Teladoc Health™Solo with Teams App

User Guide for Practitioners

P/N: MA-20224-001



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Overview

The Teladoc Health Solo™ with Teams App is for medical professional users of Microsoft Teams and the Teladoc Health Solo platform for clinical applications at the practice level.

LEGAL DISCLOSURE: The names in this document do NOT represent real people. They are only used for examples.

Intended Use

The Teladoc Health Solo platform, which is used with Microsoft Teams, is intended to provide high quality HIPAA compliant audio and video sessions between a provider and a patient over the Teladoc Health Network.

Features

Features of the Solo for Teams App are defined below.

Teladoc Health Solo platform

- On demand virtual encounter (i.e. the session or visit) workflows
- Advanced Enterprise Analytics
- Configurable Services and intake
- Scheduled and same day appointments
- Smart Notes integration
- Patient imaging access

Microsoft Teams

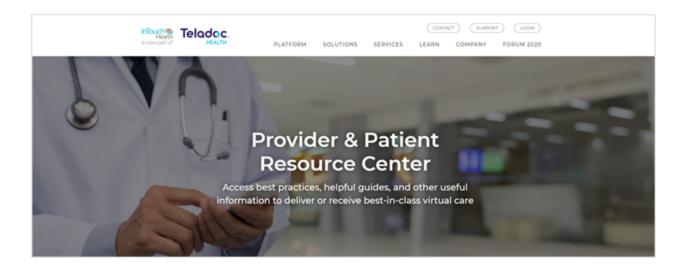
- Session recording
- Screen sharing
- Background video effects
- Multiparty
- Asynchronous messaging (clinician to clinician)
- Chat
- Transcription



Support

Online documentation is available from the Provider & Patient Resource Center.

- 1. Select **Support** from the right, top User Icon
- 2. Select the **Provider & Patient Resource Center**





Requirements

A participating organization must have a Teladoc Health Solo software subscription and a Microsoft Teams subscription. Both the Solo and Teams administrator must agree to the integration between Solo and Teams.

NOTE: Contact Teladoc Health to enable the Teams integration for your practice.

Tenant: Teladoc Health will provide the administrator with the Solo App for the Microsoft Teams tenant administrator to install and approve. Once installed, Solo users will be able to access the Solo with Teams App in Microsoft Teams. A Microsoft Teams tenant is your company's Microsoft Teams account. It is a dedicated instance of Microsoft Teams and your organization's data for Teams stored within a specific location.

NOTE: If the user is unable to reach the Teladoc Health network for any reason, the user will get a clearer message that indicates that the **Participant cannot connect due to network issues**.

NOTE: See the MA-20165 Practice Admin User Guide for more information about the Teladoc Health Solo platform.



Safety Instructions

Users of the system require clinical judgment and experience to review and interpret the patient data transmitted.

Notes, Cautions, and Warnings

The types of safety instructions are:

NOTE: Supplementary information to facilitate the operation of the system.

CAUTION: Instructions for avoiding damage to the system.

WARNING: Information may prove hazardous to the safety of a person near the Teladoc Health Patient Access device.

ERROR: An error has occurred.



Roles

The various Provider roles are:

Practitioner	Can interact with patients and document on patient record (can access PHI); cannot do admin tasks.
Practitioner Admin	Can do both Practice Admin + Practitioner tasks (without manually switching between roles).
Practice Admin	Ability to configure waiting rooms create users; cannot interact with patients; limited access to PHI (i.e., can see basic demographic information).
Scheduler	Can interact with patients and access (i.e., read) PHI, but cannot document on patient record; cannot do admin tasks.
Practice Admin + Practitioner	Can do both Practice Admin + Practitioner tasks (must manually switch between roles).
Practice Admin + Scheduler	Can do both Practice Admin + Scheduler tasks (must manually switch between roles).
Nurse	Role can enter or edit all or select data fields based on JSON configuration. If field(s) are configured responses are display only and do not allow Nurse to enter, edit or omit data or edit. Nurse cannot sign consult notes.
Back Office	Can work with existing patient's data, can apply addendum to consult notes.
Front Desk	The role used exclusively by Evergreen Health.
Organization Admin	Practice Admin for all practices in the organization.
Organization Practitioner	Practice Admin for all practices in the organization.
Patient	The role associated with patients; only allowed access to Patient App (i.e., patient journey).
Guest	The role associated with guest users invited to a video call from within the session; only information collected about guests is name
Interpreter:	A user who is invited much like a guest but is marked with an 'interpreter' identifier that allows us to treat that user as a special kind of guest.

The function for each role defined above is described in the table below.

Function	Organ- ization Admin	Prac- titioner Admin	Practice Admin	Prac- titioner	Organ- ization Prac- titioner	Scheduler	Front Desk	Trainee	Patient
Create users, reset the pass- word for users	X	X	X						
Log in to any practice in the organization, switch practice	Х				X				



Function	Organ- ization Admin	Prac- titioner Admin	Practice Admin	Prac- titioner	Organ- ization Prac- titioner	Scheduler		Front Desk		Trainee	Patient
Edit practice settings:	Х	Х	X								
enable provider survey											
enable Two- factor Authentication											
enable "Select a service" page											
create/edit care locations											
Fax Contacts (manual or auto)											
Create or edit Service settings	Х	Х	Х								
Work with the patient:		Х		X	Х	Х	Х		Х	Х	
Search for patient		Х		Х	Х	X	Х		Х	Х	
Create patient		X		Х	X	Х			Х	Х	
Edit patient demographics		Х		Х	Х	Х	Х		Х	Х	
View patient documents		Х		Х	Х	X	Х		X	X	
View device readings		Х		Х	Х	X			Х	Х	
Dashboard		Х		Х	X	Х	Х		Х	Х	
Create new appointment		Х		Х	Х	Х			Х	X	X
Emergent consult requestright column		Х		Х	X	Х			X	Х	
Emergent consult requestt - Accept or Decline ECR		×		Х	Х						
Fill medical forms											×



Function	Organ- ization Admin	Prac- titioner Admin	Practice Admin	Prac- titioner	Organ- ization Prac- titioner	Scheduler	Back Office	Front Desk	Nurse	Trainee	Patient
Fill consent forms											Х
Attend Video- call (virtual encounter)		Х		Х	X	Х				Х	Х
Provider to pro- vider call		X		Х	Х	Х			×	Х	
Invite par- ticipants to the active video-call		Х		X	X	Х				X	
Screen-sharing during video- call		Х		Х	X	Х				Х	
Add a doc- ument to the patient during video-call		Х		X	Х	X				X	
Call to care loc- ation		X		Х	×	Х			×	Х	
Manually change appoint- ment status		Х		Х	X	Х			×		
Receive noti- fications about appointment status		Х		Х	Х	X	X		X	×	X
Smart Notes Encounter Creation		Х		X	X				X	X	
Smart Notes (formerly visit notes):		Х		X	X		X		X	×	
Smart Notes Create		Х		Х	Х			Х	Х		
Smart Notes Edit		Х		Х	Х			Х	Х		
Smart Notes Comment		Х		Х	Х					×	



Function	Organ- ization Admin	Prac- titioner Admin	Practice Admin	Prac- titioner	Organ- ization Prac- titioner	Scheduler		Front Desk		Trainee	Patient
Smart Notes Sign		Х		Х	Х						
Smart Notes Add addendum text		Х		Х	X		×		X		
Smart Notes View		Х		Х	Х	Х	Х		Х	Х	
Consultation Note - Create		×		Х	Х						
Consultation Note - Edit		×		Х	Х						
Consultation Note - Sign		×		Х	Х						
Consultation Note - View		×		Х	Х	Х	×		Х	Х	
Addendum - Create		Х		Х	Х						
Addendum - Edit		×		Х	Х						
Addendum - Sign Own		Х		Х	Х						
Addendum - View		×		X	Х	Х	×				
Fax (manual)		Х		Х	Х		Х		Х		
Visit Summary		Х		Х	Х	Х	Х		Х	Х	
Audit Log		Х			Х		Х				
Provider survey		Х		Х	Х	Х			Х	Х	
Patient survey											X
My Apps / Third Party Apps - View		Х	Х	Х		Х	×		X	Х	
View Audit Log		Х					Х				
Data Export											
Report Gen- erator (CSV)		Х					Х				
Data Download (CSV)		Х									
Data Download (XML)		Х									



NOTE:

- 1. except for organization admin role
- 2. if it enabled in WR settings in the patient journey
- 3. if notifications enabled in WR settings (on appointment creation and cancel appointment only)
- 4. Permission can be enabled for a role in user management section (not implemented yet)
- 5. Should not affect Mayo Escalation process, after leaves the call, at CL Waiting for teleconsultant page should be displayed
- 6. Only an originating practitioner can create and sign their own consultation note amendment and addendums

Multiple Roles

Practice Admin can create the following multiple-user roles:

- Practitioner and Practice Admin
- Scheduler and Practice Admin
- Organization Admin and Organization Practitioner



Getting Started

A Practice Admin is responsible for installing the Solo with Teams App into their Microsoft Teams tenant. Work with your Account Manager and Solution Services contacts on your Teladoc Health team to enable this integration

Log into Microsoft Teams

Open the Microsoft Teams application and log in.

Add Solo to Teams

The Practice Admin is responsible for adding the Solo software to Microsoft Teams tenant.

- 1. Click here to log into the Microsoft Teams tenant administration tool.
- 2. Navigate to the Microsoft Teams Apps and select **Manage Apps** to install the Solo with Teams App.

NOTE: Teladoc Health will provide the correct version of the Solo App for you to install.

- 3. Select the **Permissions** tab and then **Review permissions** to approve permissions.
- 4. Optionally pin the App following the Teams policy.

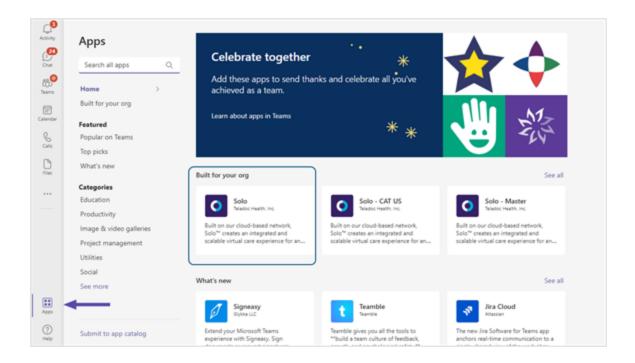
Open Solo in Teams

Work with your Account Manager and Solution Services contacts on your Teladoc Health team to enable the integration for your practice

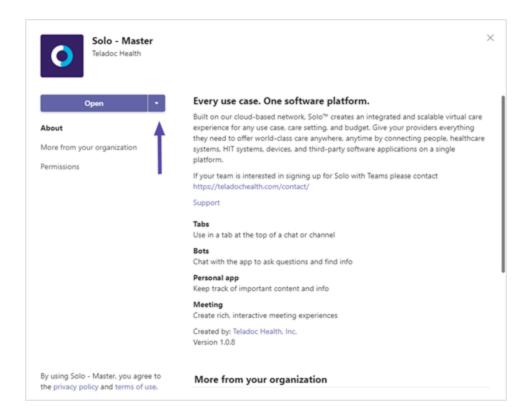
NOTE: Make sure your camera and microphone have been enabled.

- 1. From the Teams interface, click on the Apps icon in the lower left corner of the screen.
- 2. A screen called **Apps** will open in Teams.
- 3. Select your Solo application.



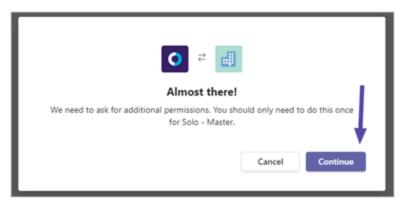


4. If the Teladoc Health Solo with Teams App has been installed, select the **Open** button. For questions, contact your Practice Admin



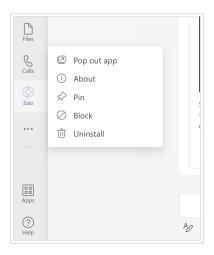


5. When done, select Continue.



Pin Apps

Click on Solo from the left Teams toolbar to pin it. You can also drag the Solo App to rearrange its location on the toolbar. If it is already pinned, your Teams administrator may have already set it up.



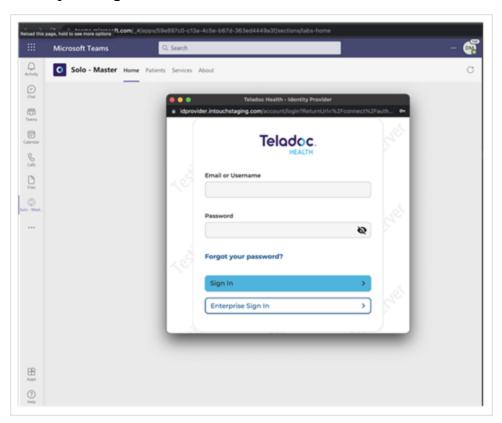
Log Into Microsoft Teams

Log in to your Solo with Teams App.

NOTE: When Solo is used outside of Teams and has the Solo with Teams App enabled, users will receive the message <**Please login so you can launch your appointments using Microsoft Teams**>.



1. Enter your login credentials

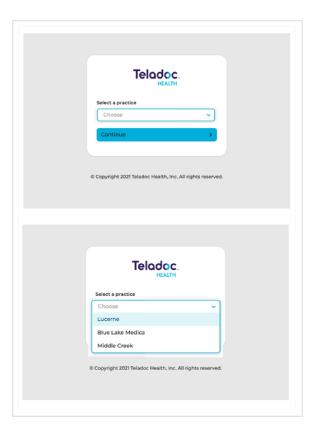


- 2. When done, select **Enterprise Sign In.**
- 3. Now, **Select a Practice** using the drop down menu.

NOTE: This step is only required if your Microsoft Teams organization is associated with more than one practice using Solo.

4. If promoted, select a Practice using the dropdown menu.





5. If you do not have access to the practice selected, you will receive the following error.



Reset Password

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



1. Click on Forgot Reset from the login dialog.

NOTE: To recover your **Username**, call Technical Support or open chat by clicking the **Chat with a Live Agent** link provided.

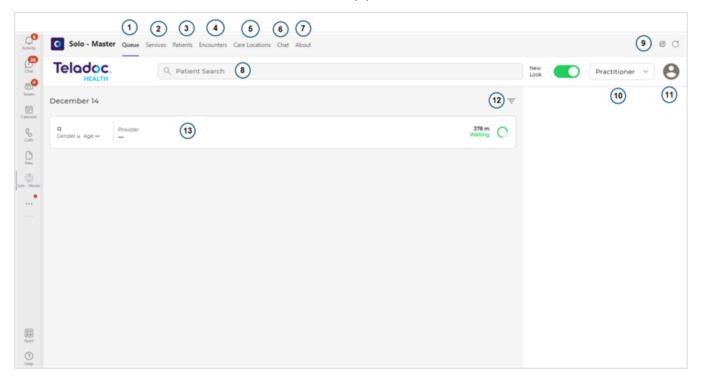
- 2. Enter your **Username** and email address.
- 3. When done, select Log In.
- 4. You should receive an email with a link to reset your password. Click on that link.
- 5. Enter your email address.
- 6. When done, click on the Continue button.





Dashboard

The Teladoc Health Solo application opens in the Microsoft Teams application with tabs that enable the features of the Solo for Teams App.



Element	Description
1	Queue tab: The Queue tab contains all the appointments scheduled within a 24 hour period.
2	Services tab: The Services tab contains the Services available for your practice.
3	Patient tab: The Patient tab contains the Solo functionality a practitioner requires to manage a patient's information, schedule, surveys, and more.
4	Encounters tab: The Encounters tab contains the functionality to manage, edit, and create your virtual encounters.
5	Care Locations tab: The Care Location tab contains all the devices, or Care Locations, your administrator has added to your account.
6	Chat tab: The Chat tab contains help information. Select to view a tour or help.
7	About tab: The About tab contains information about your Solo application within Teams.
8	Patient Search: A patient search bar allows users to search for their patients using a drop down menu, or an Advanced search.
9	Help: A question mark represents help. Click on it to navigate to the Teladoc Health online help site.
10	Role selection: A pull down menu is provided for you to alternate between a Practice Admin and Practitioner role This option is only available if one has both a Practitioner and Administration role.



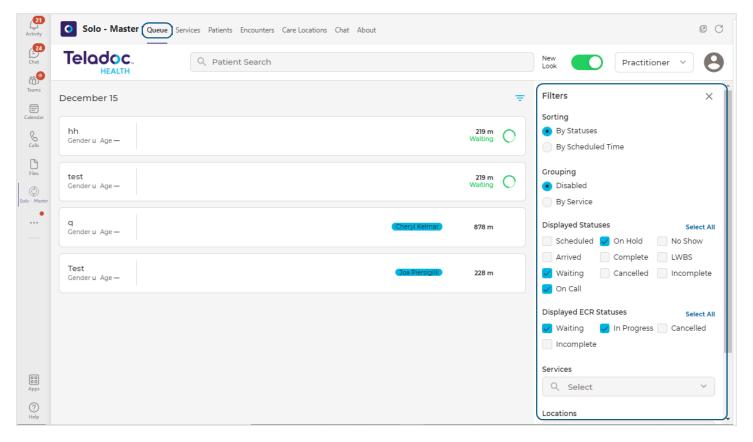
Element	Description
11	User icon: A drop down provides the functionality for you to create a profile, set practice settings, navigate to the dash-board, pre-call diagnostics, or obtain support.
12	Filter icon: The Filter icon enables a filter to search for patients and other information using a variety of properties.
13	Main interface: In this example the Queue tab is selected and an encounters bar is shown.

Queue tab

The Queue tab provides a list of patients scheduled for a virtual encounter within 24 hours. The number on the right side of the bar represents how long the patient has been **Waiting**.

NOTE: See the Scheduling section to review how to schedule an appointment for your patient.

1. Search for your patient or filter the queue using the **Filter** panel or do a **Patient Search**.





Services tab

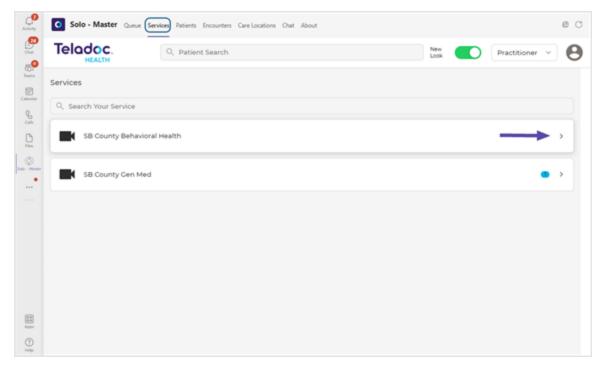
The **Services** tab provides the ability to configure Services for your practice. Once saved, Services cannot be deleted, only edited.

NOTE: A patient bar appears in the middle panel for every patient that belongs to a selected Service.

1. Select a Service by clicking a Service from the middle panel.

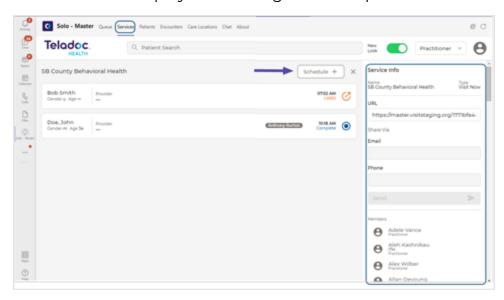
NOTE: Search Your Service if it's not displayed.

2. To bring up **Service Info** on the right panel, select the > from the Services bar. The patient bar contains the name of the patient, their status, practitioner name, date, and more.





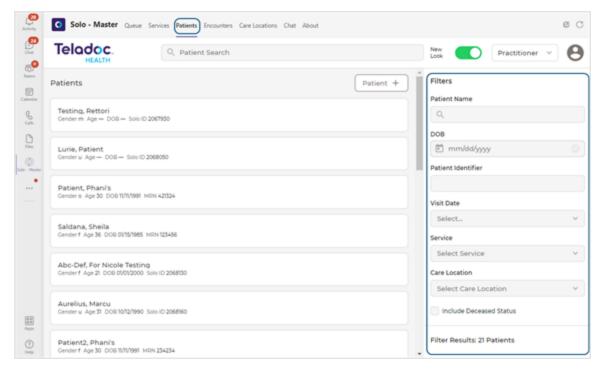
3. Service Info is displayed in the right Patient panel.



Patient tab

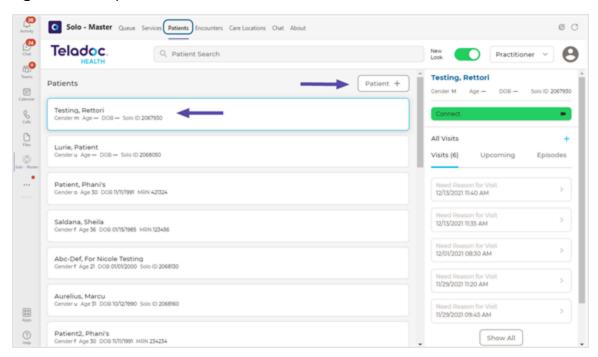
The **Patient** tab provides tools to manage your patient's demographic and medical information, appointments, surveys, and virtual encounters.

 Use the Filters panel on the right to filter by Patient Name, Patient Identifier, Visit Date, Service, Care Location or do a Patient Search.





2. Click on a patient bar from the middle panel to bring up your patient's information in the right Patient panel.

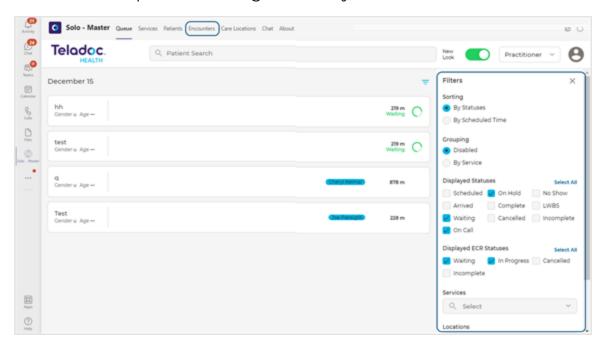


Encounter tab

The Encounters tab provides the ability to select and add an encounter.



1. Use the **Filters** panel on the right to filter your encounters.



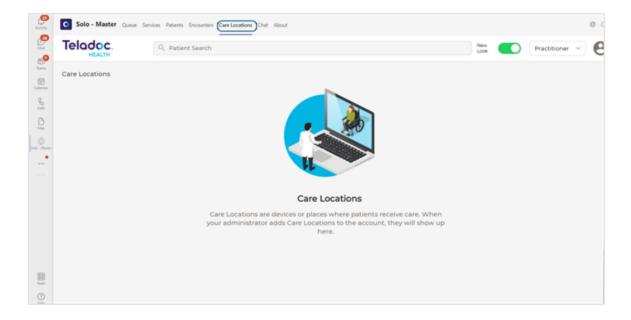
2. Click on an encounter bar from the middle panel to bring up the details of the encounter in the right Patient panel.

Care Location tab

The Care Location tab displays a list of devices or places where patients can receive care.

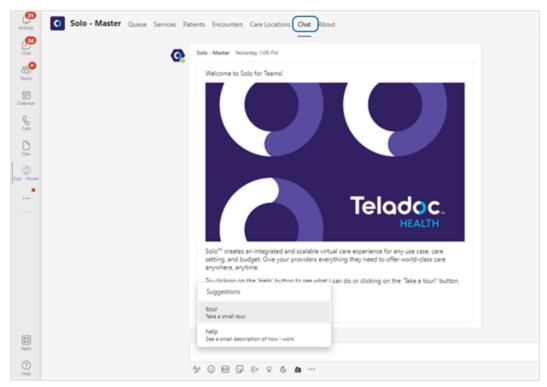
NOTE: Your Practice Admin must add Care Locations to their practice in order for the Care Locations to display here.





Chat tab

The **Chat** tab provides the ability to take a tour about the Teladoc Health Solo for Teams App, or click on **Help** to view topics.

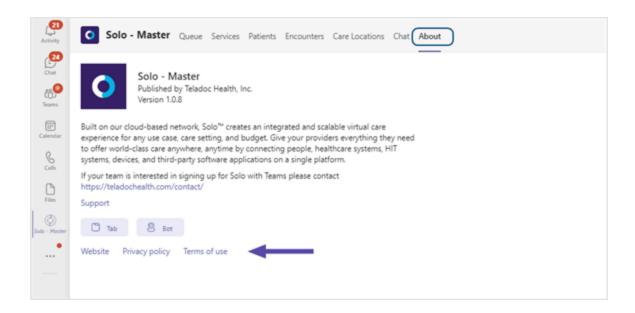




About tab

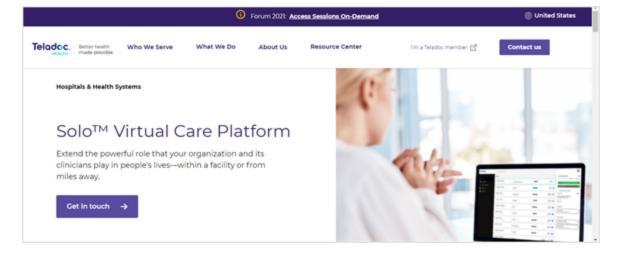
The **About** tab provides information about the Teladoc Health Solo for Teams App configured for your practice.

NOTE: Help can be selected if your team is interested in signing up for Solo with Teams. Contact Teladoc Health.



Website

Select Website to view the Solo™ Virtual Care Platform site.





Privacy Policy

Select Privacy Policy to view your organization's privacy policy.



Terms of Use

Select Terms of Use to view terms of use for your organization





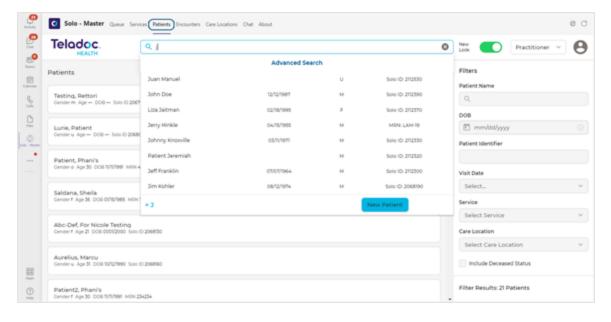
Manage Patients

Manage your patients using the **Patient** tab. Search for a patient, add a patient, edit demographic information and more.

NOTE: For more information, see the **Patient** tab section.

Search for Patient

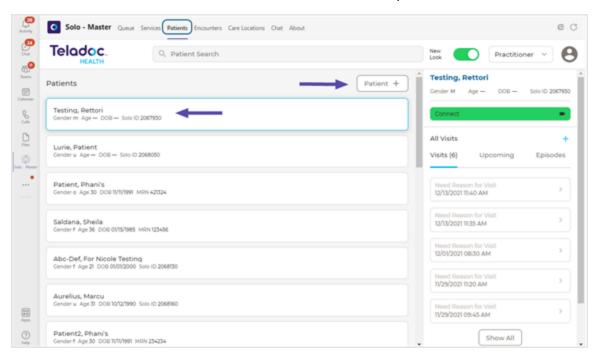
- 1. Filter your search using the Patient Filter described in the Patient tab section.
- 2. Search for a patient using the Patient Search bar. An Advanced search is available or



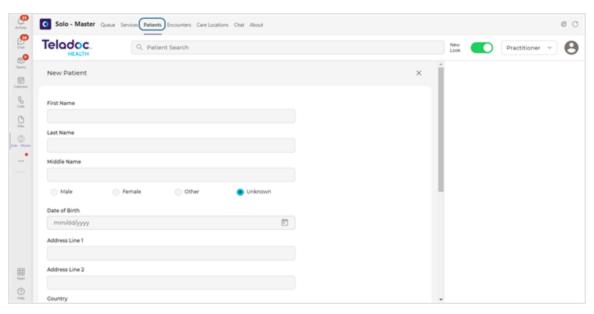


Add New Patient

1. Click on the Add Patient + button to add a new patient.



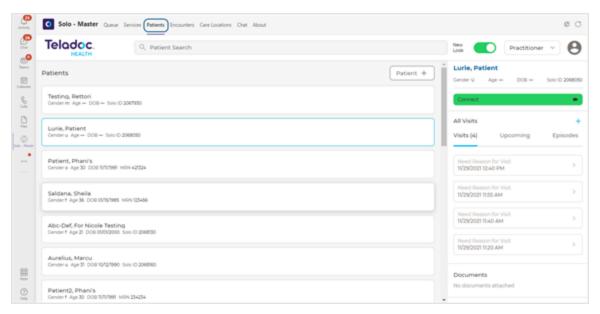
- 2. Enter your patient's information, including their Preferred Language and MRN.
- 3. When done, click on the bottom Confirm button.



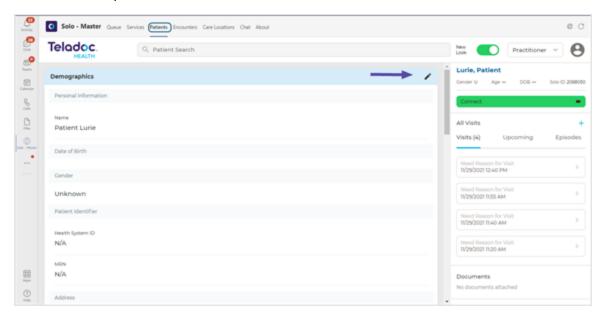


Edit Patient Information

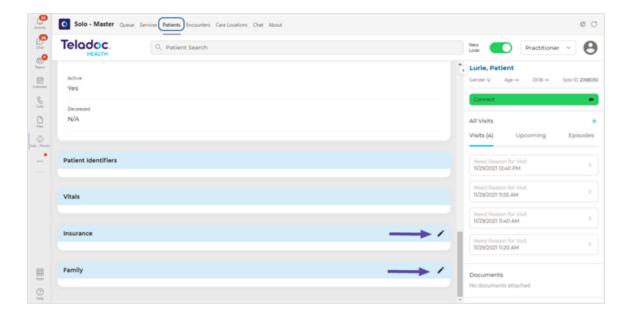
- 1. Select your patient bar from the middle panel to bring up your patient information in the right Patient panel.
- 2. Select the patient's name from the Patient panel to edit their information.



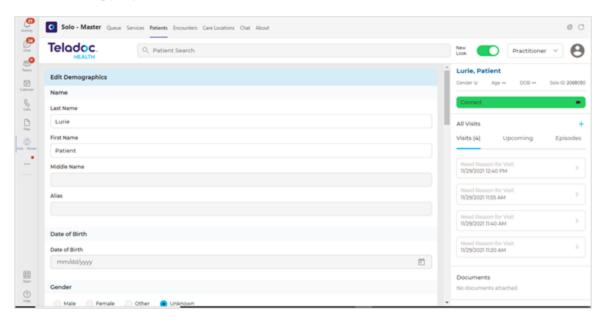
3. Click on the pencil edit icon.







- 4. Edit your patient's information.
- 5. Select the **Save** button when done.



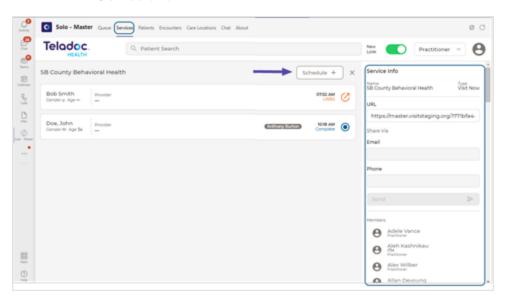


Schedule

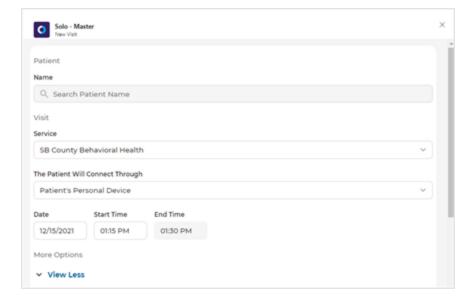
Schedule an appointment (i.e. virtual encounter) using the Services tab or Patients tab

Services tab

- 1. Select the **Services** tab to schedule a virtual encounter.
- 2. Select the **Schedule +** button.

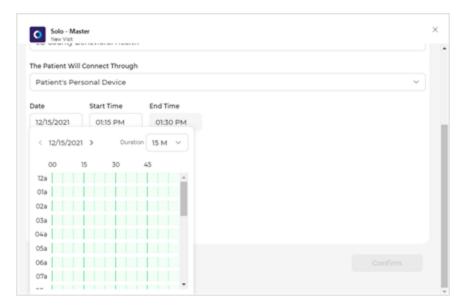


3. In the New Visit Patient dialog, enter your patient's information.



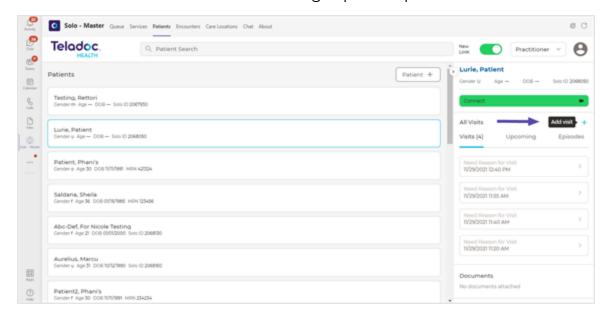


4. Schedule the time and date using the drop down calendars.



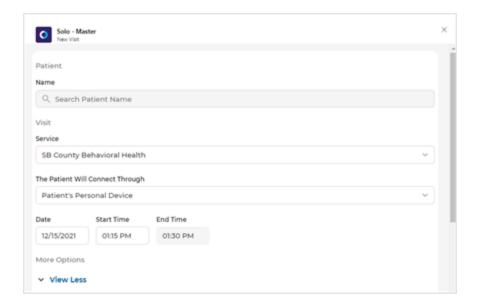
Patient tab

- 1. Select the **Patient** tab to schedule a virtual encounter.
- 2. Select a patient bar to bring up patient information in the right, Patient panel.
- 3. Select the Add Visit + icon from the right patient panel.

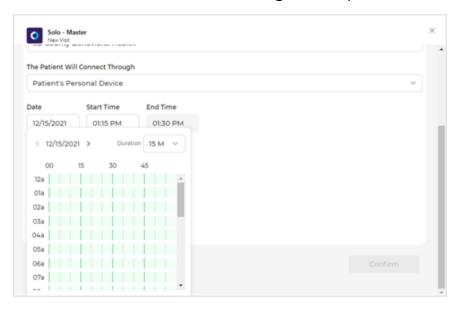


4. In the **New Visit** Patient dialog, enter your patient's information.





5. Schedule the time and date using the drop down calendars.

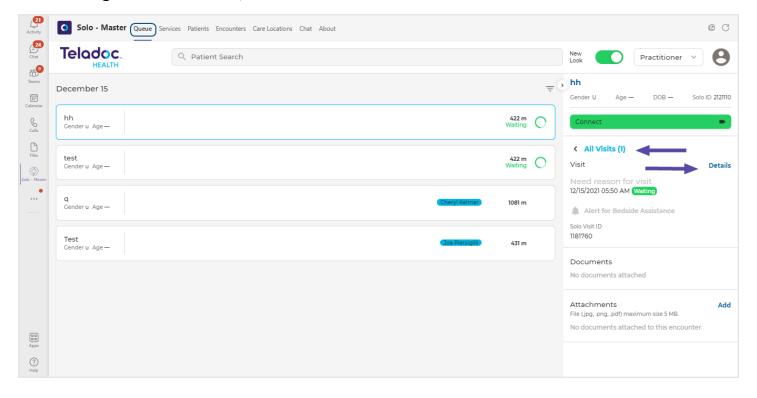




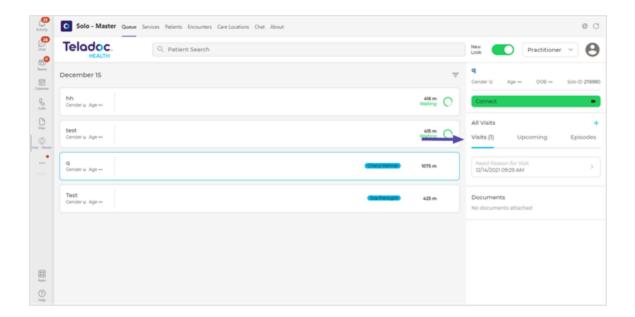
Queue

Select the **Queue** tab to begin a virtual encounter with a patient who has been scheduled for an appointment within the last 24 hours, or select or add an encounter (See the <u>Manage</u> <u>Encounters section</u>)

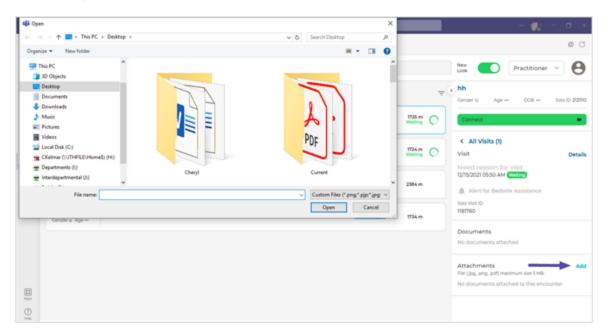
- 1. Click on a patient bar from the middle panel to bring up your patient information in the right Patient panel or do a **Patient Search**.
- 2. Click on your patient's name from the right Patient panel to navigate to the Patient tab to manage your patient's information, appointments, and more. See Manage Patients.
- 3. Select **All Visits** to view **Visits**, **Upcoming** visits, and **Episodes** by clicking on the terms from the right Patient Panel; as well as **Documents** and more.





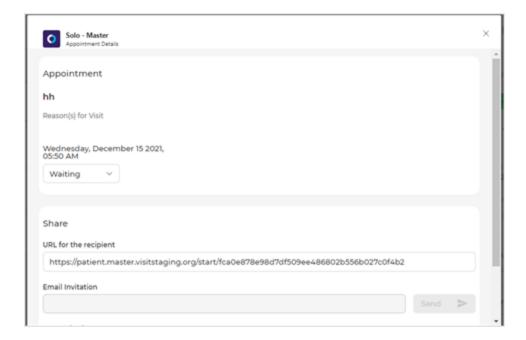


4. Select Add to add attachments.



- 5. Select **Details** to invite your patient to a virtual encounter.
- 6. Share the URL for the recipient with your patient and other participants.





7. Your patient will be prompted to check-in.



8. When ready to begin your virtual encounter, select the green **Connect** button from the right Patient panel.

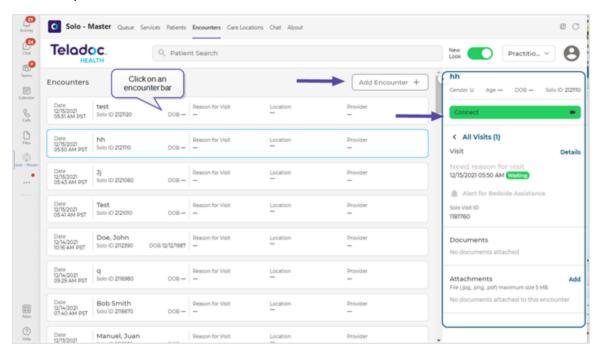


Manage Encounters

Use the **Encounter** tab to select an encounter, add an encounter, and more.

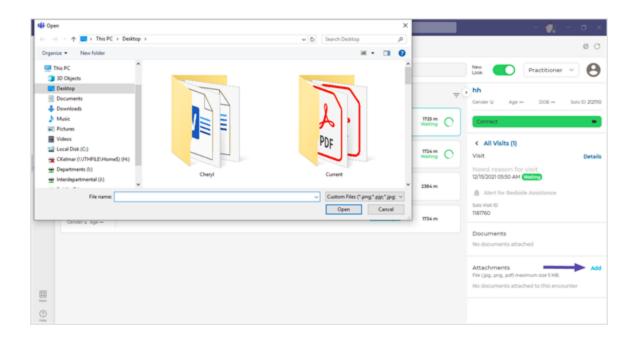
Select an Encounter

- 1. Use the Filter feature to narrow your search. See the Encounter tab section.
- 2. Select an encounter bar to display encounter information about your patient in the right Patient panel.

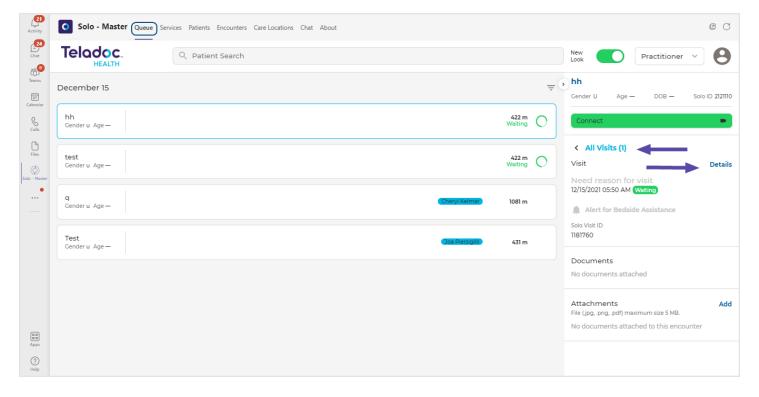


3. Select Add to add attachments.

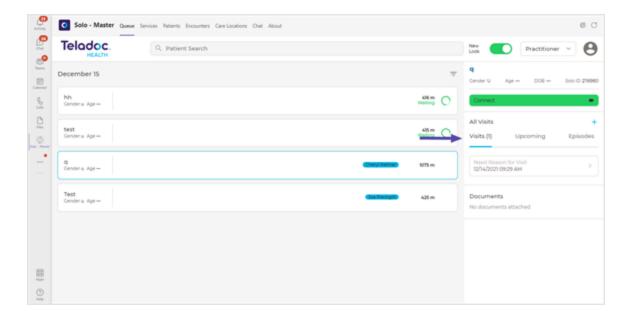




4. Select **All Visits** to view **Visits**, **Upcoming** visits, and **Episodes** by clicking on the terms from the right Patient Panel; as well as **Documents** and more.

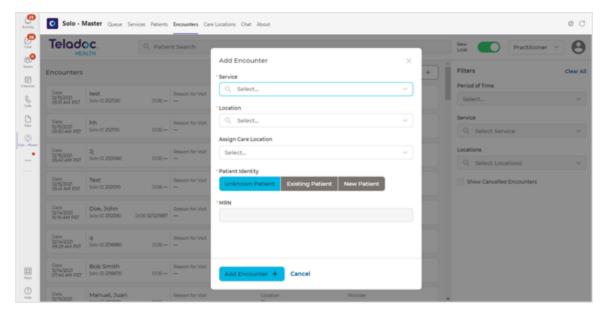






Add an Encounter

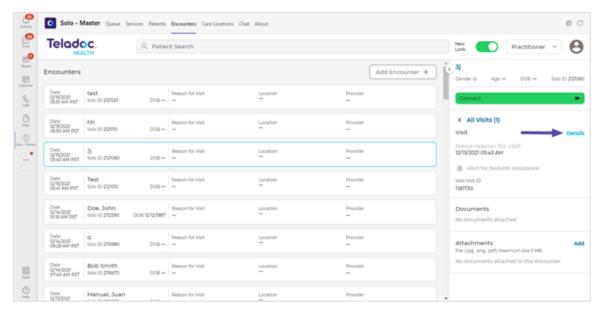
- 1. Add an encounter by selecting the **Add Encounter +** button in the upper, right corner of the screen.
- 2. Enter your Service, Location, Care Location, and more in the Add Encounter dialog.
- 3. When done, click on the Add Encounter button on the bottom of the screen or Cancel.



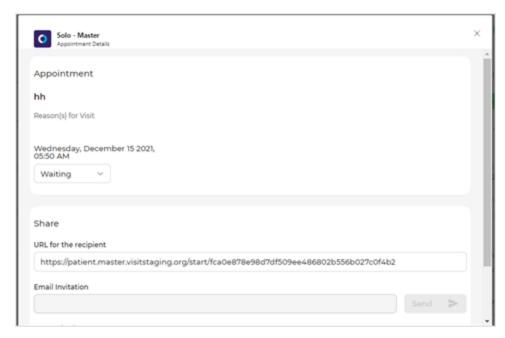


Start an Encounter

- 1. Select an encounter following the instructions above.
- 2. Then, select **Details** from the right patient panel after selecting your encounter.



3. From the **Appointment Details** dialog, share the **URL for the recipient** with your patient or participant.



4. Your patient will be prompted to check-in.





5. When ready to begin your virtual encounter, select the green **Connect** button from the right Patient panel.



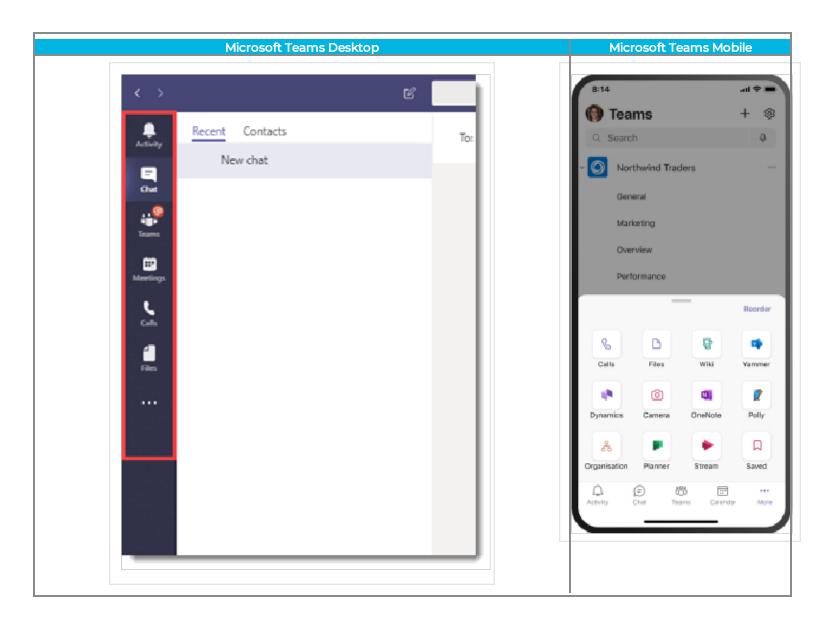
Resources

Manage App

Manage App setup policies for Microsoft Teams

Pin Apps in Teams

The Microsoft Teams setup policies let you choose Spps to pin in Teams. Apps are pinned to the app bar, which is the bar on the side of the Teams desktop and at the bottom of the Teams mobile clients (iOS and Android). You can st the order they show up in for your users.





HIPAA Procedures

As a business associate, Teladoc Health is subject to compliance of the law under 45 CFR §164.308 (Administrative Safeguards), under 45 CFR §164.310 (Physical Safeguards), and under 45 CFR §164.312 (Technical Safeguards) to maintain and transmit protected 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 in violation of 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 to ensure that the system 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 helps hospitals and medical professionals comply with HIPAA regulations. The tabs to the left describe some of the ways the telehealth system supports HIPAA compliance.

HIPAA requires all healthcare organizations to have policies and procedures, and the guidelines to the left. However, these 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 a 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 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.



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