![Northern Light Health]

From the Office of Clinical Informatics

Quick Reference Guide (QRG)
Provider Telehealth Scheduled Visit Workflow

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This Quick Reference Guide (QRG) reviews the provider telehealth scheduled visit workflow.

Review Provider Telehealth Scheduled Visit Workflow

➢ **From the Ambulatory Organizer:**

STEP 1: Click your patient's name to open their chart.

STEP 2: Click the **Telehealth** component.

Confirm Your Display Name

STEP 1: Click Settings.

STEP 2: Replace the Display Name if necessary; then, click Save.

NOTE: To exit without making any changes, click Cancel.

Send an Invitation Link

STEP 1: From the Telehealth component, click Invite.

STEP 2: Select the appropriate contact method using the drop-down arrow; then click Send.

Start the Visit

STEP 1: Click Start Visit in the Telehealth component.

NOTE:

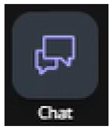
- The Visit Preview window displays your camera's current view and allows you to turn your camera and microphone on or off before you join the visit.
- If prompted at any point, click Allow to grant access to your microphone and camera.

STEP 2: Click Join Visit.

STEP 3: Carry out your discussion with your patient.

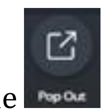
NOTE: Once you join a visit, you can perform various visit-related actions and view patient information using the following left-hand icons:

- **Use the** 

Participants icon to invite another participant to the call.
- **Use the** 

Chat icon to send real-time messages to participant(s) using the Write a Message field.
- **Use the** 

Patient Record icon to view your patient's conditions, medications, lab results and allergies during the call.

STEP 4: During your discussion with the patient, click the 

Pop Out icon at the bottom of the video pane to free the patient video pane from the Telehealth Visit window, allowing you to move the patient's video to any location.

NOTE: The floating patient video can be dragged and dropped anywhere on your screen(s). This allows you to see the patient while documenting their information.

STEP 5: Click the History of Present Illness text field.

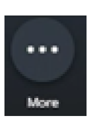
NOTE: You must complete the HPI for all Telehealth visits.

STEP 6: Type /telehealth*; then double-click the SmartText to open the Telehealth template.

STEP 7: Document the Telehealth template with the appropriate information based on the patient visit.

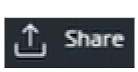
STEP 8: At the conclusion of the visit, hover over the patient's floating video pane; then click Back to Tab to re-open the Telehealth Visit window.

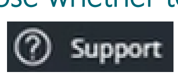
Access Additional Telehealth Visit Features

STEP 1: Click the 

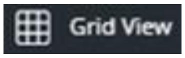
More icon to access additional features

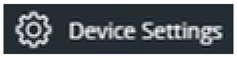
NOTE:

- Click 

Share to show participants other content within the screen during the call. Choose whether to share a Microsoft Edge tab, a window, or your entire screen.
- Click 

Support to get help with meeting functionality issues.

- Click 

Grid View to change the screen layout so that multiple participants can display at the same time.
- Click 

Device Settings to change the background effects, microphone options, and/or speaker connections.

<u>End the Visit</u>

<u>STEP 1</u>: Click the  End icon; then click 

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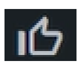
<u>STEP 2:</u> If you select 

, you will be disconnected from the call while the patient remains connected to the call while they wait for another staff member to join.

<u>STEP 3</u>: Note the length of the call for billing purposes.

<u>STEP 4</u>: Click the  Thumbs Up or  Thumbs Down icon to rate the audio and video quality of the call.

<u>STEP 5</u>: Click the X Close Button to exit the Telehealth Visit window.

<u>Document the Patient as a No Show</u>

<u>STEP 1</u>: From the Ambulatory Organizer, click Arrived in the Status column.

<u>STEP 2</u>: Select No Show from the drop-down menu.