Teladoc Health™

Care Location App™

User Guide

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Overview

The Care Location App allows Teladoc Health users to access Services using Windows, the Web or iOS Provider Access Software.

> **NOTE**: Use of the word "device(s)" in this User Guide refers to Teladoc Health telehealth products, not medical devices as defined in Section 201(h) of the FD&C Act. In addition, the word "mobile devices" refers to smartphones and tablets.

Requirements

The Care Location App is designed to run on a Teladoc Health device, iPad, or from any browser.

> **NOTE:** The Practice Admin is responsible for setting the Teladoc Health Solo platform and the required Care Location settings, such the **Care Location** toggle from the **Patient Journey**.

Supported Devices

- iPad – 5th Generation or newer
- iPad Air 2 – or newer
- iPad Pro – 1st Generation or newer
- iPad Mini – 4th Generation or newer
- iPhone 6S or newer

Supported Operating Systems

Supported operating systems includes:

- iPad: iOS 13 and above
- iPhone: iOS 13 and above

Refer to the iPad User Guides: http://support.apple.com/manuals/ipad and http://support.apple.com.manuals/iphone for more information.

Browser

Browsers make it easier for customers to get the latest solutions without the burden of pushing updates to individual computers.

NOTE: Android users must use Chrome.

Browser	Version	Support as of 4/2022	iOS
Chrome	91.0 and later	91.0	Mac OS 10.14 and later Windows 10 & 11 Android v 7.0 and later
Safari	14.0 and later	14.0	Mac OS 10.14 and later OS 12.1 and later
Firefox	88.0 and later	88.0	Windows 10 & 11
Edge	88 and later	88.0	Windows 10 & 11
Internet Explorer	Not supported	N/A	N/A

Network Configuration

The Teladoc Health System is comprised of a Remote Presence Patient Access Device and a minimum of one Provider Access Device linked via the Internet over a secure connection.

NOTE: For the best performance, use the information found in these documents:

- MB-15513 - Network Configuration for Teladoc Health Devices
- MB-14011 - Teladoc Health Telehealth Network Specifications

Connection

Wireless Network connections can be made using the touch-screen under Settings.

Non-Overlapping Channels

To achieve a smooth transition from one wireless access point (WAP) to the next, configure each WAP on a non-overlapping channel.

Transmitting Power

The WAPs may be configured to provide the wireless signal at different power transmission levels. Setting the WAP to the maximum power transmission will deliver the maximum coverage area.

Interference

If WAPs are co-located in the same environment, radio frequency interference may be generated. Too many WAPs transmitting on overlapping channels may degrade the wireless signal quality. Reduce the WAP transmission power by reducing the coverage area and limiting the overlap between adjacent WAPs.

Security Options

Each wireless network must be configured with security to prevent unauthorized access to the net-work. The ADU provides multiple features to configure and secure the wireless network. Domain membership is not supported, but all other current security configurations can be configured. WPA2/AES-PSK is preferred.

Peripherals

Headsets

- Logitech headsets
- Sennheiser headsets
- Apple AirPods
- Apple EarPods

Monitors

You should use a monitor that lets you clearly see your provider during your Encounter.

Webcams

Teladoc Health Patient App supports most webcams. For devices without webcams, Teladoc Health recommends using Logitech cameras.

Roles

The various Provider roles are:

Primary Roles	
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).
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).
Organization Admin	Practice Admin for all practices in the organization.
Organization Practitioner	A Practitioner with some admin capabilities.
Secondary Roles	
Scheduler	Can interact with patients and access (i.e., read) PHI, but cannot document on patient record or admin tasks.
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.
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.

Primary Roles

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

Function	Organization Admin	Practitioner Admin	Practice Admin	Practitioner	Organization Practitioner
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
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
Search for patient		X		X	X
Create patient		X		X	X
Edit patient demographics		X		X	X
View patient documents		X		X	X
View device readings		X		X	X
Dashboard		X		X	X
Create new appointment		X		X	X
Emergent consult reques-tright column		X		X	X
Emergent consult requestt - Accept or Decline ECR		X		X	X
Attend Video-call (session)		X		X	X
Provider to provider call		X		X	X
Invite participants to the active video-call		X		X	X
Screen-sharing during video-call		X		X	X
Add a document to the patient during video-call		X		X	X
Call to care location		X		X	X
Manually change appoint-ment status		X		X	X

Function	Organization Admin	Practitioner Admin	Practice Admin	Practitioner	Organization Practitioner
Receive notifications about appointment status		X		X	X
Switch between Fit and Fill mode for the Web and Desktop platforms	X	X	X	X	X
Smart Notes Encounter Creation		X		X	X
Smart Notes (formerly visit notes):		X		X	X
Smart Notes Create		X		X	X
Smart Notes Edit		X		X	X
Smart Notes Comment		X		X	X
Smart Notes Sign		X		X	X
Smart Notes Add addendum text		X		X	X
Smart Notes View		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
Addendum - Create		X		X	X
Addendum - Edit		X		X	X
Addendum - Sign Own		X		X	X
Addendum - View		X		X	X
Fax (manual)		X		X	X
Visit Summary		X		X	X
Audit Log		X			X
Provider survey		X		X	X
Patient survey					
Users with a large number of Care Locations can display them quickly.				X	X
My Apps / Third Party Apps - View		X	X	X	
View Audit Log		X			

Function	Organization Admin	Practitioner Admin	Practice Admin	Practitioner	Organization Practitioner
Report Generator (CSV)		X			
Data Download (CSV)		X			
Data Download (XML)		X			

Secondary Roles

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

Function	Scheduler	Back Office	Front Desk	Nurse	Patient
Work with the patient:	X	X		X	
Search for patient	X	X		X	
Create patient	X			X	
Edit patient demographics	X	X		X	
View patient documents	X	X		X	
View device readings	X			X	
Dashboard	X	X		X	
Create new appointment	X			X	X
Emergent consult request-tright column	X			X	
Fill medical forms					X
Fill consent forms					X
Attend Video-call (session)	X				X
Provider to provider call	X			X	
Invite participants to the active video-call	X				
Screen-sharing during video-call	X				
Add a document to the patient during video-call	X				
Call to care location	X			X	
Manually change appointment status	X			X	
Receive notifications about appointment status	X	X		X	X

Function	Scheduler	Back Office	Front Desk	Nurse	Patient
Smart Notes Encounter Creation				X	
Smart Notes (formerly visit notes):		X		X	
Smart Notes Create			X	X	
Smart Notes Edit			X	X	
Smart Notes Comment					
Smart Notes Add addendum text		X		X	
Smart Notes View	X	X		X	
Consultation Note - View	X	X		X	
Addendum - View	X	X			
Fax (manual)		X		X	
Visit Summary	X	X		X	
Audit Log		X			
Provider survey	X			X	
Patient survey					X
My Apps / Third Party Apps - View	X	X		X	
View Audit Log		X			
Data Export					
Report Generator (CSV)		X			

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

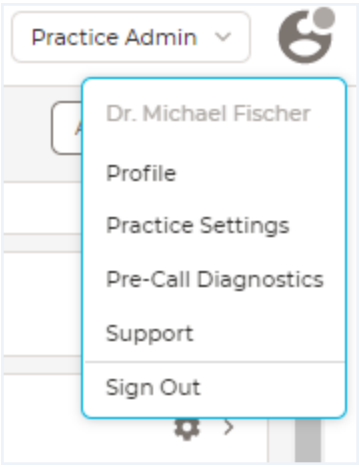
Setup

The Practice Admin is responsible for configuring users, locations, hours of operation, the Care Location App, and user display screens for workflows that drive your practice using the Teladoc Health Solo platform.

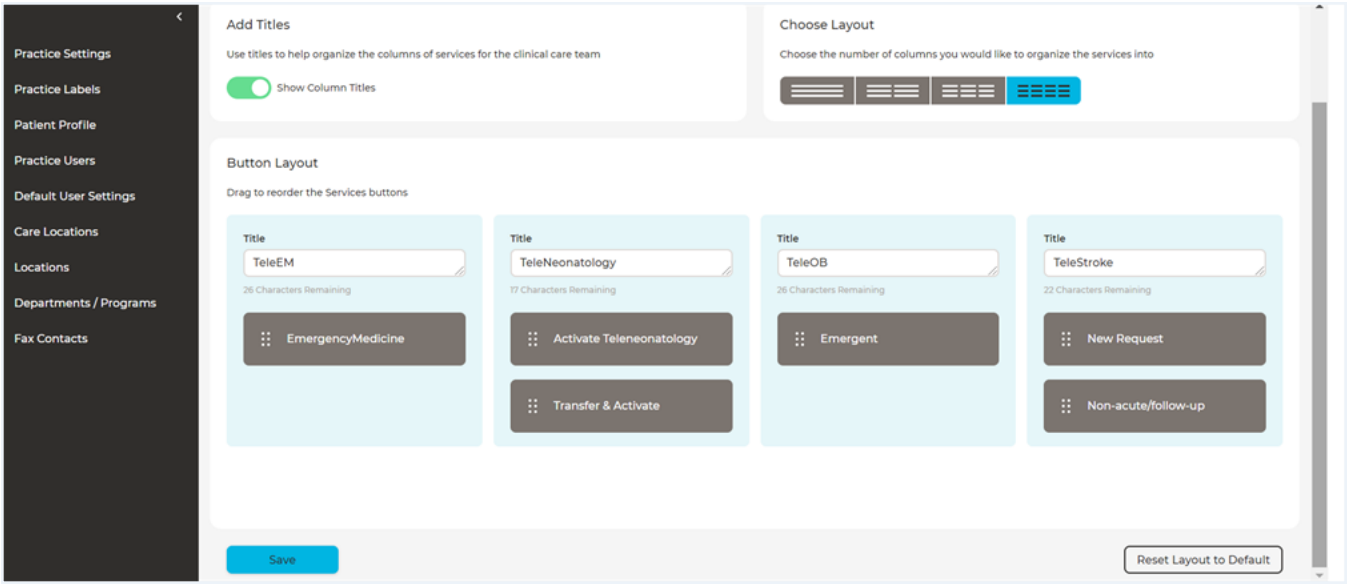
Solo

1. Log into the Teladoc Health Solo platform as a Practice Admin.
2. Select **Practice Settings** from the User icon dropdown menu.

> **NOTE:** For more information about Practice Settings, refer to MA-20166 Practice Admin User Guide



3. Enable each feature by selecting the associated checkbox.
4. Select to **Edit** categories, **Add Titles**, and **Choose Layout** for the Care Location App



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

Activate Care Locations

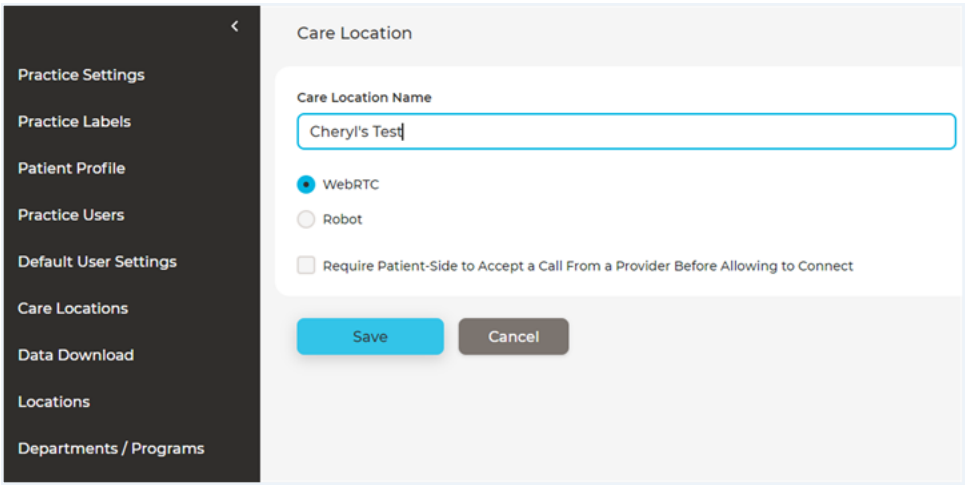
> **NOTE:** Add a Care Location for both the Check-In stand and the Care Console 3rd party medical peripherals.

Manual Activation

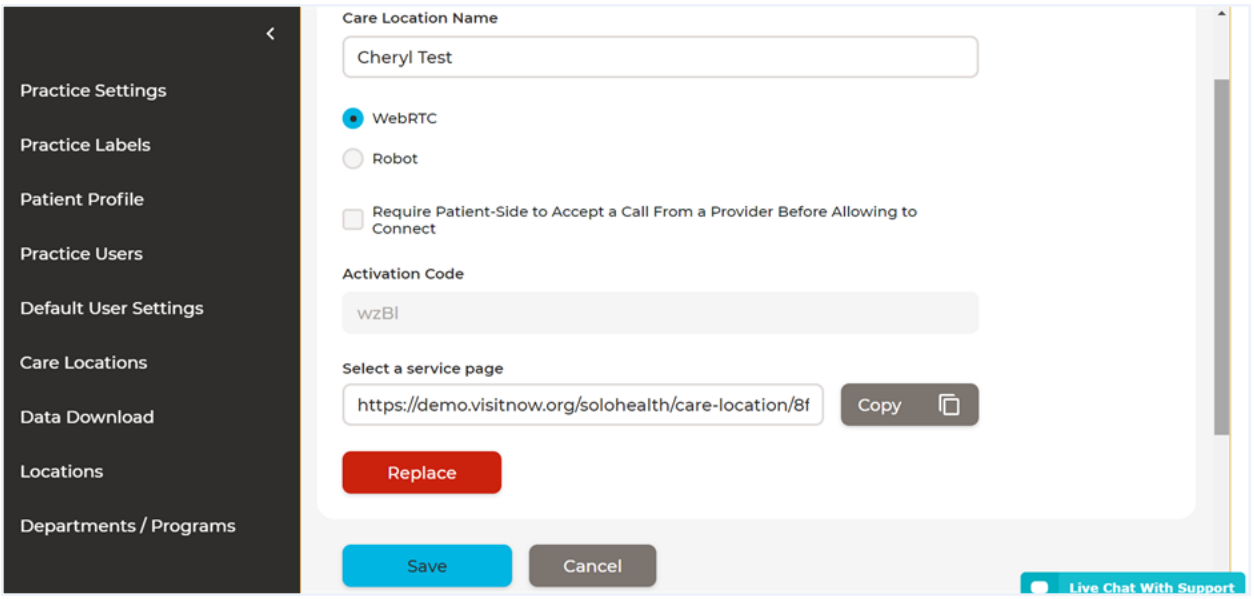
1. Select **Care Locations** from the left navigation panel.
2. Add a New Care Location
   - Click on the **Add New** button in the upper, right corner of the screen.
   - Enter a **Care Location Name** in the **Care Location** screen.
   - Select the **WebRTC** radio button for the Check-In stand and **Robot** for the Care Console with medical peripherals.

     > **NOTE:** The Robot selection will require you to enter the serial number for your device and Client ID.

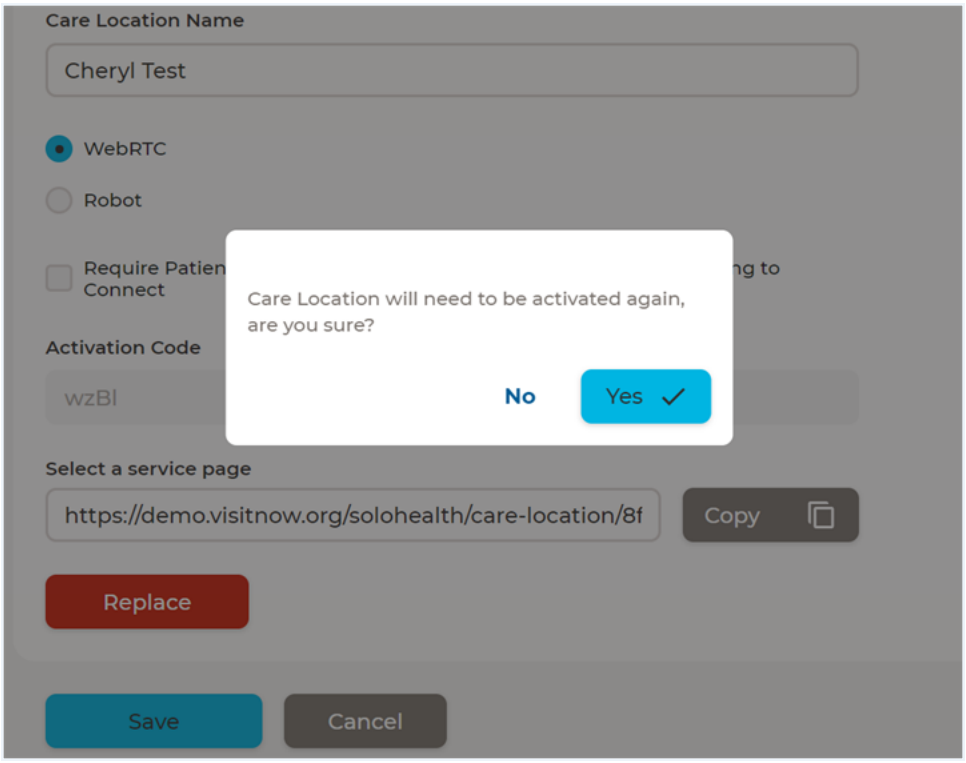
   - When done, select **Save**.



3. Update/Activate an existing Care Location.
    - Click on your Care Location bar from the middle screen. A new **Care Locations** window will open.
    - Verify the information and when correct, select **Replace**.

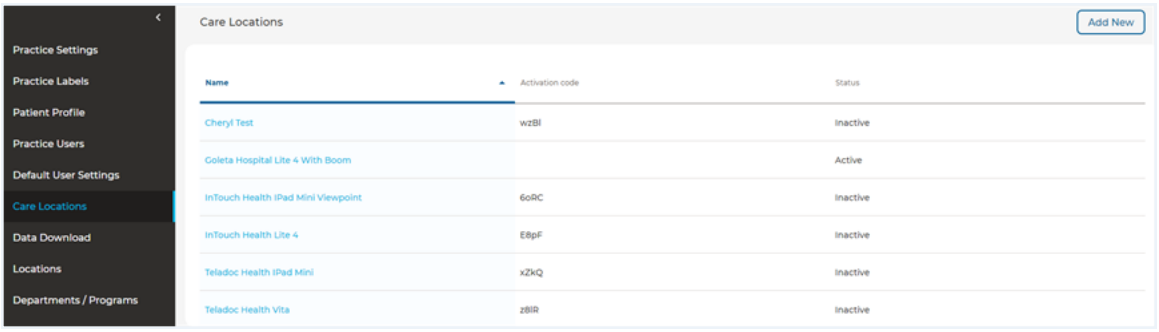


    - Select **Yes** to the message <**Care Location will need to be activated again, are you sure?**>.

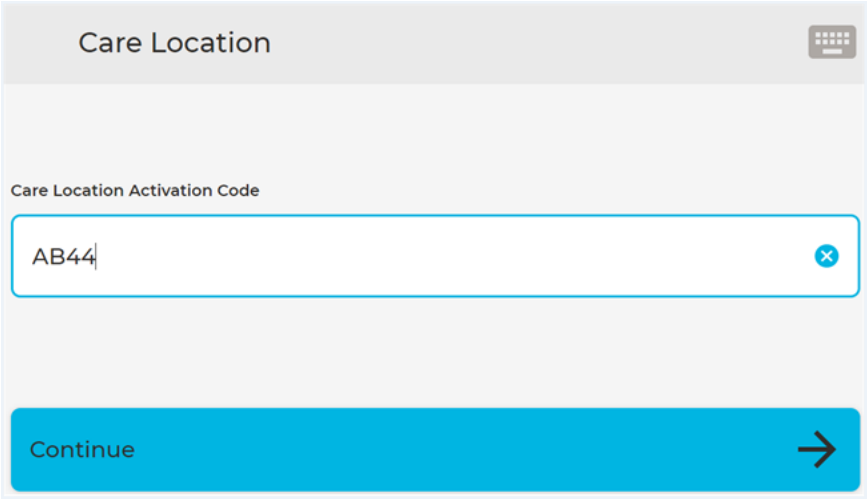


- When done, select **Save**.

4. Upon saving, an activation code will be displayed next to the Care Location name in the **Activation code** column.
5. Copy the **Activate code** next to your Care Location.



6. Now, using your iPad running the Care Location App, enter the activation code into the **Care Location Activation Code** field.



7. When done, select **Continue.**

Auto Activation

For information about setting up auto-activation, contact your Teladoc Health representative.

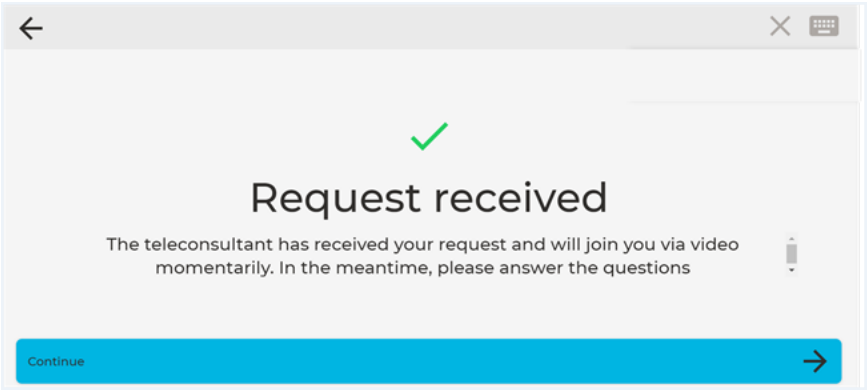
Check-In

Select your service from the Care Location App.

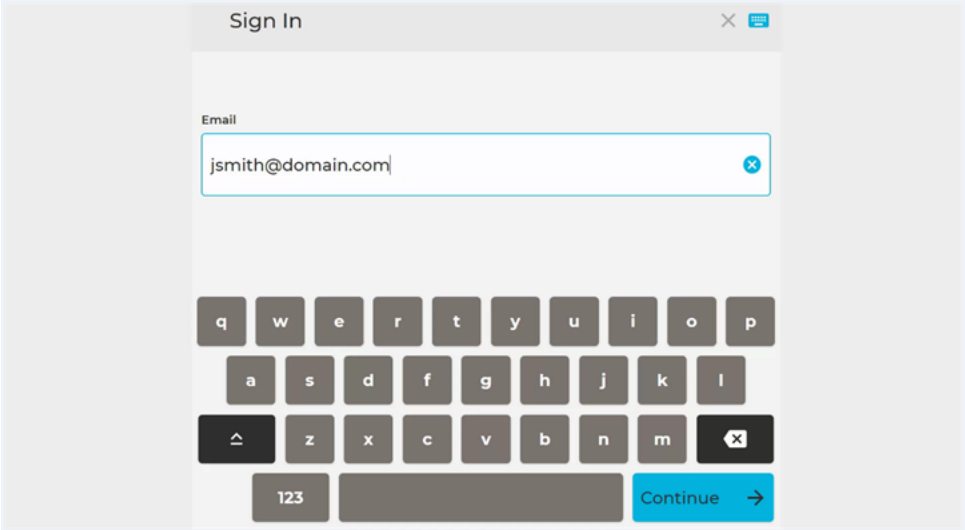
1. Select a service to begin by tapping on a service from the touch screen.

2. A request for a session is automatically sent.

> **Note:** A page will display to indicate when the practitioner received their request.



3. Enter your patient's email address.

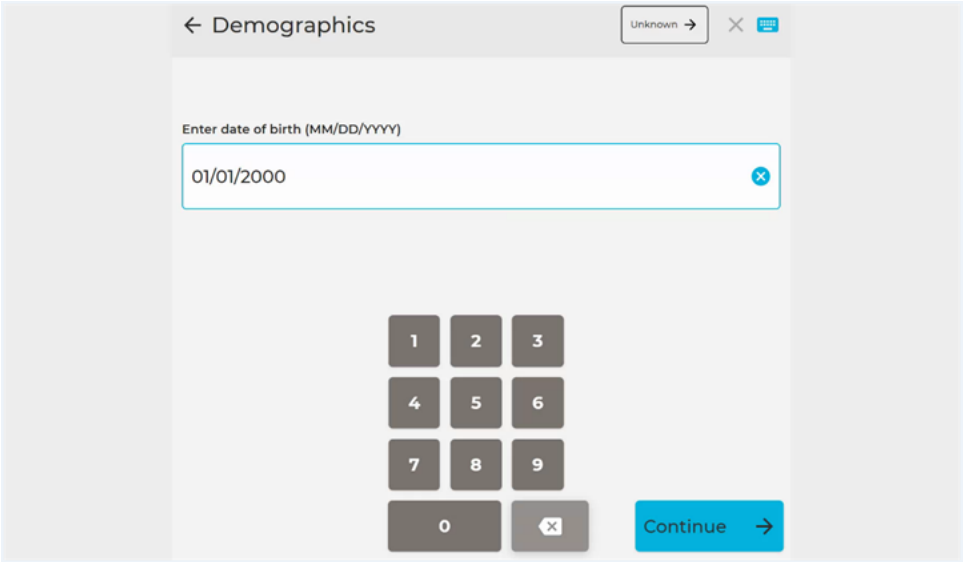


Scheduling

The attendant or scheduler schedules sessions.

New Patient

1. For new patients, follow the **Demographics** prompts and enter a new patient's name, phone number, gender, and their reasons for their visit (i.e. session).

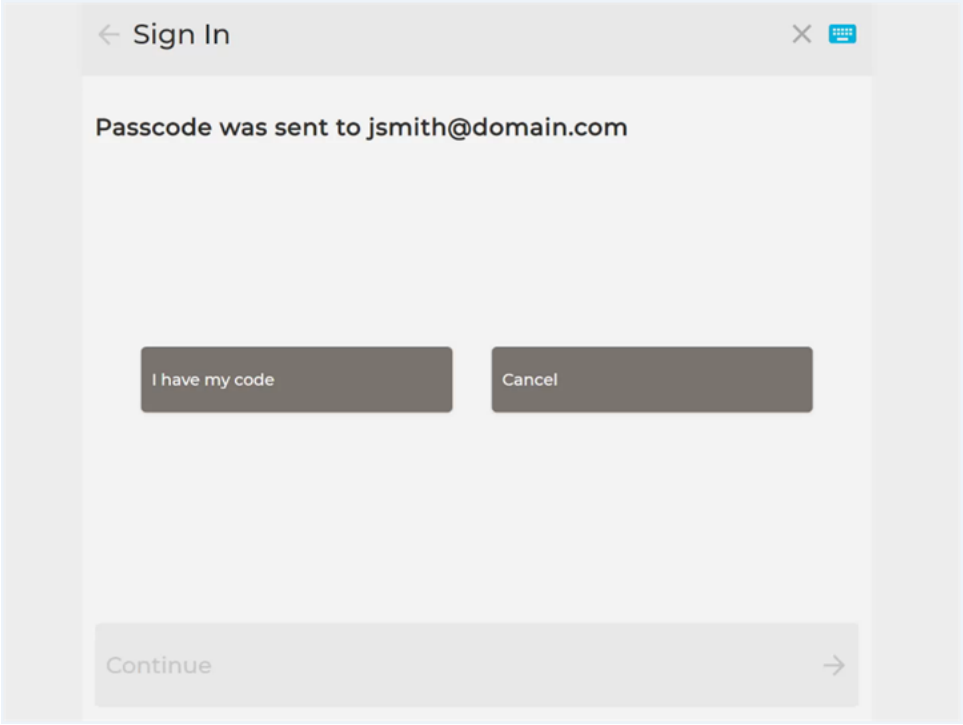


2. Once done, a **Scheduling** screen will display. Go to the **Scheduling** section.

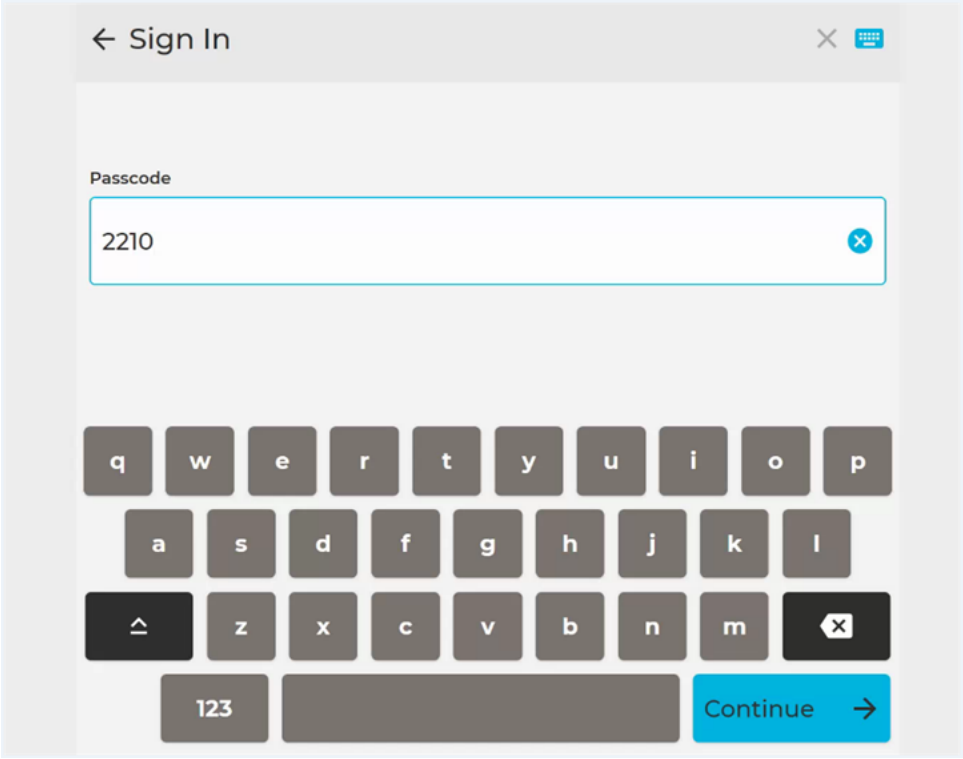
Existing Patient

For existing patients, information about your existing patient will be retrieved and displayed.

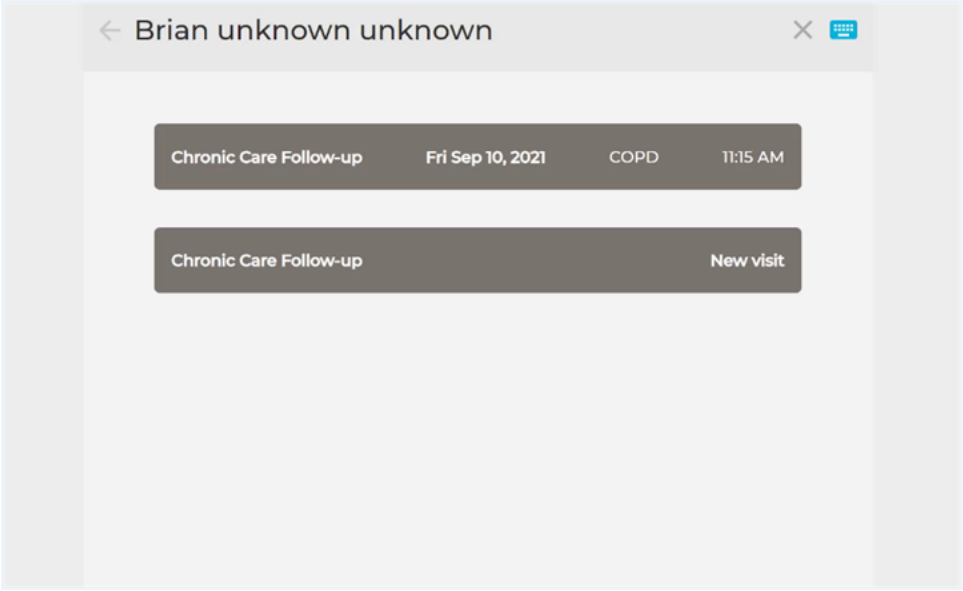
1. You will receive a message to verify your Passcode.
2. Select **I have my code**



3. Enter your passcode and when done **Continue**.

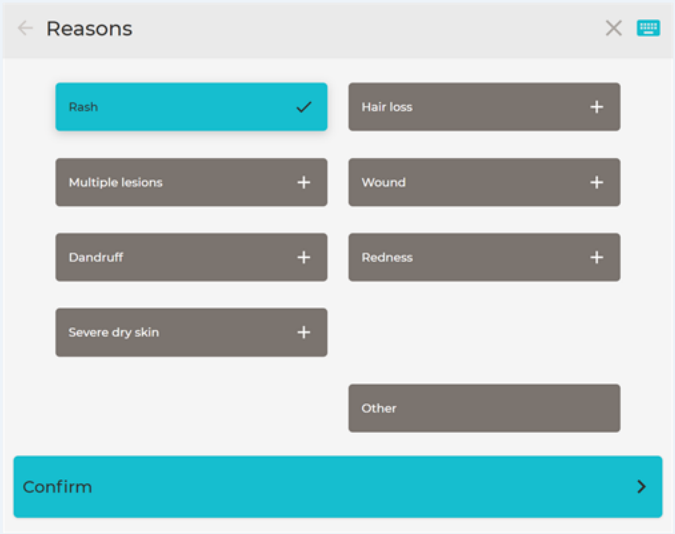


4. Patient information about your patient will then be retrieved and displayed.



5. For scheduled Visits, continue to the Symptoms section.

6. For new Visits, verify the accuracy of your patient's **Demographics** information..
    - Select the **Reasons** for the visit.



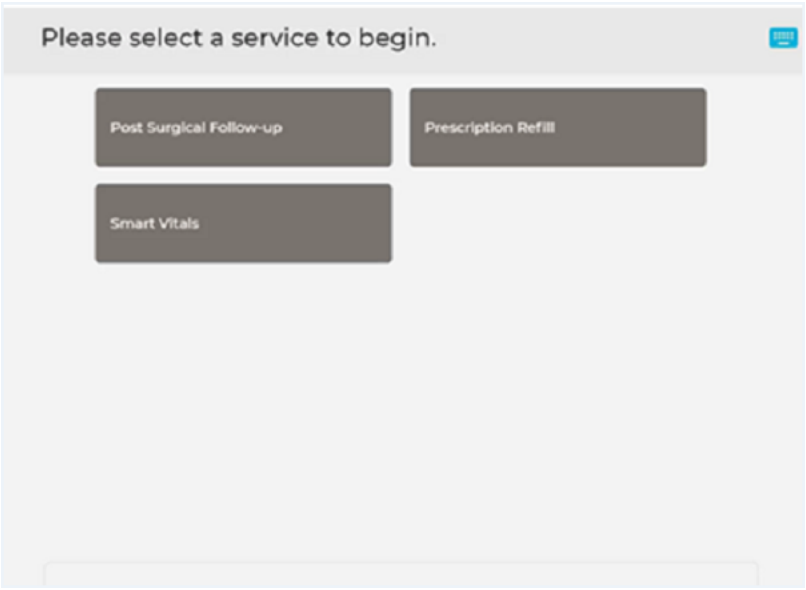
    - When done, click on the **Continue** button.

Medical Peripherals

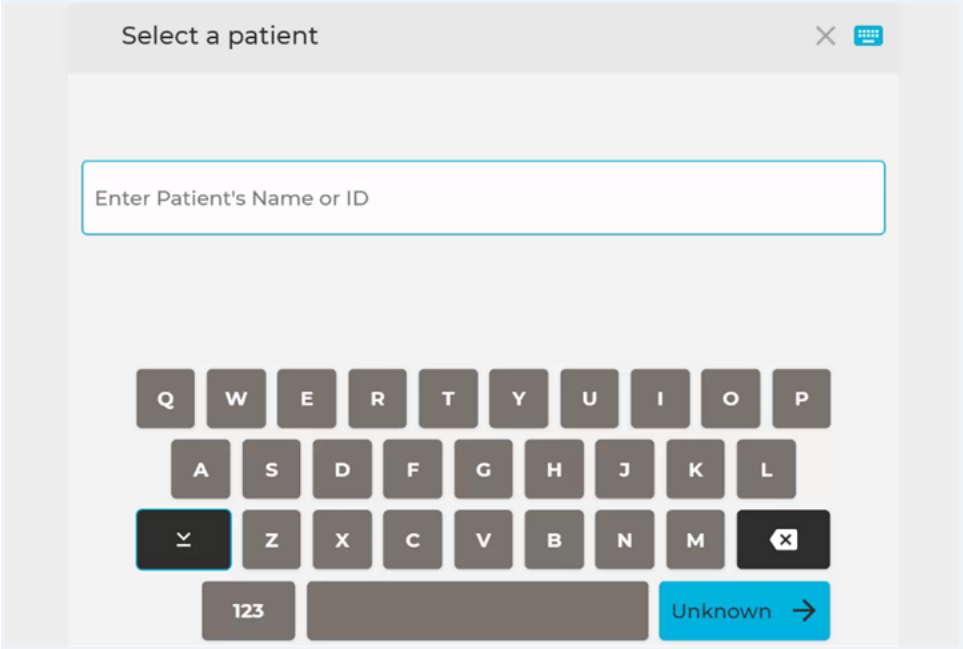
Teladoc Health devices may run with 3rd party medical peripheral devices. To set up the Care Location App to run with these devices, follow the instructions below.

1. Begin by taping anywhere on the welcome screen.

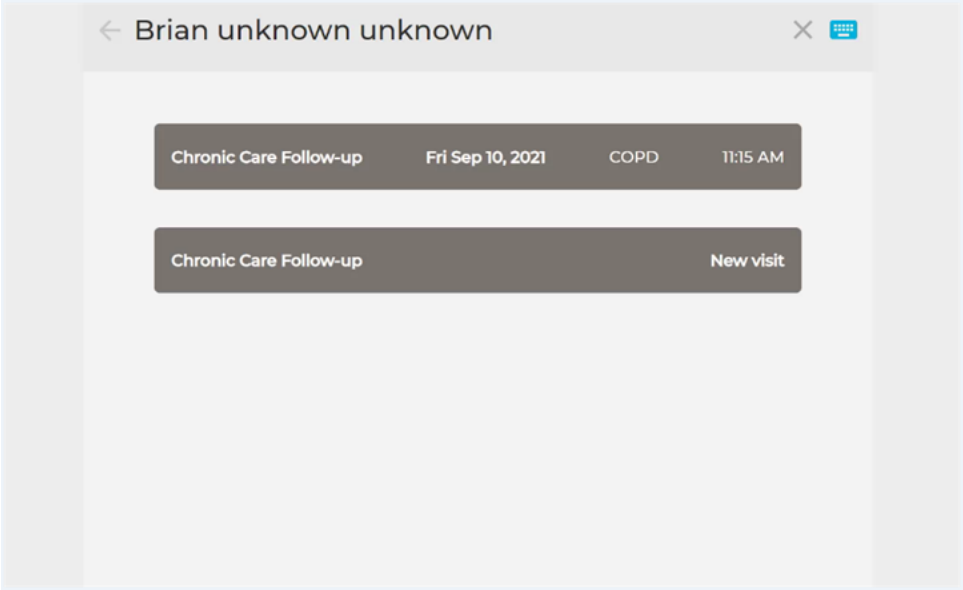
2. Select your Services.



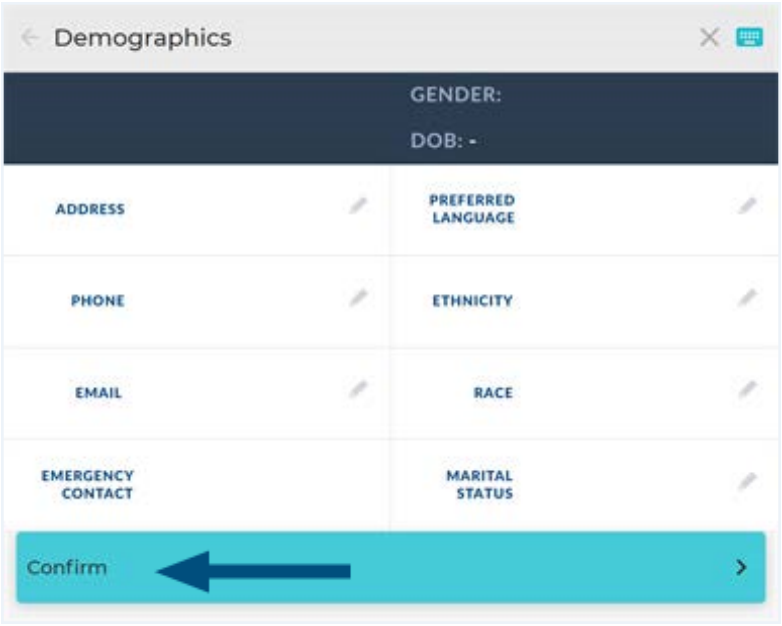
3. Enter your **Patient Name or ID**.



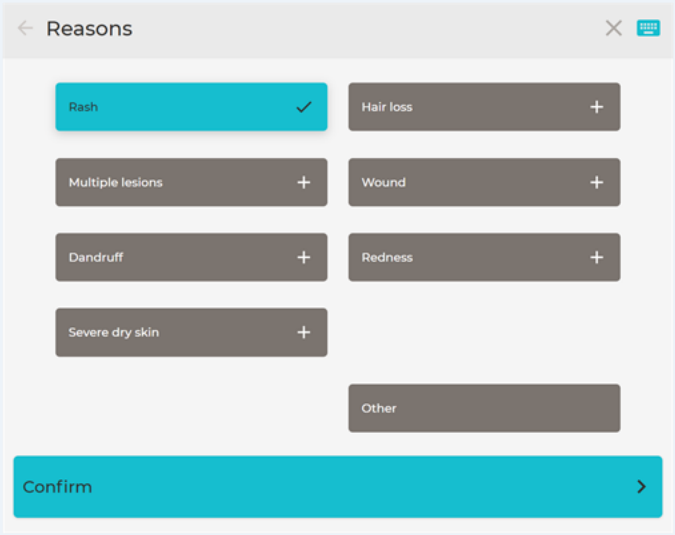
4. When done, select **Continue** from the **Select a patient** screen if the patient name or ID show is correct.
5. A screen will provide you with an option to select either a new visit or an existing visit for your patient.



6. For an Existing Visit (i.e. the top bar in the above example), go to the **Third Medical Peripheral Devices** section.
7. For a **New visit:**
    - Verify the accuracy of your patient's **Demographics** information or select the pencil icon next to a demographic type to edit it.
    - When done, select **Confirm**.



- Select the **Reasons** for the visit.



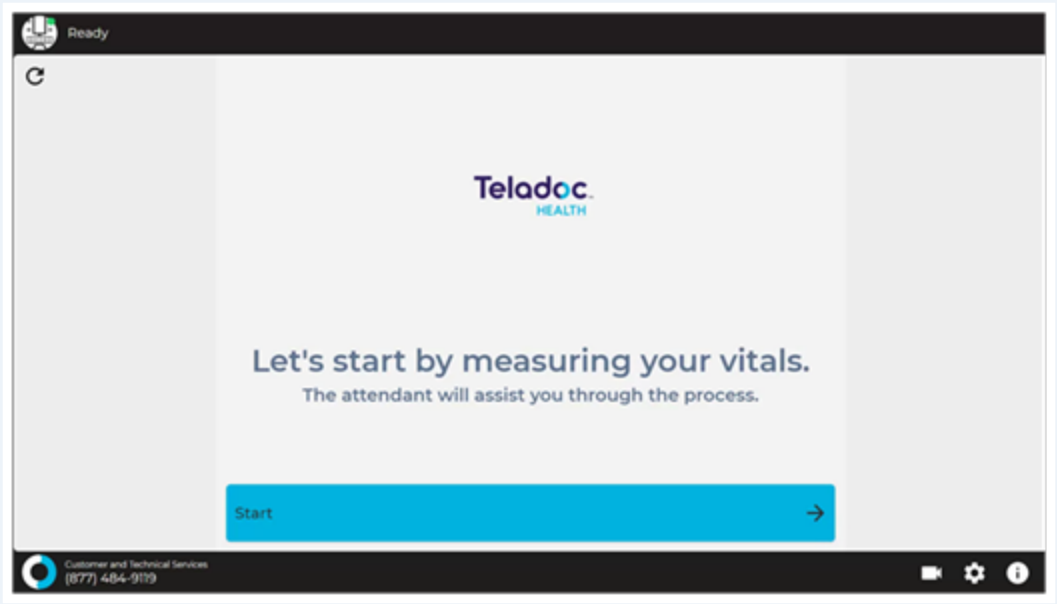
- When done, select **Continue**.
- Continue to the Scheduling section of this document.

Third Party Medical Peripherals

The Scheduler or Attendant is responsible for collecting patient vitals using third party medical device peripherals.

> **NOTE:** For more information, contact your Teladoc Health representative.

1. When you are ready to measure your patient's vitals, click on the **Start** button.

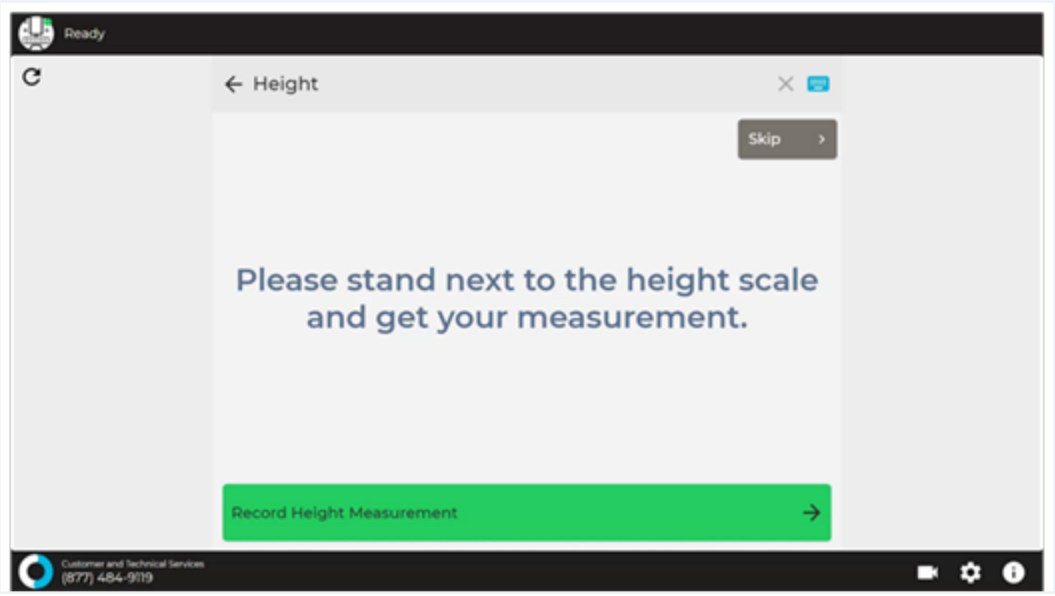


Height Scale (Stadiometer)

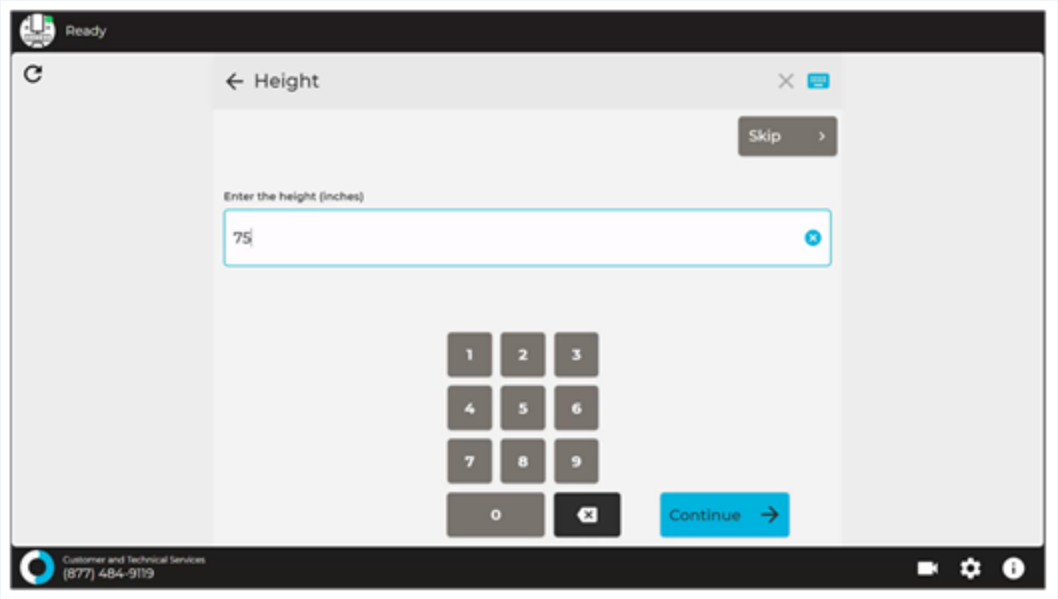
The Stadiometer scale is manufactured by Charder Electronic Co., Ltd. and is a Class I medical device. It is used for measuring a patient's height .

Follow the system prompts:

1. **Please stand next to the height scale and get your measurement.**
2. Select **Record Height Measurement** when ready to continue.



3. Click in the text field of the **Height** Scale screen to activate the keyboard and enter the patient's height in inches.
4. When done, select **Continue**.

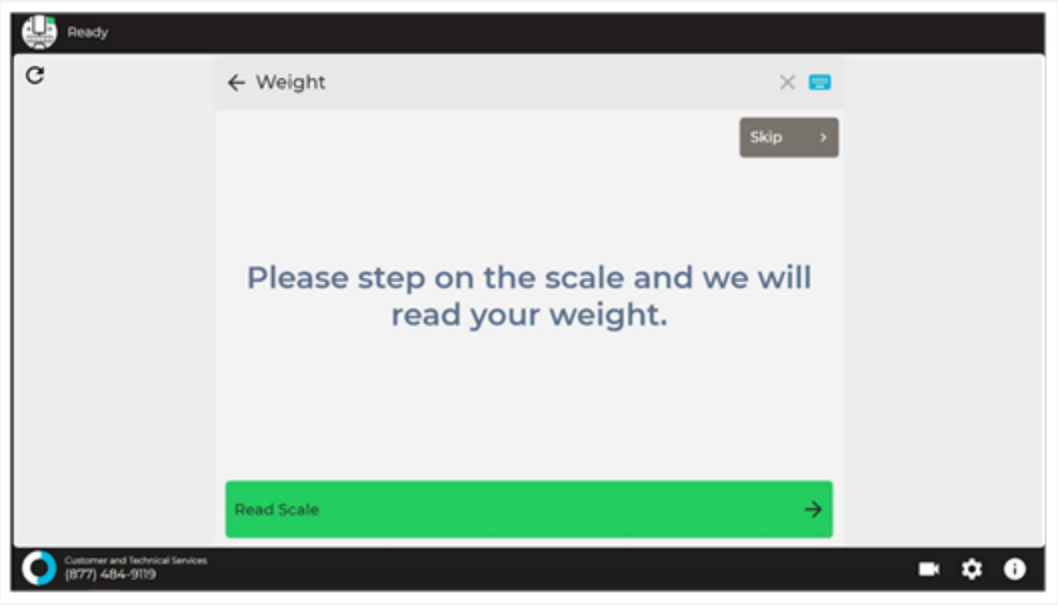


Weight Scale

The Model 600 SlimLine Digital Health Scale is manufactured by Fairbanks Scales and is a Class I medical device. It is used for measuring a patient's body weight .

Follow the system prompts:

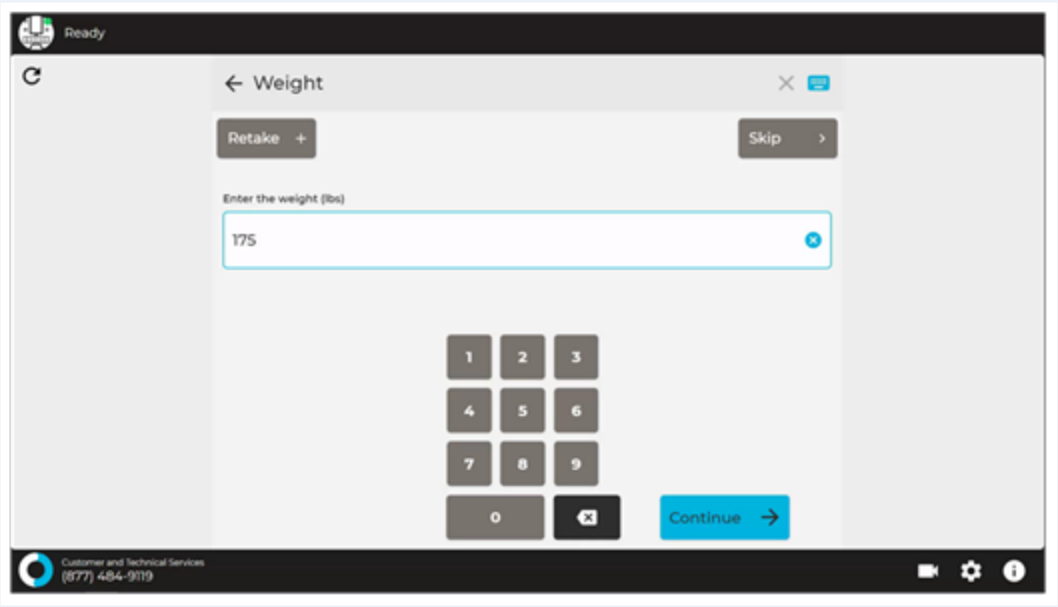
1. Ask you patient to **Please step on the scale and we will read your weight**.
2. When ready, select **Read Scale**.



3. The touch screen will display **Measuring weight.**
4. Your patient's weight should automatically populate the weight field.

> **NOTE:** If you receive an error message, manually enter the patient's weight by selecting the text field from the **Weight** screen to activate the keyboard.

5. When done, select **Confirm**.



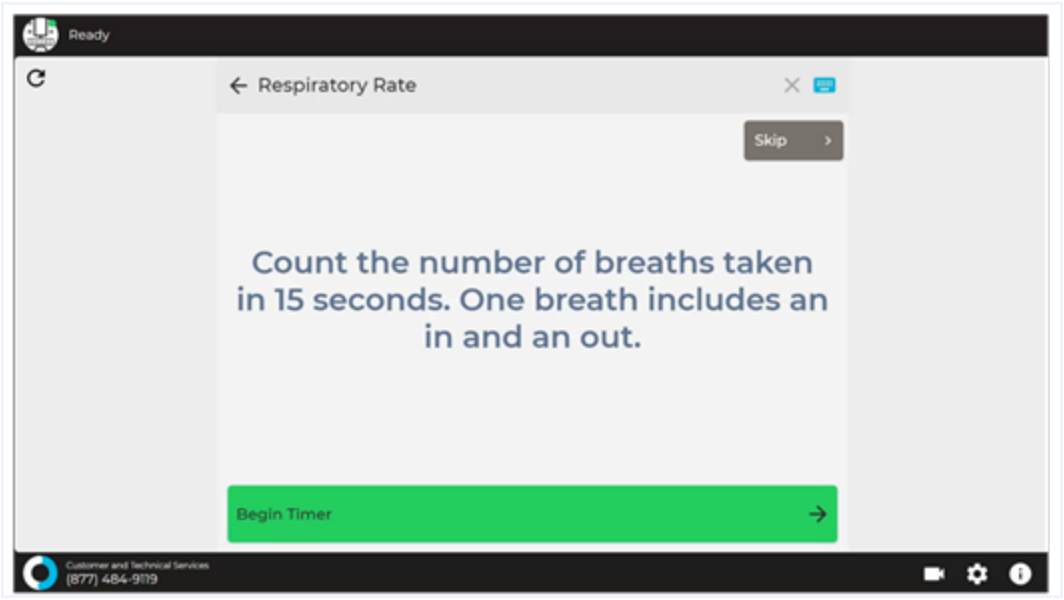
6. Select **Retake** to measure the patient's weight again.

Respiration Rate

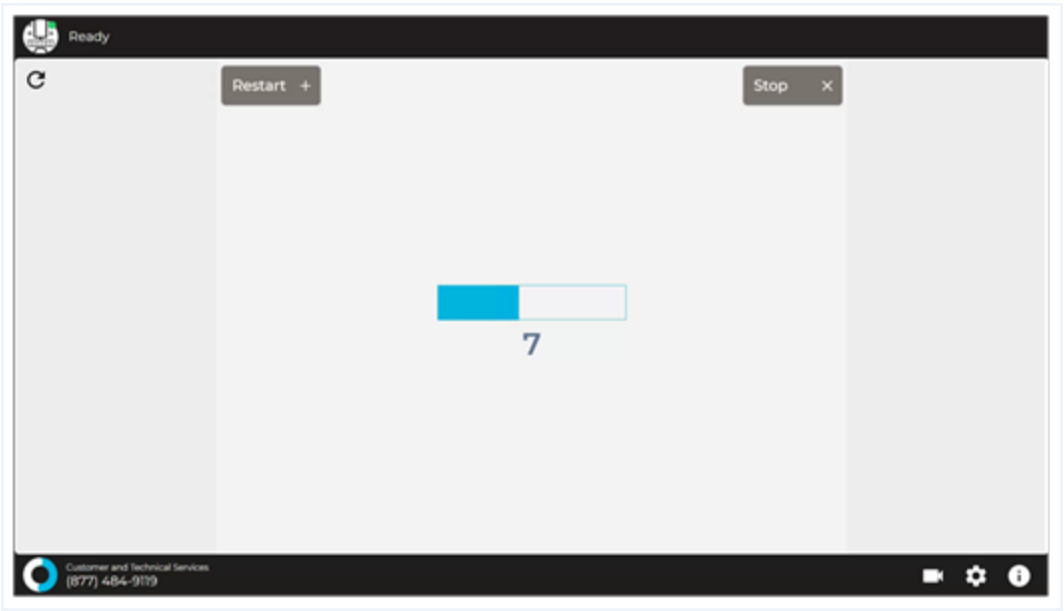
The Attendant captures the respiration rate for the patient by counting the number of breaths their patient takes in 15 seconds.

Follow the system prompts:

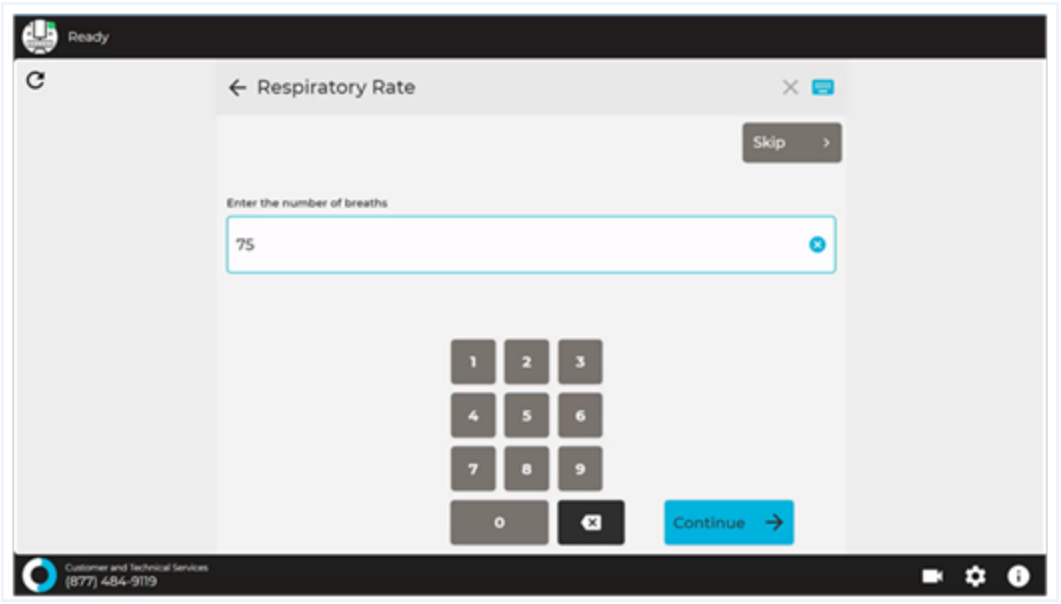
1. **Count the number of breaths taken in 15 seconds. One breath includes in and an out.**
2. To begin, select **Begin Timer**.



3. A bar counter will display. Select **Stop** when done.



4. The system will prompt you to **Enter the number of breaths**.
5. Click in the text field on the **Respiration** screen to activate the keyboard and to enter your patient's respiration rate.

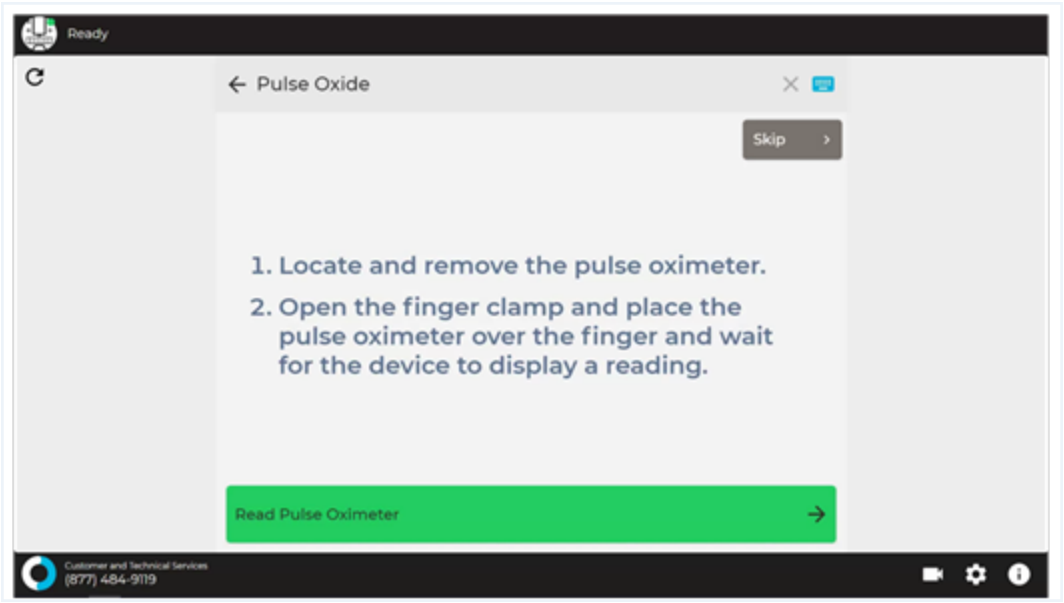


6. When done, select **Continue**.

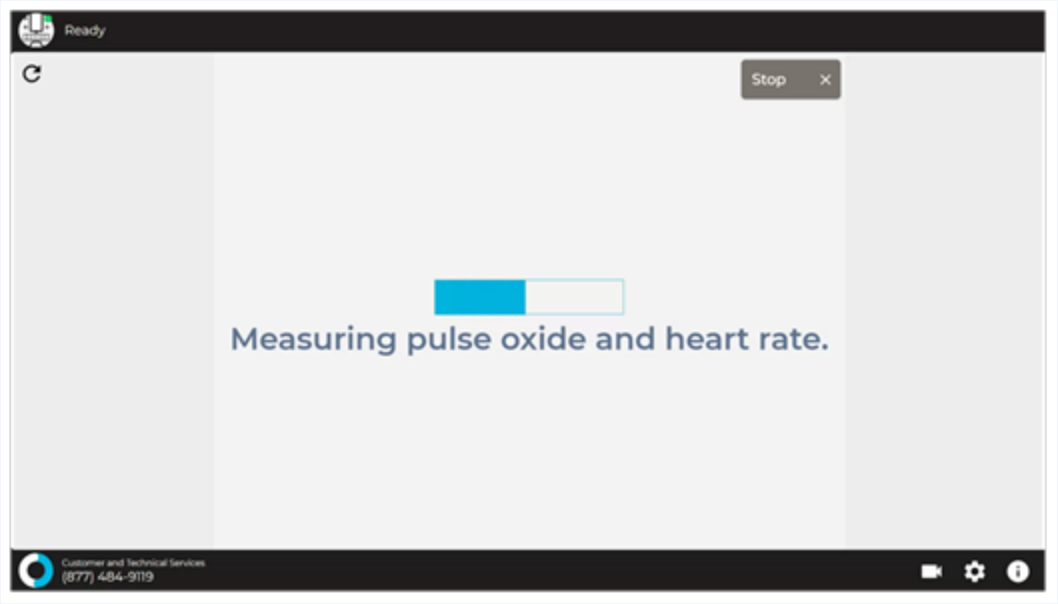
Pulse Oximeter

The USB Model 3231 OEM External Pulse Oximeter is manufactured by Nonin and is a Class II medical device. It is used to monitor the oxygen saturation of their blood.

1. When ready, select **Read Pulxe Oximeter** to continue or **Skip**.



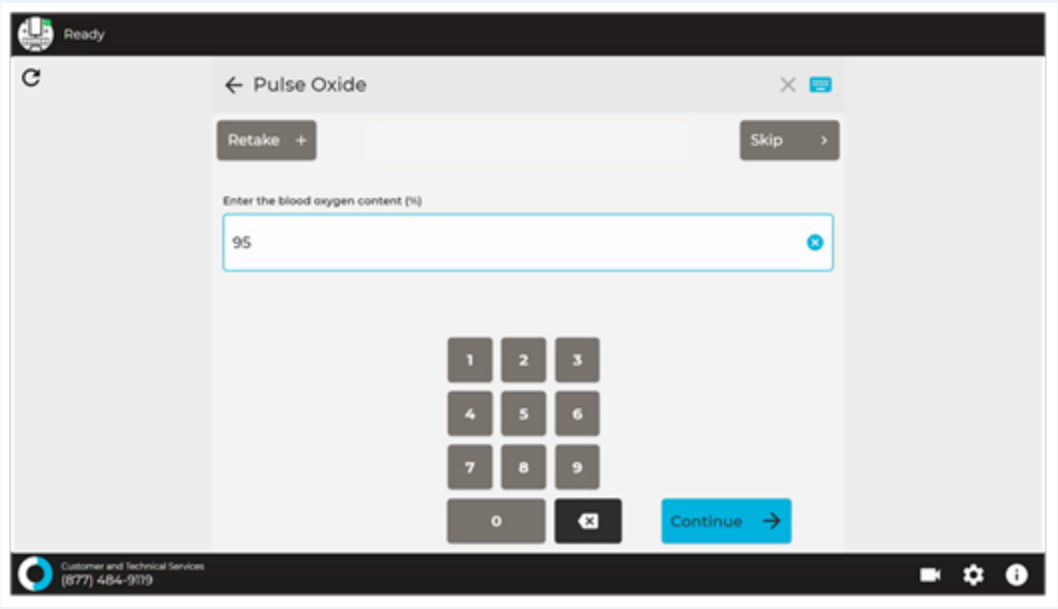
2. The system will display **Measuring pulse oxide and heart rate**.



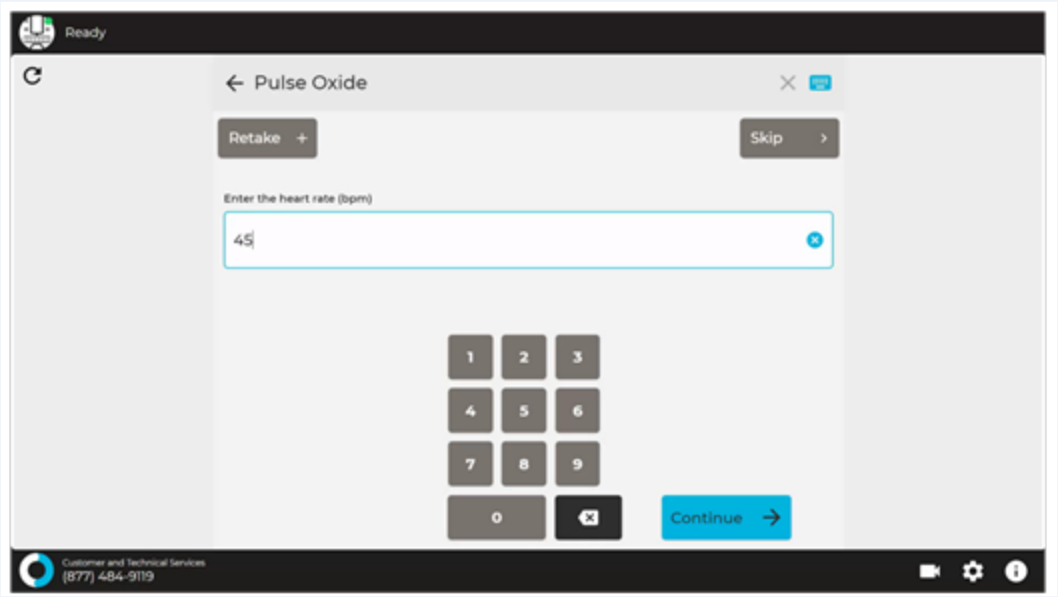
3. **Enter the blood oxygen content %**.
4. The patient's pulse oximeter is automatically displayed.

> **NOTE:** If you receive an error message, manually enter your patient's pulse rate by selecting the text field from the **Pulse Oximeter** screen to activate the keyboard.

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



6. Enter the **heart rate** from the **Pulse Oximeter** screen
7. When done, select **Continue**.



8. Select **Retake** to take the patient's heart rate again.

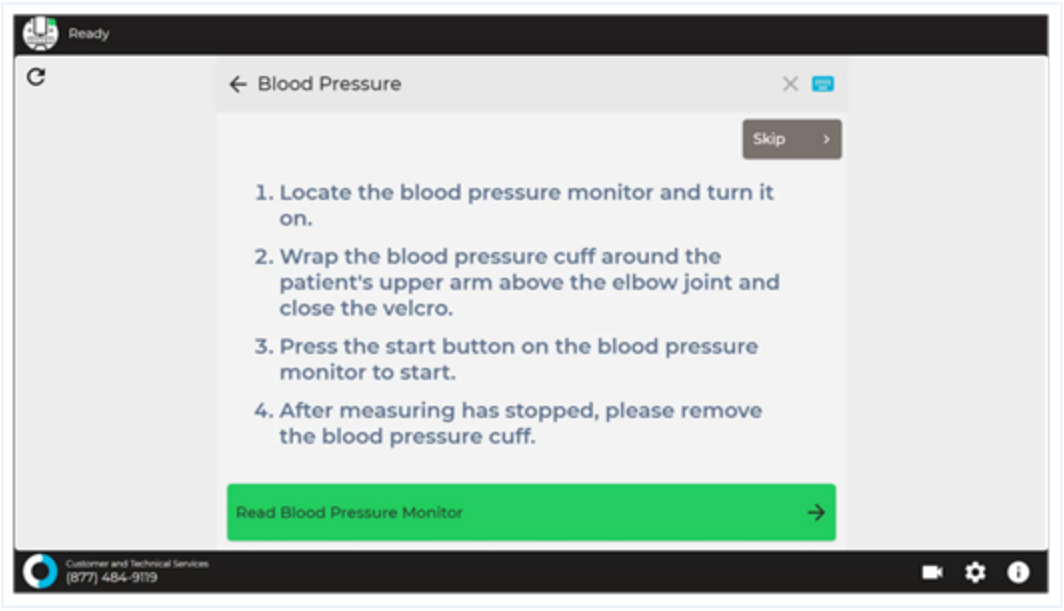
Blood Pressure

The Welch Allyn® Connex® ProBP™ 3400 digital blood pressure device is manufactured by Hillrom and is a Class II medical device. It is used to measure a patient's blood pressure.

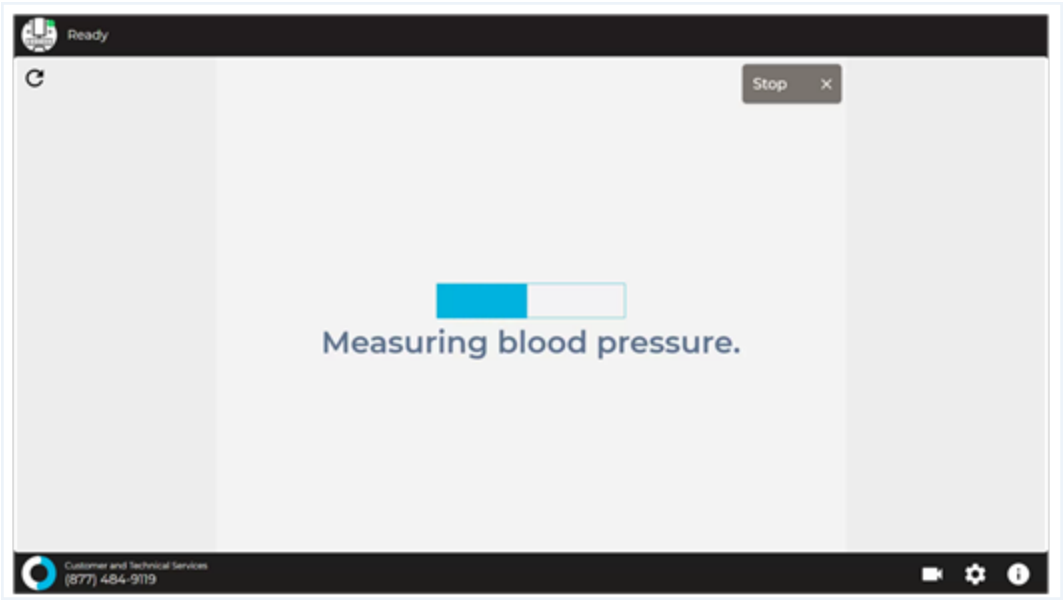
Follow the system prompts:

1. When ready, select **Read Blood Pressure** when ready.

> **NOTE:** Instruct your patient to extend their arm out away from their body and rest it on the desk surface. The system prompt will be <Wrap the blood pressure cuff around the patient's upper arm above the elbow joint and close the velcro. >

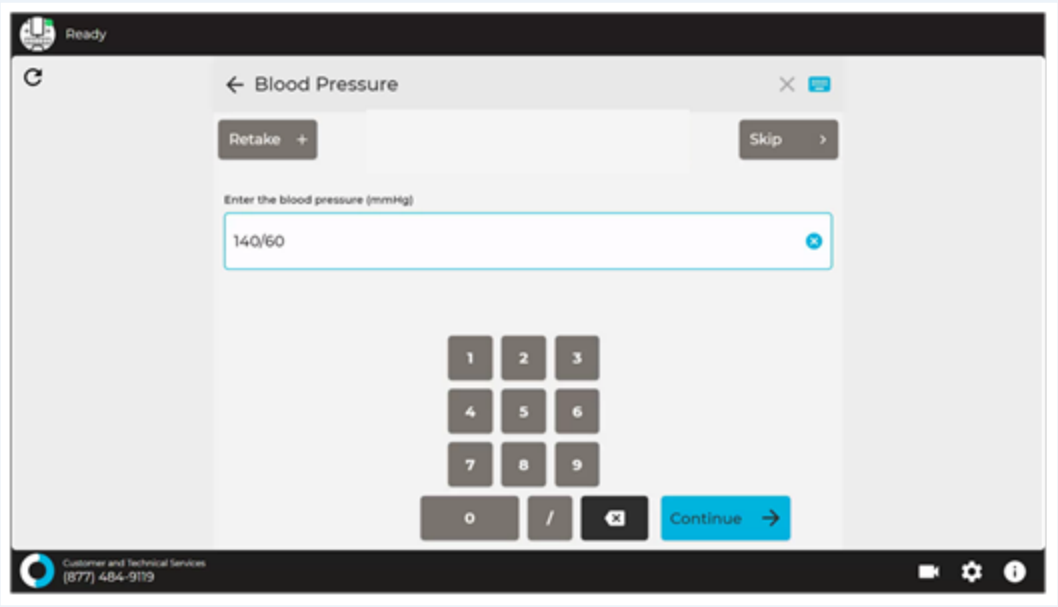


2. The system will display **Measuring blood pressure**.



3. After measuring has stopped, the patient's blood pressure is displayed and recorded.

> **NOTE:** If you receive an error message, manually enter the patient's blood pressure by clicking in the field of the **Blood Pressure** screen to activate the keyboard.



4. Remove the blood pressure cuff.
5. When done, select **Continue**.
6. Select **Retake** or **Skip** to take the patient's blood pressure again or skip.

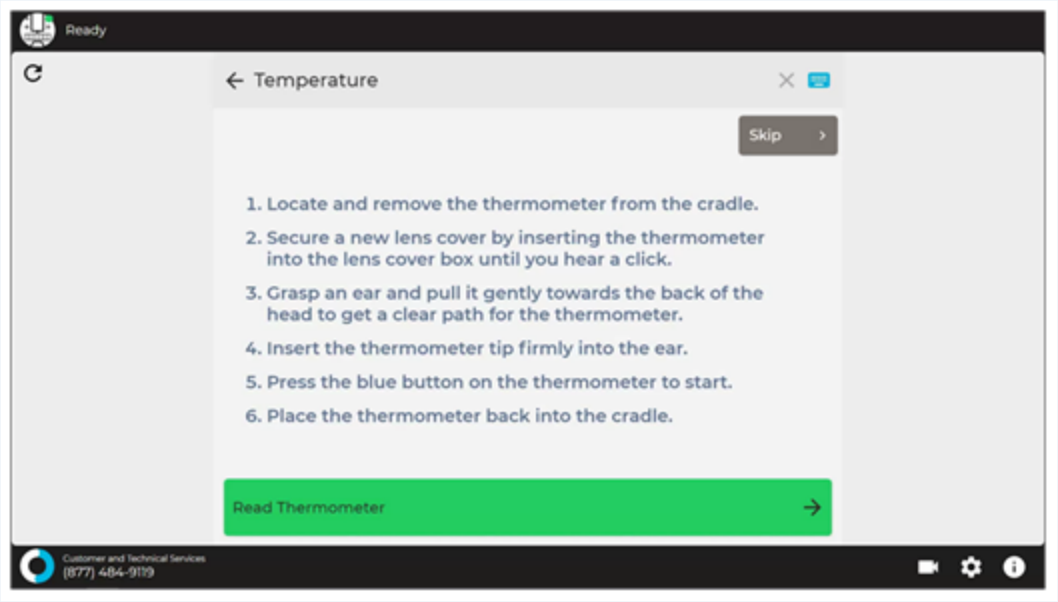
Thermometer

The ThermoScan Pro 6000 thermometer is manufactured by Braun and is a Class II medical device. It is used to measure a patient's body temperature.

> **NOTE:** It's thin plastic disposable cover should be discarded after use.

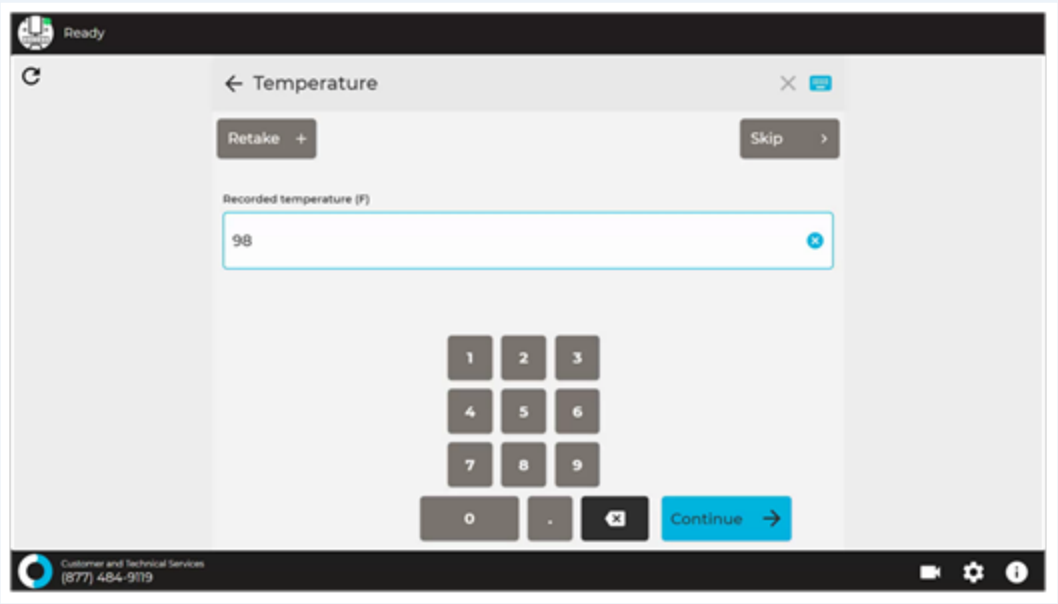
Follow the system prompts:

1. When done, select **Read Thermometer**.



2. The system will display **Measuring temperature**.
3. When done, the patient's temperature is automatically displayed.

> **NOTE:** If you receive an error, manually enter the patient's temperature by selecting the text field from the **Temperature** screen to activate the keyboard.

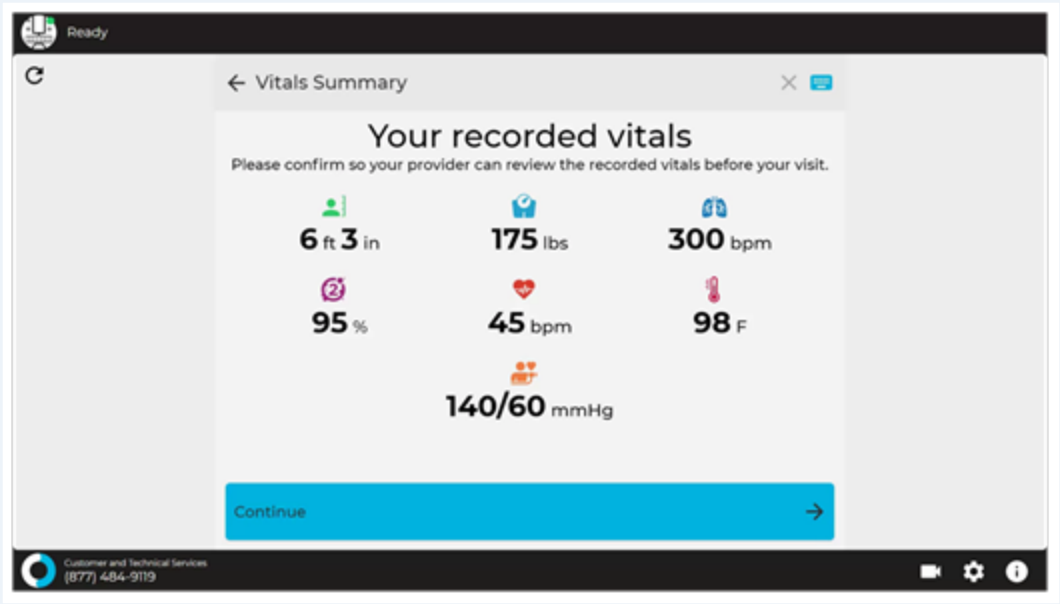


4. Place the thermometer back into the cradle on the left.
5. Select **Retake** to take the patient's temperature again.

Vitals Summary

A summary of **Your recorded vitals** will display.

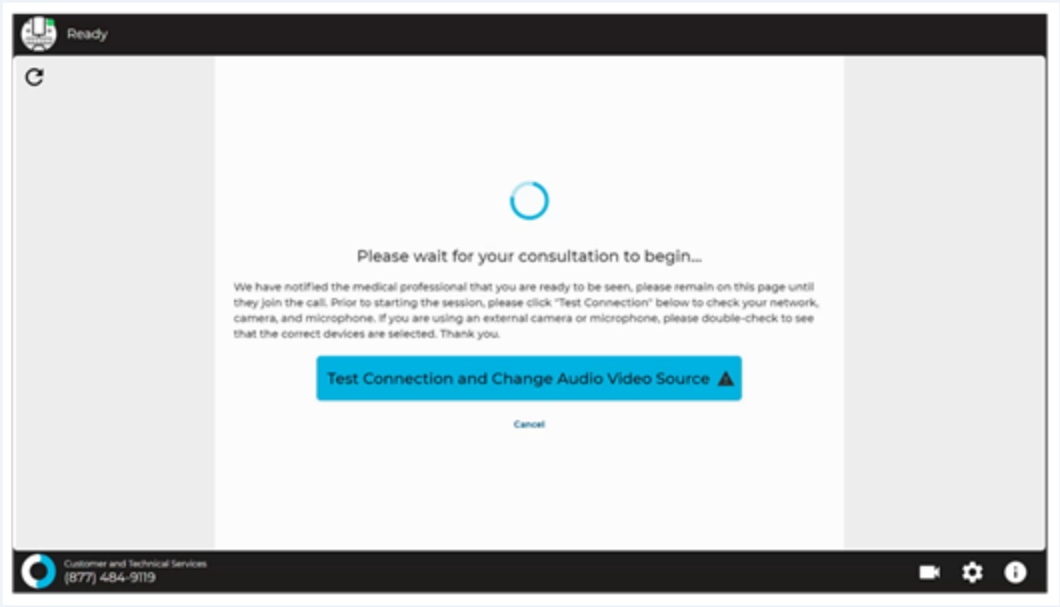
> **NOTE:** The patient's status becomes Waiting after their vitals have been collected.


Ready
Vitals Summary
Your recorded vitals
Please confirm so your provider can review the recorded vitals before your visit.
6 ft 3 in
175 lbs
300 bpm
95 %
45 bpm
98 F
140/60 mmHg
Continue
Customer and Technical Services
(877) 484-9119

Prepare an Encounter

You will be asked to wait for your practitioner to join.

> **NOTE:** Teladoc Health recommends their Provider Access software; Windows version for the session. Ensure that the **Connect to Teladoc Device with Desktop/Mobile App** toggle is enabled. Locate it by selecting **Settings** under the User icon. See MA-20013 Provider Access software for Windows User Guide.



The session will begin when your practitioner enters.

Test Connection

Test your session connection if needed. Click on the **back** button when done.

Leave an Encounter

Confirm you wish to leave the session.

Resources

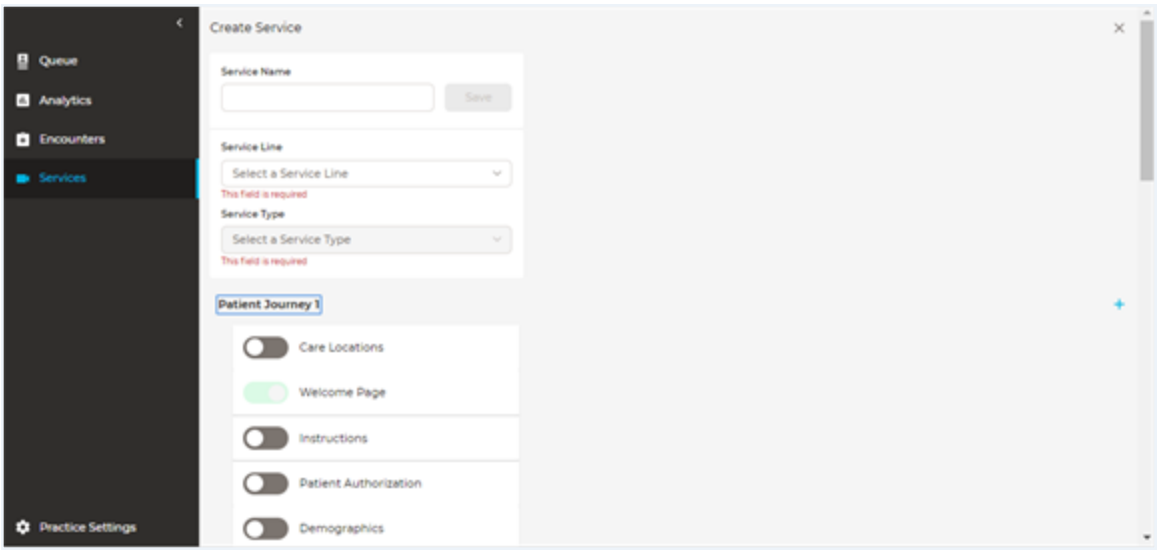
The topics are:

- Enable Care Location toggle
- Enable Windows Provider Access Software
- Diagnostics

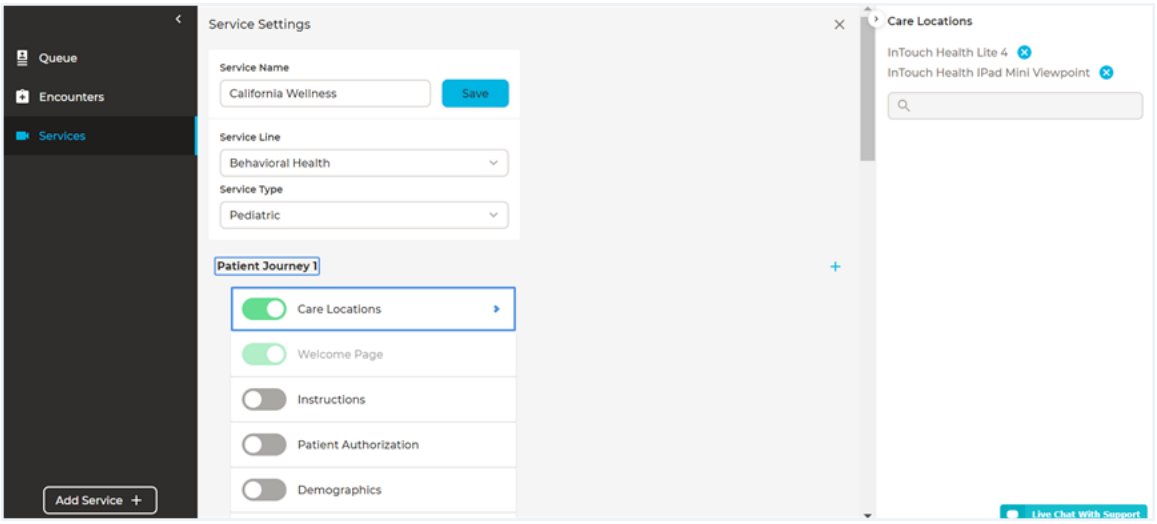
Care Location Toggle

The **Care Location** toggle must be enabled for Services.

1. As a Practice Admin, select **Practice Settings** from the user icon drop down.
2. Select **Services** using the left navigation panel.
3. Click on the gear icon to the right of your **Services** from the middle **Services** panel.



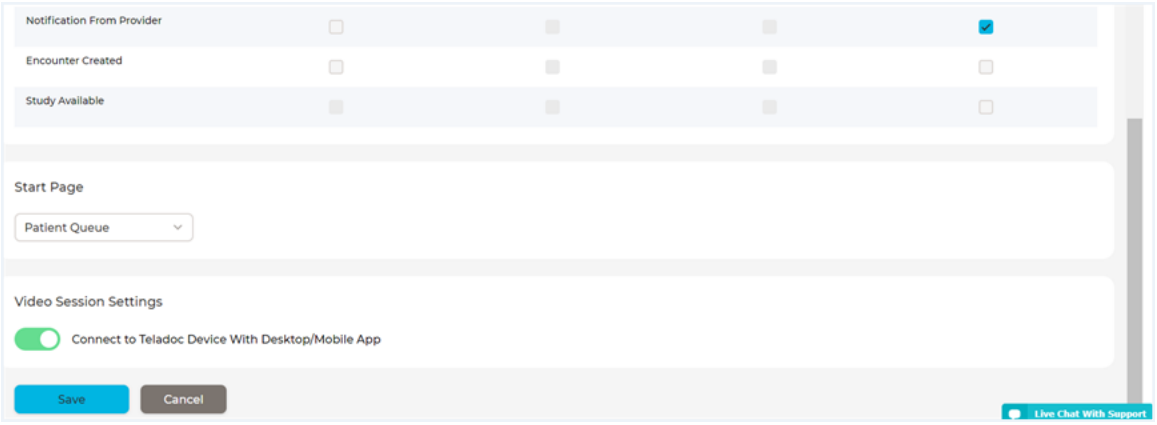
4. Enter the name and other information for your Services.
5. Click on the **Care Location** toggle to enable a selection of Care Location in the right panel.
6. As you type in the file provided, a list of available **Care Locations** will populate the dropdown menu.
7. Select the Care Console as a **Care Location** to enable the toggle.



Enable Windows PAS

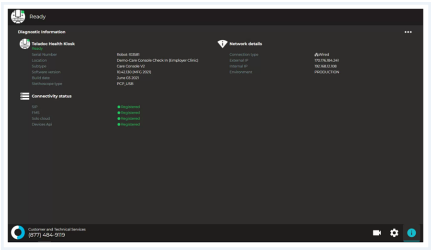
Teladoc Health recommends their Provider Access software Windows version for the session.

1. Select **Settings** from the icon menu.
2. From the **Settings** middle dialog, scroll down and enable the **Connect to Teladoc Device with Desktop/Mobile App** toggle under **Video Session Settings**.



Diagnostics

Diagnostic information is available from the **Diagnostic Information** screen for connectivity status and more.


Ready
Diagnostic Information
Teladoc Health Kiosk
Network details
Connectivity status
Customer and Technical Services
(877) 484-9119

HIPAA

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

24/7 Live Technical Support

1-800-484-9119

1-800-484-9119

24/7 Live Remote Technical Support & Live Chat

https://intouchhealth.com/contact-us/

Email Support

ITHSupport@intouchhealth.com

Website

www.InTouchHealth.com

Teladoc Health User Manuals

https://intouchhealth.com/manuals/

Sales & Product Demos

1-805-562-8686

Teladoc Health Coordinator User Guide Manufactured by

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