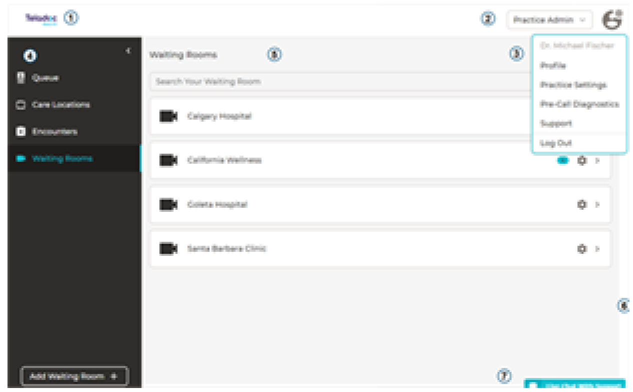
Introduction

This guide is for Practitioners, Schedulers, and other medical professionals.

User Interface

The interface is the left, middle and right panel and a tool bar.

1. The **Tool Bar** contains the logo, **Patient Search** bar, and user role.
2. **Patient Search:** Enter an existing or new patient's name, or ID to search for a patient.
3. **User Role:** Use the dropdown to select your role or roles. The dot in the corner of this icon represents your online status
4. The **Left Navigation** panel for navigation.
5. The **Middle Panel** provides content for the topic chosen from the left navigation panel.
6. The **Right Panel** provides content for topics chosen from the middle panel.



User Roles

Roles are setup by the Practice Admin.

- **Practitioner**. Physicians, and others who contribute to patient Encounters.
- **Practitioner Admin.** Personnel who perform administration.
- **Scheduler**. Personnel who collect patient vitals and manage schedules.
- **Back Office**. Personnel who perform administrative functions.

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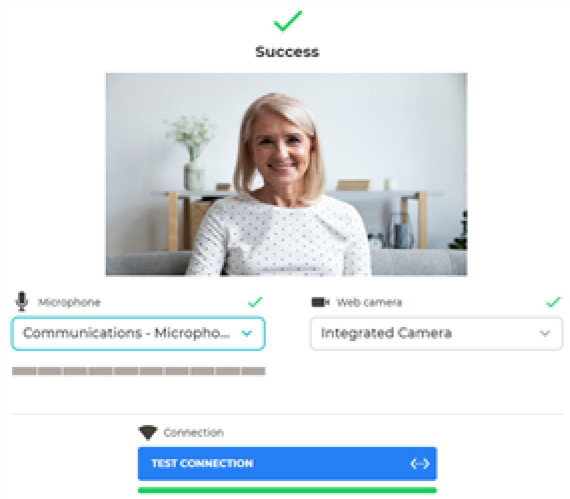
Test Your Connectivity

Select **Pre-call Diagnostics** from the User icon dropdown and **Connectivity Test**.

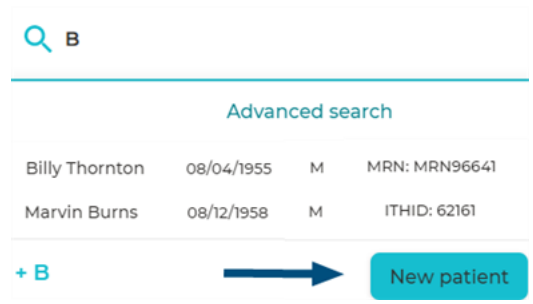


Manage Patients

Use the Patient Search bar to create new patients, search and view existing patients, and edit patient data.

Add a **New Patient**

1. Select the **Patient Search** bar at the top of the screen and the **New Patient** button to add your patient.
2. Type in the patient's information in the middle panel.



Patient Status

Scheduled: Make an appointment

Arrived: Patient at location of appointment

Cancelled: Patient cancels appointment

No Show: Patient doesn't show

Waiting: Patient is in a Waiting Room

Away: Patient is away or disconnected

LWBS: Patient leaves first before encounter begins

On Call: Patient enters encounter

Completed: Practitioner ends encounter

Incomplete: Encounter ends incomplete

On Hold: Practitioner places patient on hold in waiting room

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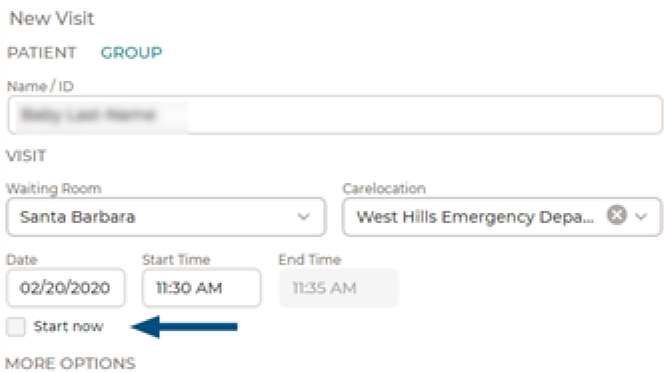
Conduct a Virtual Encounter

An Encounter is a live remote virtual visit between a patient and their provider.



Practitioner to Patient Connection

Two options are available:

1. Schedule a patient to connect.
2. If your patient requires urgent care, check your patient in now and connect immediately to them.

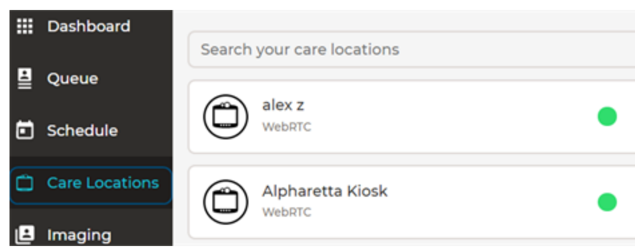
Connect to a Device:

1. Select **Care Location** from the left navigation bar to populate the middle panel with devices.
2. The right panel will populate with information about the device.
3. Select a device with a status of ready.
4. Select the green **Connect** button.

   Ready = Green

   Busy = Blue

   Offline = Gray



5. Your patient encounter view opens.

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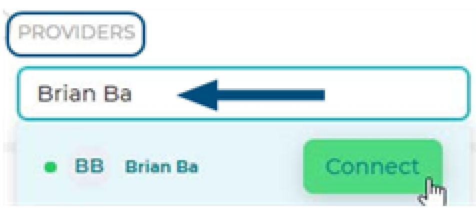
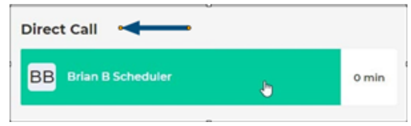
Practitioner to Practitioner Connection

Collaborate with experts

1. Select **Queue**.
2. **Caller:** Enter Practitioner's name in **PROVIDERS** field and select **Connect**.



3. **Receiver:** Select the receiver's name from **Direct Call** and **Connect** to make a direct call.



4. When done, **End Call** by selecting the **X** at the bottom of the screen.

Encounters with Teladoc Health Devices

Urgent Care patients do not need an appointment. Check the **Start now** box in the **New Visit** form.

Camera Controls

View and interact with patients in a remote location using remote camera view.

Zoom In and Out

Use the mouse wheel to zoom in and out

1. Roll the mouse forward and back to zoom in and out.
2. Use box zoom by left-clicking at the center of where you want the view.
3. Hold and drag your mouse.
4. Release the mouse once box is sized.

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5. Zoom out by clicking the right mouse and return to the default view setting.

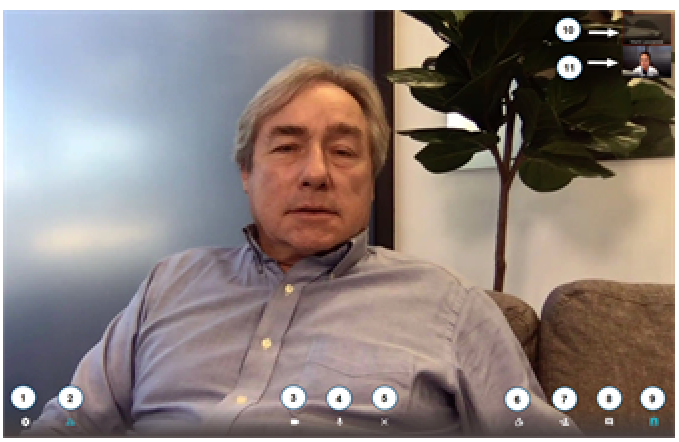
Panning

Modify your view by panning the view.

1. Pan the camera view with a single left mouse click.
2. To pan left, left-click on left side of screen.

Encounters without Teladoc Health Devices

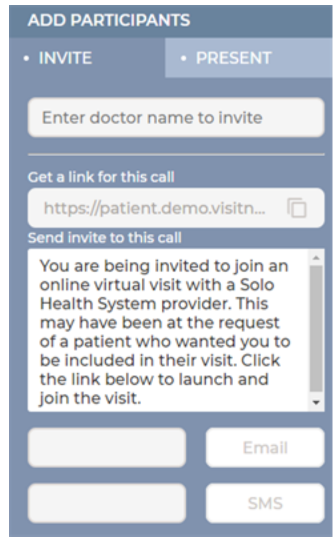
During a virtual encounter, modify your video, share your screen, chat, and more.



Add Users to Encounter

Add participants to your encounter.

1. Select **Add Participants** ( )
2. Select the **Invite** tab from the **ADD PARTICIPANTS** dialog



3. **Enter doctor name to invite**. Matching results will appear as you type. The doctor must be a registered user of your practice.
4. Select the **clipboard** icon to copy the access URL.

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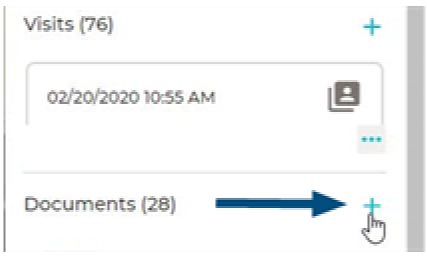
5. Send an invitation to your patient to join a virtual encounter using email or a SMS text message.

Send Forms during Encounters

Chat and answer patient questions. Generally, these forms require a signature.

1. Select the plus sign in the **Document** section from the Patient panel.

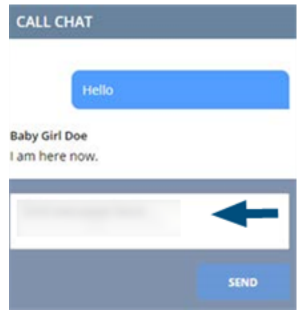


2. Select a **Document** window from the list and select **Send**.

Contact Teladoc Health 24/7 Live Support: +1 (877) 484-9119

Chat During Encounter

Select the Chat icon to chat with your patient during a virtual encounter. Type your message and select **Send**.



A Provider joining from the iOS Provider app using iPhone can now chat with other participants.

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