



Solo[®] Escalation Policies

USER GUIDE

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Definition of "Device"

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 Federal Food, Drug, and Cosmetic (FD&C) Act.

In addition, the term "mobile devices" refers to smartphones and tablets.



Virtual Care System

Solo[®] integrated virtual care platform

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.

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 any time. 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, 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 workflows.



Solo[®] Care Coordination Overview

This guide is for Emergent Notification Routing and Escalations 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.



TigerConnect and QGenda Feature Overview

Automated User Pairing

When a client admin opens the scheduling or messaging integration pages, Solo[®] users will be automatically paired with users from the client's scheduling/messaging tool. This automation simplifies the process of managing user relationships and ensures accurate pairing.

Note: If the user used a different email address, or Auto-Merge is otherwise not working, you can make a pair manually. See page 12 for more information on manual pairing.

Scheduling and Messaging Integration

Column displays which integrations each user is configured for. This provides a clear overview of user settings.

Integration pages support the National Provider Identifier (NPI) for pairing users ensuring more accurate and reliable user pairing.

Each user entry on the TigerConnect and QGenda Settings pages includes:

- A date, time and time zone stamp indicating the last time the entry was updated or revised.
- The full name of the user for better identification and management.
- The users email and/or NPI number.

User Tabs separate paired and unpaired users. This allows client admins to easily switch between views and manage users effectively.



Manual User Pairing for TigerConnect and QGenda

Preconditions

- The users exist in the clients TigerConnect and/or QGenda applications.
- The users have been assigned to a task (schedule).
- A Solo[®] Practitioner Admin or Practice Admin user role is required to pair users.

How to pair users manually

 Navigate to Users Profile > Practice Settings > QGenda Settings or TigerConnect Settings

The integration of Solo[®] and TigerConnect/QGenda will automatically display users from both applications that have the same unique email address. If the user used a different email address, or Auto-Merge is otherwise not working, you can make a pair manually.

2. Select two users to pair manually > Pair Manually

NOTE: If a client admin makes a change to their scheduling application, then they can click on "Synchronize with the External System" to manually sync any recent schedule changes. Clients external scheduling application will be automatically synced with Solo[®] every 10 minutes.

The Paired users will then be displayed under the "Paired Users" section of the page. The paired user(s) can then be added into an escalation policy/path. See page 15 for more info about escalation policies.



Paired Users Overview

| Teladoc. | Q. Patient Name or Identifier | | | G |
|--------------------------|---|--|----------------------|--|
| < | TigerConnect Settings | | | Synchronize with the External System |
| Practice Settings | | | | |
| Messaging Visits | Unpaired Users Paired Users | | | |
| Practice Labels | | | | Q. Filter by Name, Email or NPI |
| Patient Profile | Solo | TigerConnect | Integrated Platforms | |
| Practice Users | Chris Casas thedemo2024+chris@gmail.com | Chris Casas ccasas@teladochealth.com | QGenda, TigerConnect | Θ |
| Default User Settings | Esther Esther thedemo2024+esther@gmail.com | Esther Wong esther.wong@teladochealth.com | QGenda, TigerConnect | Θ |
| Default Service Settings | Eugene Danilenko thedemo2024+eugene@gmail.com | Eugene Danilenko edanilenko@teladochealth.com | QGenda, TigerConnect | Θ |
| Care Locations | Jeffrey Pierce thedemo2024+jeffrey@gmail.com | Jeffrey Pierce jpierce@teladochealth.com | QGenda, TigerConnect | Θ |
| Patient Groups | Sandy Kalyan santhu.it11+tstqgenda3@gmail.com | Sandy Kalyan santhuit11+tstqgenda3@gmail.com | QGenda, TigerConnect | Θ |
| Locations | Santhi Provider santhu.it11+tstqgenda2@gmail.com | Santhi Provider santhu.it11+tstqgenda2@gmail.com | QGenda, TigerConnect | Θ |
| | Santhiya Bhuvanesh santhuit11+tstqgenda1@gmail.com | Santhiya Bhuvanesh santhu.it11+tstqgenda1@gmail.com | QGenda, TigerConnect | Θ |
| Departments / Programs | Scott Fowler thedemo2024+scott@qmail.com | Scott Fowler scott.fowler@teladochealth.com | QGenda, TigerConnect | Θ |
| Escalation Policies | Vince Kuppamala thedemo2024+vince@gmail.com | Vince Kuppamala vkuppamala@teladochealth.com | QGenda, TigerConnect | Θ |
| TigerConnect Settings | | | | |
| QGenda Settings | | | | |
| | | | Last Updated: 1 | 0/02/2024 02:09 PM PDT by Santhiya Bhuvanesh |



Escalation Policies

Preconditions

- Client must have an integration with their external notification's application.
- Clients must have an integration with their external scheduling application.
- Users must be paired between Solo[®], Notifications and Scheduling applications as mentioned above.
- Users must be scheduled in the clients scheduling application.
- A Solo[®] Practitioner Admin user role is required to pair users.
- Only Emergent encounter-based visit types from the encounter dashboard are supported.
- Only emergent workflows are supported.

Creating an Escalation Policy

1. Navigate to Users Profile > Practice Settings > Escalation > Create Escalation Policy

| Teladoc. | Q, Patient Name or Identifier | | | G |
|--------------------------|------------------------------------|---------------------|-------------------------|----------------|
| < | Escalation Policies | | Create Esc | alation Policy |
| Practice Settings | | | | |
| Messaging Visits | Policy Name | Services | Last Modified | |
| Practice Labels | EEG Service Policy | | 04/15/2024 12:48 PM PDT | |
| Patient Profile | Stroke Weekday Shift Protocol | | 04/15/2024 01:06 PM PDT | |
| Describes Harver | Cardiology Weekday Shift Policy | | 06/06/2024 03:17 PM PDT | |
| Practice Users | ED Behavioral Health Weekend Shift | | 06/06/2024 03:17 PM PDT | |
| Default User Settings | new1 zzz | | 07/04/2024 12:40 PM PDT | |
| Default Service Settings | EEG Night Call Service | EEG Services | 09/13/2024 04:03 AM PDT | |
| Care Locations | dsfgsdfg | | 09/19/2024 07:05 AM PDT | |
| Patient Groups | Stroke Service Nights and Weekends | Cardiology Services | 10/17/2024 11:20 AM PDT | |
| Locations | | | | |
| Integrations | | | | |
| Departments / Programs | | | | |
| Fax Contacts | | | | |
| Escalation Policies | | | | |
| TigerConnect Settings | | | | |
| QGenda Settings | | | | |
| 🖆 Exit Settings | | | | |

- 2. In General Settings add:
 - The "Policy Name" of the escalation policy you are adding.



- "Service" associated with the escalation policy.
- Set the "Decline/Ignore Protocol".
- Select if you want to "Restart the escalation policy when it ends".
- Select if you want to "Also notify providers for incoming shifts".
- 3. Customizing name of Path 1 > Pencil icon > Edit Path 1 name > Apply

| Teladoc. | Q Patient Name or Identifier | | G |
|--------------------------|---|---------------------------|---|
| < | Services | | • |
| Practice Settings | PPM Hub Stroke Service × PPM Spoke Stroke Service × | × | |
| | Decline/Ignore Protocol * | | |
| messaging visits | Proceed through paths | ~ | |
| Practice Labels | Restart the Escalation Policy when it ends | | |
| Patient Profile | Also notify providers for incoming shift | | |
| Practice Users | Overlap time * 5 min | utes | |
| Default User Settings | | | |
| Default Service Settings | Stroke Provider Group | Apply Cancel | ŵ |
| Care Locations | Who to potify | Response time allowance * | |
| Patient Groups | | O seconds | |
| Locations | Add Backup for Path 1 | | |
| Integrations | Notification message * | | |
| Departments / Programs | | | |
| Fax Contacts | 0/1,500 maximum characters | | |
| Escalation Policies | ▲ Tags | | |
| 🛨 Exit Settings | Add Path | | |

4. Add "Who to notify" using the type-ahead in the dropdown.

| Services Practice Settings Messaging Visits Practice Labels Patient Profile Practice Labels Patient Profile Practice Settings Default User Settings Default Service Settings Care Locations Patient Groups Locations Patient Groups Locations Patient Settings Default Service Settings Care Locations Patient Groups Locations Patient Profiles Patient Groups Locations Patient Groups Locations Patient Settings Default Service Settings Care Locations Patient Groups Locations Patient Groups Locations Patient Groups Locations Patient Settings Default Settings Default Settings Stroke Provider Group Integrations Notification message* Departments / Programs Fax Contacts Pig Exalation Policies | Teladoc. | Q Patient Name or Identifier | | G |
|---|--------------------------|---|-----|---|
| Practice Settings Messaging Visits Practice Labels Pation Proble Practice Users Pation Proble Pation Softings Default User Softings Default Service Settings Pation Locations Pation Locations Pation Softings Default Service Settings Pation Locations Pation Softings Default Service Settings Stroke Provider Group Who to notify Notification message* Depathments / Programs Fac Contacts V1:300 realmum duaraters Escalation Policies Add Path | < | Services | | ^ |
| Messaging Visits Pictice Labels Practice Labels I bet start the Esclation Policy when it ends Patient Profile I controlly provides for incoming shit Practice Labels I controlly provides for incoming shit Practice Usors Overlap time * s minutes Default User Settings Stroke Provider Group Care Locations Wino to notify Patients / Pograms Add Backup for Stroke Provider Group Integrations Netification message * Departments / Pograms I control stroke Provider Group Add Backup for Stroke Provider Group Cate Locations Netification message * Opartments / Pograms Fax Contlacts 0.1500 manimum characters Escalation Policies Add Path | Practice Settings | PPM Hub Stroke Service × PPM Spoke Stroke Service × ✓ | | |
| Messagily Visis Proceed through paths Practice Labels Restart the Scalation Policy when it ends: Patent Profile Image: Control of the start of the scalation Policy when it ends: Patent Profile Image: Control of the start of the scalation Policy when it ends: Patent Profile Image: Control of the start of the scalation Policy when it ends: Patent Profile Image: Control of the start of the scalation Policy when it ends: Patent Profile Image: Control of the start of the scalation Policy when it ends: Patent Profile Image: Control of the start of the scalation Policy when it ends: Patent Profile Image: Control of the start of the scalation Policy when it ends: Patent Profile Image: Control of the start of the scalation Policy when it ends: Patent Profile Image: Control of the start of the scalation Policy when it ends: Patent Profile Image: Control of the start of the scalation Policy o | M | Decline/Ignore Protocol * | | |
| Practice Labels Patient Profile Patient Profile Patient Profile Patient Profile Default User Settings Default Service Settings Service Provider Group Who to notify Response time allowance * 0 0 Seconds User Settings Add Backup for Stroke Provider Group Vin Storke Provider Group Add Backup for Stroke Provider Group Vin Storke Provider Group Seconds United settings Add Backup for Stroke Provider Group Vin Storke Revider Settings Seconds United settings Seconds United settings Seconds United settings Add Bath | messaging visits | Proceed through paths V | | |
| Patient Profile Practice Usors Default User Settings Default Service Settings Care Locations Patient Groups Care Locations Patient Groups Locations Locations Integrations Departments / Programs Fax Contacts Escalator Policies Locations Tage | Practice Labels | Next steps if a provider declines or doesn't respond to a consult request Restart the Escalation Policy when it ends | | |
| Practice Users Oerlap time * s minutes Default User Settings Default Service Settings Care Locations Patient Groups Cators Add Backup for Stroke Provider Group Anount of time before moving to next step Locations Add Backup for Stroke Provider Group Integrations Patient Sropanss Fax Contacts 0.150 maximum diracters Escalation Policies * Tags | Patient Profile | Also notify providers for incoming shift | | |
| Default User Settings Default Service Settings Care Locations Patient Groups Locations Locations Locations Integrations Departments / Programs Fax Contacts Escalation Policies Locations Locations Add Bath | Practice Users | Overlap time * 5 minutes | | |
| Default Service Settings Carl Locations Patient Groups Locations Locations Locations Locations Add Backup for Stroke Provider Group Add Backup for Stroke Provider Group Add Backup for Stroke Provider Group Departments / Programs Fax Contacts Escalation Policies Locations Fax Settings | Default User Settings | | | |
| Care Locations Patient Groups Locations Locations Add Backup for Stroke Frovider Group Integrations Papartments / Programs Fax Contacts 0/1500 maximum characters Escalation Policies Add Path | Default Service Settings | Stroke Provider Group | Ø 🛈 | |
| Patient Groups 0 seconds Locations Add Backup for Stroke Provider Group Integrations Notification message* Departments / Programs 0 Fax Contacts 0/1500 maximum characters Escalation Policies Add Path | Care Locations | Who to notify Response time allowance * | | |
| Locations Add Backup for Stroke Provider Group Integrations Notification message * Departments / Programs V. Stoff and message * Fax Contacts 0/1.500 maximum characters Escalation Policies Add Path | Patient Groups | O seconds Til Amount of time before moving to next step | | |
| Integrations Notification message * Departments / Programs Image: Contacts Fax Contacts 0/1500 maximum characters Escalation Policies Image: Contacts f Excl Settings Ad Path | Locations | Add Backup for Stroke Provider Group | | |
| Departments / Programs Image: Contacts Fax Contacts Image: Contacts Escalation Policies Image: Contacts fr Exit Settings Ad Path | Integrations | Notification message * | | |
| Fax Contacts U/1500 maximum characters Escalation Policies Add Path | Departments / Programs | | | |
| Escalation Policies Add Path | Fax Contacts | 0/1,500 maximum characters | | |
| C Exit Settings Add Path | Escalation Policies | ▲ Tags | | |
| | | Add Path | | * |

NOTE

You can create one or multiple "Who to notify" steps in an escalation path. The



number of paths is limited to 5 and the number of steps is limited to 10

NOTE See page 15 for more information on task-syncing with QGenda

5. Add the Response Time Allowance (in minutes), which is the amount of time that elapses before the next step.

NOTE Clicking on the "Trash" icon will remove the "Who to notify" step.

6. Add custom messaging in "Notification Text" by adding available Tags.

| HEALTH | Q Patient Name or Identifier | | | | |
|----------------------|--|--|---|---|-----|
| ~ | | | | | |
| ctice Settings | Stroke Provider Group | | | 4 | 1 1 |
| saging Visits | Who to notify | Response tim | e allowance * | | |
| ice Labels | Primary Physicians (L1 am) \times | 120 Amount of time | seconds | Ŵ | |
| nt Profile | Who to notify | Response tim | e allowance * | | |
| | Secondary Physicians (L2 am) \times | 120 Amount of time | seconds | Ŵ | |
| ice Users | Who to notify | Response tim | e allowance * | | |
| It User Settings | Tertiary Physicians (L3 am) × | ~ 60 | seconds | ŵ | |
| ult Service Settings | | Amount of time | before moving to next step | | |
| Locations | Add Backup for Stroke Provider Group | | | | _ |
| ent Groups | I I I I I I I I I I I I I I I I I I I | | | | |
| tions | | | | | |
| rations | 0/1,500 maximum characters V Tags | | | | |
| rtments / Programs | Location Id Location Name Service Id Service Name Care Locat Patient MRN Encounter Id Encounter Reasons Encounter Created | tion Id Care Location Name Pat By Encounter Created At Practi | ient Full Name Patient Preferred P ce Id Practice Name Last Know | Name Patient Gender Patient DOB vn Well Time Physician Callback Number | |
| Contacts | Requesting Provider | | | | |
| lation Policies | Add Path | | | | |
| | | | | | |
| Exit Settings | Cancer | | | | |

NOTE

Make sure all required field denoted by an asterisk (*) are completed prior to the next step

ΝΟΤΕ

See page 16 about adding Smart Note fields as tags to Notification Text

Configured "Notification message" example:



| | Secondary Physicians (L2 am) $	imes$ | 120 Amount of t | seconds | 觉 |
|------------------|--|--|---------------------------------------|---------------------------------------|
| ice Settings | Who to notify | Response | ime allowance * | |
| | Tertiary Physicians (L3 am) \times | ~ 60 | seconds | ŵ |
| aging Visits | | Amount of t | me before moving to next step | |
| ce Labels | Add Backup for Stroke Provider Group | | | |
| Profile | Notification message * | | | |
| (FIUIIIe | Patient: Patient Full Name | | | |
| e Users | Gender: Patient Gender | | | |
| | DOB: Patient DOB | | | |
| User Settings | MRN: Patient MRN | | | |
| | Location; Location Name | | | |
| Service Settings | Service: Service Name | | | |
| | Reason(s): Encounter Reasons | | | |
| ocations | Created by: Encounter Created By | | | |
| | Created Date/time: Encounter Created At | | | |
| Groups | LKW: Last Known Well Time | | | |
| | Requesting Provider: Requesting Provider | | | |
| ıs | Callback Number: Physician Callback Number | | | |
| | 453/1,500 maximum characters | | | |
| ons | ✓ Tags | | | |
| | Location Id Location Name Service Id Service Name | Care Location Id Care Location Name | Patient Full Name Patient Preferred N | Jame Patient Gender Patient DOB |
| ents / Programs | Datiant MPN Concurter Id Encounter Pagrant Encou | unter Created Ru Encounter Created At Dr | estica Id Brastica Name Last Know | e Well Time Bhuriciae Callback Number |
| | Patient Milly Encounter to Encounter Reasons Encou | inter created by Encounter Created At | actice to Practice Ivame Last Know | n weil time Physician Caliback Number |
| acts | Requesting Provider | | | |

7. Click "Create" to complete the set-up. Click "Cancel" to discontinue creating a new escalation policy and changes will not be saved.

| NOTE |
|---|
| You can create one or multiple escalation paths with different recipients and |
| notification messages |

Linear Escalation Policy with Decline/Ignore Protocol

Administrators can configure an escalation policy with Decline/Ignore Protocol set to "Proceed through Paths." When this protocol is set, the following occurs:

- Instant transition to subsequent steps once a provider declines within the primary Paths.
- Accept and decline buttons maintain visibility across all Path steps in the client messaging tool.
- Parallel processing across multiple paths; a decline in a Path triggers subsequent steps in Path 1 and additionally configured concurrent paths.
- Unaffected continuity for concurrent paths if a user chooses to ignore a step within Path 1.
- Trigger of a new escalation policy step upon user's decline button action, persisting the button in the UI for reference.
- System-generated browser notification to inform users of consult declination.



Restarting an Escalation Policy after the Policy Ends

An admin can restart the escalation policy from the beginning after it processes the last step. This feature ensures continuous attempts to address consult requests until a practitioner accepts the consult or the maximum cycle limit (10 cycles) is reached.

Escalation Policy Restart Options

Automatic Restart

Once all "Who to notify" steps in an escalation policy have been processed without a practitioner accepting the consult request, the policy will automatically restart from Path 1, "Who to notify" steps.

Immediate Restart

If the last step of the escalation policy is configured with zero-time allowance, the first step will begin immediately after the last step ends.

Configuring Restart Options

A configuration called "Restart the Escalation Policy when it ends" is located under General Settings. A checkbox is located under the Decline/Ignore Protocol options to enable or disable this feature.

NOTE

The default setting is OFF. When ON, the escalation policy will continue to execute, process, and restart for up to 10 cycles.

Error Messaging for Unsynchronized Tasks between an Escalation Policy and QGenda

Admins are promptly notified within Solo[®] when a task synced with Qgenda is deleted or becomes unsynced, enabling swift action to maintain the integrity of escalation policies and uninterrupted notifications.

Upon deletion of a Qgenda-synced task, Solo[®] will display an error state below the affected step in the corresponding escalation policy.

The error message "One or more tasks have been revised in your scheduling tool. Review and resync." Alerts administrators to the task deletion, prompting them to



take corrective action in Qgenda to avoid disruptions to notifications and potential impacts on patient care.



Error message:

| 2 Patient Name of Identifier | | | | 0 |
|--|---------|---|--------------|---|
| Create Escalation Policy | | | | |
| General Settings | | | | |
| Policy Name * | | | | |
| Neurology Policy | | | | |
| Services * | | | | |
| Service Name X | .v | | | |
| | | | | |
| Decline/ Ionore Protocol * | | | | |
| Decline/ Ignore Protocol * Proceed through paths free streps if a provider declines or duesn't respond to a consult responded to be a consult respon | v. | | | |
| Decline/ Ignore Protocol * Proceed through paths Next stress if a provider declines or dwesn't respond to a consult respondence of the stress | et. | | | |
| Decline/ Ignore Protocol * Proceed through paths frest steps if a provider declines or dwear's respond to a consult regar Path 1 This is the first communication outreach made. Who to notify * | el. | Response time allowance * | | |
| Decline/ Ignore Protocol * Proceed through paths frest steps if a provider declines or devent's respond to a consult reput Path 1 This is the first communication outreach made. Who to notify * On Call Providers Group 1 × | * #L | Response time allowance * seconds | ¹ | |
| Decline/ Ignore Protocol * Proceed through paths Next steps if a provider declines or dwern't respond to a consult responder Path 1 This is the first communication outreach made. Who to notify * On Call Providers Group 1 × On Coll Providers Group 1 × | eti. | Response time allowance * seconds Amount of time before moving to text recipients | Đ | |
| Decline/ Ignore Protocol * Proceed through paths Next steps if a provider declines or dwern't respond to a consult respondent Path 1 This is the first communication outreach made. Who to notify * On call Providers Group 1 1 X © One of more tasks face been resided in your scheduling tool. Resided Add Backup for Path 1 | ed. | Response time allowance * seconds Amount of time before moving to next recipients | ŵ | |
| Decline/ Ignore Protocol * Proceed through paths frest steps if a provider declines or dwern't respond to a consult repor Path 1 This is the first communication outreach made. Who to notify * On Call Providers Group 1 × On Call Providers force 1 × Notification message * | est. | Response time allowance * seconds Amount of time before moving to next recipients | Đ | |
| Decline/ Ignore Protocol * Proceed through paths frest steps if a provider declines or devent's report to a consult report Path 1 This is the first communication outreach made. Who to notifly * On Call Providers Group 1 X On Call Providers Group 1 X Notification message * Placeholder text | eti. | Response time allowance * Seconds Amount of time before moving to next recipients | | |

Adding Smart Note fields as tags to Notification Messages

Administrators can incorporate smart notes fields as tags in escalation policy notification messages. This ensures that providers receive comprehensive patient information, empowering them to make informed decisions regarding consult requests. Providers will receive notifications enriched with additional patient information, enabling them to render decisions effectively.

Note about Delayed Tag Application:

- To ensure tagged data is included in notification messages, a 5-second delay is implemented for each consult creation. This accommodates variations in data availability depending on the method of encounter creation.
- If there is a change in the JSON template at the service level, then the tags will disappear from the escalation policy notification messages and will appear blank in the provider's message.

• If a service is removed from an escalation policy, then the then the tags will disappear from the escalation policy notification messages and will appear blank in the provider's message.

There is no error message to indicate tags will be removed from escalation policies if the JSON template is removed from the service.

| Teladoc. HEALTH | Q Patient Name or Identifier | | | 6 |
|--------------------------|---|---|--|---|
| č | Secondary Physicians (L2 am) $	imes$ | 120 seconds | Ŵ | * |
| `_ | | Amount of time before moving to next step | | |
| Practice Settings | Who to notify | Response time allowance * | | |
| | Tertiary Physicians (L3 am) × | 60 seconds | ŵ | |
| Messaging Visits | | Amount of time before moving to next step | | |
| Practice Labels | Add Backup for Stroke Provider Group | | | |
| Detient Deefle | Notification message * | | | |
| Patient Prome | Patient: Patient Full Name | | | |
| Practice Users | Gender: Patient Gender | | | |
| | DOB: Patient DOB | | | |
| Default User Settings | MRN: Patient MRN | | | |
| | Location: Location Name | | | |
| Default Service Settings | Service: Service Name | | | |
| | Reason(s): Encounter Reasons | | | |
| Care Locations | Created by: Encounter Created By | | | |
| | Created Date/time: Encounter Created At | | | |
| Patient Groups | LKW: Last Known Well Time | | | |
| | Requesting Provider: Requesting Provider | | | |
| Locations | Callback Number: Physician Callback Number | | | |
| 100000000 | 453/1,500 maximum characters | | | |
| Integrations | ✓ Tags | | | |
| Dopartmonte / Programe | Location Id Location Name Service Id Service Name Care Location Id Care Lo | cation Name Patient Full Name Patient Preferred P | Name Patient Gender Patient DOB | |
| Departments / Hograms | Patient MRN Encounter Id Encounter Reasons Encounter Created By Encounter I | Created At Practice Id Practice Name Last Know | vn Well Time Physician Callback Number | |
| Fax Contacts | Requesting Provider | | | |
| Escalation Policies | Add Path | | | |
| ← Exit Settings | Create | | | |

NOTE

To implement this feature, contact the support team. They will update the JSON templates with the required JSON configurations.



Escalation Process and Execution

Confirming an escalation policy is executed

Preconditions

- A new patient record and encounter were added.
- User(s) were paired across applications (Solo®, QGenda and TigerConnect).
- User(s) were scheduled.
- User(s) received an "Alert" notification in their Messenger.

| 83 | Teladoc Health - DEV - Q | | Chris Casas CC |
|-----------|--------------------------|---|----------------|
| Messenger | | You're On Duty: Telehealth Provider 1 | |
| Roles | Inbox 🛛 Alerts | Alerts (1) | |
| | Alerts | 11/01/24 2:11 PM | 1 |
| Broadcast | History | Teladoc Escalation Notifications Patient: Phianna Gomez Gender: femal DOB: 03/29/1961 MRN: 764RTY56 Location; PPM Spoke Stroke Service Reason(5): Slured speech, Numbress, Dizziness Created by: Starter Esther Created Date/lime: 110/12024 2:11 PM PDT LKW: 110/12024 2:01 PM Requesting Provider: Dr. Purdy Callback Number: 0987654321 Accept Decline | |
| | | | |

How it works

Once the user accepts the new consult request in their "Alerts", a new message will be sent to their "Inbox", with the Solo® Consult Link. Users can click on the Solo® Consult Link to launch them directly to the consult in the Encounter page.

- Accepting a consult stops the configured escalation policies.
- **Declining** a consult immediately notifies the next configured user(s).
- Ignoring a consult immediately notifies the next configured user(s).

In General Settings, if a user configures the "Decline/Ignore Protocol" to "Stop



Escalations and Contact Decline Recipients", and a user "Declines" a consult, then the primary paths and steps are stopped, a Decline Path commences (if configured), and recipient(s) are notified.

If the primary user(s) in a configured step "Ignores" the consult, then the secondary user(s) in a configured step are notified.

- If primary and secondary user(s) in configured steps "Ignores" the consult, then confirm the tertiary user(s) in a configured step are notified
- If primary, secondary and tertiary user(s) in configured steps "Ignores" the consult, then the user(s) in the next configured step are notified.

New Consult Follow up Message to Provider in TigerConnect

Providers who accept a new consult request in TigerConnect Messenger will automatically receive a follow-up message in their inbox containing a Solo® Visit URL along with relevant patient information.

After a provider user accepts a consult in their TigerConnect Messenger "Alert Box", they will receive a second message in their "Inbox" (not Alert). The follow-up message will include the same notification text and a URL link to the Solo® consult. Tagged data from the notification message will be included under the URL. The message will be labeled "Solo® Consult Link."

NOTE

Admins do not need to configure the URL in the notification text. The system will automatically include it in the follow-up message.

Follow-up message example:



| | You're On Duty: Telehealth Provider 1 | |
|---|---|--|
| Inbox - Alerts | AS API Service (DEV MULTI ORG) | |
| API Service (DEV MULTI 2:11 PM Solo Consult Link: https://ppm | 105 PM 10 days with | |
| Chat w Eugene's new ac Oct 30 Chris: Yes, she need "permissi 1/2 Read | Solo Consult Link: <u>Inter/Inter/Inter/Inter/Inter/Inter/Contentsr</u> patientid=1369918tvisitid=8124511#rjoht-column Patient: Fiona Applet | |
| Jeff Cook | Dors: 07/21/1981 MRN: 3765678H0DFGH Location: PM Socke Location | |
| Steve Hickenbottom | Service: PPM Spoke Stroke Service Reason(s): Confusion, Balance, Numbness Created by: Esther Esther | |
| JP Jeffrey Pierce | Created Date/time: 11/01/2024 1-47 PM PDT LKW: 11/01/2024 1-06 PM PDT LKW: 11/01/2024 1-06 PM Requesting Provider: Dr. Dragone Cellesati M. New - 10724 CT020 | |
| Eugene Danilenko, Jeff Cook, | Caliback Number: 1234567890 2:11 PM 10 days left | |
| 8 | Solo Consult Link: <u>https://ppm.visitstaging.org/all-encounters?</u> patienttRinana Gomez Gender: female DDB: 03/29/061 MRN: 724RTY56 Location: PPM Spoke Location Service: PPM Spoke Location Service: PPM Spoke Storke Service Reason(s): Sturred speech, Numbress, Dizziness Created Dts:Exther Estine Created Date/time: 11/01/2024 2:11 PM PDT LKXV: 10/01/2024 2:01 PM Requesting Provide: D: 9/2r54321 2:11/PL Startes | |

Unassigning Provider(s) from a Consult Request

When a provider or another user "unassigns" a previously assigned consult, the consult becomes available to notify other providers in the practice. This ensures consults are efficiently managed and reassigned according to the configured escalation policies.

If unassigned, the configured escalation policy will resume, notifying recipient(s) in the next configured step of the Path according to the policy.

Once all configured steps of the policy are processed, or if there are no other steps configured, the policy will stop after the last step of the path unless the client configures the path to restart.

NOTE An escalation policy can be configured to be executed from Path 1 to a Decline Path1.

Encounter Audit Log Events

Assigned Provider events are logged in the encounter audit log, capturing essential data to uphold standards of care, ensure compliance, mitigate risks, and enhance communication and collaboration. This provides admins with real-time access to critical actions, ensuring comprehensive tracking and transparency for consult management.



The following actions are included in the audit log:

- Provider Assigned to a Consult
- Provider Unassigned to a Consult
- Provider Reassigned to a Consult
- Provider Declined a Consult

Solo[®] Escalation Policy Reporting

Solo[®] Escalation Policy Reporting data is available through the HHS Data Teams SQL Server Reporting Services (SSRS) (commonly known as the BI Reports Portal). Using this portal, clients can subscribe to data sets on a daily/weekly/monthly basis. The Teladoc Health FleetOps team manages the email subscription services.

This includes new data elements and formats per the Solo® Escalation Policy Data Dictionary, recipient action tracking for each action (accept, decline, ignore, unassign), and a row for each notified recipient. Concurrent consult calculations for newly created, unassigned consults, and time since encounter calculations are also included. Ignored events are excluded but can be reviewed in the encounter audit log or user activity logs. Ignore actions display time since in hh:ss format relating to the response time allowance. Historical data can be applied to new column headers in case of path name changes.

User Activity Log Events

Escalation policy events are in the User Activity Logs (UALs) in Super Admin to enhance tracking and transparency of user actions related to consult management. Detailed logging of key user events provides valuable insights and accountability.

New user events added in User Activity Logs include:

- User accepted (assigned) to a consult, logs when a user accepts and is assigned to a consult.
- User unassigned from a consult, logs when a user is unassigned from a consult.
- User declined a consult, logs when a user declines a consult.
- User Did not respond to a consult, logs when a user does not respond to a consult.



Each event in the User Activity Logs will include the following common data elements:

- Username, the name of the user who took the action.
- User Role, the role of the user within the system.
- Datetime of Action, the date and time when the action occurred.

Configuration and Usage

- The new user events will be visible in the User Activity Logs accessible to Super Admin users.
- These logs will help track and audit user actions related to consult management, improving oversight and operational transparency.

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Teladoc Health is the global virtual care leader, helping millions of people resolve their healthcare needs with confidence. Together with our clients and partners, we are continually modernizing the healthcare experience and making high-quality healthcare a reality for more people and organizations around the world.

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