

2 Provider TeleHealth Instructions

2.1 Creating a TeleHealth appointment

For instructions on creating appointments in general you can read the [Using The Calendar](#) tutorial from the OpenEMR wiki.

2.1.1 Open the Calendar

2.1.2 Choose a time slot and open a new calendar appointment. TeleHealth sessions can only be launched if it is within two hours of the server time.

2.1.3 Set the Appointment Category field to either of these two values:

2.1.3.1 **TeleHealth Established Patient**

2.1.3.2 **TeleHealth New Patient**

Category:

2.1.4 Choose a patient and set any other appointment details like you normally would for a patient appointment.

2.1.5 Hit the Save button

2.1.6 Verify the appointment created with the TeleHealth icon indicating it is a TeleHealth session.

2.2 Launching a TeleHealth appointment

2.2.1 Navigate to the Calendar

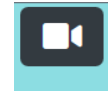
2.2.2 Click the video launch icon next to the patient's name.

2.2.3 The launch icon's are color coded to represent the status of the session. The legend for the types of launch icons are:

2.2.3.1 Blue for sessions that are available to be launched



2.2.3.2 Black for sessions that have passed the two hour launch period



2.2.3.3 Green for appointments that have been completed and can no longer be launched.



2.2.4 Confirm that you wish to launch an appointment. If this is the first encounter of the day for this client it will create a new encounter. If the appointment belongs to another clinician it will copy the appointment into your own calendar and mark the clinician's appointment as having been transferred to you.

2.2.5 Grant Access to your local microphone and camera. You must have at least one of these devices working in order to join the session.

2.2.6 Press the Join Now button to start the telehealth session. Your patient will be unable to join until you press the join now button.

A screenshot of a web browser window titled "TeleHealth Session" with a close button in the top right corner. The main content area is split into two sections. On the left is a large black video player with a blue "Join Now" button and a microphone icon at the bottom. On the right is a patient information panel for "Susan Philsberry" with her date of birth (2003-09-01) and age (18). Below this is an "Appointment Agenda" section with a blue "Join Now" button.

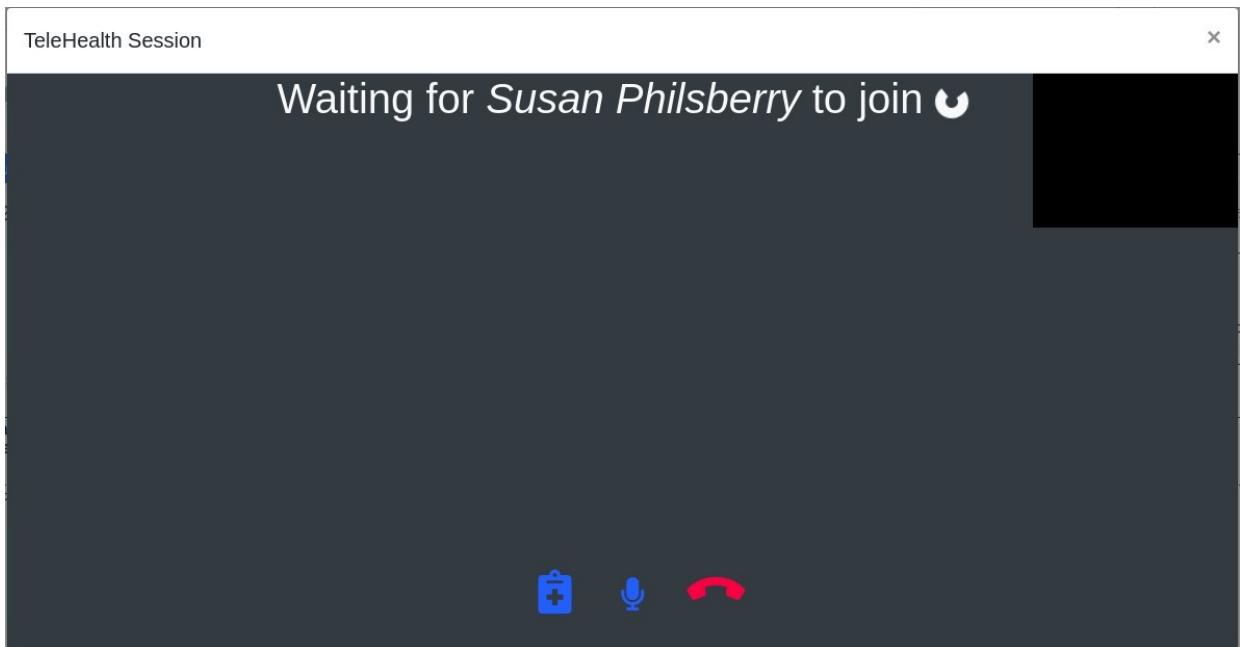
TeleHealth Session

Susan Philsberry
DOB: 2003-09-01
AGE: 18

Appointment Agenda

Join Now

2.2.7 Now wait for your patient to join the call



2.3 Enable / Disable Video & Microphone

2.3.1 To turn off your camera press the video camera icon. Press the icon again to turn it back on.



2.4 Minimize / Maximize Session to take notes

2.4.1 During your TeleHealth session if you need to record vitals, add encounter forms, or do other work inside the EMR while you are working. You can hit the notes clipboard icon to minimize the video window.



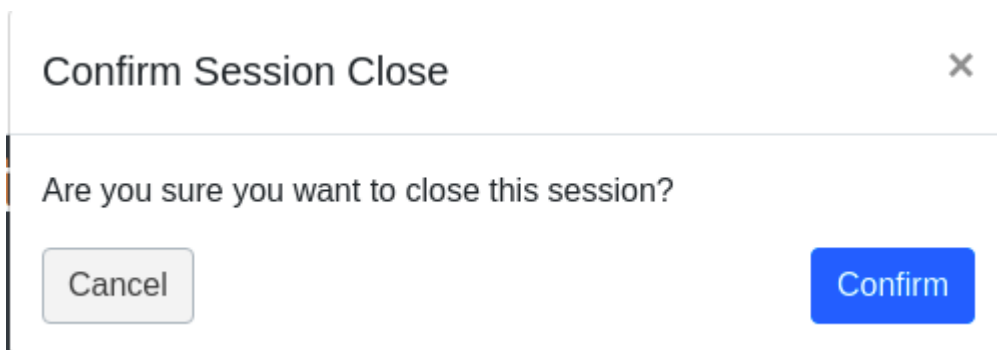
2.4.2 If you wish to expand the video session hit the expansion icon.



2.5 Ending Session call

2.5.1 To end the session press the hangup button

2.5.2 You will be asked to confirm that you wish to close the session.



2.5.3 Press the Confirm button

2.5.4 Update the appointment status. You can choose to not update the appointment, mark the appointment as a No Show, or mark the appointment as the appointment as complete and the patient has left. Choosing one of these buttons will close the session immediately.

2.5.5

Update appointment status



2.5.6 If another status option is better for the appointment you can choose one from the dropdown list.

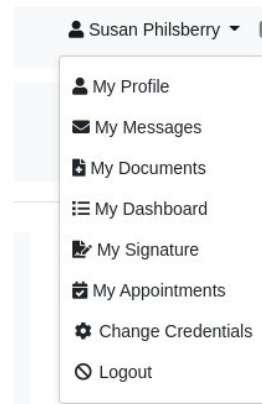


2.5.7 When you choose another status option, press the **Set Status** button to update the status and close the session.

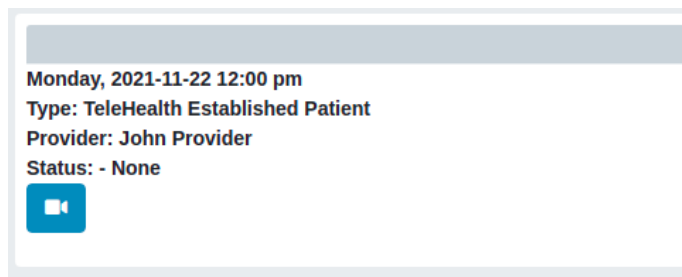
3 Patient TeleHealth Instructions

3.1 Launch an existing TeleHealth appointment

3.1.1 Login and open the Appointments tab

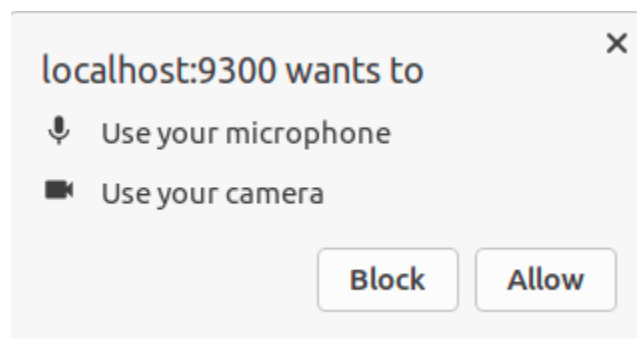


3.1.2 Find the session you wish to launch



3.1.3 Click the Launch TeleHealth session icon for your session

3.1.4 Grant permission to your microphone and camera



3.1.5 Wait for your provider to join

3.1.6 Hit the Join button to launch your session.



- 3.2 Schedule a new TeleHealth appointment
 - 3.2.1 Login and navigate to your Appointments screen
 - 3.2.2 Click the Schedule New Appointment screen

Schedule A New Appointment

- 3.2.3 Choose from one of the two options for the Visit dropdown
 - 3.2.3.1 TeleHealth New Patient
 - 3.2.3.2 TeleHealth Established Patient

Request New Appointment ×

Visit: TeleHealth Established Patient ▼ Date:

Time: : PM ▼ Patient: Philsberry, Susan

Duration: 15 minutes

Provider: Provider, John ▼ Openings

Reason:

Save

- 3.2.4 Select your provider you wish to make an appointment with and hit the **Openings** button
- 3.2.5 Choose one of the available time slots. If your provider has not created any openings for the date range you choose you will not see any slots open.

| Day | Available Times |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Tuesday 2021- 11-23 | AM |
| | 8:30 8:45 9:00 9:15 9:30 9:45 10:00 10:15 10:30 10:45 11:00 11:15 11:30 11:45 |
| | PM |
| | 12:00 12:15 12:30 12:45 1:00 1:15 1:30 1:45 2:00 2:15 2:30 2:45 3:00 3:15 3:30 3:45 4:00 4:15 4:30 4:45 5:00 5:15 5:30 5:45 6:00 6:15 6:30 6:45 7:00 7:15 7:30 7:45 8:00 8:15 8:30 8:45 9:00 9:15 9:30 9:45 10:00 10:15 10:30 10:45 11:00 11:15 11:30 11:45 |

3.2.6 Once your time is selected hit the Save button to save your appointment.

3.2.7 Your appointment status will show as pending until your clinic has confirmed the appointment.

Tuesday, 2021-11-23 9:30 am

Type: TeleHealth Established Patient

Provider: John Provider

Status: ^ Pending