Teladoc Health™ Solo™ Practice Admin User Guide

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Patent(s):

http://www.intouchhealth.com/patents

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Virtual Care System

Health systems view virtual care as an extension of their services; relying on a combination of software, hardware, networks, systems, and people to work together to deliver improved access and care to their patients.

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

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

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

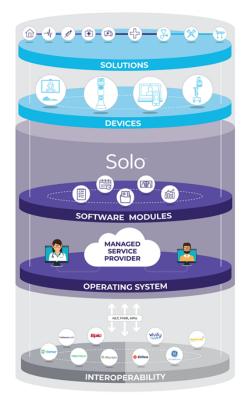
Designed for healthcare, security, and reliability

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

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

With Solo, you can connect people, systems, health information technology systems, devices, and third-party applications to enable telehealth solutions across patient journeys. Whether launching a scheduled visit, providing care for patients, Solo provides a core set of tools to deliver virtual care to users with an immersive, patient-centric view of their clinical work flows.







Overview

This guide is for the Practice Admin using Solo[™]. Solo is a virtual health care platform that combines detailed intake processes, electronic health records, insurance eligibility checking, online payment, e-prescribing, and video conferencing. Solo works with your internet browser on any device with a webcam and internet.

NOTE: Any and all names used in this document are only used as example. They do not represent true persons.

Intended Use

Solo is intended to provide high quality HIPAA compliant audio and video sessions between a provider and a patient over the Teladoc Health Health Network.

Indications for Use

Solo is HIPAA compliant and can be used for audio and video telecommunications in a variety of clinical environments.



Requirements

Teladoc Health's Solo software is designed to run on a broad range of devices under a variety of network conditions.

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

Browser

NOTE: Browsers more than a year old are not supported. Windows 7 is not supported as of 2021.

Browser	Version	OS
		Mac OS 10.14 and later
Chrome	76.0 and later	Windows 7 and 10
		Android 7.0 and later
Cofori	ri 12.1 and later	Mac OS 10.14 and later
Safari		iOS 12.1 and later
Firefox	68.0 and later	Windows 7 and 10
Edge	Currently not supported. Edge will be supported on Windows 10 in 2021.	N/A
IE	Not supported	N/A

iPad

The following iPads are supported:

- iPad 4th Generation and later
- iPad Air iPad Air 2 and later



- iPad Pro-2nd Generation and later
- iPad Mini 3rd Generation and later

iPhone

The iPhone 5 and later models are supported.

Desktop

Windows

Hardware	Minimum Required	
Processor	1.9 Ghz Intel dual processor (Second Generation)	
RAM	6 GB	
Microphone	Required	
Speakers or head- sets	Required	

Mac

Macs running Mac OS 10.13 and later are supported.

Lighting

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







Without Good Lighting

With Good Lighting

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.



Getting Started

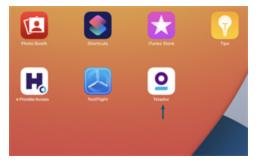
Install iOS Provider App

Teladoc Health's Provider Access for iOS is available from the Apple App store.

- 1. Obtain an Apple ID to download from https://appleid.apple.com
- 2. Acquire the Teladoc Health Provider App from the Apple Store.
- 3. Use https://apps.apple.com/us/app/intouch-provider/id1416079653 or search.
- 4. Select the Teladoc Health Provider App and **GET** to download it.



5. Select the Teladoc Health Provider App.



Verify iOS Camera and Microphone

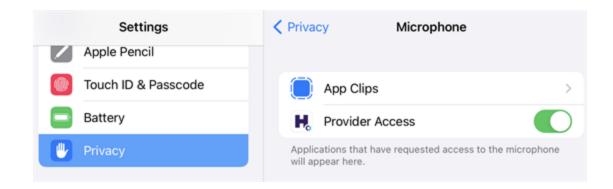
The Switch camera option is only available after a user joins the encounter. See <u>Activate Care</u> <u>Location</u>.

- 1. Tap the Camera app.
- 2. Tap the switch camera icon ()) to switch from the back to the front camera.
- 3. Make sure you can see yourself.



Follow the steps below to test your audio.

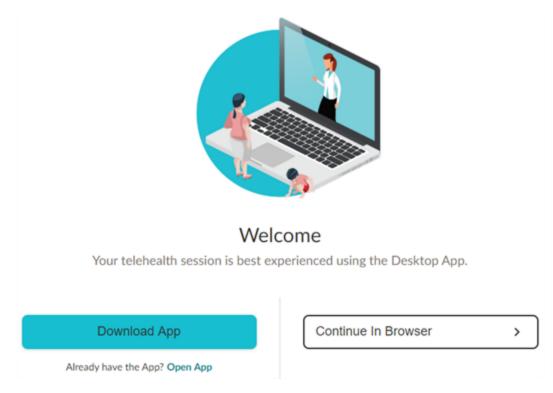
- 1. Tap the Settings app.
- 2. Tap **Privacy**.
- 3. Slide the toggle for Teladoc Health Provider Access to green.



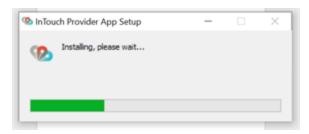


Install Desktop Provider App

1. Click the link in the email or text message from your provider.



- 2. Click **Download App**. The file will be downloaded.
- 3. Double click on the installed executable file (exe)
- 4. An install dialog will appear to download the Teladoc Health's Provider App.



5. Once done, log in.



Verify Windows Camera and Audio

Camera

- 1. Click the Windows icon and select **Settings**.
- 2. Enter **camera** in the search window.

Settings	
命 Home	Talk to Cortana
camera ×	Microphone
Camera privacy settings	Make sure Cortana can hear me.
RE Use the camera to create an account picture	Check the microphone

3. Click Camera privacy settings.

û Home	Camera
Find a setting	Allow access to the camera on this device
Privacy	If you allow access, people using this device will be able to choose if their apps have camera access by using the settings on this page. Derying access blocks Windows and apps from accessing the camera.
Windows permissions	Camera access for this device is on
A General	Camera access for this device is on Change
Speech, inking, & typing	
R Diagnostics & feedback	Allow apps to access your camera
H Activity history	If you allow access, you can choose which apps can access your camera by using the settings on this page. Denying access only blocks apps from accessing your camera. It does not block Windows.
App permissions	On On
A Location	

4. Make sure "Allow apps to access your camera" is set to **On**.

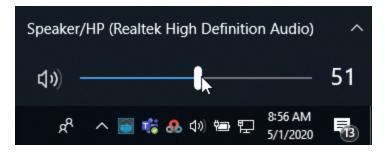


Audio

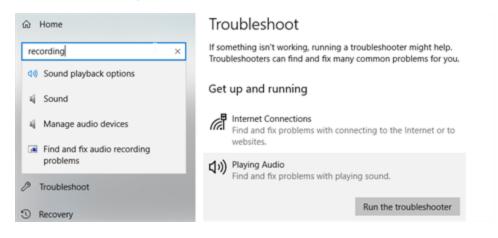
1. Click the speaker icon in the Task Bar.



2. Adjust the slider so that the volume is loud enough for you to hear.



- 3. Click the Windows icon and select Settings.
- 4. Enter **recording** in the search window.



5. Select Find and fix audio recording problems.



📝 Recording Audio

Troubleshoot and help prevent computer problems

L.,		
	100	
L	100	

Recording Audio

Find and fix problems with recording sound.

Advanced

Publisher: Microsoft Corporation Privacy statement

	Next Cancel
6.	Click Next.
	Recording Audio
	Which of these devices do you want to troubleshoot?
	O Microphone - ThinkPad Dock USB Audio
	The connector for this device is located on the front side of the computer.
	Microphone Array - Realtek High Definition Audio (Current Default Device)
	No jack information available.
	Next Cancel

7. Make sure the correct microphone is selected and then click **Next**.



- 🦻	Recording	Audio
-----	-----------	-------

Detecting pr	oblems	
Checking defaul	lt audio device	
		Cancel

8. Follow any recommended steps.

Logging In (Browser)

- 1. Open your browser and enter the URL provided to you by your Teladoc Health representative.
- 2. When your Teladoc Health browser opens, select to either **Download App**, or **Open App** if you already have it, or **Continue in Browser**.

Welcome
Your telehealth session is best experienced using the Desktop App.
Download App Continue In Browser > Already have the App? Open App
©2020 InTouch Technologies, Inc. All Rights Reserved.

3. Enter your username and password, which was provided to you by Teladoc Health.



Teladoc.	
Email or Username	
Password	Ø
Forgot your password?	
Sign In	->
Enterprise Sign In	>
Create Account	>
Dark	

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

Enterprise Login

Enterprise login is for hospitals provisioned by Teladoc Health to use hospital credentials.

- 1. On the login page, click **Enterprise Sign in** near the bottom of the page.
- 2. Enter the domain name provided to you by Teladoc Health.



Teladoc.	
Enterprise	
Continue	>
Regular Sign In	<u> </u>
Dark	
Support	

- 3. Once logged in, select **Continue**.
- 4. Sign in using your hospital credentials.
- 5. If you forgot your user name or password, contact your IT department.

Reset Password

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

- 1. If you forgot your **password**, click **Forgot Reset it.**
- 2. To recover your **Username**, call Technical Support or open chat by clicking the **Chat with a Live Agent** link.



Те	Iddoc. Health
Reset Password	
Username or Email	You must enter the username or the email address associated with your user account.
Required fields	Continue

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



Roles

The table below describes the roles for the Teladoc Health software platform.

NOTE: Analytics, Imaging, and Smart Notes described below are only available if purchased as separate modules.

Function	Practitioner Admin	Practice Admin	Practitioner	Scheduler	Nurse	Back Office
Configure Practice Settings	Х	Х				
Create and Edit Departments/Programs	Х	х				
Add and Edit Practice Users	Х	Х				
Add and Edit Care Location	Х	Х				
Add and Edit Services	Х	Х				
Create and Search Vendors	Х					Х
View Device Readings	Х		Х		Х	
Configure User Settings for Other Roles	Х	Х				Х
Receive Notifications	Х	Х	Х	Х	Х	Х
Download Utilization and Quality Data	Х	Х				Х
Add and Edit Patients	Х		Х	Х	Х	
Create and Edit Appointments	Х		Х	Х	Х	
Provider to Provider Call	Х		Х			
Invite Vendors to Virtual Encounters	Х		Х	Х	Х	
Conduct Virtual Encounters	Х		Х	Х		
Screen Sharing during a Virtual Encounter	Х		Х			
Visit Summary	Х		Х	Х	Х	Х
View Audit Log	Х	Х				Х
View Provider and Patient Surveys	Х		Х			Х
End a Virtual Encounter	Х		Х		Х	
Setup Devices - Unpack and charging	Х					Х



Function	Practitioner Admin	Practice Admin	Practitioner	Scheduler	Nurse	Back Office
Set a Profile	Х		Х		Х	
Select Hours of Operation	Х	х		х		
Add Participants to a Virtual Encounter	Х		Х		х	
Put Virtual Encounter on Hold	Х		Х		Х	

Multiple Roles

Practice Admin can create the following multiple-user roles:

- Practitioner and Practice Admin
- Scheduler and Practice Admin



Dashboard

The **Practice Admin Dashboard** is divided into three (3) sections; a left navigation bar, a middle and right panel when needed, and a tool bar on top of the page.

Teladoc.					Pract	ice Admin 🗸 🧲
<	March 11			Ŧ		Dr. Michael Fischer
Queue Care Locations	Lieberman, Mary Age 31 Cender f	Reason for Visit Anxiety San Diego Wellness Center Care Location InTouch H IPad Mini Viewpoint	Assign	ed 🔰	Sorting By Statuses By Scheduled Time	Profile Practice Settings Pre-Call Diagnostics
 Encounters Services 	Rogers, Cheryl Age 45 Cender f	Reason for Visit Heart San Diego Wellness Care Location San Diego Wellness Center Viewpoint	Assign	ed 🔰	Grouping Disabled By Service	Support Sign Out
	Yang, Sam Age - Gender m	Location San Diego Wellness Center	322400 Assign	im 🔰	Displayed Statuses Scheduled On P	_
Add Service +					Vaiting Can On Call	
					Displayed ECR Statuses Waiting On C Incomplete	Select All Call Cancelled
					Services Q California Wellnes	s × V
					C San Diego Wellne	ss Center (1/1) × V

The elements are:

- 1. The Teladoc Health logo: Click the logo to return to the start page from other pages.
- 2. **User Role** dropdown: For multiple user roles, switch between roles by selecting the roles from this dropdown.
- 3. User Icon dropdown: Select user options and Profile to manage your profile.
 - Practitioner's Name
 - Profile: Select to configure your name, email, etc.
 - Settings: Select to configure your available options.
 - Pre-call diagnostics: Test and verify your audio and video connection.

NOTE: Pre-call diagnostics is not currently available on iOS Apps.



- **Support**:. Select to use Teladoc Health's online help (i.e. https://intouchhealth.com/support/.)
- Log out: Select to log out.
- 4. Left Navigation Panel: Select Teladoc Health logo from the upper, left corner of the screen. The following options are available from the Practice Admin's left navigation panel.

NOTE: The listed topics do not include the software modules of Smart Notes, Imaging, and Analytics.

NOTE: The Practice Admin does not use the Queue, Care Locations, and Encounter topics.

- Queue
- Care Locations
- Encounters
- Services
- 5. **Middle Panel:** The middle panel provides the content for the topic you selected from the left navigation panel. The default is a list of **Services**.
- 6. **Right Panel:** The right panel provides the content for the topic you selected from the left and middle navigation panels. It is referred to as the Patient panel when patient information is selected, Room Info when Services is selected, and Filter when filtering functionality is available.
- 7. Live Chat: Select for live chat support.

Generic Fields

The generic field types listed below are for users of Solo and configured by the Practice Admin or Practitioner Admin.



NOTE: Work with your Teladoc Health to configure to hide the **Select All/Deselect All** button, make some fields mandatory, configure closed-ended question to appear as a bullet or numbered lists, or relabel the MRN field to fit your specific needs.

NOTE: Mandatory fields are indicated by an orange dot to the left of the fields when mandatory. The Mandatory Fields for Encounters toggle must be enabled.

- h - l f l l l h -			
Label for Health	System ID		
Chris MRN			
Label for Accoun	t Number		
Account Num	nber		
Label for MRN	-		
MRN			

Text Area

Enter an unlimited number of alpha numerical characters in the text field. The Text Area can expand horizontally by clicking and dragging its lower, right hand corner.



Check Boxes

Toggle check boxes on or off to allow users to select one or several properties.

Patient history reviewed



Radio Buttons

Radio buttons are a set of fields where the user can select only one option from multiple options.

Additional Medications

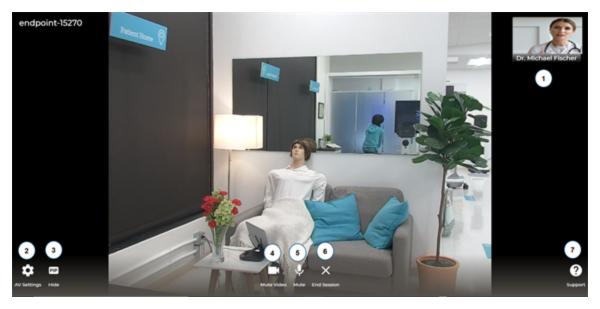


Drop Downs

A drop down can provide you with multiple options. Select one or many.

iPad Dashboard

The iPad dashboard is described below.



Key	lcon	Description
1		PIP : Picture in Picture: The video taken by the selected camera of your iPhone or iPad will be displayed in a Picture In Picture (PIP) box at the upper right corner.

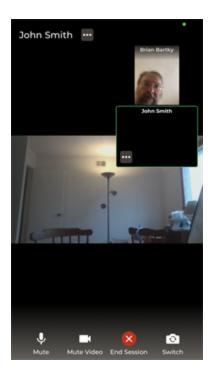


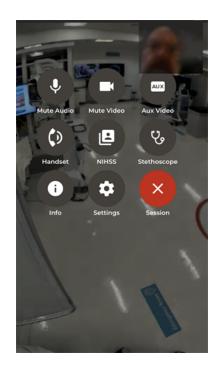
Key	lcon	Description
2	•	AV Settings: Tapping the Settings button open the AV Settings menu.
3	PIP Hide	PIP Hide: Tap to Hide the Picture In Picture.
4		Mute Video : Tap the Mute Video icon to stop displaying your image on the Patient Access Device.
5	Ŷ	Mute Audio: Microphone: Tap the Microphone icon to mute the microphone. When muted you will not be heard on the device. iPhone displays
6	×	End Session: Tap the End button to disconnect from a virtual encounter. You will be prompted to confirm that you wish to disconnect. Tap, Yes to disconnect.
7	Support	Support: Tap to access Telado Health's online help website.



iPhone Dashboard

The iPhone dashboard is shown below and described in the Elements table.





Elements

Element	lcon	Description
ı	Ŷ	Mute Audio: Microphone: Tap the Microphone icon to mute the microphone. When muted you will not be heard on the device. iPhone displays
2	-	Video : Tap the Mute Video icon to stop displaying your image on the Patient Access Device.
3	۵	Camera: Tap the Camera icon to take a snapshot of the Remote Camera view. Use the Media button on the Tab Bar to view, sort, edit, share, and delete snapshots. This option is only available on the iPad.
4	233	Aux Video: Tap the Aux Video button to switch the Remote Camera view to a different camera on the Patient Access Device.
5	¢)	Privacy Handset : Tap the Privacy Handset button to turn the Privacy Handset on. The standard Patient Access Device audio system will be disabled; which means the microphone and speakers are inactive. The handset is for conversations that require privacy and understandability in a noisy environment. When the Handset is turned off, the audio system is transferred from the handset, back to the Patient Access Device. When the Stethoscope is on, the Privacy Handset is disabled. Privacy handset is only for certain devices when connected.



Element	lcon	Description	
6	ĉ	Stethoscope : Patient Access Devices with a Stethoscope allows for remote auscultation. If you have connected to a device with a stethoscope, the stethoscope button will be lit. When turned on, the stethoscope button is blue. This option is only available if the Stethoscope is plugged in.	
7	*	Laser Pointer : Several Patient Access Devices have a laser pointer that allows the remote user to point out items or areas of interest. If you are connected with a laser pointer, the Laser Pointer button will be enabled. When the laser is turned on the Laser Pointer button will turn red. This option is only available for iPad.	
8	R	Automatic Drive: AutoDRIVE button will be disabled until the Remote Camera view is returned to the Main view. This option is only available for iPad.	
9	45	Full-Screen Video (iPad Only): Tap the Full-Screen button to maximize the video to fit the entire screen. The Tool Bar is still available, but the Tab Bar is not. To return to the Normal Interface, tap the Normal-Screen button.	
10	0	Info Menu : Tapping the Info button, located on the Tool Bar, opens the Info Menu. Tap on any menu option to open it. Tap elsewhere on the Multi-Touch display to close the menu. Clinical applications are only available on iPad. See the Info Menu section.	
11	\$	Settings: Tapping the Settings button open its Menu. Tap on any option to open it. Tap elsewhere on the display to close the menu. <u>See the Settings Menu section.</u>	
12	×	End Virtual Encounter : Tap the End button to disconnect from a virtual encounter. You will be prompted to confirm that you wish to disconnect. Tap, Yes to disconnect.	
13		PIP : Picture in Picture: The video taken by the selected camera of your iPhone or iPad will be displayed in a Picture In Picture (PIP) box at the upper right corner.	
14	tome	Home: Return to Home Page. While connected to a Patient Access Device, you can access other apps and make or accept calls by pressing Home . To return, tap the red bar (see below) at the top of your iOS screen.	
15	🚖 Му Аррз	My Apps: Select from a variety of Teladoc Health apps, such as Imaging, Analytics, Smart Notes, and more. This option is only available for iPad. An alternative interface is available when running one of these apps; to display a much larger Advanced Controls area.	
16		Driving: Tap the Driving button to use your iPhone to operate a drivable Patient Access Device. To drive using an iPad. Select the Driving Tab in the iPad Tab Bar.	
17	En Media	Media for iPad: Edit images using Provider Access.	

Tool Bars

The iPad Tool Bar is located at the top of the screen. It can be accessed by tapping its icon. Tap the X to close the iPhone Tool Bar.



User Icon

The User Icon contains your Practice Admin initials and status. Configure your **Profile**, **Settings**, receive **Support** and more.

The options are:

<u>Profile</u>

<u>Settings</u>

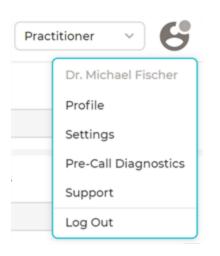
Pre-Call Diagnostics

Support

Log Out

Profile

1. Select **Profile** from the User icon dropdown menu.



2. The left navigation panel will populate with the categories under Profile and the middle panel will populate with the form used to configure your profile.



NOTE: A Practice Admin has not requirement to enter a phone number. This feature is for Providers to receive notifications.

<	Name
User Profile	First name
	Cheryl
Name	
	Middle name
Email	
Phone	Last name
	User ID
	ff499dd5-d5e2-43ae-afcd-be1cf7c41c
	Email
	E
	Email
	Phone
	Mobile phone for SMS
	<u>■</u> • +]
	Save

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

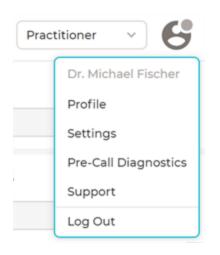
Settings

The Practitioner Admin is responsible for configuring the software for their practice.

NOTE: For more information about setting up the Location, Fax Contacts, Departments, and more, refer to MA-20166 Practice Admin User Guide



1. Select **Practice Settings** from the User icon dropdown menu.



- 2. The left navigation panel will populate with features for **Practice Settings**.
- 3. Enable each feature by selecting the associated checkbox from the middle panel.
- 4. Make your selection. Add a phone number in your **Profile** to receive SMS notifcations.

NOTE: Remember to add the url for **Service Page** if selected.



Telloderc.				Practice Admin 🗠	3
C Practice Settings Proctice Labels Protice Labels Patient Profile Practice Users Default User Settings Care Locations	Practice Settings Provider Survey: Too-Factor Authentication Select a Service Page US, https://Semouls/Innow.org/soloheaith/select-a-service View Patient's Scheduled Visits		Copy D		
Data (Download) Locations Departments / Programs Fax Contacts	Pactient Notifications Include In Appointment Email Patient Name Waiting Boom Name	Send Patient Notification Based on Practice Setting to All Wirs Via			
	Start Page Patient Queue v			Line Chal With Surger	

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
View Patients scheduled visits	Enable to view the patient's scheduled visits.
Episodes of care	Enable the ability to group Encounters into an episode of care.
Search Bar	Enable a patient search bar for Practitioners and Schedulers.
Notification	Select to receive notifications by email
Start page	Select a default start page or one of the following using the dropdown menu: Care Location Patient Queue Dashboard (the default) Encounters Blank



Fax Cover page setting	Enables the use of a fax cover sheet.

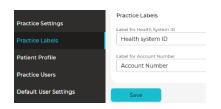
5. When done, select **Save** .

Practice Labels

The Practice Admin configures the Org MRN and Org Account number labels to match the electronic medical record (EMR). They are used for HL7 integration with customer EMR's. Different Health Systems can have different patient identifier numbers. There is no consideration for a one size fits all approach.

NOTE: These numbers can be editable in the patient profile only.

1. Select both a Label for Health System ID and Label for Account Number.



2. When done, select **Save**.

Patient Profile

The Practice Admin configures the Patient Profile setting for the practice.

- 1. Select to allow updates based on the **MRN** parameter.
- 2. Select the checkboxes to configure mandatory fields.



<	
Practice Settings	Patient Profile Settings
Practice Labels	Allow to Update MRN Mandatory patient fields
Patient Profile	✓ Name Date of Birth
Practice Users	Email Phone
Default User Settings	Address
Care Locations	Save
Data Download	Save
Locations	
Departments / Programs	

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

Practice Users

Add, edit, enable, or disable features for Practice Users.

The options are:

- Add Users
- Edit Users
- Disable Users
- <u>Reset Password</u>

Add Users

The Practice Admin configures the setting for their users.

- 1. Select **Practice Settings** from the User icon dropdown menu.
- 2. Select **Practice Users** from the left navigation bar.



Practice Users			Create new user				
Full name	Email	₹.	Role	Connect License	Connect Modules	Last Activity	
	second light of the		Admin			04/10/2020 11:35 AM	1
-	and a growth and		Practitioner + Practice Ad			04/16/2020 01:31 PM	1

- 3. The middle panel of the screen will populate with your **Practice Users**.
- 4. To add a new user, select the **Create new user** button.

Prac	tice Users								Create new user
	FULL NAME 💙	EMAIL	^	ROLE	^	LAST ACTIVITY			
1.	Alan Smith	ASmith@teladoc.com		Practitioner + Practice Admin			ф	Disable	Reset Password

- 5. Enter a name, email, phone and select the roles for the new user.
- 6. Select one or multiple user roles, such as **Practitioner** or **Practitioner + Practice Admin**. The User's middle name, phone number, and Teladoc Health's ID are optional.



Create User
Name
First name
Last name
Middle name
Email
Mobile Phone
Role Selection
 Scheduler
O Practice Admin
O Practitioner + Practice Admin
Scheduler + Practice Admin
Nurse
Practitioner Admin
 Back Office
InTouch ID
Add user

7. When done, select Add User.

Edit Users

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

- 1. Select **Practice Settings** from the User icon dropdown menu.
- 2. Select **Practice Users** from the left navigation panel
- 3. In the middle panel, scroll down to your user and click on their name.

10		brianb@domain.c	Practitioner	11/15/2019	Disable
18.	Brian B	om	+ Practice Admin	03:21 PM	Reset Password



4. The middle panel will populate with your selections.

Practice Admin
InTouch ID
3c051ab9-55d6-4af6-968f-
Role Selection
O Practitioner
Scheduler
Practice Admin
Practitioner + Practice Admin
Scheduler + Practice Admin
O Nurse
O Practitioner Admin
Back Office
Permissions
Sign off consult note
Save Disable Reset Password User Settings

- 5. Edit your **Teladoc Health ID** if necessary.
- 6. Edit the users roles from the **Roles selection** if necessary.
- Set the permissions for Smart Notes by checking the box next to Sign off consult note.
 Set off
- 8. You can Save, Disable, Reset Password, or change User Settings.
- 9. When done, select **Save** .

Disable Users

A Practice Admin can disable a user and then re-enable them at any time.

NOTE: A **Practice User** may not be deleted.



- 1. Select **Practice Settings** from the User icon dropdown menu.
- 2. Select **Practice Users** from the left navigation bar.
- 3. Scroll down to the user you want to disable.
- 4. In the middle panel, select **Disable**.

Pract	lice Users				Create new user
	FULL NAME+	EMAIL	ROLE	LAST ACTIVITY	
1	Jane Doe	janedoe@intouchhealth.com	Practitioner	10/14/2019	Disable
	Same Doe	Janeooegintouennearticonn	Procession	02:48 PM	Reset Password
2.	John Doe	johndoe@myintouchhealth.c	Practitioner		Disable
2.	John Doe	om	Practitioner		Reset Password

5. The label of the button will turn to **Enable** and you will receive a message that slides in from the upper right corner of the screen.

G	Info scheduling@into	uchhealth.com successfu ×
		Create new user
\$	Enable	Reset Password
¢	Enable	Reset Password
۵	Enable	Reset Password

Reset Password

The Practice Admin has the responsibility of resetting the password.

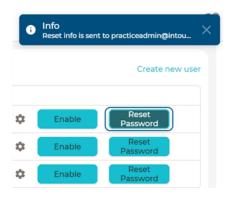
- 1. Select **Practice Settings** from the User icon dropdown menu.
- 2. Select **Practice Users** from the left navigation bar.
- 3. In the middle panel, scroll down to your user.



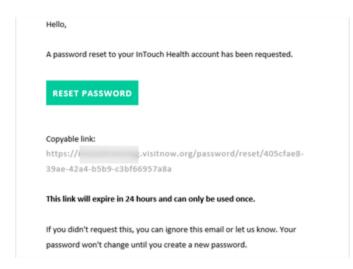
4. Select Reset Password.

177	Brian B	brianb-	Cobodulor	11/14/2019	Disable
17.	Scheduler	scheduler@domai n.com	Scheduler	09:30 PM	Reset Password

5. You will receive a message that slides in from the upper right corner of the screen.



6. An email will be sent to the practice user with a link to reset their password.





7. The practice user will then click this link to reset their password.

Care Locations

Practice Admins are responsible for provisioning specific Care Locations. They cannot be deleted; only deactivated, renamed and linked to multiple Waiting Rooms. The Care Location toggle in Services must be enabled.

The options are:

- <u>Add</u>
- <u>Activate</u>
- Edit
- Deactivate

Add

Add Care Locations to represent devices, including iPhone or iPad.

- 1. Select **Practice Settings** from the User icon dropdown menu.
- 2. Select **Care Locations** from the left navigation bar.
- 3. The middle panel will populate with Care Locations for your practice.
- 4. To add a new Care Location, select **ADD NEW**.

Care	Locations		ADD NEW
	NAME	ACTIVATION CODE	STATUS
1.	Evans Clinic iPad		Active
2.	Jon SP	736s	Inactive
3.	TIC Vita	wqnl	Inactive

5. A Care Locations panel should open in the middle of the screen.



- 6. Enter a Care Location Name.
- 7. Select the **WEBRTC**.

Carelocation Care Location Name
WEBRTC ROBOT

- 8. or select the **ROBOT** radio button.
 - Enter the serial number of the device and **Client ID**.
 - By default, **Skip activation** is unselected if not activated.

Care Location Name		
ICU Lite 4		
WEBRTC		
	_	
Serial Number		
Client ID		
Skip activation		

- 9. Enter any name for your Care Location.
- 10. When done, select **Save**.

Activate

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



- 1. Select **Practice Settings** from the User icon dropdown.
- 2. Select Care Locations from the left navigation side bar
- 3. Scroll down to your Care Location in the middle panel and copy the four-digit code from the **ACTIVATION CODE** column.

15	5.	ICU Bed 1			Active
15	6.	iPad 5G Brian B	AZIJ	-	Inactive
15	7.	ROBOT-9010			Active

- 4. Log in to the device you are provisioning as a Care Location. Use your browser to navigate to <u>carelocation.visitnow.org</u>.
- 5. Paste the 4-digit code in the **Care Location Activation Code** field.

	Confirm				
	Мужу	×			
	Care Location Activation Co	de			
	Care location				
<> m 📒	carelocation.visitnow.org		c	۵	+ (

- 6. When done, select Confirm
- 7. You will receive a confirmation: You have successfully activated care location.



144 PM FriApr12	Carelocation.visitnow.org	c	* sm •
	Care location		000000
	You have successfully activated care location	1	
	Confirm		

8. Your Care Location will now show as active.

155.	ICU Bed 1	Active
156.	iPad 5G Brian B	Active
157.	ROBOT-9010	Active

Edit

Practice Admins can edit settings for Care Locations.

- 1. Select **Practice Settings** from the User icon dropdown menu.
- 2. Click Care Locations from the left navigation side bar
- 3. In the middle panel, scroll down to your Care Location and select name.

Care	Locations		ADD NEW
	NAME	ACTIVATION CODE	STATUS
1.	Evans Clinic iPad		Active
2.	Jon SP	736s	Inactive
3.	TIC Vita	wqnl	Inactive



- 4. Make changes as needed.
- 5. When done, select **Save**.

Deactivate

Practice Admins can deactivate Care Locations.

- 1. Select **Practice Settings** from the User icon dropdown menu.
- 2. Select **Care Locations** from the left navigation side bar.
- 3. In the middle panel, scroll down to your Care Location.
- 4. Make your changes as needed.
- 5. When done, select **Replace**.

Care Location Na	ame	
iPad 5G Bria	in B	
 WEBRTC 		
ROBOT		
Select a service p	sage	
https://	visitnow.org/intouch/care-location/8f06d1d5-0f93-43bf	C
Replace		

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





Download Data

Practice Admins and Practitioner Admins can download an Extensible Markup Language (XML) file with a set of rules for encoding session data and provider survey results. To download data?

1. Select **Data Download** from the left navigation panel.



- 2. Use the calendar dropdown to make select data ranges for your data.
- 3. The middle panel will populate with calendar selection information.
- 4. Select a **Start Date** to open the calendar menu.
- 5. Select a start and end date from the calendar menu. Click the question mark in the lower right corner to display keyboard shortcuts.

Practice Settings	From	_						
Practice Labels	Clea	r 1	0/02/20	020	Ē	03:00	P	M ∽ PDT
Patient Profile	Clea	r 1	0/05/20	020		01:00	A	M ~ PDT
Practice Users	ĸ	¢	Oc	tober 2	020	>	ж	
Default User Settings	MON	TUE	WED	<u>Thu</u>	FRI	SAT	SUN	
Care Locations	28 5	29 6	30 7	1	2	3 10	4	IO AM PST
Data Download	12	0 13	14	o 15	9 16	10	11	
Locations	19	20	21	22	23	24	25	
Departments / Programs	26	27	28	29	30	31	1	



- 6. When done, select Generate.
- 7. Select **Download**. Depending on whether you select a **CSV** or **XML** file, a file named "data.csv" or "data.xml' will be downloaded to your workstation.

Locations

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 the Waiting Room must be enabled.

NOTE: This feature can only be used if you either purchased the Coordinator Module.

The options are

- <u>Add</u>
- Edit

Add

- 1. Select **Practice Settings** from the User icon dropdown menu.
- 2. Select Locations from the left navigation sidebar.

	Locations	ADD NEW
Practice Settings	NAI	ME
Practice Labels		
Patient Profile		
Practice Users		
Default User Settings		
Care Locations		
Data Download		
Locations		



- 3. The middle panel will populate with the Locations for your practice.
- 4. To add a new Location, click **ADD NEW**.

Locat	ions ADD NEW
	NAME
1.	Lite v4 -19026
2.	OB Hospital
3.	Douglas Clinic
4.	ITH West Medical Center

5. Enter a Location name, Geolocation ID, Care Location, Time Zone, and configure the hours.

~
8 ~

6. Select a Care Location and Time Zone using the dropdown. By default, Locations are open.



Create Location	
Location Name	
Central Hospital	
Geolocation ID	
Care Locations	
ICU	~
NICU1	
TV Pro (TIC ICU)	

- 7. Use the radio buttons to select either Always open or Open during specific hours.
- 8. 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 will be open.
 - Optional. Click **add interval** to create extra open periods for each day.



 Always Open d 	open uring specific h	ours	Reset all	
Set hours by	,			
Week	~	·]		
	Start time	E	nd time	
🗹 Мо	12:00 AM)-(12:00 AM	24
	Add Interval			
🔽 Tu	12:00 AM]-(12:00 AM	24
	Add Interval			
🗸 We	12:00 AM]-(12:00 AM	24
-	Add Interval			
🗹 Th	12:00 AM]-(12:00 AM	24
4	Add Interval			
🗹 Fr	12:00 AM)-(06:00 PM	18
۵	12:00 PM	-	01:00 PM	1h
-	Add Interval			
🗸 Sa	09:00 AM]-(05:00 PM	8 h
4	Add Interval			
🗸 Su	10:00 AM]-(04:00 PM	6 h
	Add Interval			
Save				

9. When done, select **Save** .

Edit

- 1. Select **Practice Settings** from the User icon dropdown menu.
- 2. Select Locations from the left navigation bar to navigate.
- 3. In the left panel, select your Location.



4. Make edits as needed

E-list	
Edit Location	
Location Name	
ITH West Medical Center	
Ceolocation ID	
4388	
Care Locations	
ED Bay1 × ITH Demo Lite 4 (MedSurg) ×	~
Time Zone	
	Ø ~
Always open	
Open during specific hours	
Save	

5. When done, click Save.

Departments

A department exists within Locations. They cannot be deleted; only renamed and associated Services removed.

NOTE: This module can only be used if you either purchased the Coordinator module or for Emergent care use.

The options are

- <u>Add</u>
- Edit



Add

Practice Admin Practice Admins can add departments and programs.

- 1. Select **Practice Settings** from the User icon dropdown menu.
- 2. Select **Departments / Programs** from the left navigation panel.

Practice Settings	Departments / Programs				ADD NEW
		NAME	SPECIALTIES	WAITING ROOMS	
Practice Labels					
Patient Profile					
Practice Users					
Default User Settings					
Care Locations					
Data Download					
Locations					
Departments / Programs					

- 3. The middle screen will populate with the departments for your practice.
- 4. To add a new department, select Add New.



<	Edit Department / Program
Practice Settings	Department / Program Name
Practice Labels	General Medicine
Patient Profile	Specialties
Practice Users	Specialty
Default User Settings	Waiting Rooms
Care Locations	Q 1 Kate 9.1 × V
Data Download	Save
Locations	
Departments / Programs	
Fax Contacts	

- 5. Enter the new department or program name.
- 6. Enter any **Specialties**.
- 7. Add **Services** using the dropdown menu. Matching names will be displayed.

Practice Settings	Create Department / Program Department / Program Name	
Practice Labels	Veparunent/Program Name	
Patient Profile	Specialties	
Practice Users	Specialty	
Default User Settings	Services	
Care Locations	Q Service	~
Data Download		
Locations		
Departments / Programs		

8. When done, select **Save**.



Edit

Practice Admins can edit departments and programs.

- 1. Select **Practice Settings** from the User icon dropdown menu.
- 2. Select **Departments / Programs** from the left navigation panel.
- 3. Scroll down to the your department or program.

<	Edit Department / Program
Practice Settings	Department / Program Name
Practice Labels	General Medicine
Patient Profile	Specialties
Practice Users	Specialty
Default User Settings	Waiting Rooms
Care Locations	Q 1 Kate 9.1 × V
Data Download	Save
Locations	
Departments / Programs	
Fax Contacts	

- 4. Edit the fields you want to modify.
- 5. When done, Select **Save**.

Fax Contacts

Fax Contacts are used to fax Teladoc Health's Smart Notes 4 documentation.

The options are



- <u>Add</u>
- Add Previously Used
- Edit
- <u>Remove</u>

Add Fax Contacts

The Practice Admin is responsible for adding fax contacts.

- 1. Select **Practice Settings** from the User icon dropdown menu.
- 2. Select Fax Contacts from the left navigation panel.
- 3. The Add New Fax Contact page will populate the middle panel:
- 4. To add a new fax contact, select Add New or Unknown numbers.

New

1. Add a name and fax number.

Practice Settings	Add New Fax Contact X	
_	Name	
Practice Labels	Brian Kabath	
Patient Profile	Number	
Practice Users	• +1 (805) 702-3944	
Default User Settings	Add Care Locations	
Care Locations	Add Consult Note Forms	
Data Download		
Locations		
Departments / Programs	Save	
Fax Contacts		

2. Use the dropdowns menu to select a country code for the fax number and **Care Location**. Matching names will be displayed.



Add New Fax Contact	×
Name	
Susan Monte	
Number	
<u>■</u> +1	
	-
🛛 🗺 U.S. Virgin Islands +1340	
Uganda +256	
Ukraine +380	
United Arab Emirates +971	
United Kingdom +44	
United States +1	•

Add Unknown number

- 1. For Unknown Fax Contacts, select **Unknown Numbers** from the upper right corner of the screen.
- 2. When the Unknown Numbers dialog opens, select either to Add New Fax Content or Remove Number.

Unkr	nown number	s		>
	NUMBER	LAST USAGE AT		
1	+1805562 8663	01/28/2020 04:42 PM	Add New Fax Contact	Remove number

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

Previously Used Fax Contacts

Practice Admin configure their practice so previously used Fax Contacts can be used by Practitioners, Schedulers, and others.

- 1. Select **Practice Settings** from the User icon pulldown menu.
- 2. Select Fax Contacts from the left navigation panel.



3. Select Add New Fax Contact from the Unknown numbers dialog.

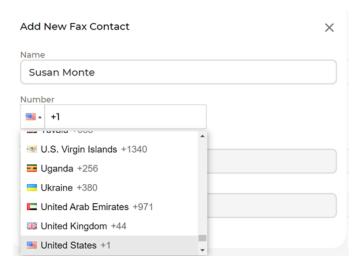
Unkr	nown Number	S	×
	NUMBER	LAST USAGE AT	
1	+1805678 9912	08/19/2020 07:13 PM	Add New Fax Contact Remove number

4. To remove a fax number, select **Remove Number**.

Unkı	nown <mark>n</mark> umber	S		×
	NUMBER	LAST USAGE AT		
1	+1805562 8663	01/28/2020 04:42 PM	Add New Fax Contact	Remove number

5. Edit the Name

6. Select a country code from the drop-down and enter a fax number.



7. When done, select **Save**.



Edit Fax Contacts

- 1. Select **Practice Settings** from the User icon dropdown menu.
- 2. Select **Fax Contact** from the left navigation panel.
- 3. In the middle panel, scroll down to your fax contact and select the name.

ax C	ontacts			Unknown Numbers Add Ne
	Name	Number	Auto Faxing Care Locations	Auto Faxing Consult Note Forms
1.	Brian Kabath	+1 (805) 702-3944		
2.	San Diego Hospital	+1 (616) 447-8892	InTouch Health Lite 4	Acute Neurology: Acute Neurology

4. Make your edits as needed.

Change Fax Contact	×
Name	
San Diego Hospital	
Number	
mi · +1 (616) 447-8892	
Add Care Locations	
InTouch Health Lite 4	
Add Consult Note Forms	
Acute Neurology: Acute Neurology 😣	
Remove	
Remove	

5. When done, select **Save**.



Remove Fax Contacts

- 1. Select **Practice Settings** from the User icon dropdown menu.
- 2. Select **Fax Contact** from the left navigation panel.
- 3. In the middle panel, select the fax contact **Name** to remove.
- 4. When done, select **Remove.**

Change Fax Contact	>
Name	
San Diego Hospital	
Number	
*1 (616) 447-8892	
Add Care Locations	
InTouch Health Lite 4 🙁	
Add Consult Note Forms	
Acute Neurology: Acute Neurology 😣	
Remove Save	

Auto Fax

Practice Admins can configure auto fax for signed Smart Notes.

- 1. Enter one or more care locations. Matching names will be displayed.
- 2. If you entered a care location by mistake, click the X to remove it.



	Change Fax Contact	×
Practice Settings	Name	
Practice Labels	San Diego Hospital	
Patient Profile	Number +1 (616) 447-8892	
Practice Users	Add care locations	_
Default User Settings		
Care Locations	InTouch Health Lite 4 😣	
Data Download		
Locations	Acute Neurology: Acute Neurology 😣 🚽	
Departments / Programs	Remove	ve
Fax Contacts		

3. When done, Select **Save**.

Pre-Call Diagnostics

Pre-Call Diagnostics allows you to test the video connection for the browser version of Solo.

NOTE: Pre-call diagnostics is not available on iOS Provider app or any mobile phones (browser or iOS App).

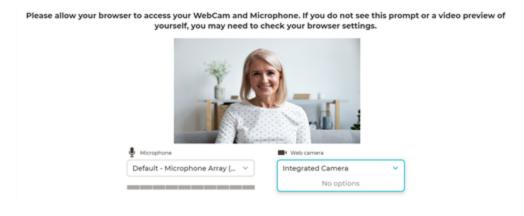
1. Click the User icon and then **Pre-call Diagnostics.**

NOTE: Make sure permissions to use your camera and microphone are allowed.



Practitioner 🗸 🚱	
	Dr. Michael Fischer
_	Profile
	Settings
	Pre-Call Diagnostics
	Support
	Log Out

2. Select a camera using the Web Camera.



3. Use the **Microphone** drop down.





4. Select the test icon (

Y-C	
Microphone	Web camera
Default - Microphone Array (\vee	Integrated Camera
•	
Connection	
	↔ ←

- 5. A green bar will display as your test progresses.
- 6. When done, a green **SUCCESS** checkmark will appear.

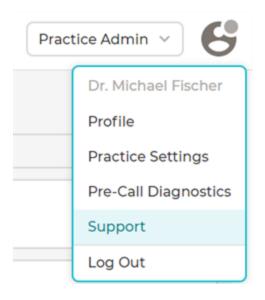


Success		
Connection	«·· »	

Support

Access Teladoc Health's easy to use online documentation for the Practice Admin and/or chat with a Teladoc Health representative..

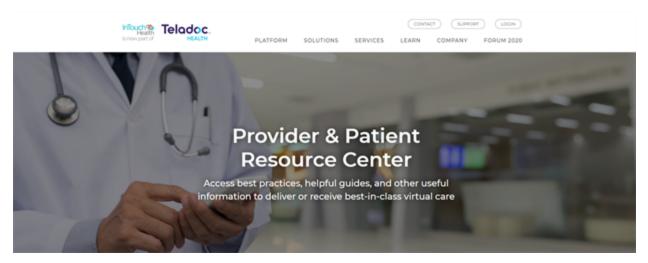
1. Select **Support** from the right, top User Icon



2. Browse and select the Practice Admin documentation from the Provider & Patient



Resource Center https://intouchhealth.com/support/





Left Navigation Panel

The topics are:

- Practice Settings
- Practice Label
- Practice Users
- Default User Settings
- <u>Care Locations</u>
- Data Download
- Locations
- Departments
- Fax Contacts

Queue

Generally, the Queue is not used by the Practice Admin. It is used for a practitioner to view patients who have been scheduled for a virtual encounter within the past 24 hours.

- 1. Select **Profile** from the right, top User Icon
- 2. Select **Queue** from the left navigation panel.
- 3. Use the right panel Filter to refine your search based on **Sorting**, **Grouping**, **Statuses**, **Waiting Room**, **Locations**, and **Care Locations**.



Teladec.				Prac	tice Admin 🗸 🧲
<	March 11		Ŧ		Dr. Michael Fischer
Queue Care Locations	Lieberman, Mary Age 31 Gender f	Reason for Visit Location Care Location Anxiety San Diego Wellness IPad Mini Center Viewpoint	401734 m 🛐	Sorting By Statuses By Scheduled Time 	Practice Settings Pre-Call Diagnostics
 Encounters Services 	Rogers, Cheryl Age 45 Gender f	Reason for Visit Location Care Location Heart San Diego Wellness Indouch Health Center Viewpoint	401672 m Assigned	Crouping Disabled By Service 	Support Sign Out
	Yang, Sam Age - Gender m	Location Care Location San Diego Wellness Dad Mini Center Viewpoint	322406 m 🛐	Displayed Statuses Scheduled On Arrived Con	_
Add Service +				Vaiting Can	
				Displayed ECR Statuses Waiting On Incomplete	Select / Call Cancelled
				Services Q California Wellnes	ss x v
				Q San Diego Welling	ess Center (1/1) \times \checkmark

Care Locations

View information about your practice's Care Locations.

1. Select **Care Locations** from the navigation panel to edit Services.

Care Locations	
Search your care locations	
Behavioral Health TV Pro Generic	•
Behavioral Health Vici Generic	۰
Eutura Cart Generic	٠
Hanna CL IPad WebRTC	•

Encounters

View virtual encounters for your practice.



- 1. Select **Encounters** from the left navigation panel.
- 2. User the Filter right panel to sort by Waiting Room, Care Location, Location, Consult Note Statuses, and Filter by.

Browser

<	Encounters				Î	Filters	Clear All
Queue	Date Smith, Johnny	Reason for Visit	Location	Provider		Period of Time	
Care Locations	02/11/2021 04:41 PM Solo ID 723210 DOB 01/	1/1950 Headache, Fever, Achy	-	-		Select	×
Encounters	Date Smith, Johnny 02/11/2021 04:38 PMs Solo ID 723200 DOB 01/	Reason for Visit 1/1950 Headache, Fever	Location	Provider —		Service Select Service	~
Services	Date Smith, Debbie	Reason for Visit	Location	Provider		Locations	
	02/11/2021 04:22 PM Solo ID 723130 DOB 01	1/2001 Headache, Fever	-	-		Q Select Locations	~
	Date Smith, Bobby 02/11/2021 03:39 PM Solo ID 722990 DOB 01	Reason for Visit Headache, Fever	Location	Provider —		Filter By	
	Date Smith, Jane	Reason for Visit	Location	Provider		My Encounters	
Add Service +	02/11/2021 02:48 PM Solo ID 722620 DOB 01/	1/1960 Headache, Fever, Achy	-	-			

Services

A Practice Admin can add, edit, and configure Services for different patient journeys, questionnaires, data capture, and surveys.

- 1. Select Teladoc Health's logo from the upper, left section of the window.
- 2. Select **Services** from the left navigation panel.
- 3. The middle panel will populate with a list of Services.
- 4. The blue circle provides the number of patients for each Service.



<	Services	
Le Queue	Q Search Your Service	
Care Locations	Calgary Hospital	• •
÷ Encounters		
Services	California Wellness	3 \$ >
	Goleta Hospital	\$ →
	Santa Barbara Clinic	\$ >

Add Services

1. From the left navigation panel, select the plus sign icon next to Add Services.



2. Enter a Service Name, Service Line, and Service Type.



Create Service
Service Name
Service Waiting Room Save
Service Line
Select a Service Line 🗸
This field is required
Service Type
Select a Service Type 🗸 🗸
This field is required
Patient Journey 1
Care Locations
Welcome Page
Patient Authorization
Instructions
Demographics
Demographics Extra

3. Use the drop down menu for the Service Line and Type.

NOTE: You must first select the Service Line before the Type becomes active.



Service type	
Select a service type	~
Critical Care Medicine	
Anesthesiology	
Adult Cardiothoracic Anesthesiology	
Obstetric Anesthesiology	
Pain Medicine	
Pediatric Anesthesiology	

- 4. Enable the toggle switches by holding the mouse down and moving them to the right.
- 5. When enabled, the color of the toggle switch will turn green.



6. Scroll down to **Patient Journey** to configure the patient's InTake process.

Service Toggles

Toggles are broken up into Patient Journey and General Settings.

Toggle Categories	Toggles
Patient Journeys	<u>Care Locations</u>
	Welcome Page
	Patient Authorization
	Instructions
	Demographics
	Demographics Extra
	Eligibility
	Reasons for a Visit
	Smart Vitals
	Scheduling
	Insurance
	<u>Consent Forms</u>
	Medical Questionnaires
	• <u>Telehealth</u>
	• <u>Survey</u>



Toggle Categories	Toggles
	• Thank you
	• Emergent
General Settings	Hours of Operation
	Reasons
	<u>Visit Window</u>
	Patient Notifications
	Permissions to Enter
	Group Calling
	EHR Mapping
	Select a Service Page
	Share Services
	Mandatory Fields Encounter
	Allow Only New Patients
	<u>Set Max Video Resollution</u>

Care Location

The Care Location toggle must be enabled for Services.

- 1. Click on the Care Location toggle to enable a selection of Care Locations
- 2. As you type, a list of available **Care Locations** will populate the dropdown menu.
- 3. Select a Care Location to enable the toggle.

Welcome Page

The **Welcome Page** toggle enables patients to view virtual encounters after they check-in. This is a default toggle and will always be on.

Patient Authorization

The **Patient Authorizatio**n toggle enables on-demand encounters when a patient is not invited.

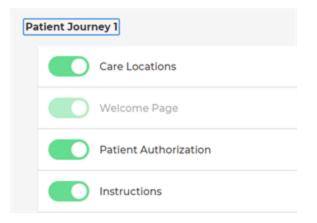


- 1. Select the **Patient Authorization** toggle to enable options for patient authorization codes.
- 2. Select the radio button for **By email** or **By member ID** to enable the toggle.

Instructions

The **Instructions** toggle enable a configurable page to allow the practice to present instructions or information to patients at the beginning of the intake process for any reason. Generally, they are instructions about how to complete the intake process or what to do if they are experiencing an emergency.

1. Click on the Instructions toggle to enable it



Demographics

The **Demographics** toggle enables information to be collected during the check-in process. Choose one or more types.

- 1. Select **Demographics** to enable a list of demographic information.
- 2. Click on each radio button for each piece of demographic information your practice will require or select **Select All**.

Instructions	Demographics
Demographics	Z Address
Demographics Extra	Cender



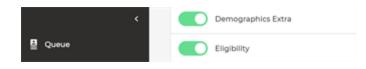
- 3. When done, select and slide the **Demographics** toggle to the right.
- 4. Select the **Demographics Extra** toggle to use electronic medical record (EMR)s.

Eligibility

The **Eligibility** toggle is a specific feature developed for clients to enable eligibility requirements for the Teladoc Health Intake module.

NOTE: Contact your Teladoc Health representative for more information.

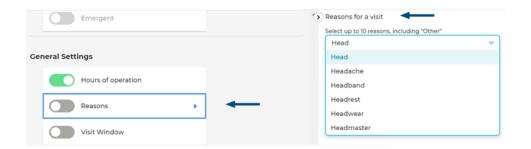
1. Click on the **Eligibility** toggle to enable it.



Reasons

The **Reasons** toggle enables up to 10 reasons for a patient's visit, including the option **Other**.

- 1. Type your practice's reasons.
- 2. As you type, matching results will populate the dropdown.



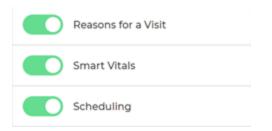


3. Once done, click and slide the **Reasons** toggle to the right.

Smart Vitals

The **Smart Vitals** toggle enables collection of vital from patients using a variety of approved peripheral devices.

1. Click on the Smart Vitals toggle to enable it.



Scheduling

The **Scheduling** toggle enables patients the ability to select their appointment time during the intake process.

Insurance

The **Insurance** toggle enables patients to enter their insurance plan and member ID during the InTake process.

NOTE: This module is only available if your organization purchased Teladoc Health's InTake module.

Consent Forms

The **Consent forms** toggle enables patients to receive specific forms used during the InTake process. These questionnaires are customizable. If you need other forms, contact your telehealth administrator.



1. Select the **Consent Forms** toggle to enable a selection of forms to choose from..

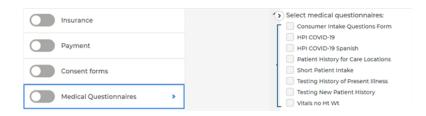
Insurance		Select consent	t forms:
Payment		Test Consen	t For Care
Consent forms	• 🗲		

- 2. Select a form by clicking on the checkbox next to each form.
- 3. When done, the **Consent forms** toggle will be enabled.

Medical Questionnaires

The **Medical Questionnaires** toggle enables a variety of available medical questionnaires for your practice. These questionnaires are customizable.

- 1. Select the **Medical Questionnaire** toggle to enable a selection of medical questionnaires.
- 2. Select one or more of them by clicking on the checkbox next to each medical questionnaire.



Telehealth

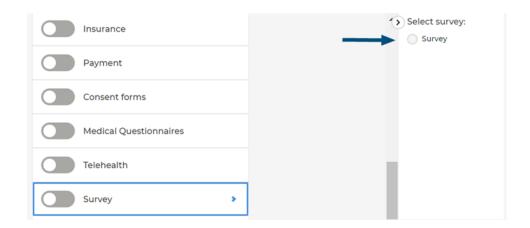
The **Telehealth** toggle enables the ability for a patient and Practitioner to have an virtual encounter.



Survey

The **Survey** toggle enables a variety of surveys to help patients evaluate their Practitioner. They may opt out. These questionnaires are customizable. If you need other forms, contact your telehealth administrator.

1. Click on the **Survey** toggle to enable a selection of surveys.



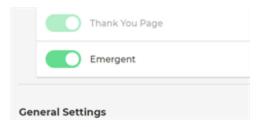
2. Select the default survey box to enable the toggle.

Thank You Page

By default a **Thank You Page** toggle enables patients to view when a virtual encounter has ended.

Emergent

The **Emergent** toggle enables the emergent care workflow.

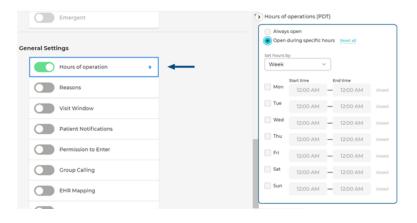




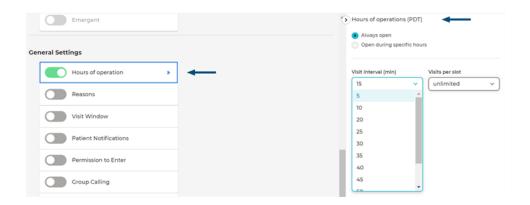
Hours of Operation

The Hours of Operation toggle enables hours to be configured for your Services.

- 1. Click on the Hours of Operation toggle to enable a selection.
- 2. Click on the radio button to choose either **Always open** or **Open during specific hours**. By default, hours of operation are configured on a weekly basis.
- 3. To configure hours of operation for specific dates, select
- 4. Individual Dates from the dropdown.



5. Use the dropdown menu to configure the length of time for each virtual encounter.





6. Use the **Visits per slot** dropdown to configure the number of visits per slot for your practice.

Emergent	1	Hours of operations (PDT)	-
General Settings		Always open Open during specific hours	1
Hours of operation	-	Visit interval (min)	Visits per slot
Reasons	·	15 ~	unlimited V
Visit Window			2 3
Patient Notifications			4 5

Reasons

The **Reasons** toggle enables up to 10 reasons for a patient's visit, including the option **Other**.

- 1. Type your practice's reasons.
- 2. As you type, matching results will populate the dropdown.

Emergent		Reasons for a visit	
		Select up to 10 reasons, including "Other"	
		Head	~
General Settings		Head	
		Headache	
Hours of operation		Headband	
Reasons	-	Headrest	
Reasons		Headwear	
Visit Window		Headmaster	

3. Once done, click and slide the **Reasons** toggle to the right.



Visit Window

The **Visit Window** toggle sets the time a patient can enter the virtual waiting room. It also defines how long after the designated appointment time the patient can use the appointment link.

1. Select the Visit Window toggle.

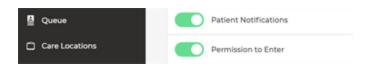
General Settings	Visit windo	w 🔶
Hours of operation	before	minutes
Reasons	after	minutes
Visit Window	←	

2. When done, the **Visit Window** toggle will be enabled.

۰ ۵	General Settings	Visit window
🗰 Dashboard	Hours of operation	Sefore 10 minutes
Queue 0/2	Reasons	after minutes
C Schedule	Visit Window	
Care Locations		

Permission to Enter

The **Permission to Enter** toggle enables practitioners to require participants to request permission before entering an encounter.





Group Calling

The **Group Calling** toggle enables Practitioners with the ability to invite and remove Practitioners and patients from a virtual encounter. Users can schedule an encounter with more than 2 participants.

TIP: This setting optimizes the patient's video quality and experience.

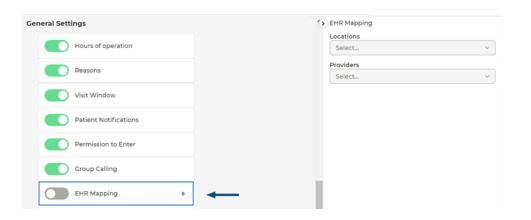
Visit Window	Description
Patient Notifications	Enabled: You can schedule multiple pat an appointment.
Permission to Enter	Disabled: Only one patient may be scheduled in an appointment.
Croup Calling	
EHR Mapping	

EHR Mapping

The Electronic Health Record Mapping toggle enables EHR mapping.

NOTE: Contact your Teladoc Health administrator before enabling this.

1. Click on the **EHR Mapping** toggle to enable a selection of Locations and Providers.





- 2. Type in the **Location** for your practice.
- 3. A dropdown menu will open as you type to provide you with matching options.

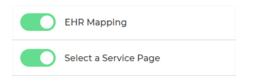
General Settings	3	EHR Mapping	
Hours of operation		Н	~
Reasons		Hanna Location Hope Wellness Clinic	
		Select	~
Visit Window			
Patient Notifications			
Permission to Enter			
Group Calling			
EHR Mapping	—		

- 4. Add **Providers** to the list by typing them into the field.
- 5. The **EHR Mapping** toggle will automatically be enabled when you fill in these fields.

Select a Service Page

The **Select a Service** toggle enables a service page to be customized. The selection of service pages must be configured at the practice level.

NOTE: This toggle can only be enabled if your organization purchased Teladoc Health's InTake Module.





Share Services

Share Services toggle enables users in another practice to have access to Services in another practice.

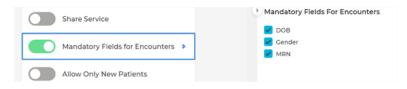
1. Select the **Share Services** toggle.

Select a Service Page	Recipient Email
Share Service >	Send Invite >
Mandatory Fields for Encounters	

- 2. Type in the **Recipient email**.
- 3. Select an option from the dropdown menu that opens as you type or add a **Recipient** email to the list by typing it into the field.
- 4. When done, select Send Invite.

Mandatory Fields for Encounters

The **Mandatory Fields for Encounters** toggle enables the Practice Admin to configure the date of birth (DOB), Gender, and MRN fields to be mandatory.



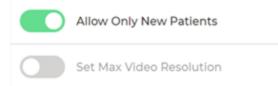
Only New Patients

The **Only New Patient** toggle ensures that patients will be created as new.

NOTE: The **Care Locations** and **Demographics** toggles must be enabled. The patient search page will not be displayed when both are enabled.

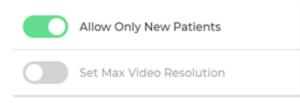


CAUTION: Users of emergent services cannot search for existing patients.



Set Max Video Resolution

The Set Max Video Resolution toggle enables maximum video resolution.



Save Services

Once you configure Services, scroll to the top and select **Save**. Services will be created immediately.

<	Create Service
Le Queue	Service Name
Care Locations	Service Waiting Room Save
• Encounters	Service Line
Services	Anesthesiology ~
	Service Type Adult Cardiothoracic Anesthesiology

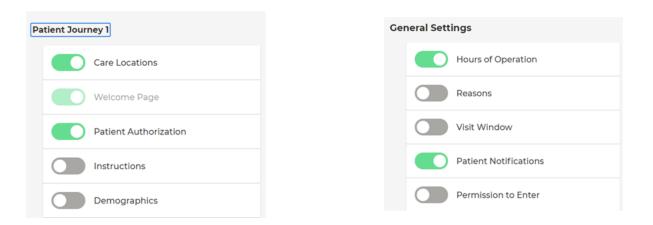


Edit Services

1. Select the gear icon from the **Services** bar in the middle panel.

<	Services	
Queue	Q Search Your Service	
📋 Care Locations	Calgary Hospital	▶ • ☆ >
÷ Encounters		
	California Wellness	3 ‡ →
	Goleta Hospital	•
	Santa Barbara Clinic	\$ >

- 2. Or double click on the Services bar in the middle panel to open the **Services Info** panel on the right to access the gear icon.
- 3. Modify the feature toggles under **Patient Journey** and **General Settings**.





4. Scroll to the top of the window and select **Save**.

<	Create Service
🛓 Queue	Service Name
Care Locations	Service Waiting Room Save
Encounters	Service Line
Services	Anesthesiology ~
	Service Type Adult Cardiothoracic Anesthesiology

5. Your changes will take effect immediately.

Add Users

Practitioner and other medical personnel must be added as members for access.

NOTE: Select **Complete** at any time to exit edit mode.

- 1. Select **Services** from the left navigation panel.
- 2. Select Services from the middle panel.
- 3. Services information will appear in the right panel
- 4. Select the pencil icon next to **Edit**.
- 5. Search for the new member in the **Search new member** box or in the text box, type the name of your user in **Members**. Matching names will appear as you type.
- 6. Select your user and Add.



Edit members	✓ Complete
Hidee Cher	
Add	+
Cheryl M Mayhem ()	•

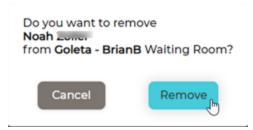
7. The new user will be added immediately.

Remove Users

- 1. Click the desired **Services** from the left navigation bar.
- 2. Services information will appear in the Patient Panel.
- 3. Select Edit from the Patient Panel.

NOTE: You can click **Complete** at any time to exit edit mode.

- 4. Click the X next to the name of the user to remove from a Services.
- 5. Select **Remove.**





Resources

Network Issues

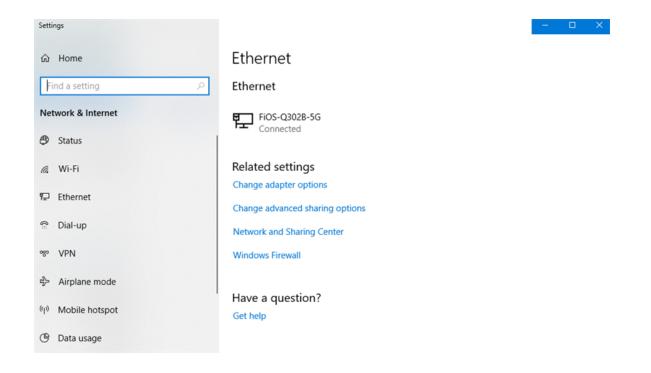
NOTE: If you are still experiencing issues after following these troubleshooting instructions, please contact your healthcare provider.

- <u>iOS</u>
- Windows
- <u>Mac</u>

Network for Windows

- 1. If using Ethernet, make sure your connection is good.
 - a. Open Settings.
 - b. Click Network & Internet.
 - c. Click **Ethernet**.
 - d. Make sure you have a valid Ethernet connection.





2. If you are still having issues, refer to <u>Fix Wi-Fi connection issues in Windows</u> or contact your Internet Service Provider.

Network for Mac

- 1. If using Ethernet, make sure your connection is good.
 - a. Launch System Preferences.
 - b. Click Network.
 - c. Make sure you see a green dot next to Ethernet as shown below.



$\bullet \bullet \circ \land \checkmark$		Network	<	Q Search
	Loc	ation: Automatic	•	
• Ethernet Connected	$\langle \cdots \rangle$	Status:	Connected	and have the 1D
Wi-Fi Connected	ŝ		Ethernet is currently active address 192.168.1.229.	e and has the IP
 Bluetooth PAN Not Connected 	寒	Configure IPv4:	Using DHCP	2
FireWire	FireWire	IP Address:	192.168.1.229	
Not Connected	Subnet Mask:	255.255.255.0		
		Router:	192.168.1.1	
		DNS Server:	192.168.1.1	
		Search Domains:	fios-router.home	
+ - &~				Advanced ?
				Revert Apply

2. If using Wi-Fi, make sure your Wi-Fi is enabled and you are connected to the fastest possible network If your Wi-Fi is enabled it will be dark with several arcs and not grayed out as shown below.



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



4. If you are still having issues, refer to <u>Connect your Mac to the internet</u> or contact your Internet Service Provider.

Network for iOS

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

2:04 PM Thu Apr 30	≈ 80% ■) Wi-Fi		
Settings Q Search	Wi-Fi ✓ FiOS- ♠ 중 (i)		
Included with your recent Apple device purchase. Must be accepted within 90 days of activation.	FiOS-		
Airplane Mode Image: Wi-Fi FiOS-Q302B-5G Image: Bluetooth	Ask to Join Networks Notify > Known networks will be joined automatically. If no known networks are available, you will be notified of available networks.		
Notifications Sounds	Auto-Join Hotspot Ask to Join > Allow this device to automatically discover nearby personal hotspots when no Wi-Fi network is available.		
Do Not Disturb Screen Time			

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



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

iOS Basics

The following is a description of the controls for an iOS device.

NOTE: The presence and locations of these ports and buttons vary depending on the iPad model and version. The iPad Dashboard is described below with the functionality described in the Elements table.

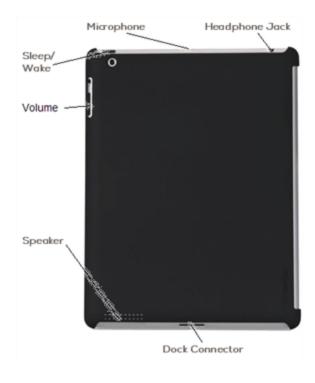
NOTE: The connector for the iPad pro has changed from Lightening to USB – C.

iPhone Controls

NOTE: Refer to https://www.apple.com/iphone/







Turn iPhone On

Press and hold down **Sleep/Wake** until the Apple logo appears.

Turn iPhone Off

Press and hold down **Sleep/Wake** the red slider appears on your screen. Drag the slider to the right to turn your iOS device off.

Locking Your iPhone

Press Sleep/Wake.

Unlocking Your iPhone

Press Home. Enter your passcode if required.



NOTE: It is recommended that your iPad / iPhone be locked with a passcode. Use the Touch ID to prohibit unauthorized access if your device is lost or stolen.

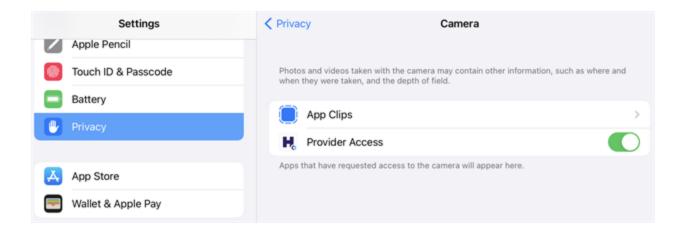


Adjusting Brightness and Volume

From the settings page, adjust the brightness, lock or unlock your screen orientation, or adjust the **Volume** slider. The iPad and iPhone volume slider, volume buttons, and the Teladoc Health Provider Access may all be used to adjust the volume.

Enable your camera and microphone



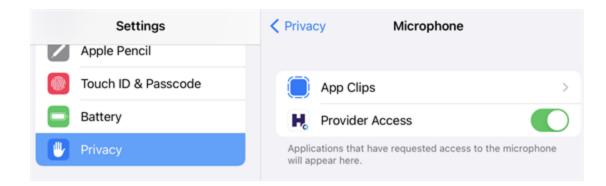


Select your camera features

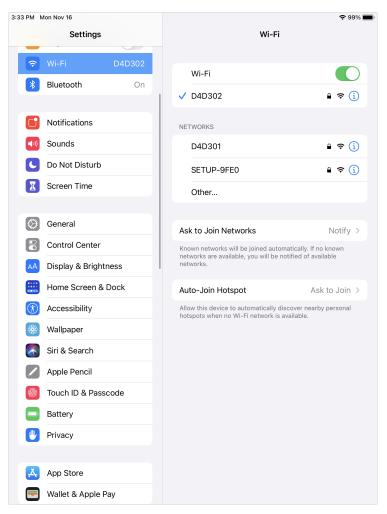
3:26 PM Tue Sep 29		奈 68% ■
Settings	Camera	
incougeo		
FaceTime	Formats	>
🧭 Safari	Record Video 108	30p at 30 fps >
News	Preserve Settings	>
Stocks	Scan QR Codes	
Maps		
Measure	COMPOSITION	
Shortcuts	Grid	
0	Mirror Front Camera	
Music		
ety TV	HDR (HIGH DYNAMIC RANGE)	
	Smart HDR	
Se Photos	Keep Normal Photo	
🙆 Camera	Smart HDR intelligently blends the best parts of separate exposures into a si the normally exposed photo in addition to the HDR version.	ngle photo. Save

Enable microphone





Enable your network settings

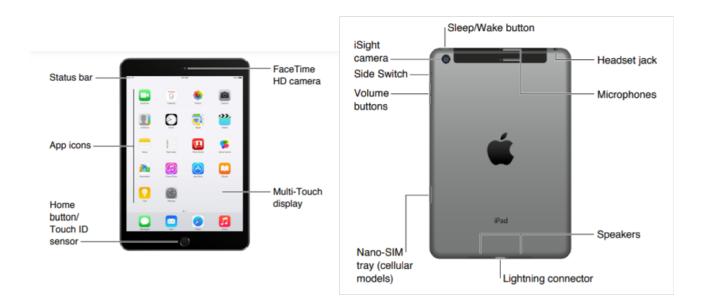




iPad Controls

The basic controls for the iPad are depicted below:

NOTE: All iPads (iPad, iPad Mini, and iPad Air) have a Lightning connector, but the iPad Pro has a USB-C connector instead. Refer to https://www.apple.com/ipad/.





HIPAA Procedures

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

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

Guidelines for Compliance

The telehealth system allows hospitals and medical professionals to remain in compliance with HIPAA privacy regulations. Teladoc Health is providing the following information to assist with HIPAA privacy regulations as they pertain to the telehealth system.

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

Access to Provider Access

The computer using the Provider Access should be placed in a location that is only accessible to individuals who have authorized access to Protected Health Information (PHI). It is recommended that Provider Access be password protected via a Windows or iOS user account.

Only authorized users should have passwords, and users should safeguard passwords according to hospital policies and procedures. Passwords should be treated as highly confidential information. If you believe your password may have been compromised, it should



be changed as soon as possible. Change your password by clicking on the "Forgot Password" link on the login screen of the Teladoc Health Provider Access.

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

Discussion and Display of PHI

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

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

Images and Video

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

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

• Ensure all personnel who have access to the Provider Access Software also have full permission to access stored images and videos under the hospital's policies and procedures;



- Make sure to store captured images and videos only on removable media (e.g., recordable CD-ROMs) which can be taken with each user or on secure network drives;
- Do not save to disk any captured images and video clips. Use these images and video segments only while logged in for a virtual encounter.

Disclosure of PHI

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



Contact Information

24/7 Live Technical Support

+1 (877) 484-9119

+1 (877) 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/

Please contact your Teladoc Health Account Representative for product User Manuals





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