

Teladoc Health™

Solo with Teams App

User Guide for Practice Admins

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Patent(s):

<https://teladochealth.com/patents/>

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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

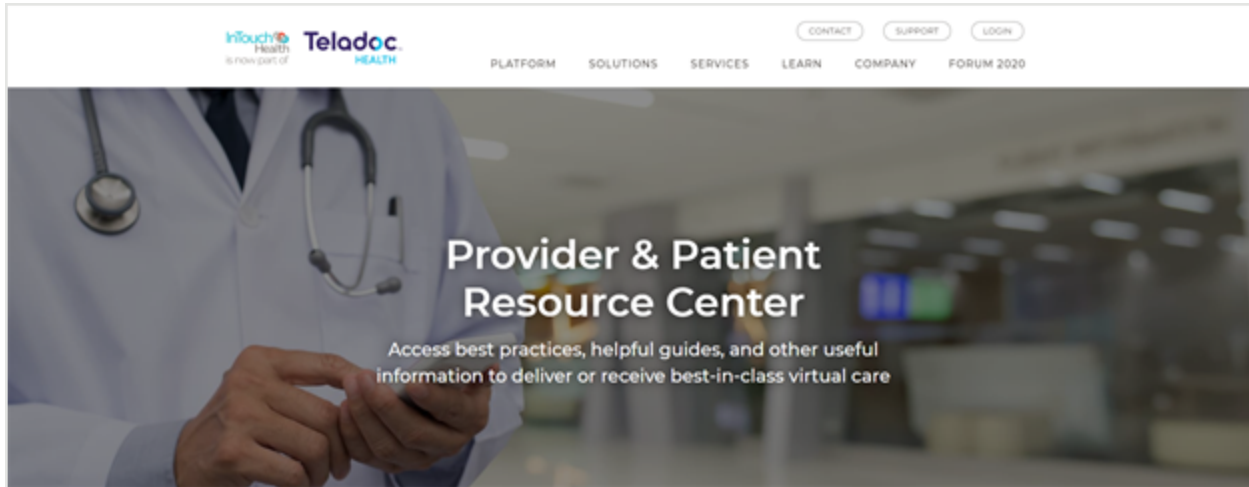
Microsoft Teams

- 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.

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	Organization Admin	Practitioner Admin	Practice Admin	Practitioner	Organization Practitioner	Scheduler	Back Office	Front Desk	Nurse	Trainee	Patient
Create users, reset the password for users	X	X	X								
Log in to any practice in the organization, switch practice	X				X						

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

Function	Organization Admin	Practitioner Admin	Practice Admin	Practitioner	Organization Practitioner	Scheduler	Back Office	Front Desk	Nurse	Trainee	Patient
Fill consent forms											X
Attend Video-call (virtual encounter)		X		X	X	X				X	X
Provider to provider call		X		X	X	X			X	X	
Invite participants to the active video-call		X		X	X	X				X	
Screen-sharing during video-call		X		X	X	X				X	
Add a document to the patient during video-call		X		X	X	X				X	
Call to care location		X		X	X	X			X	X	
Manually change appointment status		X		X	X	X			X		
Receive notifications about appointment status		X		X	X	X	X		X	X	X
Smart Notes Encounter Creation		X		X	X				X	X	
Smart Notes (formerly visit notes):		X		X	X		X		X	X	
Smart Notes Create		X		X	X			X	X		
Smart Notes Edit		X		X	X			X	X		
Smart Notes Comment		X		X	X					X	

Function	Organization Admin	Practitioner Admin	Practice Admin	Practitioner	Organization Practitioner	Scheduler	Back Office	Front Desk	Nurse	Trainee	Patient
Smart Notes Sign		X		X	X						
Smart Notes Add addendum text		X		X	X		X		X		
Smart Notes View		X		X	X	X	X		X	X	
Consultation Note - Create		X		X	X						
Consultation Note - Edit		X		X	X						
Consultation Note - Sign		X		X	X						
Consultation Note - View		X		X	X	X	X		X	X	
Addendum - Create		X		X	X						
Addendum - Edit		X		X	X						
Addendum - Sign Own		X		X	X						
Addendum - View		X		X	X	X	X				
Fax (manual)		X		X	X		X		X		
Visit Summary		X		X	X	X	X		X	X	
Audit Log		X			X		X				
Provider survey		X		X	X	X			X	X	
Patient survey											X
My Apps / Third Party Apps - View		X	X	X		X	X		X	X	
View Audit Log		X					X				
Data Export											
Report Generator (CSV)		X					X				
Data Download (CSV)		X									
Data Download (XML)		X									

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.

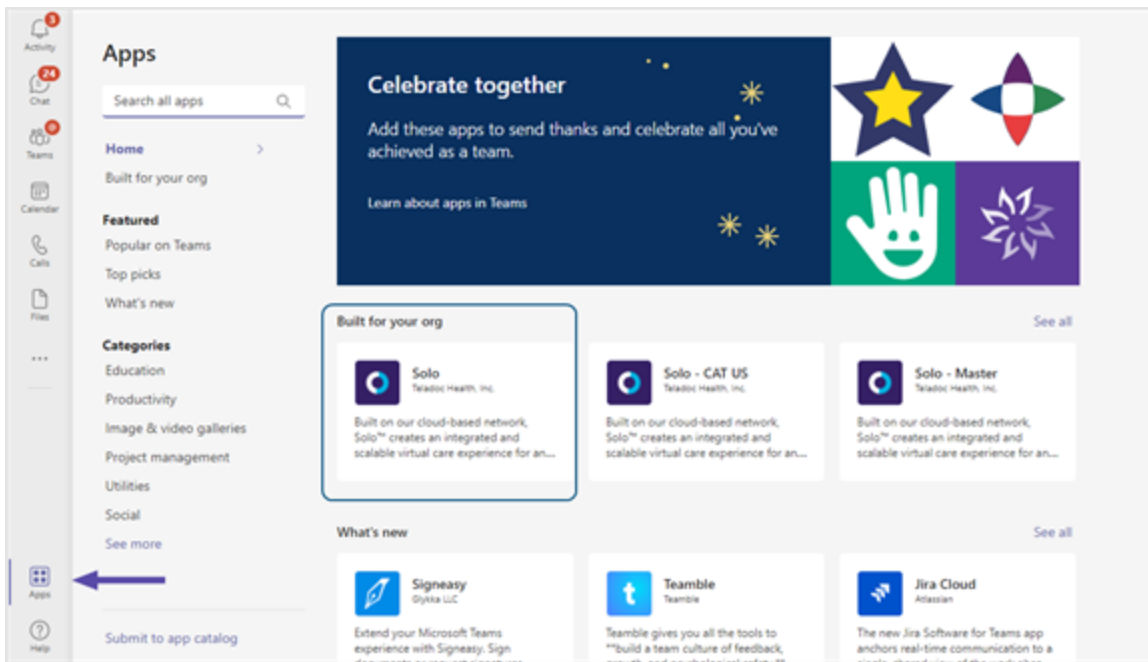
3. Select the **Permissions** tab and then **Review permissions** to approve permissions.
4. Optionally pin the App following the Teams policy.

Open Solo in Teams

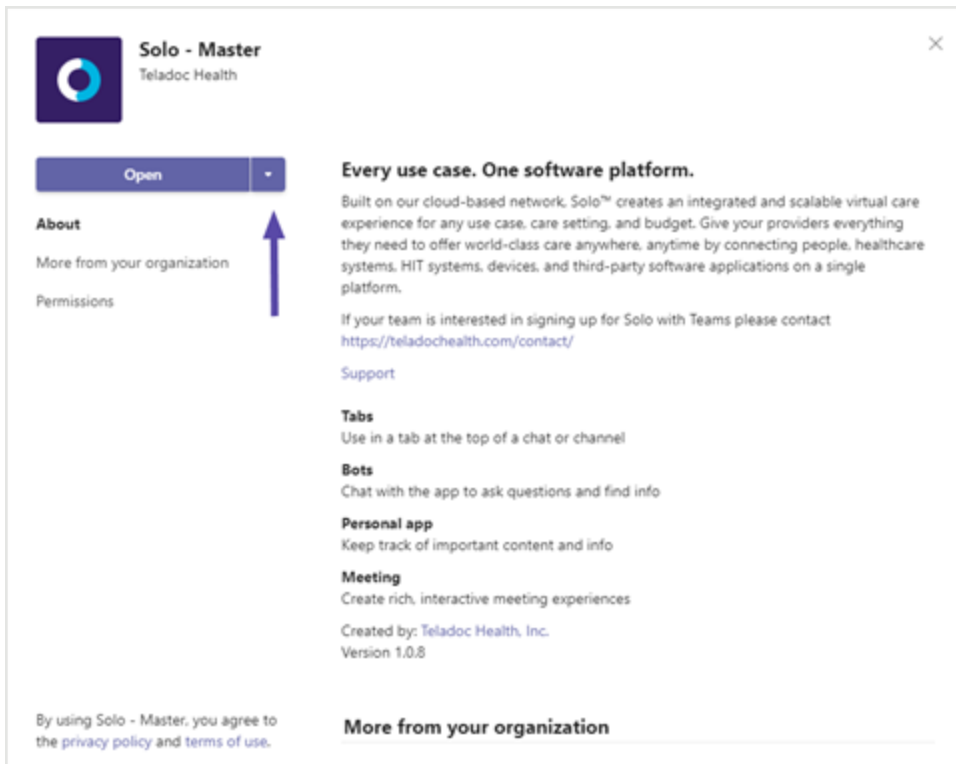
Work with your Account Manager and Solution Services contacts on your Teladoc Health team to enable the integration for your practice

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

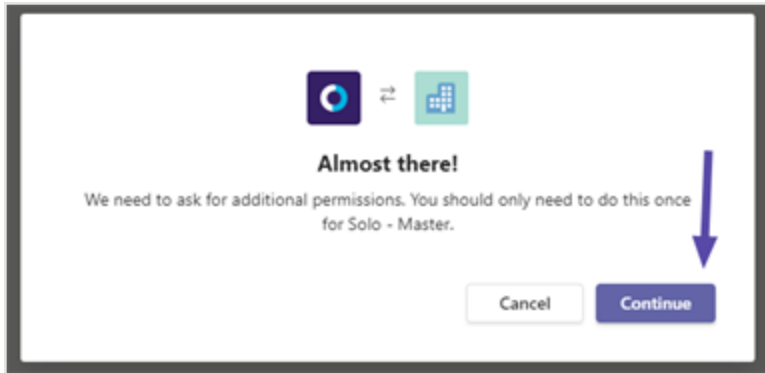
1. From the Teams interface, click on the **Apps** icon in the lower left corner of the screen.
2. A screen called **Apps** will open in Teams.
3. Select your **Solo** application.



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

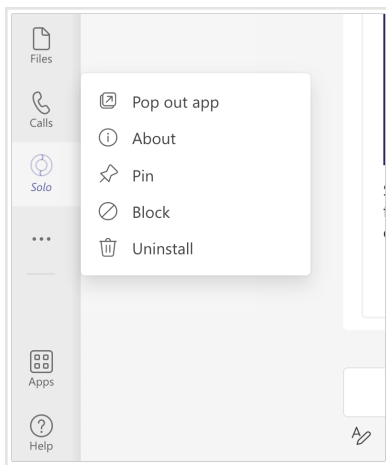


5. When done, select **Continue**.



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.

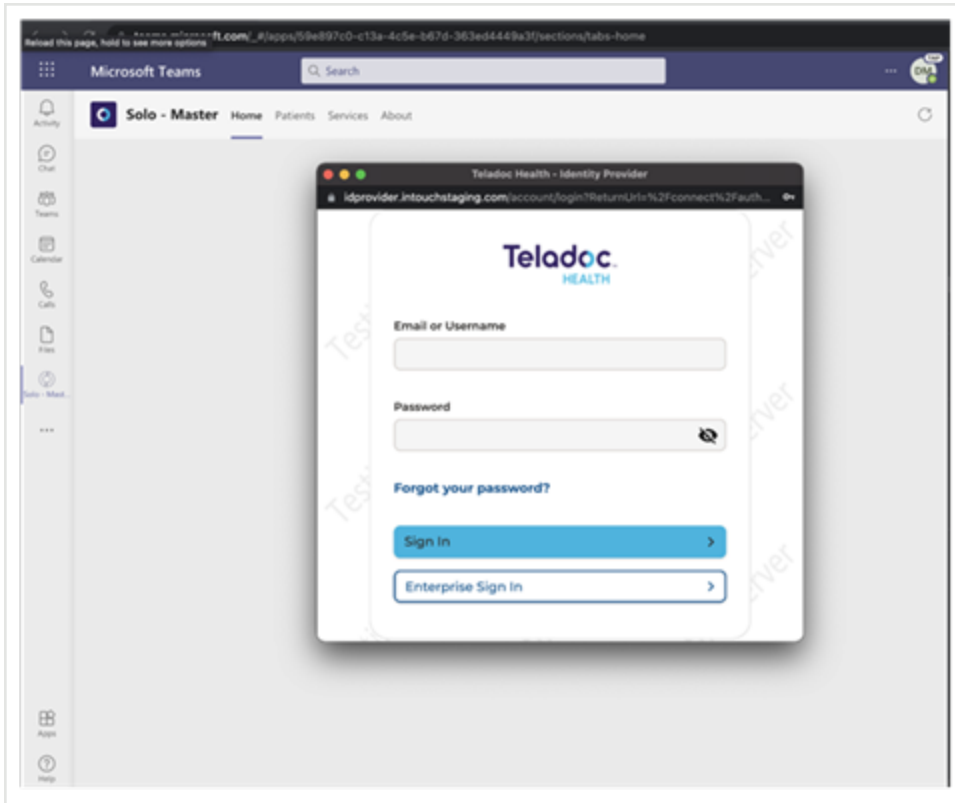


Log Into Microsoft Teams

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

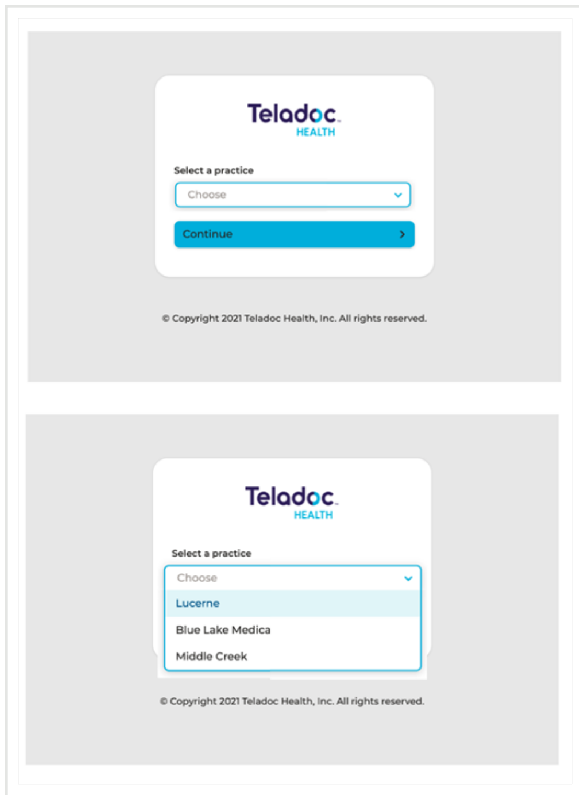


2. When done, select **Enterprise Sign In**.

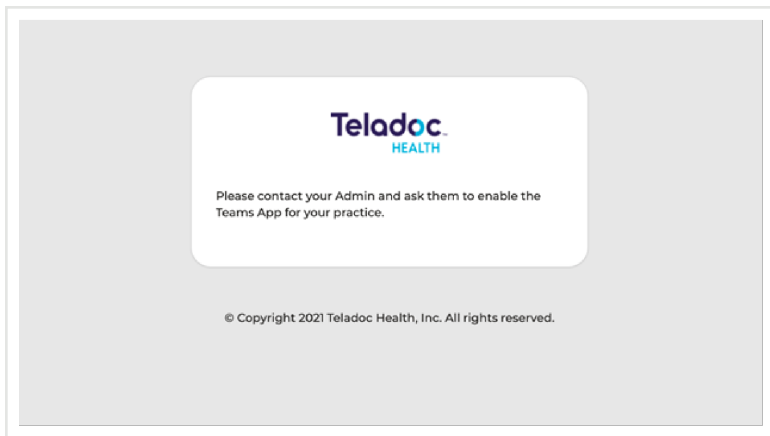
3. Now, **Select a Practice** using the drop down menu.

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.



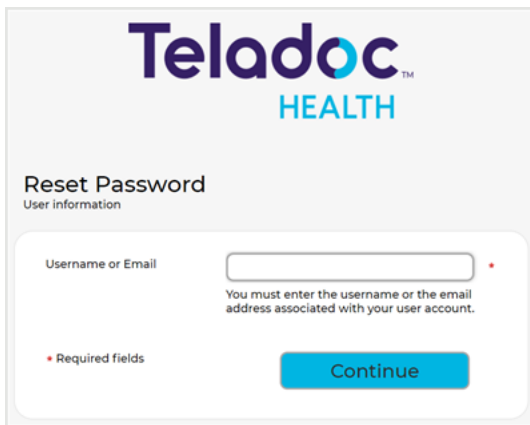
Reset Password

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.



Setup Services

Create a Service

1. Select the **Services** tab.
2. Click on the **Add Service +** button.
3. Create a **Service Name** and **Service Line**,
4. **Service Type** and set the toggles.

NOTE: See the MA-20165 Practice Admin User Guide for a detailed description of the toggles.

Add Practitioners to a Service

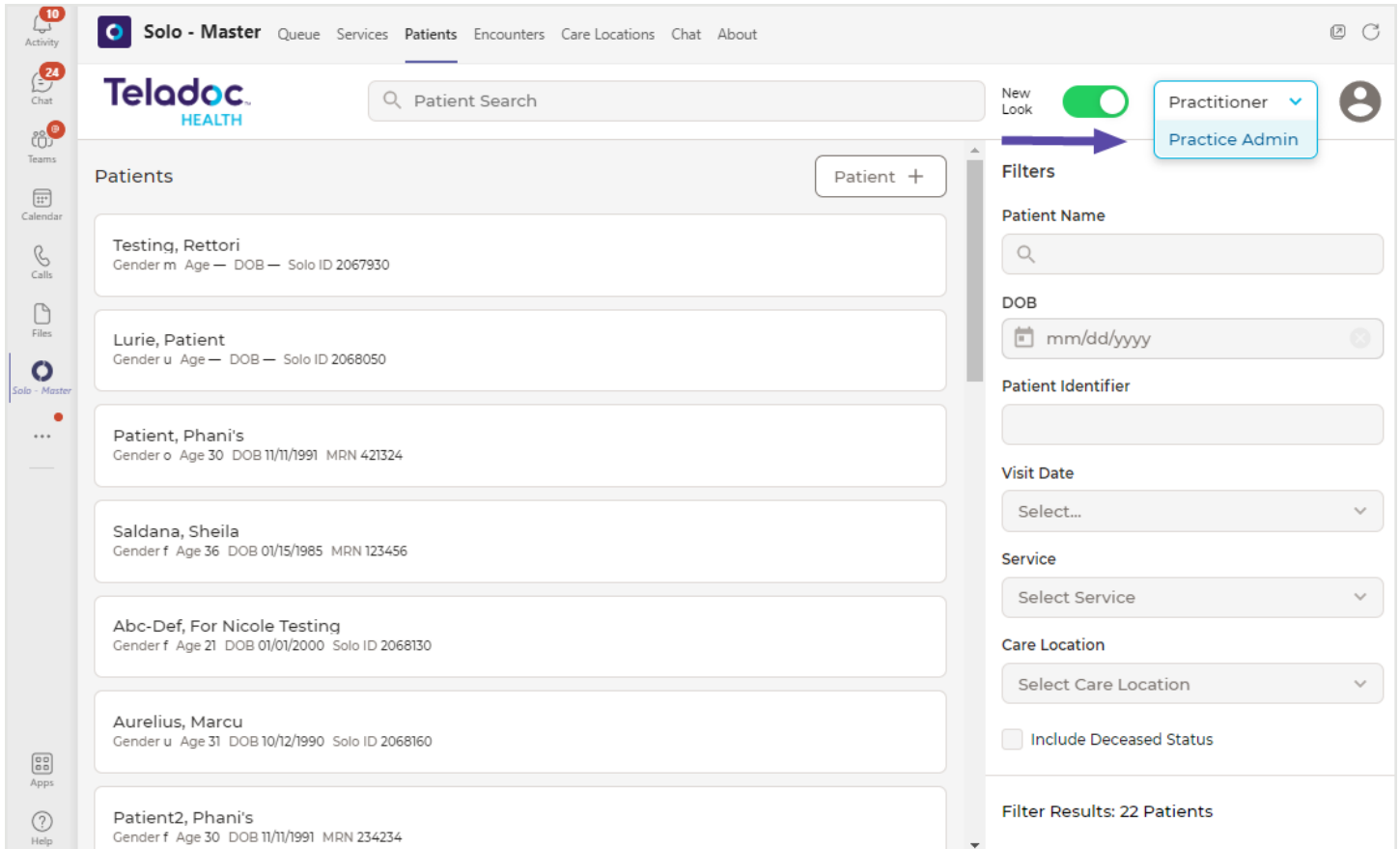
1. Once a Service is created, select it.
2. Click on **Edit Members** from the **Services Info** screen.
3. Use the Search feature to find members to add.

NOTE: Practitioners will only see services they have been added to

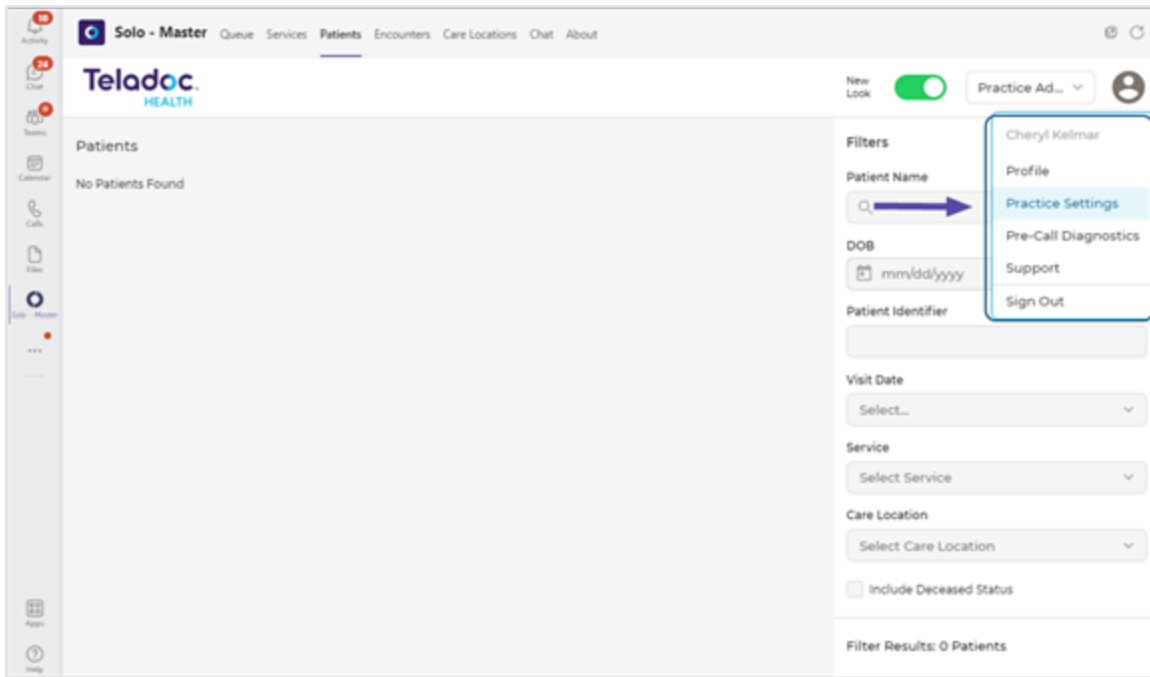
Practice Admin Dashboard

The Teladoc Health Solo with Teams application opens in the Microsoft Teams with tabs. The tabs for the Practice Admin are enabled using the instructions below:

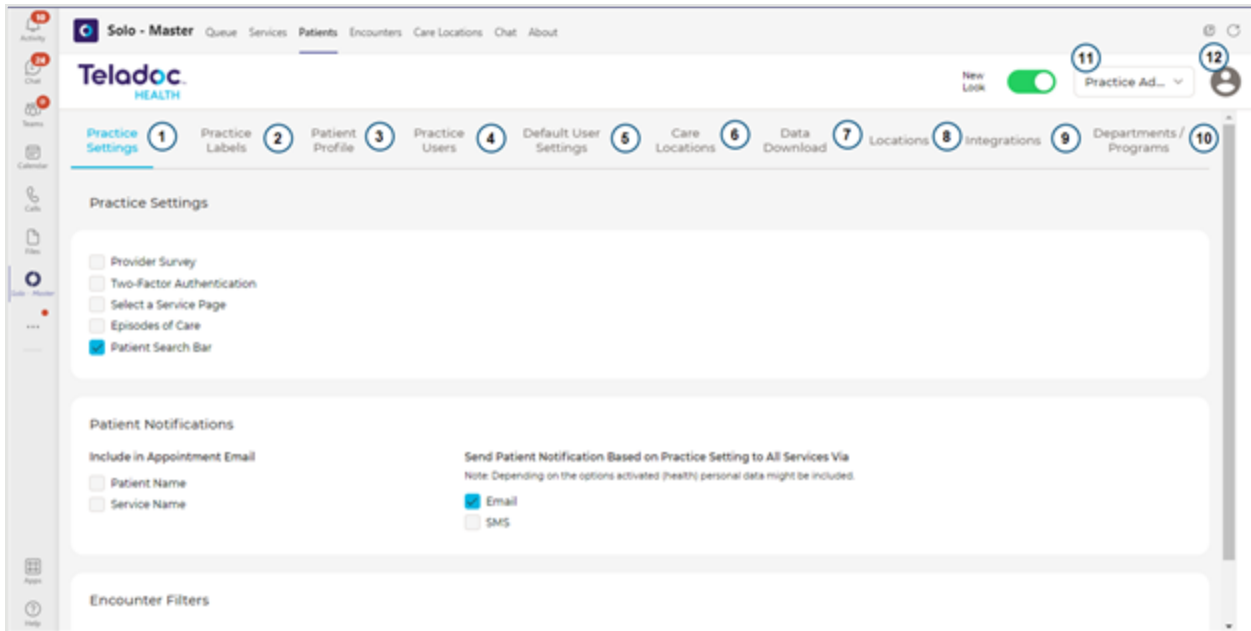
1. As a Practice Admin, use the role drop down menu to select **Practice Admin**.



2. Use the user icon drop down menu to select **Practice Settings**.



3. The Practice Admin dashboard follows:



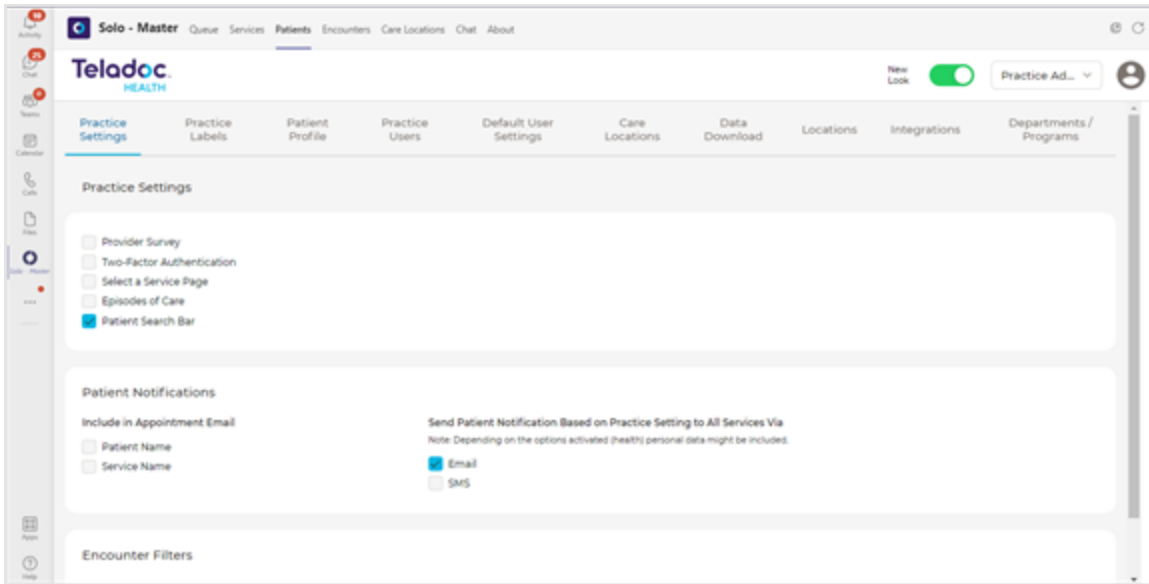
Element	Description
1	Practice Settings: Set authentication, notifications, and filters.

Element	Description
2	Practice Labels Labels for the health system, account number, and MRN number.
3	Patient Profile: Set the parameters for users to set profiles.
4	Practice Users: Create new users for your practice and see a list of practice users.
5	Default User Settings: Set default settings
6	Care Locations: Set the Care Locations and Activations.
7	Data Download: Set the dates for the data to be down loaded.
8	Locations. Add a new location and view locations.
9	Integrations: View Integrations..
10	Departments/Programs: Set departments and programs.
11	Profile Dropdown: Set the Practitioner and Practice Admin roles using the dropdown.
12	User icon: Functionality to create a profile, set practice settings, navigate to the dashboard, pre-call diagnostics, or obtain support.

Practice Settings tab

The Practice Admin is responsible for setting the parameters for their practice.

1. Select the **Practice Settings** tab.
2. Enable each practice setting feature by selecting the associated check box.



Provider Survey	Enable a Practitioner survey.
Two Factor Authentication	Enable additional security with two-factor authentication. Users will need to enter an additional pin number sent to the email address associated with their account. If enabled, all users will be required to use it.
Select a service page	Enable a selection of services for patients within specific Services when they use the Select A Service URL or when you open a white-labeled iOS App.
Episodes of care	Enable the ability to group Encounter into an episode of care.
Patient Search Bar	Enable a patient search bar for Practitioner and Scheduler.
Patient Notification	Select to receive notifications by email with Patient Name or Services information.
Encounter Filters	Select the parameters for users to filter encounter information.

3. Set up Services for the Teladoc Health Care Location App.
 - Select to **Edit** categories, **Add Titles**, and **Choose Layout** for the Care Location App that runs on your device with a touch screen.

Add Titles
Use titles to help organize the columns of services for the clinical care team

Show Column Titles

Choose Layout
Choose the number of columns you would like to organize the services into

Button Layout
Drag to reorder the Services buttons

Title	Title	Title	Title
TeleEM <small>26 Characters Remaining</small>	TeleNeonatology <small>17 Characters Remaining</small>	TeleOB <small>26 Characters Remaining</small>	TeleStroke <small>22 Characters Remaining</small>
EmergencyMedicine	Activate Teleneonatology Transfer & Activate	Emergent	New Request Non-acute/follow-up

4. When done, click on the **Save** button.

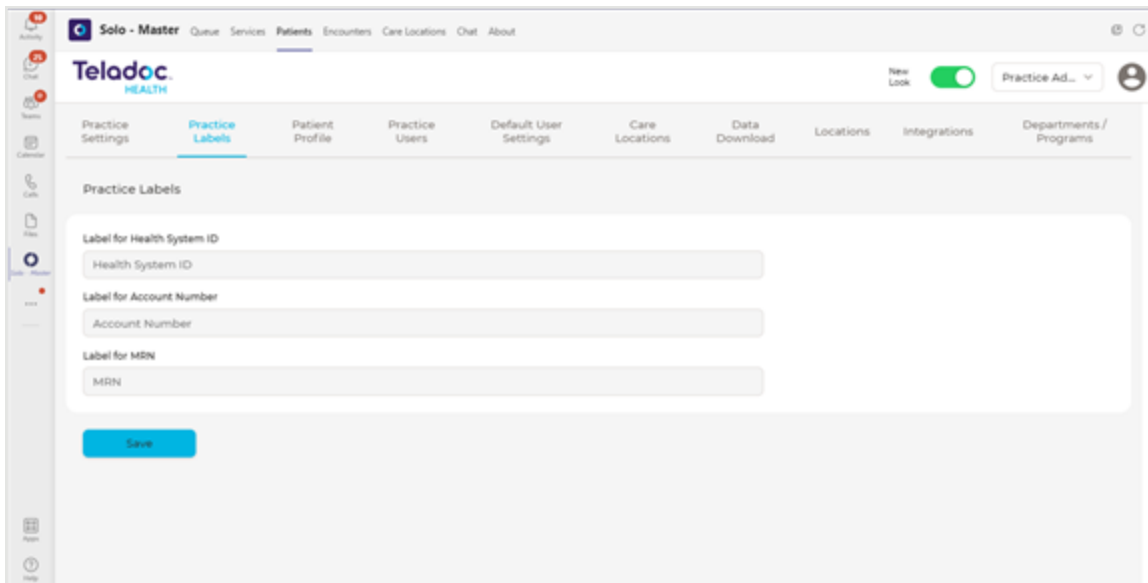
Practice Label tab

The Practice Admin configures the MRN and Account number used for HL7 integration with customer EMR's.

NOTE: Different Health Systems can have different patient identifier numbers.

1. Select the **Practice Labels** tab.
2. Enter the information in the designated fields shown below.

NOTE: An External Account Identifier is an optional configuration that can be enabled or disabled by a Teladoc Health Admin. External Account Identified is disabled by default.

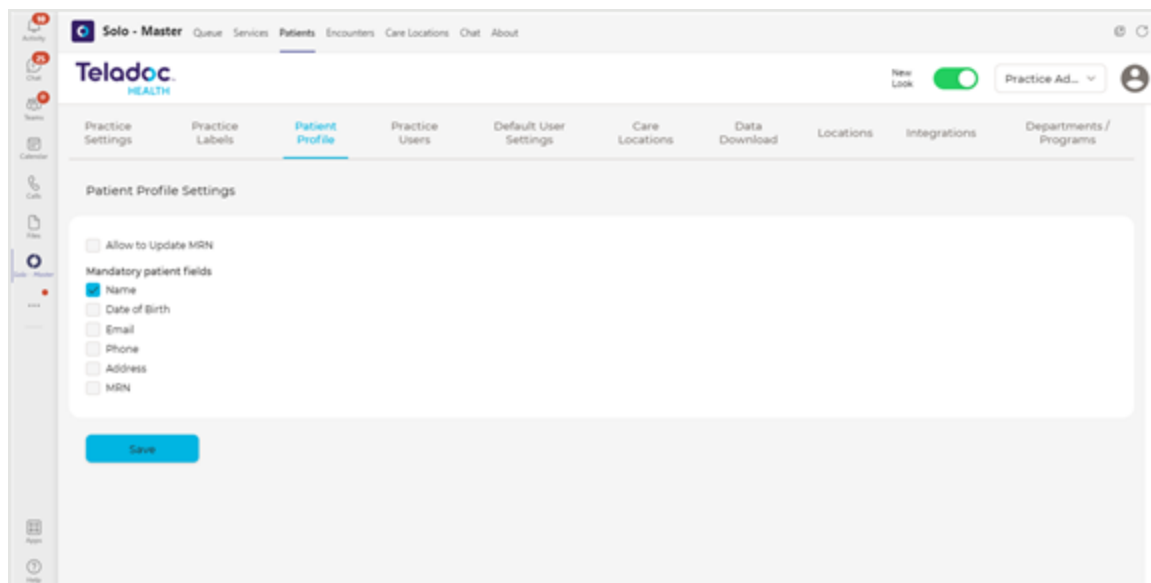


The screenshot shows the 'Practice Labels' configuration page in the Teladoc Health Solo - Master interface. The page has a top navigation bar with the Teladoc Health logo and a 'New Look' toggle. Below the navigation bar is a horizontal menu with tabs: Practice Settings, Practice Labels (selected), Patient Profile, Practice Users, Default User Settings, Care Locations, Data Download, Locations, Integrations, and Departments / Programs. The main content area is titled 'Practice Labels' and contains three input fields: 'Label for Health System ID' with a sub-label 'Health System ID', 'Label for Account Number' with a sub-label 'Account Number', and 'Label for MRN' with a sub-label 'MRN'. A blue 'Save' button is located at the bottom of the form.

Patient tab

The Practice Admin configures the template for users to set a profile.

1. Select the **Patient** tab.
2. Click on the checkbox to allow updates based on the **MRN** parameter.
3. Select the checkboxes to configure mandatory fields.

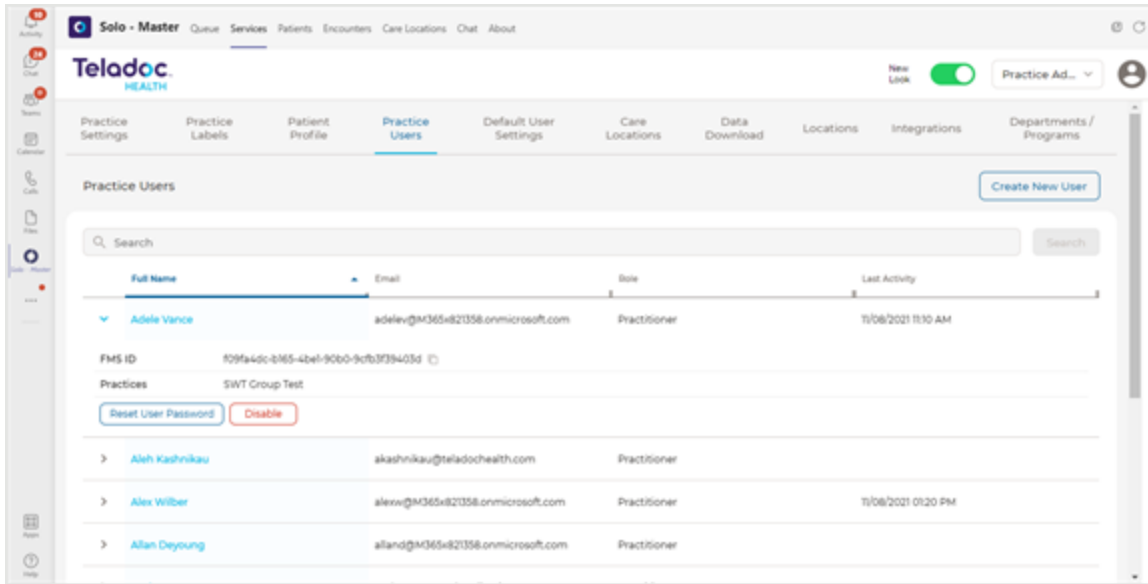


4. When done, click on **Save** button.

Practice Users tab

Practice Users are listed in the middle panel with their name, email, role, and last activity.

1. Select the **Practice Users** tab
2. Select the arrow icon next to each user to **Reset Password** or **Disable** the user.



Add Users

The Practice Admin configures the setting for their users.

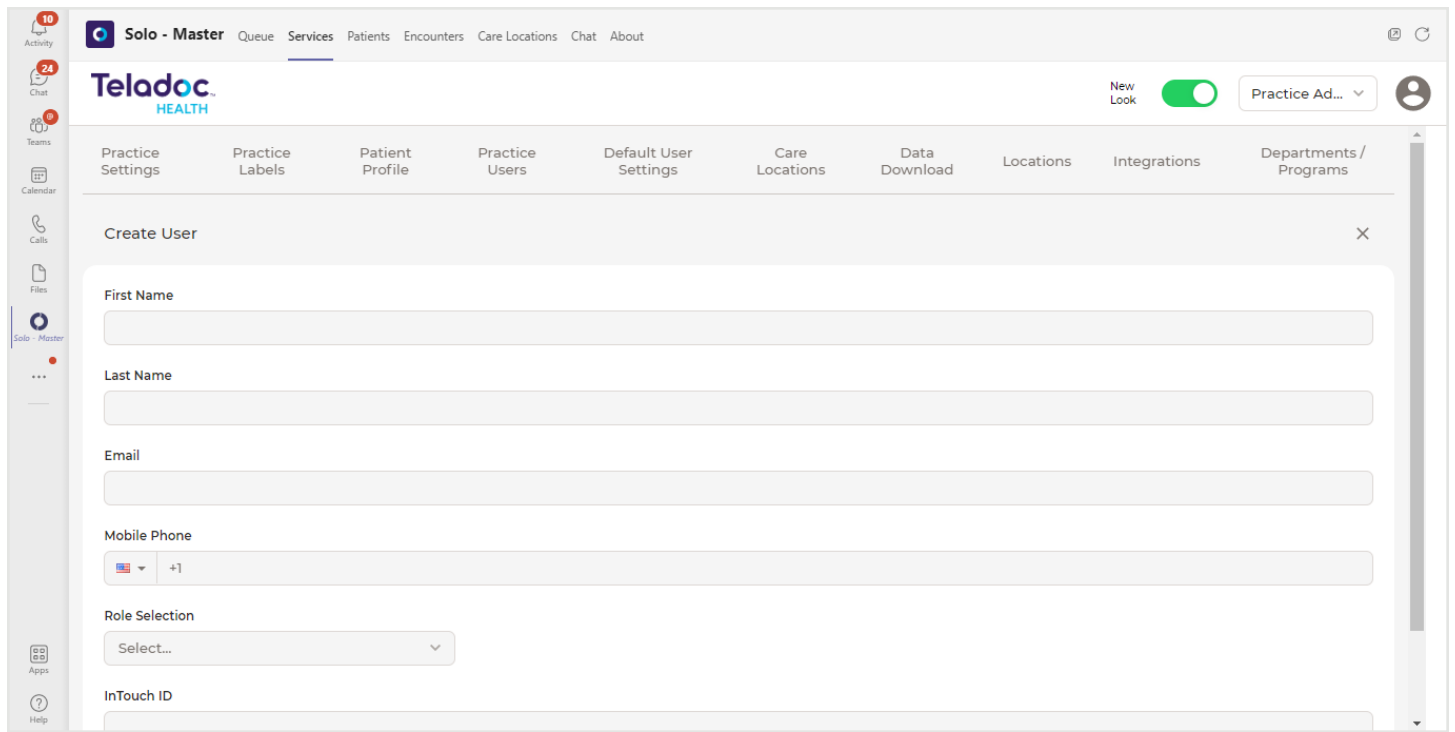
1. To add a new user, select the **Create new user** button.

The screenshot shows the Teladoc Health Solo - Master interface. The top navigation bar includes 'Solo - Master', 'Queue', 'Services', 'Patients', 'Encounters', 'Care Locations', 'Chat', and 'About'. The left sidebar contains icons for Activity, Chat, Teams, Calendar, Calls, Files, and Help. The main content area is titled 'Practice Users' and features a search bar and a table of users. A blue arrow points to the 'Create New User' button in the top right corner of the main content area.

Full Name	Email	Role	Last Activity
Adele Vance	adelev@M365x821358.onmicrosoft.com	Practitioner	11/08/2021 11:10 AM
Aleh Kashnikau	akashnikau@teladohealth.com	Practitioner	
Alex Wilber	alexw@M365x821358.onmicrosoft.com	Practitioner	11/08/2021 01:20 PM
Allan Deyoung	alland@M365x821358.onmicrosoft.com	Practitioner	
Anders Orn	anders@research-collective.com	Practitioner	
Andy Young	Andy.Young@teladohealth.com	Practitioner	
Ann Nabar	anabar@teladohealth.com	Practitioner	

2. Enter a name, email, phone and select the roles for the new user.
3. Select one or multiple user roles, such as **Practitioner** or **Practitioner + Practice Admin**.

NOTE: The User's middle name, phone number, and Teladoc Health's ID are optional.



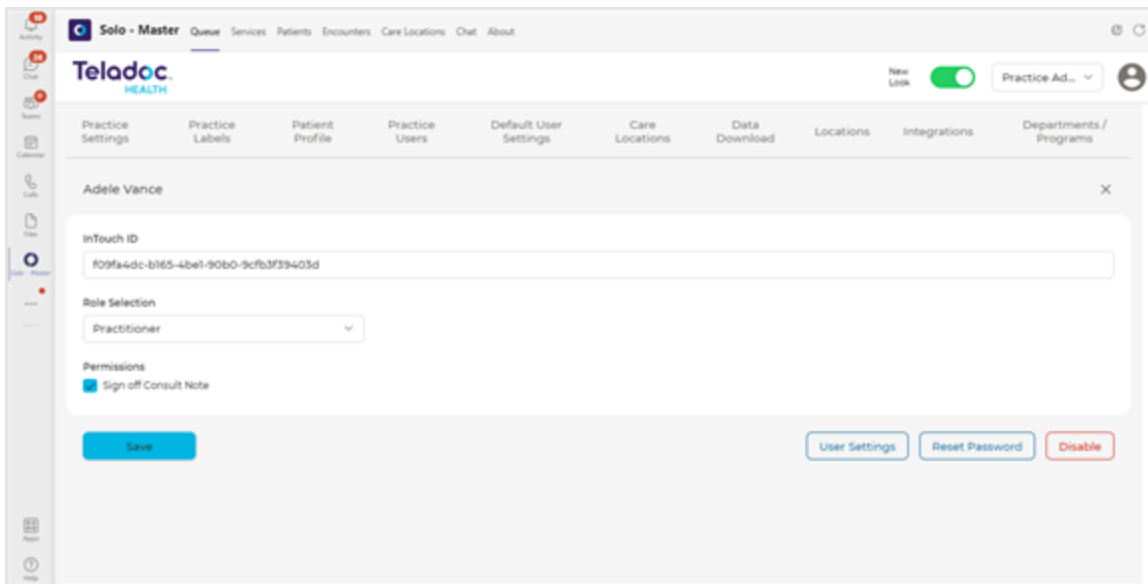
4. When done, select **Add User**.

Edit Users

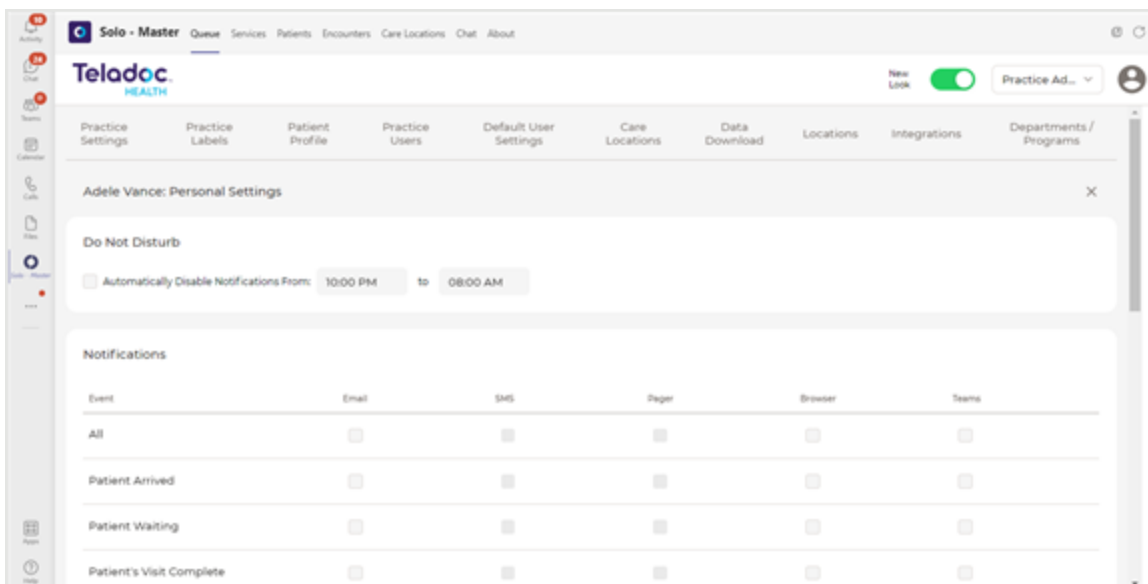
Edit user information, **User Settings**, **Reset Password**, or **Delete** a user.

NOTE: You can edit a user, but you cannot delete them.

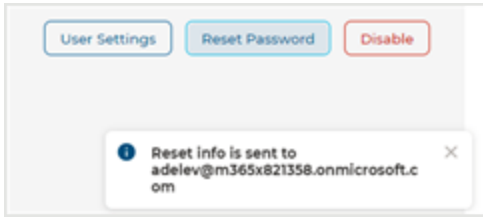
1. Scroll down to your user and click on their name to edit their information.



2. Select **User Settings** to personalize the user's experience.



3. A message will slide from the lower, right corner of the screen when you successfully reset a users password or disable them.



4. When done, click the **Save** button.

Default User Settings tab

The Practice Admin can set the default value for Practice User settings.

NOTE: Practitioners and Schedulers may over-ride them.

1. Select the **Default User Settings** tab.
2. Configure **Do not disturb** hours using the drop down provided or **Automatically disable notifications form**.
3. Select one or more of the following delivery methods for each notification type, as described in the table below.
 - Email
 - SMS (text) (A phone number must be supplied for SMS)
 - Browser
 - Tiger Connect (available if enabled by your Teladoc Health representative.)

Notifications

Notification	Description
Patient Arrived	Patient has been scheduled for an appointment and has checked in.
Patient Waiting	Patient has been assigned to a Waiting Room and is waiting for their Encounter to begin.
Patient's Visit Complete	Patient has completed their Encounter
Patient's Visit Incomplete	Patient has not completed an essential part of his/her Encounter
Patient LWBS	Patient left their Waiting Room and/or Encounter without being seen.
Patient on Hold	Patient is waiting for their Encounter either because it didn't begin or it was interrupted.
Patient No Show	Patient has not arrived for their scheduled appointment.
Patient with Updates	Patient information has been updated.
Patient with complete Forms	Patient has completed all the required forms for their Encounter

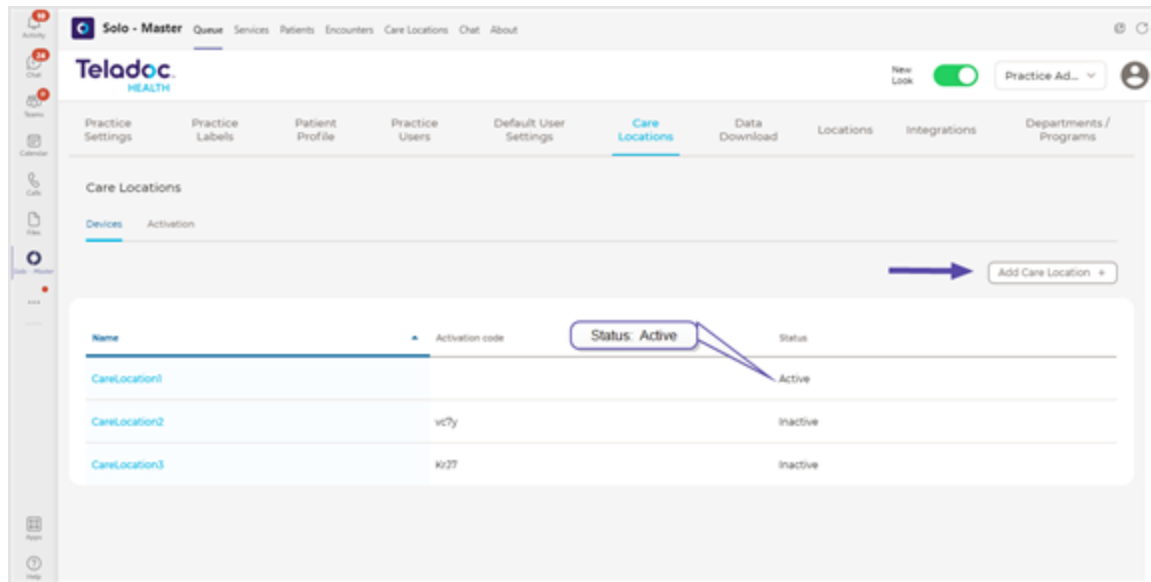
Notification	Description
Visit Notes with Comments	Visit Notes were used during a patient Encounter and notes were made.
Patients with Device Readings	Patient has device readings, such as vitals taken.
Provider to Provider	Notification from a Practitioner, Scheduler, or other medical professional to another medical professional.
Notification from Practitioners	Notification from a Practitioner, Scheduler, or other medical professional.
Consult Note was Signed	The Consult Note for the Encounter has been signed by the Practitioner or other medical professional.
Consult Note was Amended	The Consult Note for the Encounter was amended by the Practitioner or other medical professional.
Date Field Notification	The date field for notification that the patient's documentation has been updated.

4. When done, click the **Save** button.

Care Locations tab

View information about your practice's **Care Locations**.

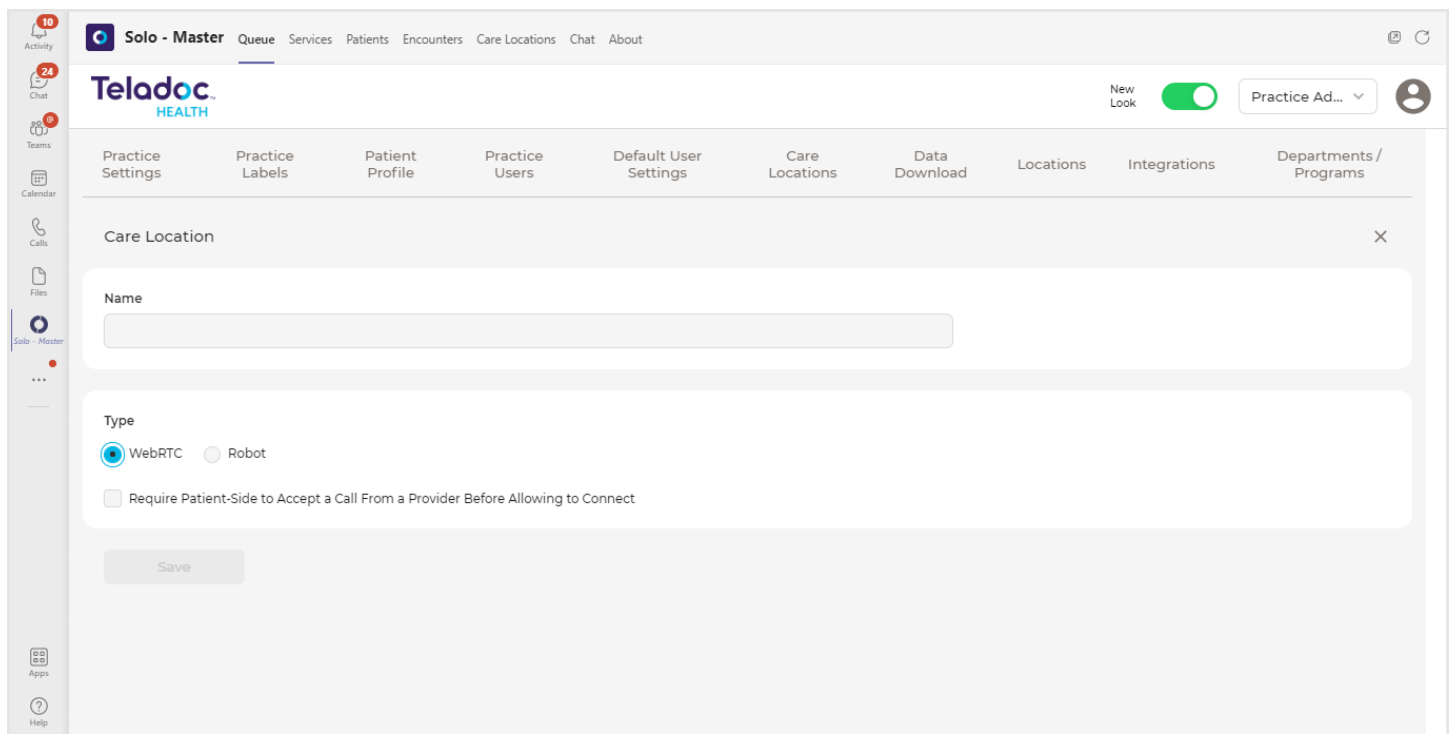
1. Select the **Care Locations** tab.
2. A list of Care Locations will display along with their **Activation code** and **Status**.



Add Care Location

Care Locations represent devices, including iPhones or iPads.

1. Select the **Add Care Location** button in the upper right corner.
2. A Care Locations panel should open in the middle of the screen.
3. Enter a **Care Location Name**.
4. Select the **WEBRTC**.



5. or select the **ROBOT** radio button.

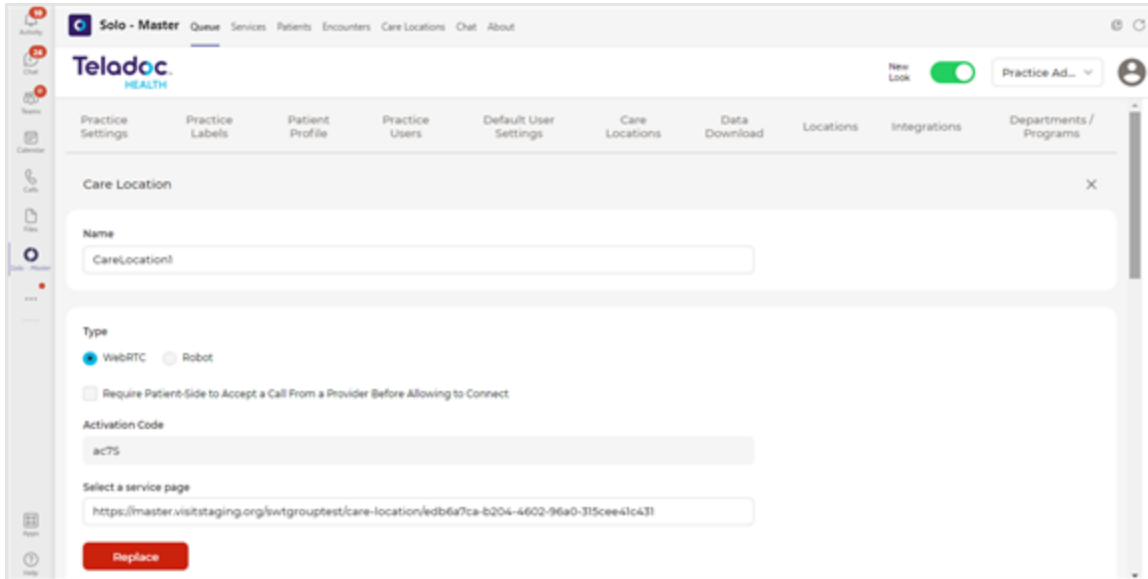
- Enter the serial number of the device and the **Client ID**.
- By default, **Skip activation** is unselected if not activated.

6. When done, select the **Save** button.

Edit Care Location

Practice Admins can edit settings for Care Locations.

1. Scroll down to your Care Location and select its name.
2. Make changes as needed.



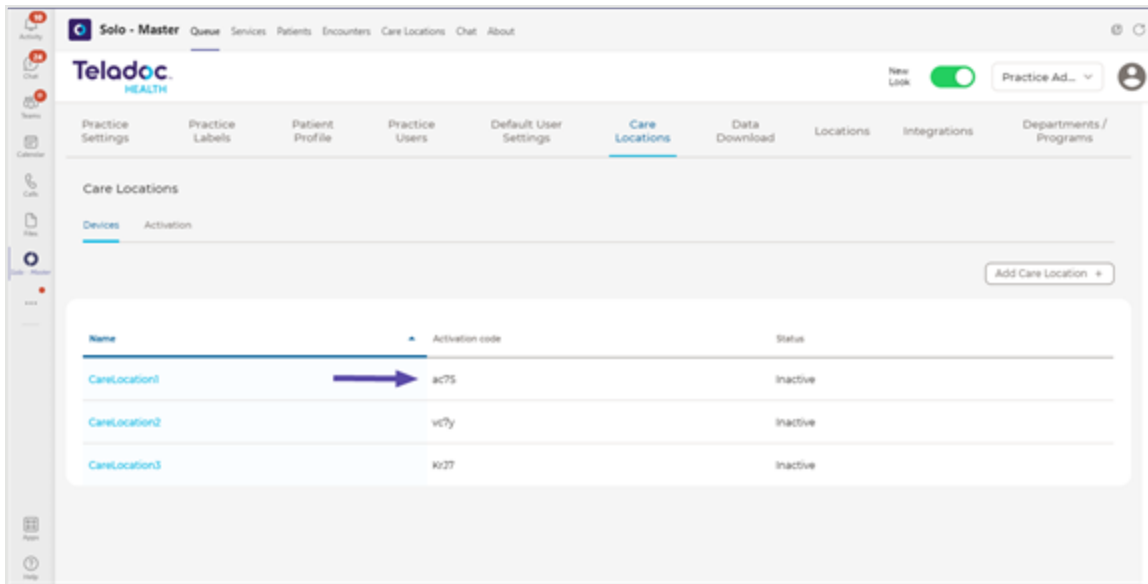
The screenshot shows the 'Solo - Master' interface for Teladoc Health. The top navigation bar includes 'Queue', 'Services', 'Patients', 'Encounters', 'Care Locations', 'Chat', and 'About'. The main menu has options like 'Practice Settings', 'Practice Labels', 'Patient Profile', 'Practice Users', 'Default User Settings', 'Care Locations', 'Data Download', 'Locations', 'Integrations', and 'Departments / Programs'. The 'Care Locations' section is active, displaying a form for editing a care location. The form includes a 'Name' field with the value 'CareLocation!', a 'Type' section with 'WebRTC' selected and 'Robot' unselected, a checkbox for 'Require Patient-Side to Accept a Call From a Provider Before Allowing to Connect', an 'Activation Code' field with the value 'ac75', and a 'Select a service page' field with the URL 'https://master.visitstaging.org/visitgroupstest/care-location/edb6a7ca-b204-4602-96a0-315cee41ca31'. A red 'Replace' button is at the bottom of the form.

3. When done, select **Save**.

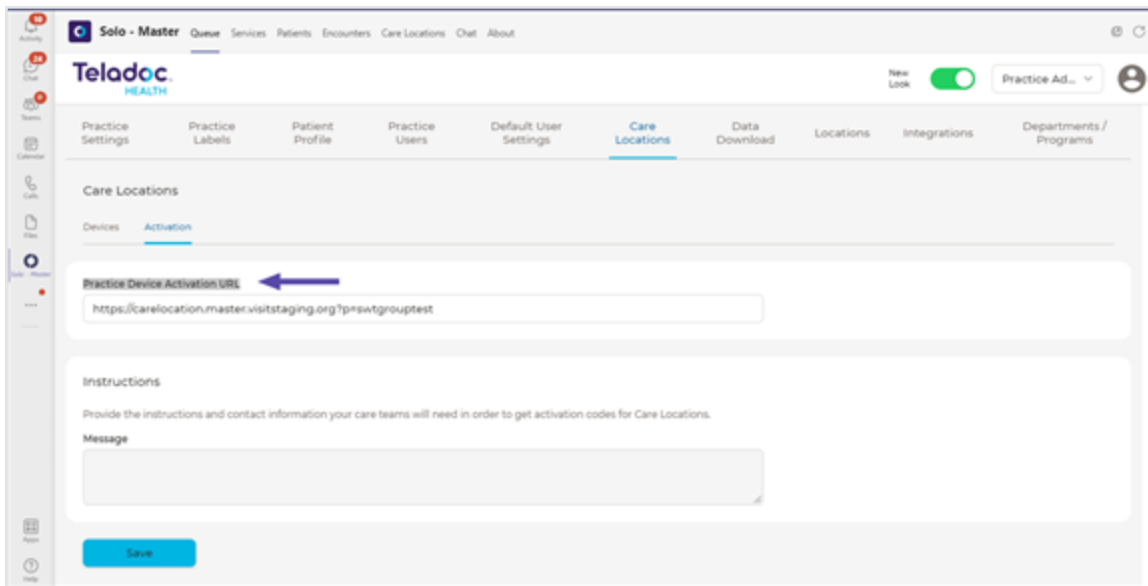
Activate Care Location

Practice Admins are responsible for activating Care Locations for their practice.

1. Scroll down to your Care Location and copy the code from the **Activation code** column.

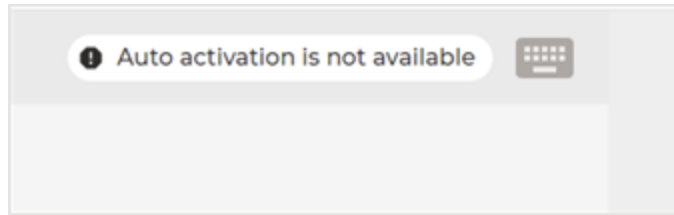


2. Log in to the device you are provisioning as a Care Location. Use your browser to navigate to the **Practice Device Activation URL** link found under the **Activation** tab.

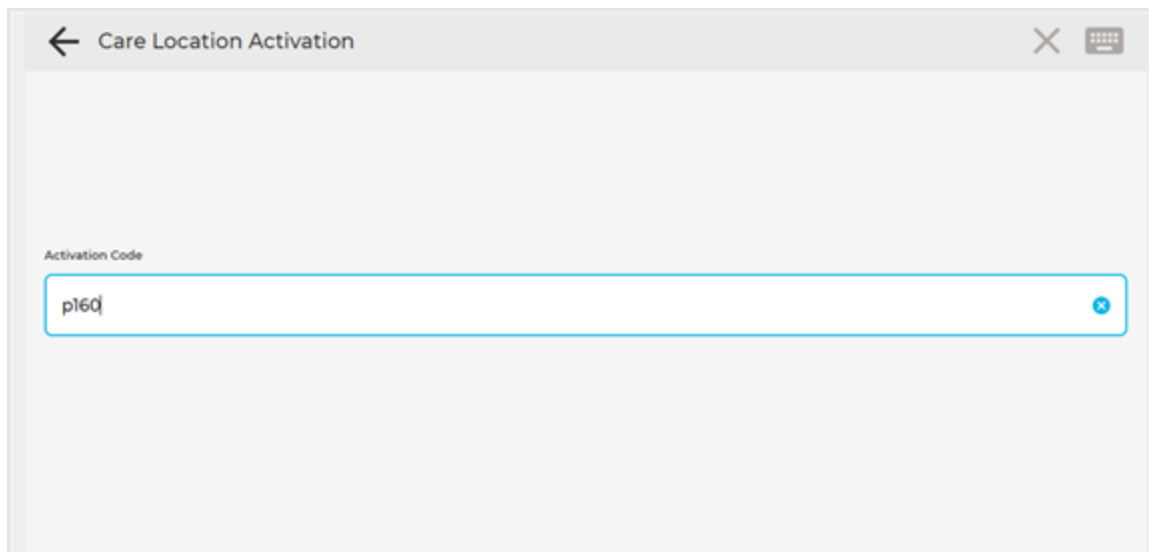


3. Click on the **Enter Code** button at the bottom of the screen.

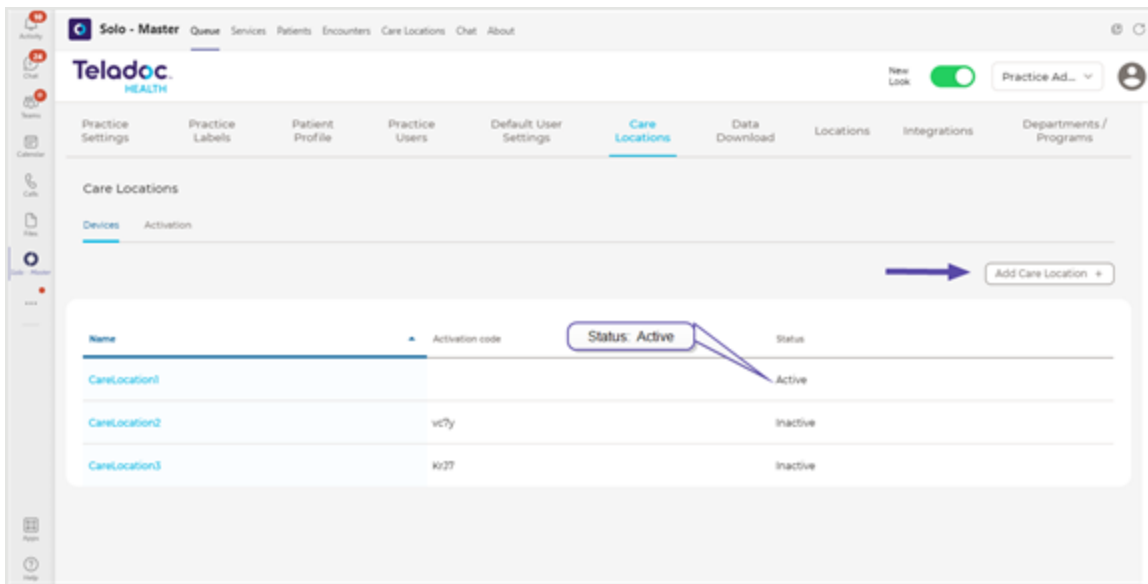
NOTE: If your Care Location is a Teladoc Health device activation should be automatic. A message will appear in the upper right corner of the screen to notify you of activation status.



4. Paste the 4-digit code in the **Care Location Activation Code** field.



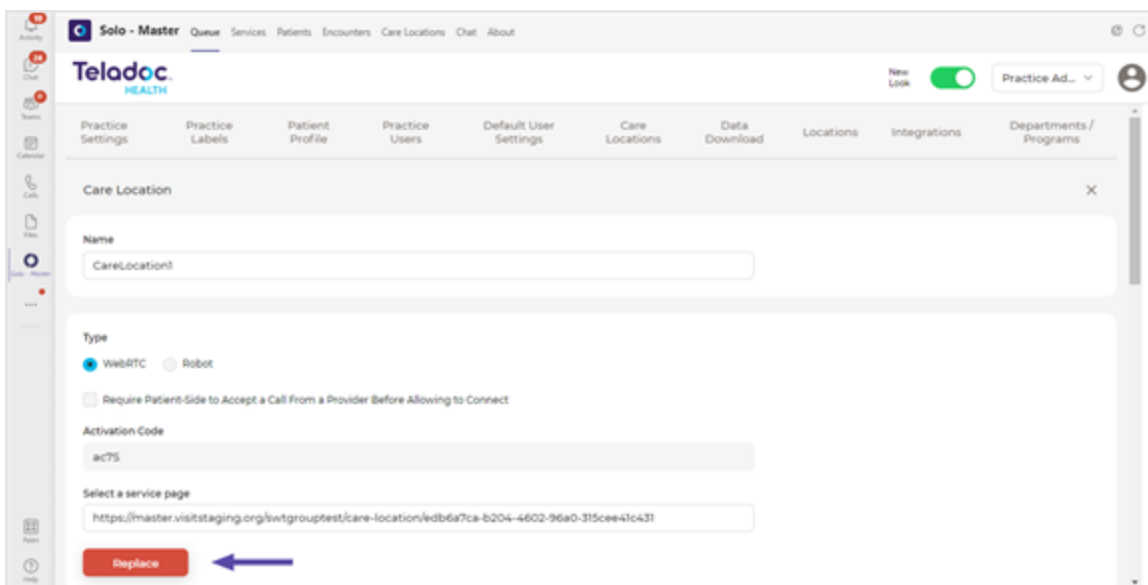
5. When done, select the **Continue** button.
6. You will receive the confirmation: **You have successfully activated care location.** and you will be prompted to **Please select a service to begin.**
7. Your Care Location will now show as **Active.**



Deactivate Care Locations

Practice Admins can deactivate Care Locations.

1. Scroll down to your Care Location and click on its name.
2. Make your changes as needed.
3. When done, select the **Replace** button.



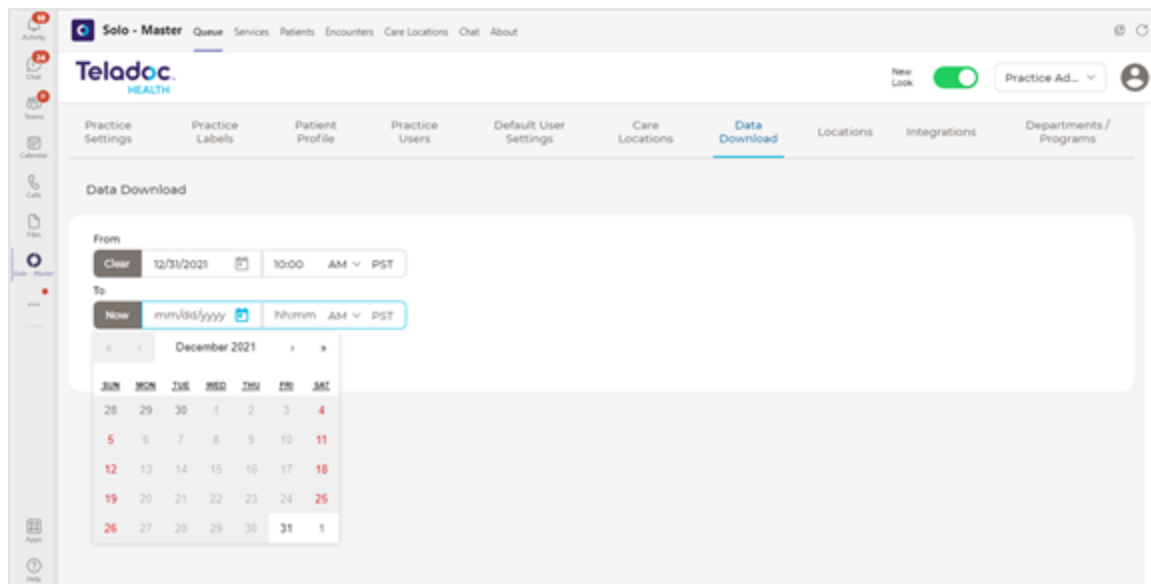
4. Click **Yes** on the dialog that instructs: < The Care Location will need to be activated again, are you sure>.



Data Download tab

The Practice Admin is responsible for setting the parameters for their practice.

1. Select the **Data Download** tab
2. Use drop downs to select the time and date parameters for your data download request.

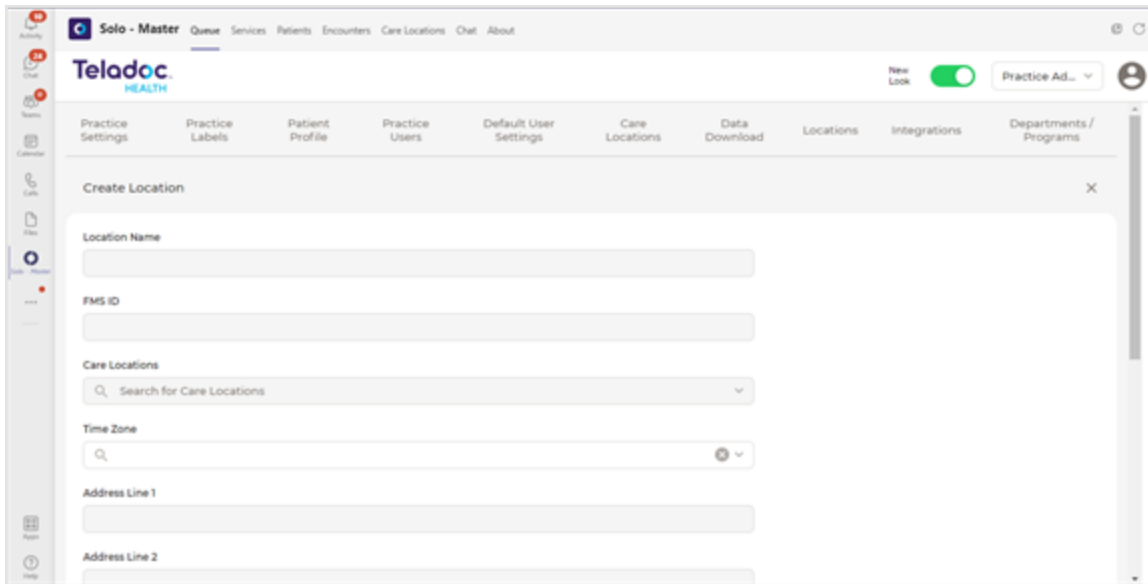


Locations tab

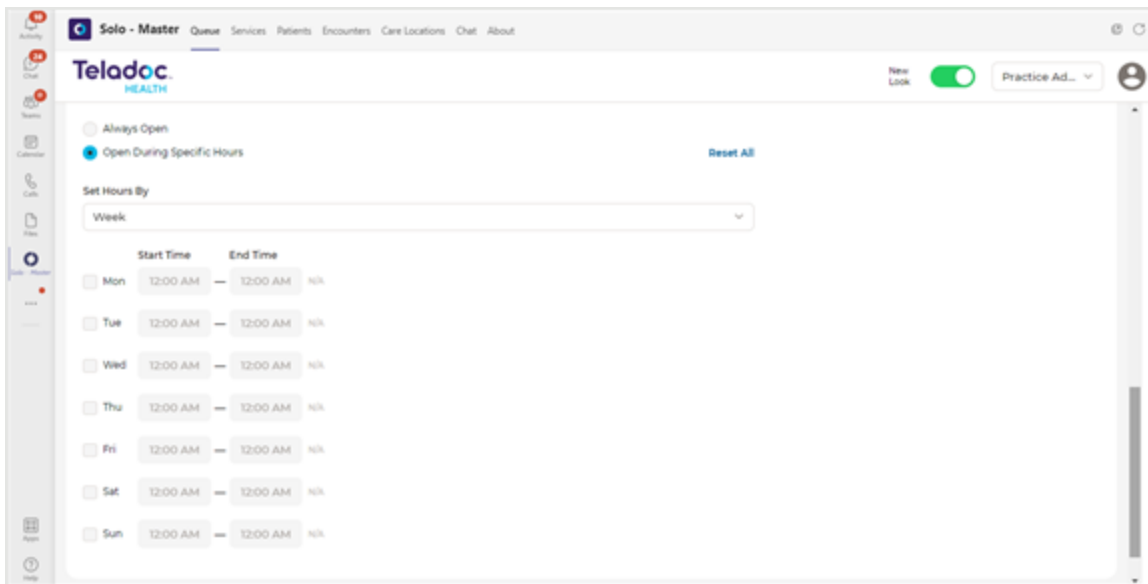
A Location is a physical place where care is provided and/or managed. You cannot delete a Location; only rename it. The Care Location toggle in Services must be enabled. Select the **Locations** tab.

Add Locations

1. To add a new Location, click the **Add New** button in the upper, right corner.
2. Enter a **Location name**, **Geolocation ID**, **Care Location**, and configure the hours.



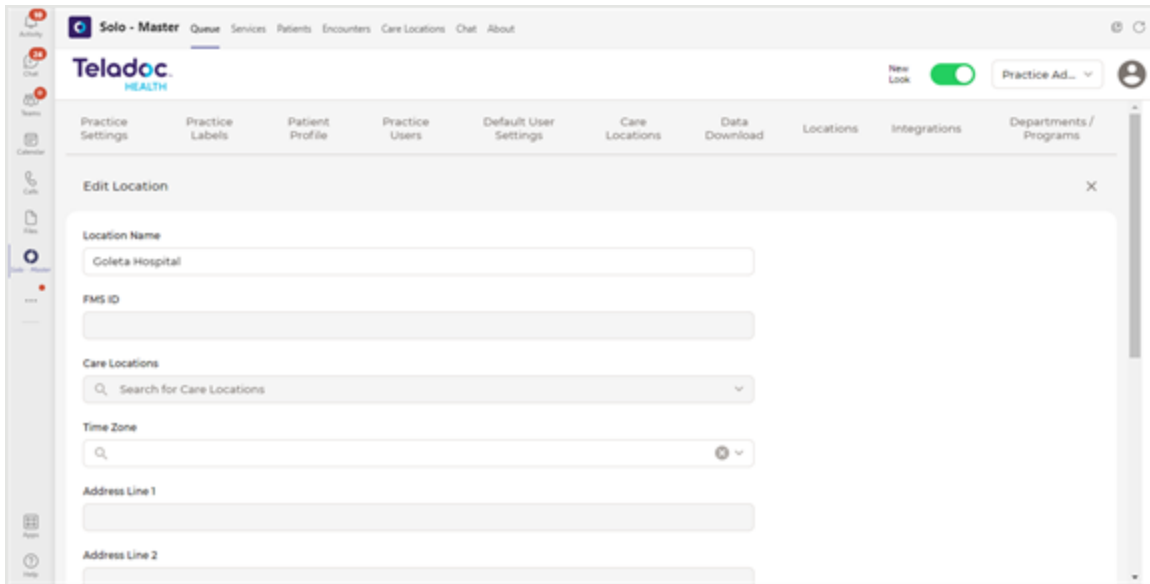
3. Select a Care Location and Time Zone using the drop down. By default, Locations are open.



4. Use the radio buttons to select either **Always open** or **Open during specific hours**.
5. Configure hours of operation. By default, hours of operation are configured weekly.
 - Select **Individual Dates** from the drop-down to update the **Hours of Operation** form.
 - Enter the **Start** and **End** times for each day your Location is open.
 - **Optional.** Click **add interval** to create extra open periods for each day.
6. When done, click the **Save** button.

Edit Locations

1. Click on the name of your Location.
2. Make edits as needed

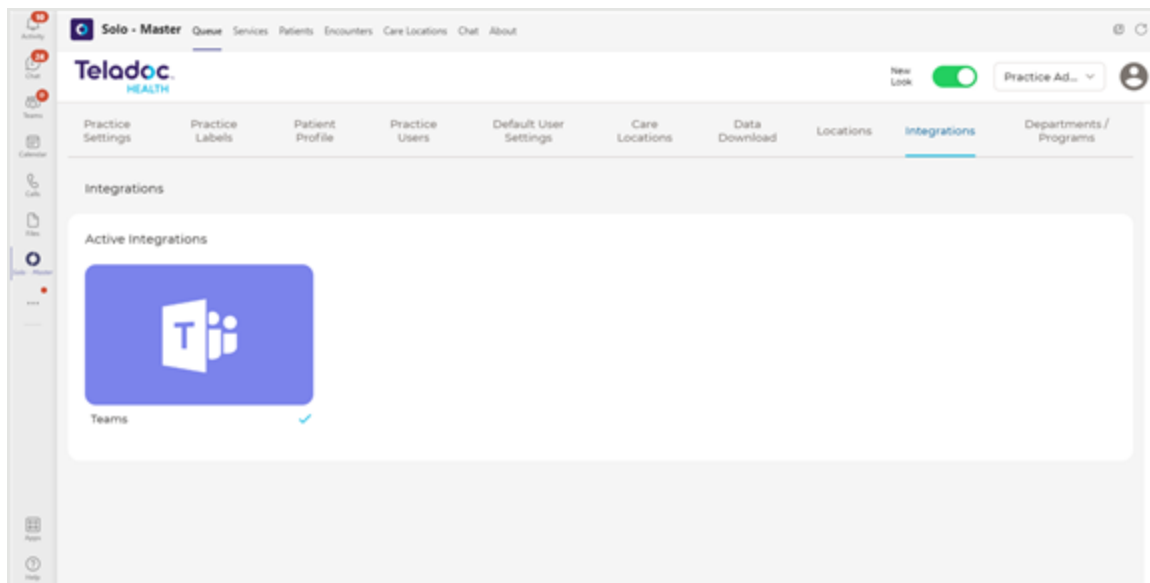


3. When done, click **Save**.

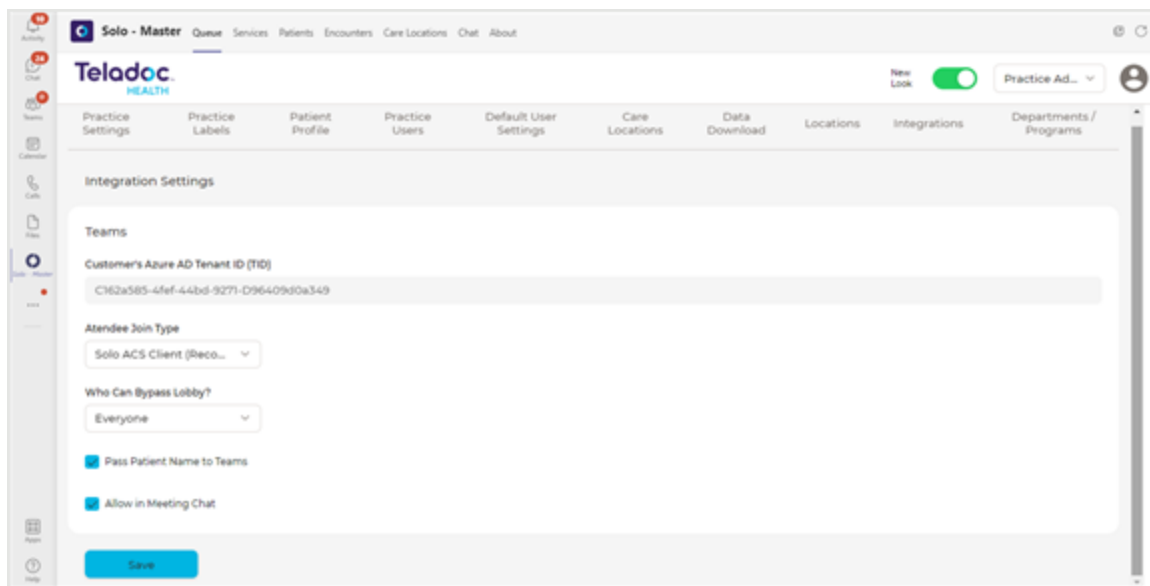
Integrations tab

The Practice Admin is responsible for setting the parameters for their practice.

1. Select the integration icon.



2. Select parameters to Integrate your practice with the Teladoc Health Solo platform.



3. When done, click on the **Save** button.

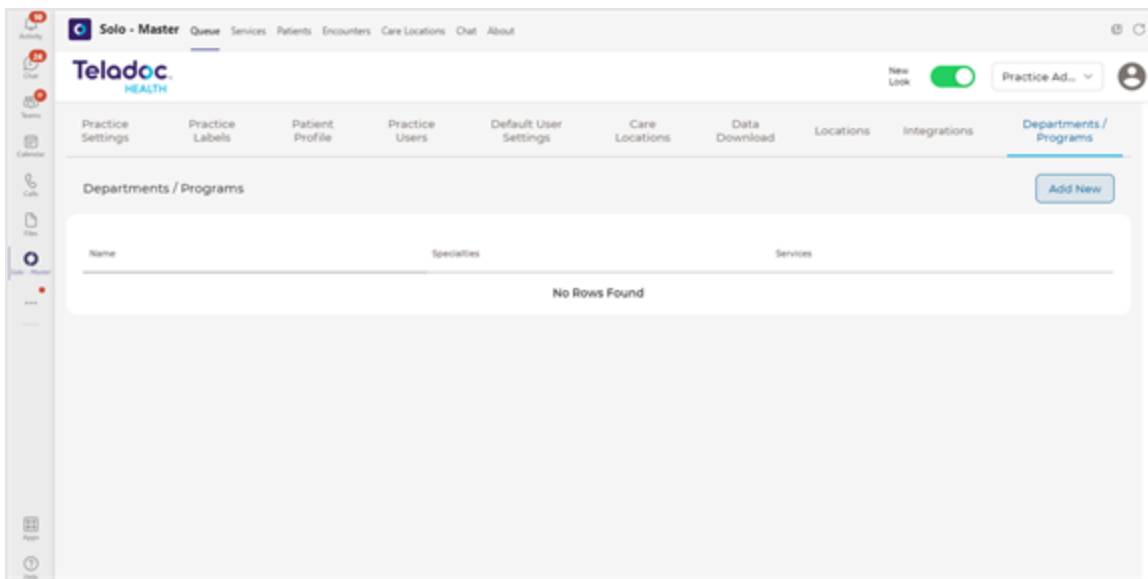
Departments / Programs tab

A department and programs exists within Locations.

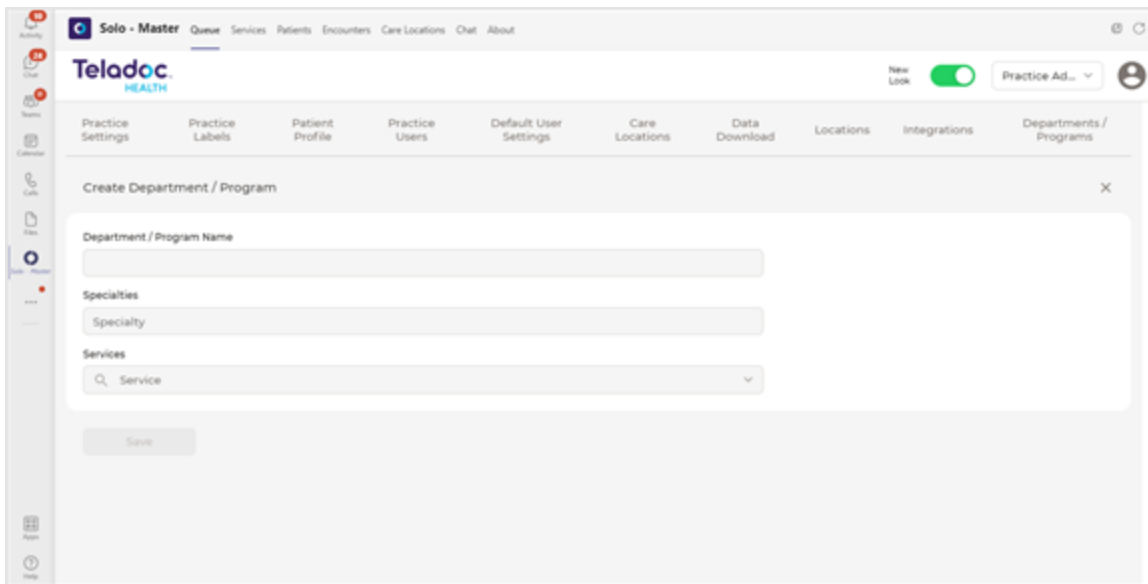
NOTE: Departments and programs cannot be deleted; only renamed and associated Services removed.

Add Department

1. Select the **Departments / Programs** tab
2. Select **Add New** in the upper, right corner.



3. Enter the information requested.



4. When done, click on the **Save** button.

Edit Department

1. Scroll down to select your department
2. Make the necessary changes
3. When done, click on the **Save** button.

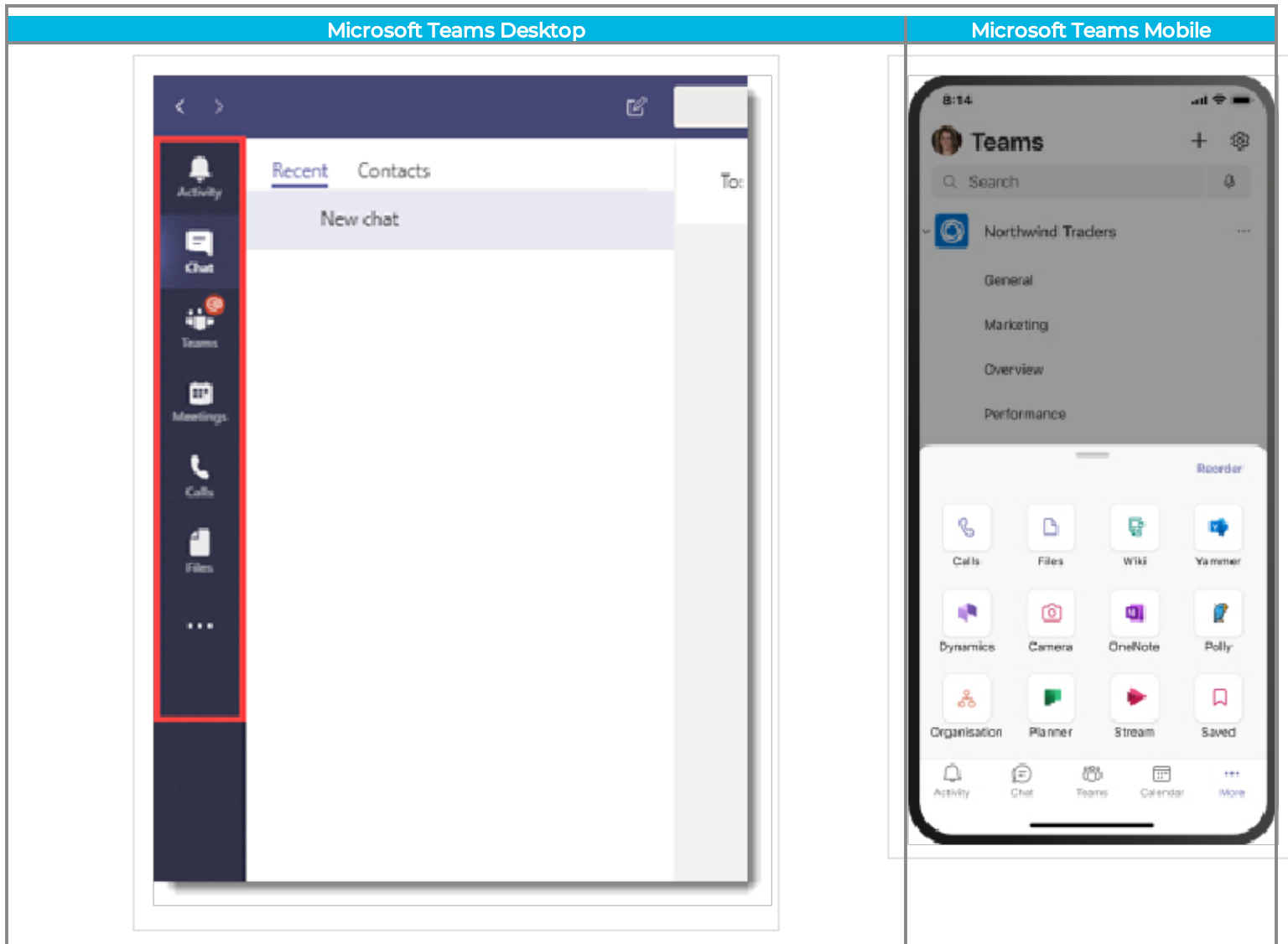
Resources

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.

Contact Information

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