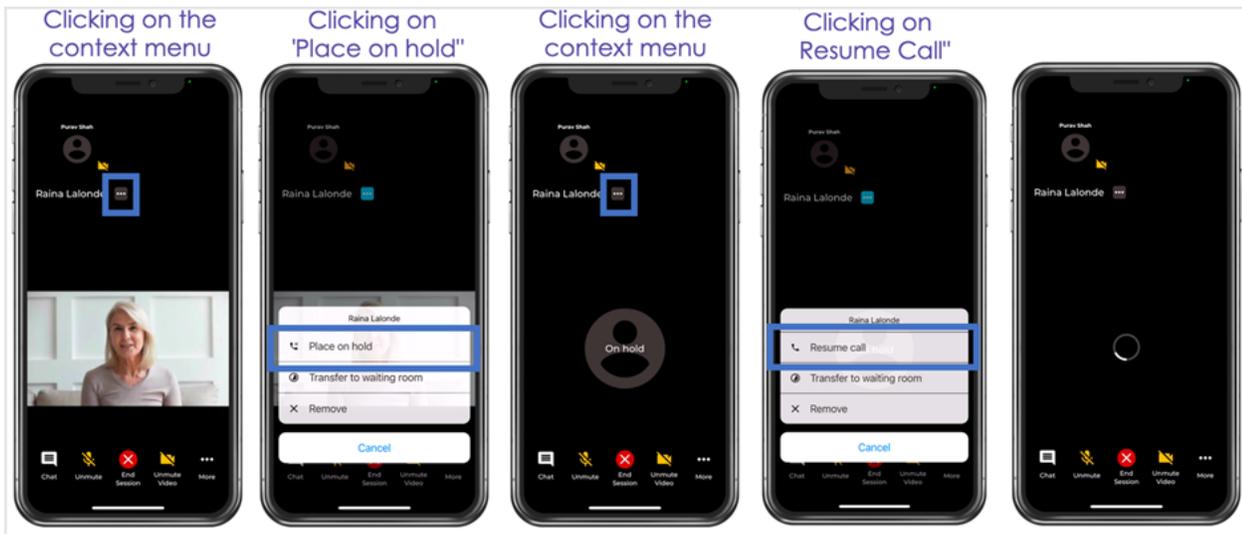


3. Select the Copy invitation link to send an email to your patient automatically.



4. Enter your phone number in the **Invite by Text Message** to receive a SMS message.
5. Practitioners can put individual patients **On Hold** within a virtual encounter so they can have a private conversation with other users. Practitioners can then resume the on going call with their patient by clicking on the **Resume** button.





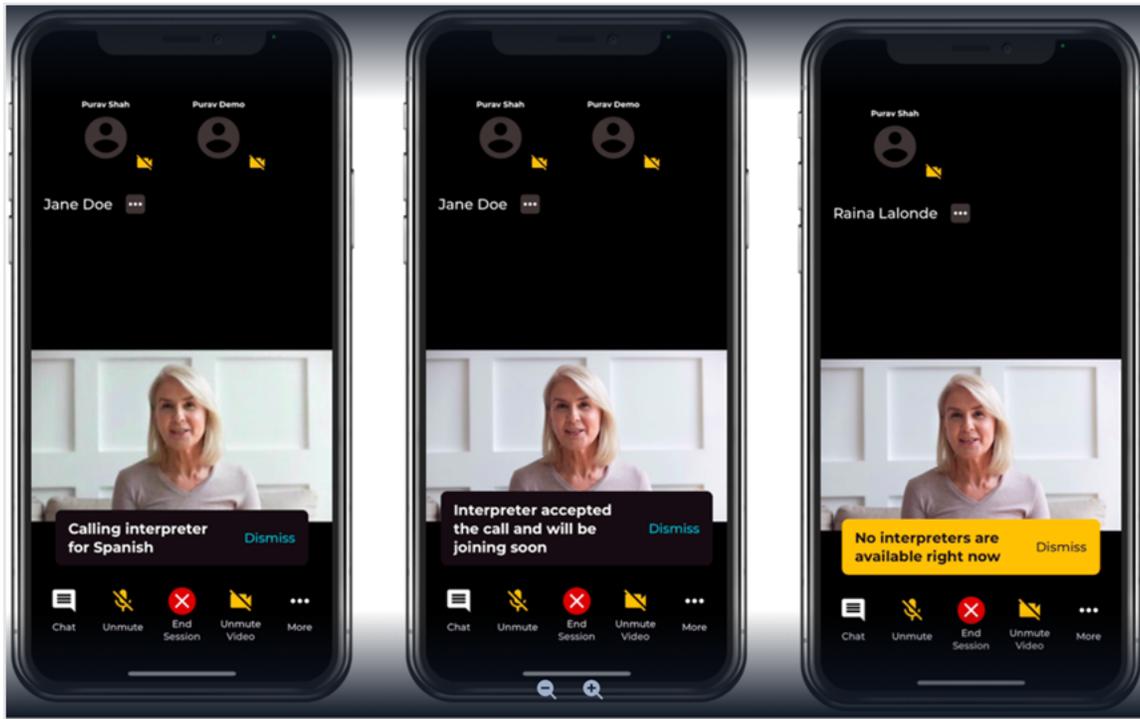
Invite Interpreter

Invite your interpreter. See [Invite Participants](#)

1. Select **Invite Interpreter** from **Add Participants**.



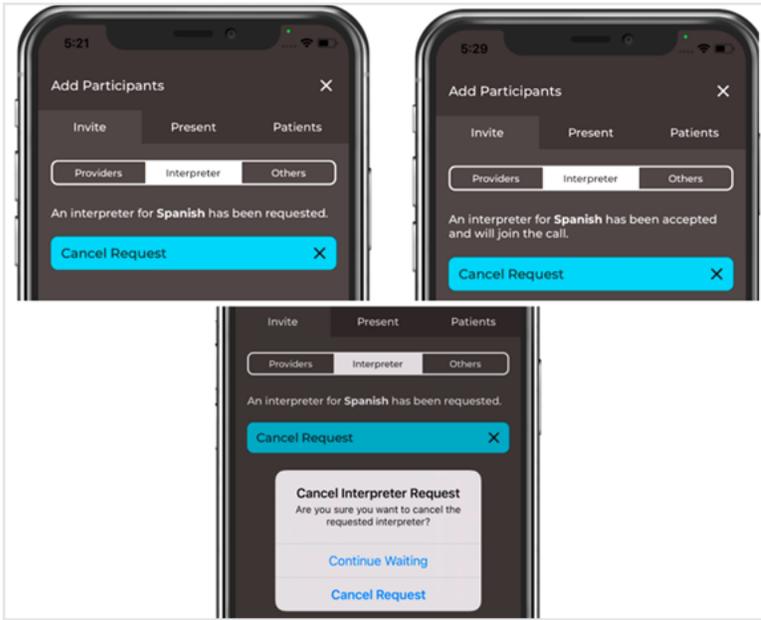
2. Select available language from the list. You can see an estimated time for the interpreter to join the call.
3. Press the **Invite Interpreter** button.
4. Provide Notifications to users based on the status of their interpreter request.



NOTE: A practitioner or other medical professional can see interpreter service-specific notifications in the session when they request an interpreter in the virtual encounter.

5. Practitioner can cancel an interpreter request and make another request.

NOTE: In the **Invite** panel, the **Interpreter Service** tab is hidden if the service is not enabled.



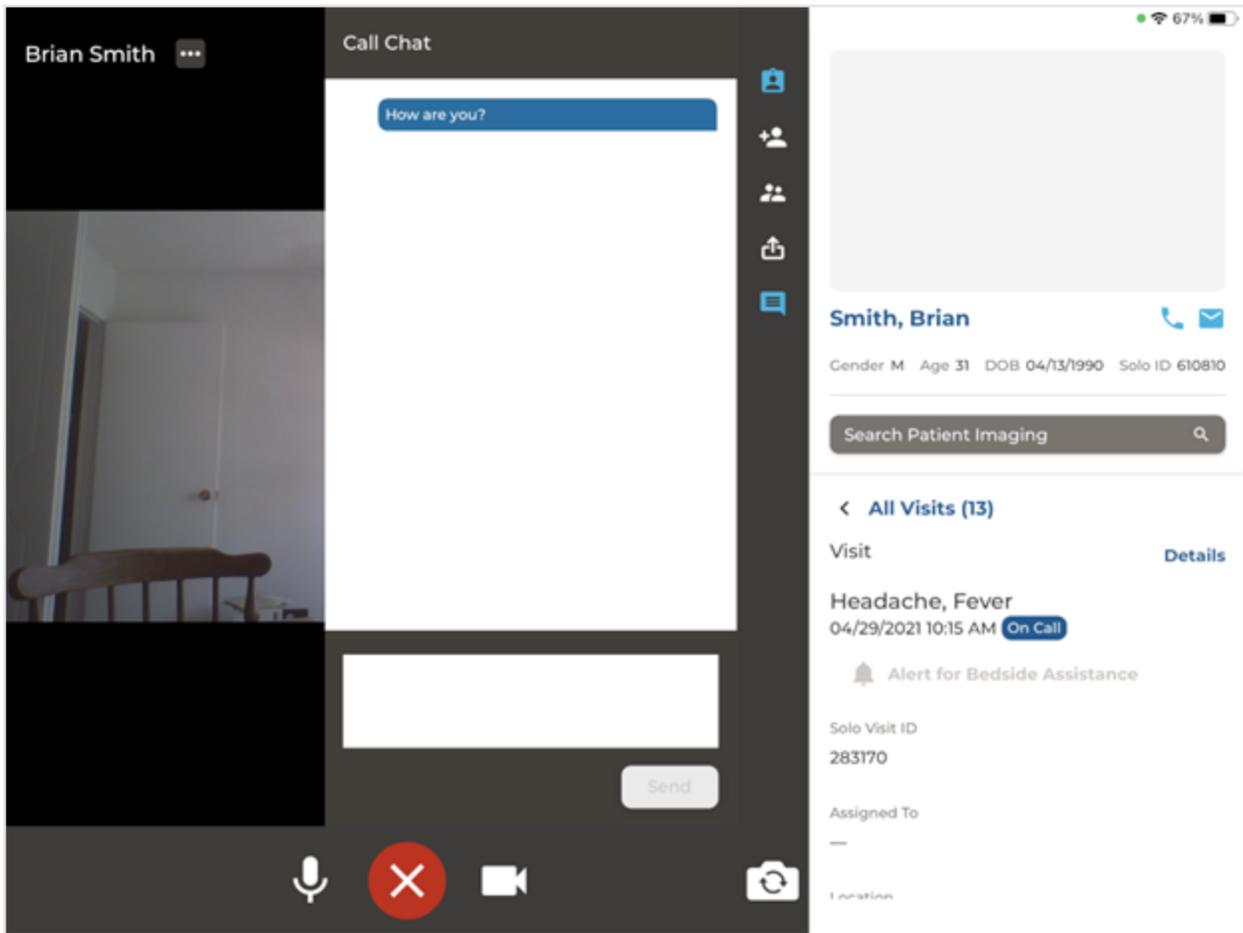
Chat

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.



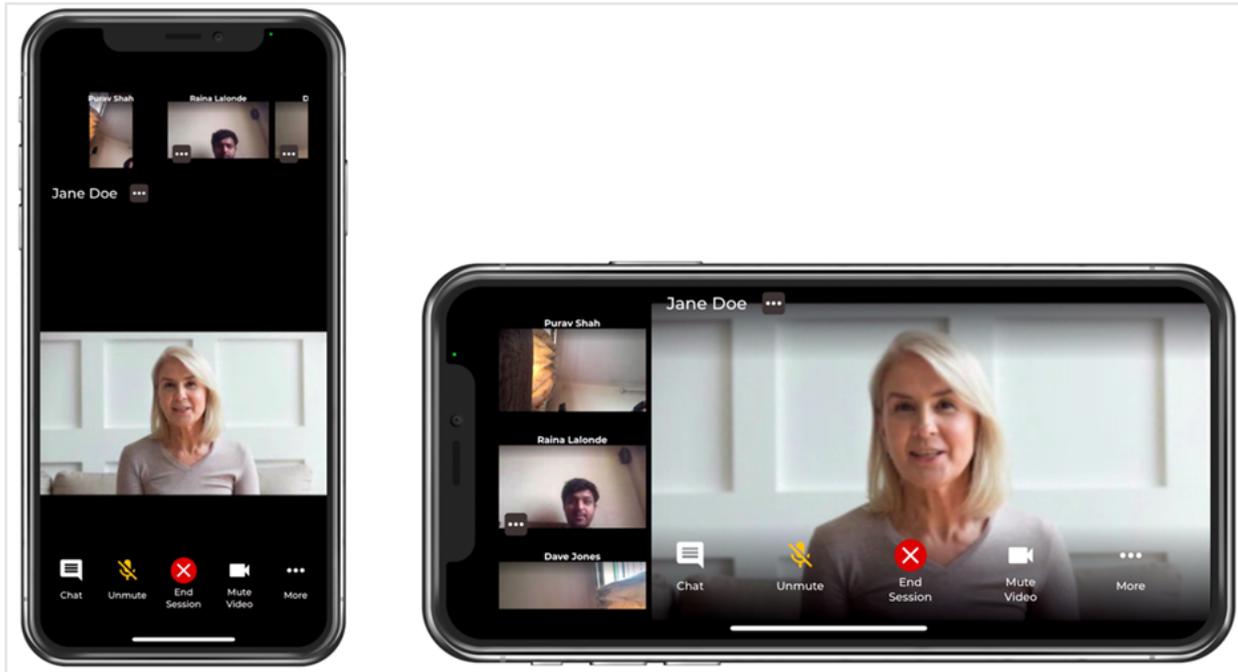
2. Enter your message in the text area of the dialog.



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

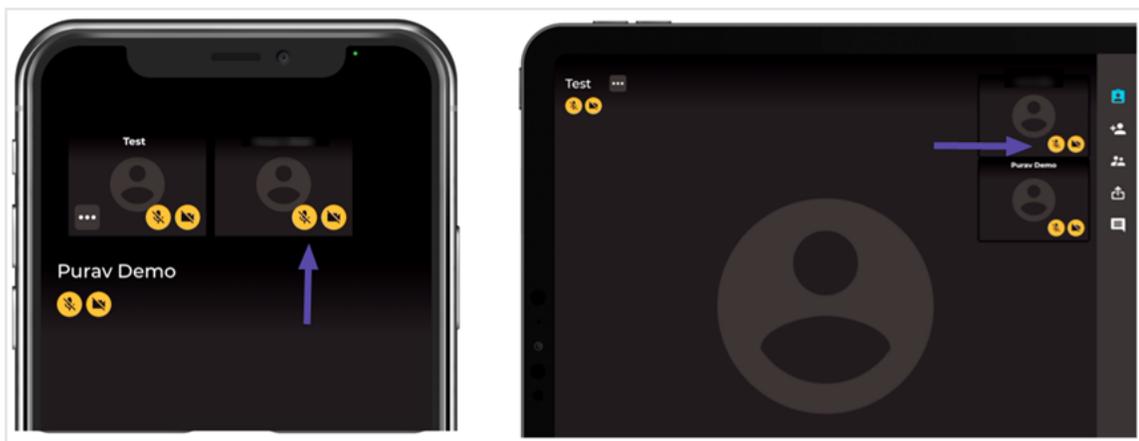
Thumbnails

Enable and disable (hide) the thumbnails that display on the view screen by clicking on them. Re-arrange your thumbnails at the top of the screen to easily scroll through all of them.



Microphone Mute Indicator:

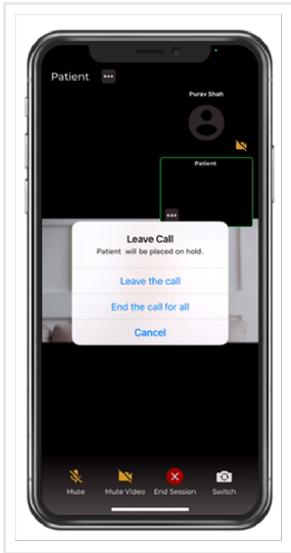
Users can see who has their microphone and camera muted using a muted microphone and camera icon next to each participant's name.



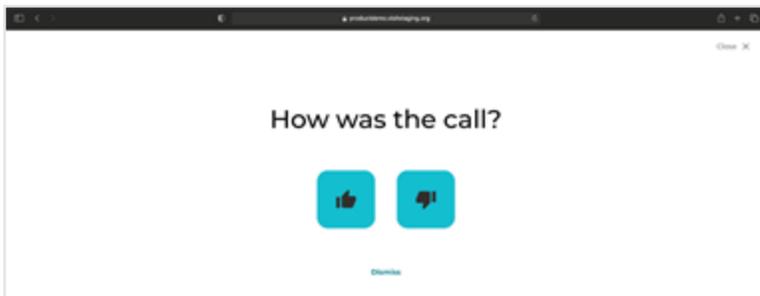
End Session

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.
3. **End the call for All** will remove your patient from Services.



4. Prompts will inquire about your virtual encounter.



5. If your Practice Admin enabled provider surveys, a provider survey will be provided automatically.
6. 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



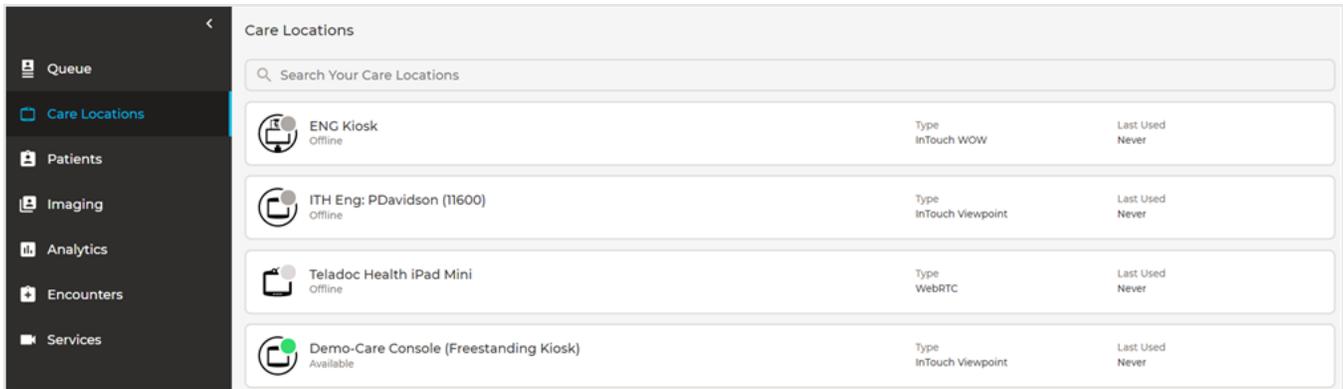
- When complete, select **Save**.
- Once your call ends, your patient's status will change to **Complete** and their name removed from Services.

Emergent Care Request

Emergent Care patients are not required to have an appointment. Go to the Emergency Care Request section of the MA-20171 Practitioner-Scheduler User Guide.

NOTE: You can only connect to a Care Location using your iPad; not your iPhone.

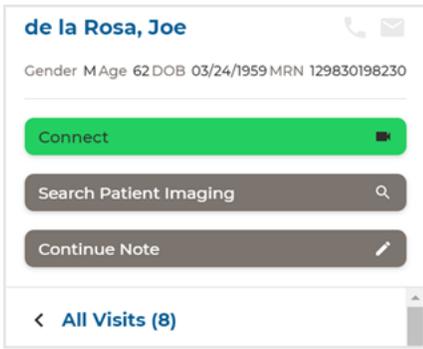
1. Using your iPad, select **Care Location** from the left navigation panel



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.



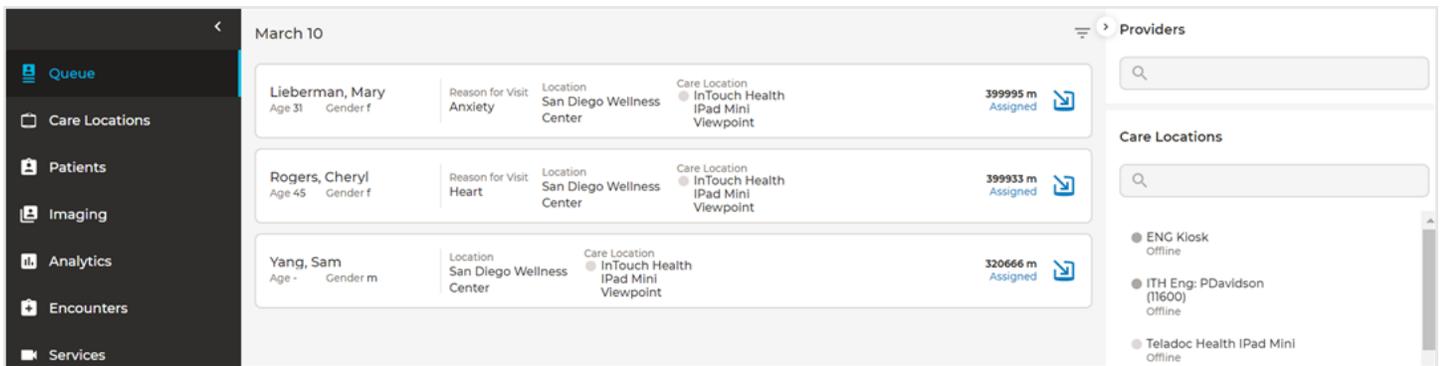
4. Your virtual encounter view opens.

Practitioner to Practitioner

Connect to collaborate with experts during your virtual encounter.

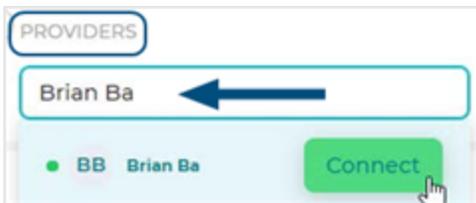
NOTE: You can only connect as a Practitioner using your iPad; not your iPhone.

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



Caller

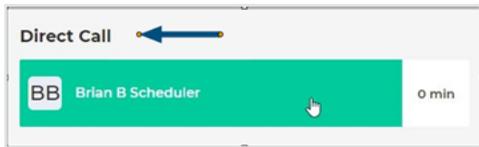
1. Enter the Practitioner or Scheduler's name in the **PROVIDERS** text box from the right panel.
2. Use the search bar to location another practitioner.



3. When done, select **Connect**

Receiver

1. **Receiver:** Select the bar with your name from the **Direct Call** dialog.



2. Then, select **Connect** to begin your virtual encounter.
3. Your direct call will begin.

Resources

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

The options are:

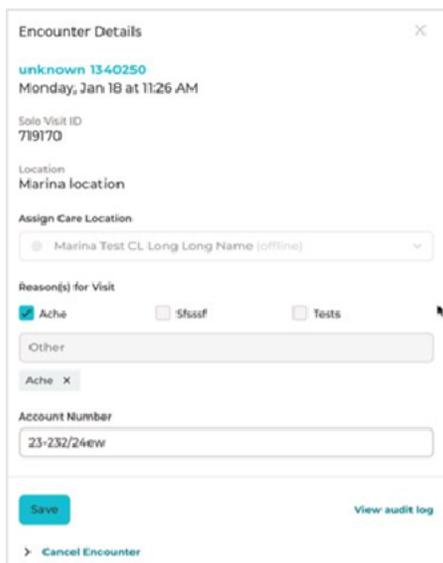
[Audit Log](#)

[Verify Up-to-Date](#)

[Troubleshooting](#)

Audit Log

An Audit Log tracks virtual encounter details, such as when an Account Number information is added, changed, or removed. Select View Audit Log from the bottom of **Encounter Details**.



The screenshot shows a mobile application interface for 'Encounter Details'. At the top, it displays 'unknown 1340250' and 'Monday, Jan 18 at 11:26 AM'. Below this, there are fields for 'Solo Visit ID' (719170), 'Location' (Marina location), and 'Assign Care Location' (Marina Test CL Long Long Name (offline)). The 'Reason(s) for Visit' section has three radio buttons: 'Ache' (checked), 'Sfsstf', and 'Tests'. There is an 'Other' text input field and a tag 'Ache X'. The 'Account Number' field contains '23-232/24ew'. At the bottom, there are buttons for 'Save', 'View audit log', and 'Cancel Encounter'.

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.

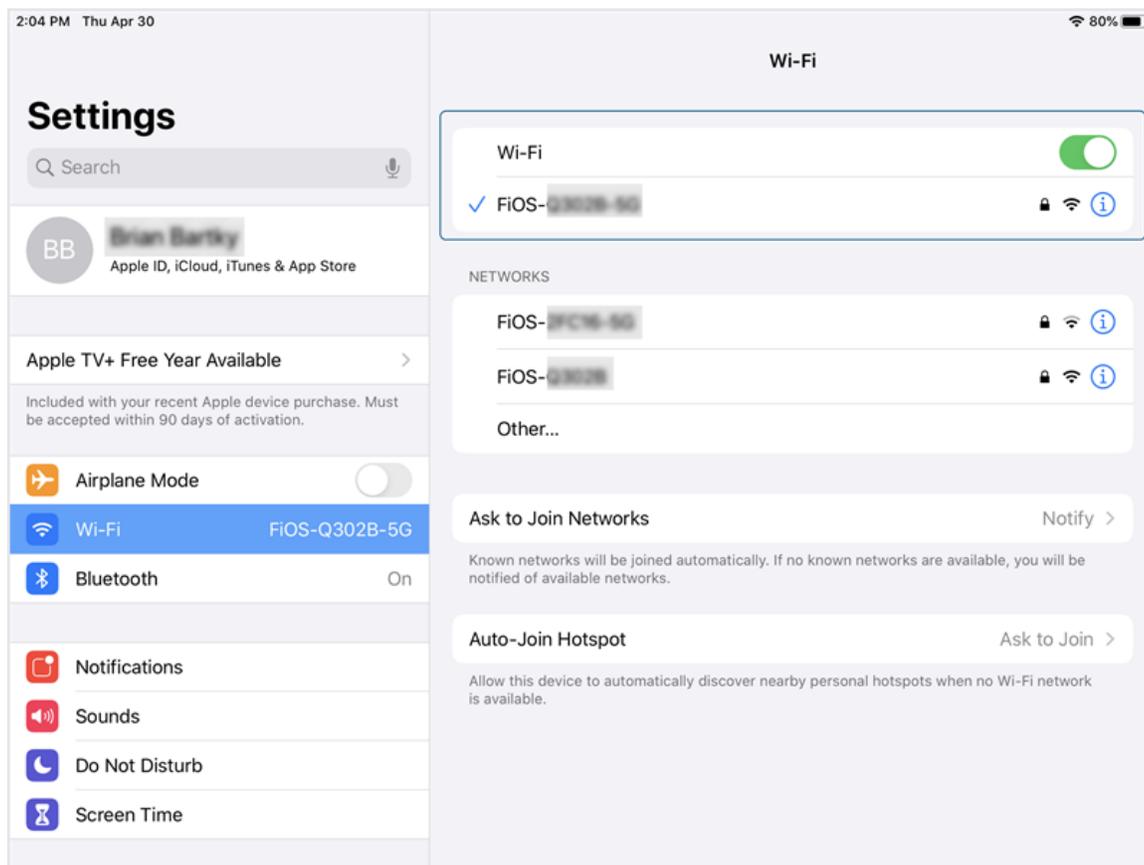
Troubleshooting

NOTE: If you are still experiencing issues after following these troubleshooting instructions, please contact your healthcare provider.

Troubleshoot Network Issues

Troubleshoot Network for iOS

1. If using Wi-Fi, make sure your Wi-Fi is enabled on your phone and you are connected to the fastest possible network.



2. If you are using cellular, and Wi-Fi is available, switch to Wi-Fi.
3. If you are using Wi-Fi, identify the location of the wireless router in your area and move closer to it.

4. If using cellular data and the connection seems poor, try restarting your cellular data.
5. If using cell data try turning off your phone and turning it on again

Troubleshoot Audio and Video

NOTES: Make sure no other apps are using your mic or camera before trying any of the links below.

If you are still experiencing issues after following these troubleshooting instructions, please contact your healthcare provider.

Troubleshoot Audio/Video for iOS

NOTES: Make sure no other apps are using your mic or camera before trying any of the steps below. If you are still experiencing issues after following these troubleshooting instructions, please contact your healthcare provider.

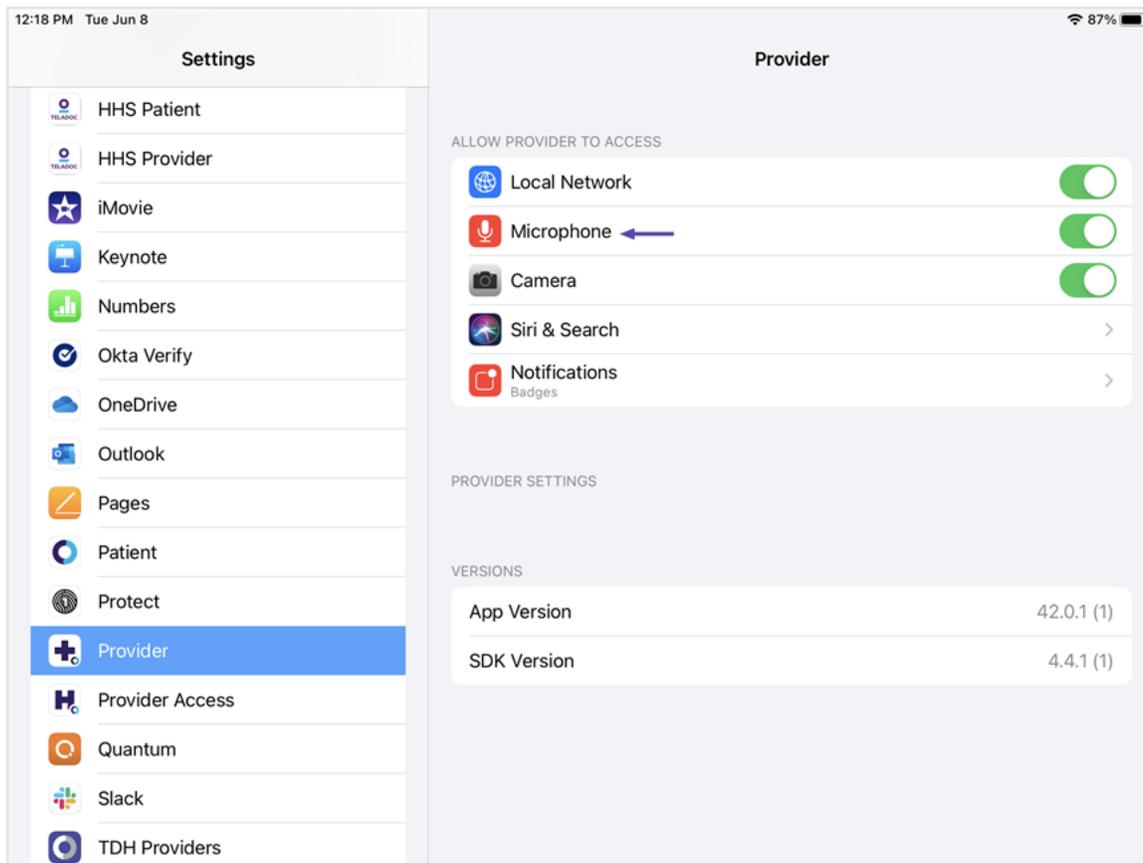
Verify That Your App is Up to Date

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

Verify Microphone

Follow the steps below to test your audio.

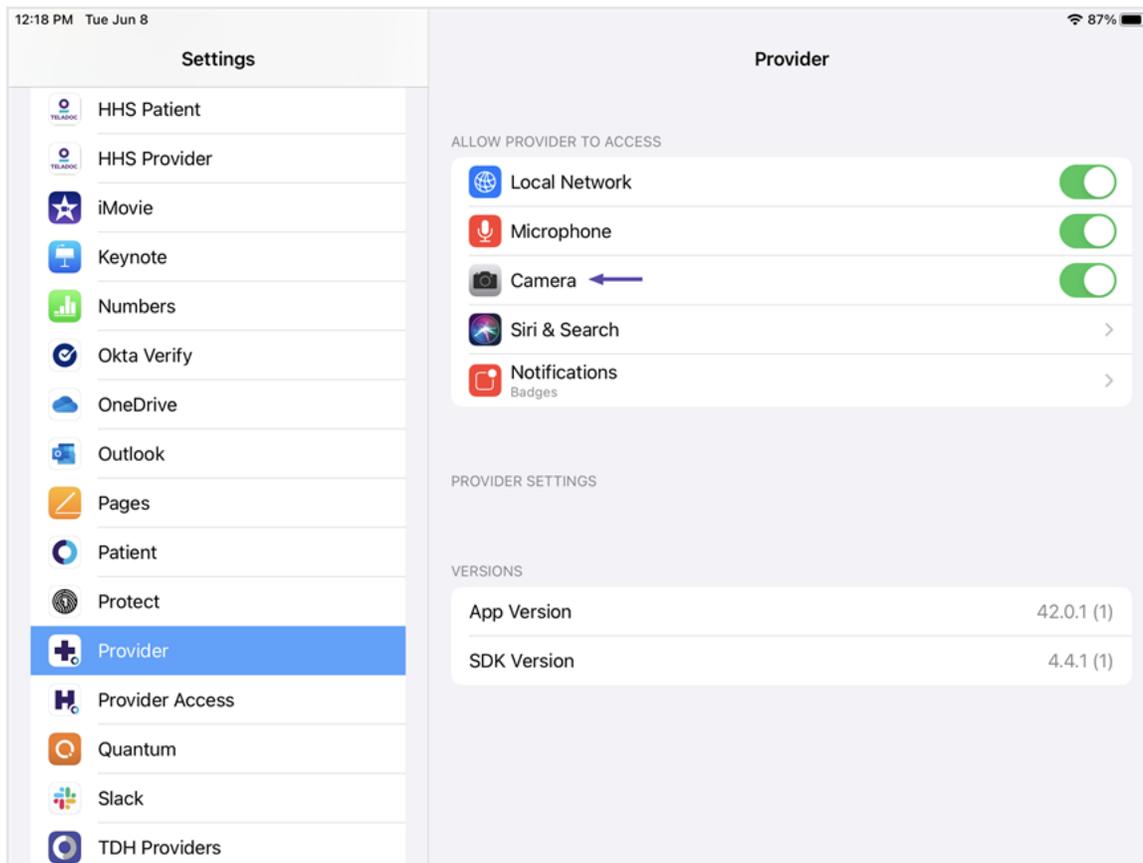
1. Tap the Settings app.
2. Tap **Provider**.



3. Tap the **Microphone** slider to enable it to green.

Verify the Camera

1. Tap the Settings app.
2. Tap on **Provider**



3. Tap on the **Camera** slider to enable it (green).

HIPAA Procedures

As a business associate, Teladoc Health is subject to the compliance of the law under §164.308 (Administrative Safeguards), under §164.310 (Physical Safeguards), and under §164.312 (Technical Safeguards) in that we maintain and transmit health information in electronic form in connection with transactions performed by the customer (covered entity). The policy of this organization is to ensure, to the greatest extent possible, that Protected Health Information (PHI) is not intentionally or unintentionally used or disclosed to violate the HIPAA Privacy Rule or any other federal or state regulations governing confidentiality and privacy of health information.

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

Guidelines for Compliance

The telehealth system allows hospitals and medical professionals to be in compliance with HIPAA regulations.

Teladoc Health is providing the following information to assist with HIPAA privacy regulations as they pertain to the telehealth system.

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

Access to Provider Access

The computer using the Provider Access should be placed in a location that is only accessible to individuals who have authorized access to Protected Health Information (PHI). It is

recommended that Provider Access be password protected via a Windows or iOS user account.

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

The Auto Logout feature is set to log out of the Teladoc Health Provider Access when the system is inactive for 30 minutes. Also, all users should be trained to log out of Windows, iOS or the Virtual Private Network (VPN), when away from the system for any period of time. This is important for security reasons, so that any person attempting access to the Provider Access will be required to enter a password for secure access.

Discussion and Display of PHI

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

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

Images and Video

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

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

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

Disclosure of PHI

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

Contact Information

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Teladoc Health User Manuals

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Please contact your Teladoc Health Account Representative for product User Manuals



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