

ComLink Telehealth

Provider Instructions

Introduction

The Comlink Telehealth module has three distinct workflows, one for each type of user that interacts with it.

1. Administrator setup
2. Provider's Session Instructions
3. Patient's Session Instructions

The Comlink Telehealth module is written for desktop computers but is also compatible with tablet devices. Both Providers and Patients may use a tablet, for either conducting or participating in the telehealth session.

This tutorial presents a large amount of detailed information. In order to make it easier to use, an abbreviated Quick Reference Guide is included at the end.

A comprehensive online writup of the Comlink Telehealth module can be found in the OpenEMR wiki page:

https://www.open-emr.org/wiki/index.php/Comlink_Telehealth

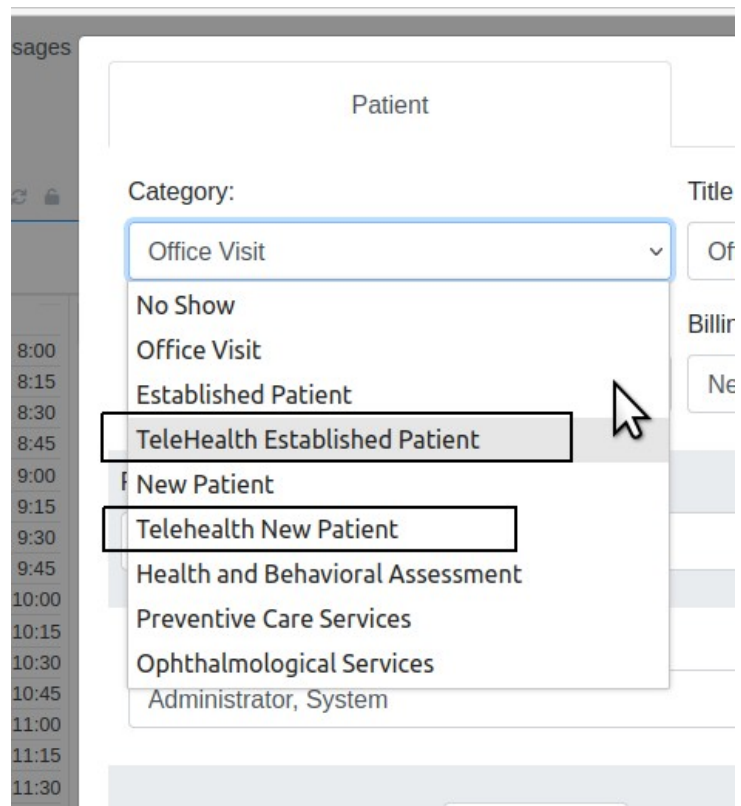
Provider's Session Instructions

A telehealth session must be associated with a patient's appointment. One benefit of this requirement is that the encounter form for that session is available for editing during the telehealth session. This will be shown later in these docs.

Create telehealth appointment

A telehealth appointment is made in the same manner as any other appointment. Specifically, how to make an the appointment is described in the Comlink page linked above, in the section, 'Schedule a new Telehealth appointment'

1. For a telehealth appointment use either of the two telehealth appointment categories:

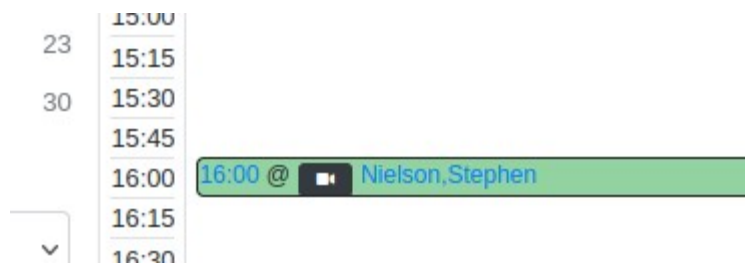


2. Fill out the appointment details as usual

- Telehealth sessions may be launched within 2 hours before or after their scheduled appointment time

3. Click 'Save' at bottom of the event dialog to create the appointment.

- The camera launch icon in the calendar's appointment listing designates an appointment as a telehealth session:



The launch icons show the status of the session.

- These colors can be different with different OpenEMR themes.
- Blue for sessions that are available to be launched
- Black for sessions that have passed the two hour launch period

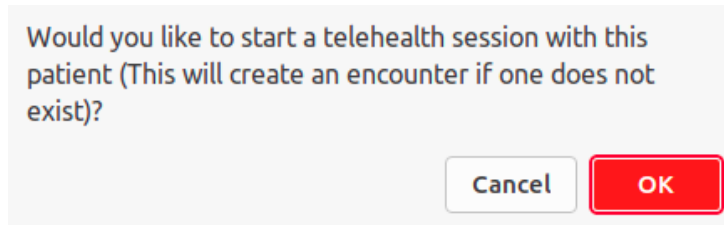


- Green for appointments that have been completed and can no longer be launched.



Launch the telehealth appointment

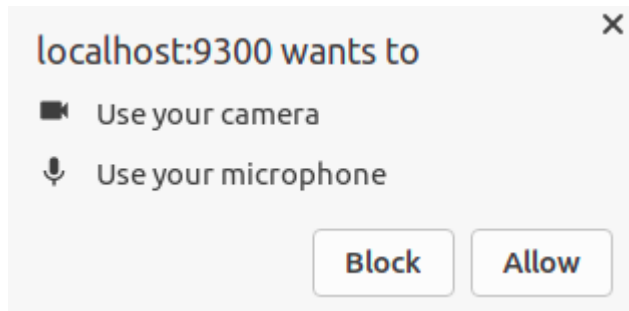
1. Open the the calendar screen
2. Click the video launch icon next to the patient's name (pictured in step 3 above)
3. Press OK to confirm that you wish to launch an appointment.



Note:

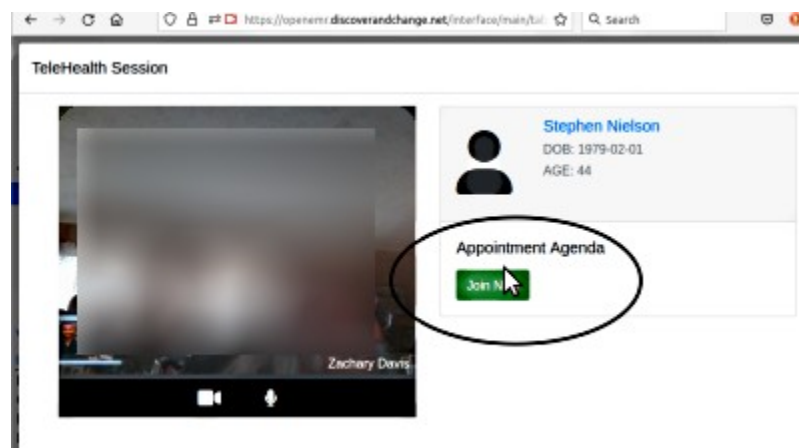
- If this is the first encounter of the day for this client it will create a new encounter.
- If the appointment belongs to another clinician it will copy the appointment into your own calendar and mark the clinician's appointment as having been transferred to you.
- If this is a pending appointment scheduled by a staff member or a patient, the appointment will have its pending status removed.
- If the patient is not currently selected for this appointment, OpenEMR will load with the current patient and the encounter for this appointment.
- If you have configured the patient portal and Notifications section, the system will send an email to the patient with a link to join the session.

4. Grant Access to your local microphone and camera.

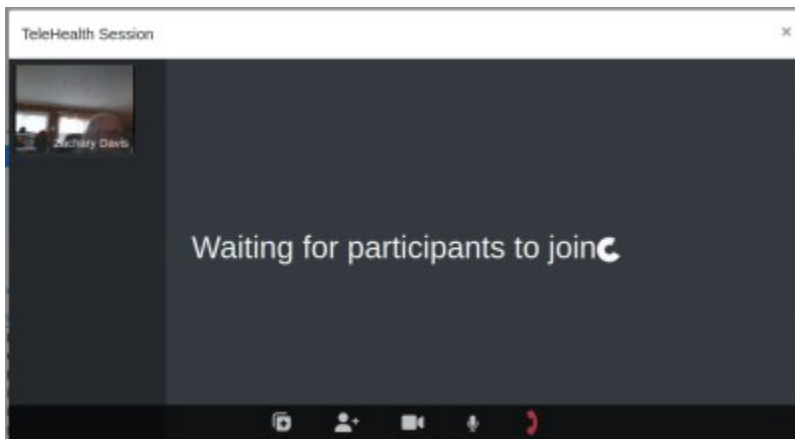


- You will be unable to join the session until you have granted access to at least one of these devices.
- The permission request may look different on your device depending on the device and browser used. For example you may be asked to allow the browser to 'record' sound and video.

5. Press the 'Join Now' button to start the Telehealth session (oval below)



- Your patient will be unable to join until you press the 'Join Now' button.



- You are now in the Telehealth Appointment waiting room where you can wait for the patient to join the call.

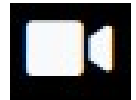
Telehealth Session Conference Room Controls

Show / Hide Room Controls

- Once the patient joins the session the room controls are shown along the bottom edge of the session panel.
- They disappear after five seconds of inactivity. Move the mouse (or tap the screen on a touch screen device) to display the controls again.

Enable / Disable Video

- Click the video camera icon to toggle your camera off or on.



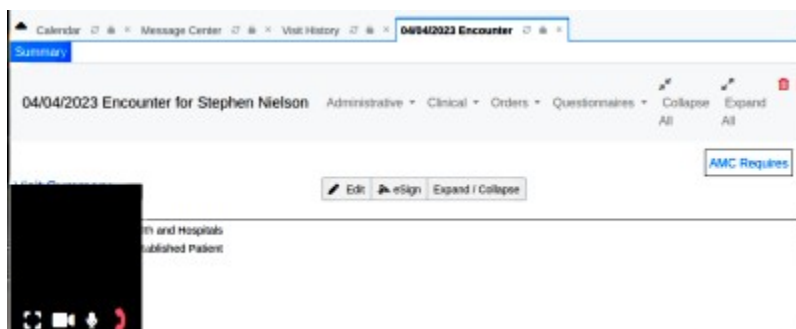
Enable / Disable Microphone

- Click the microphone icon to toggle your microphone off or on.

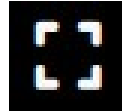


Minimize / Maximize Session For Note Taking

- During your telehealth session you may add notes or other information to the encounter form while you are working.
- Click the notes clipboard icon to minimize the video window and view the encounter form.



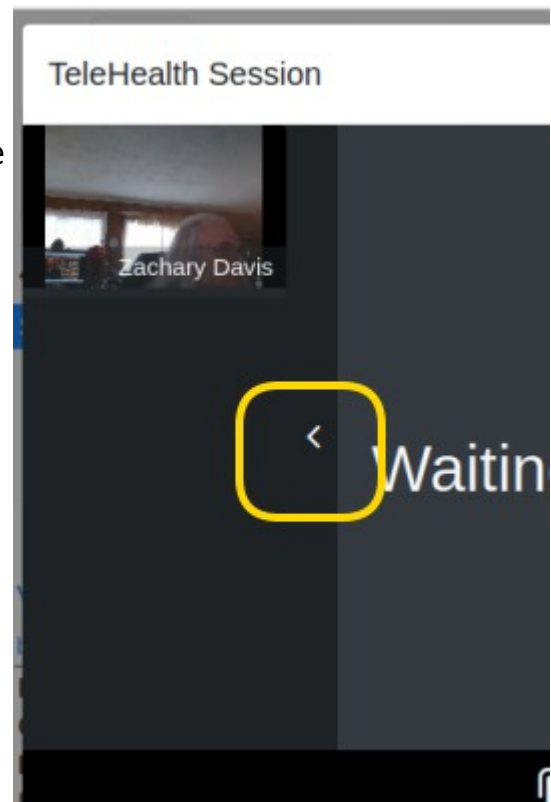
- Click the expansion icon to restore the video window.



- You can drag the minimized window to a new location for the session and it will remember your settings during the current video session.

Collapse participants / expand participants

- On large screen display devices the participant list is automatically displayed. You can collapse or expand the participant sidebar by pressing the expand or collapse icons. ('<' or '>')
- This function not available on tablets



Inviting Third Party Participant


- Once the session has begun one additional participant may be invited to join the session.
- It can be a current patient of the practice, or you may add a new patient to the practice's patient roster.

Click the 'invite Participant' icon to launch the Invite Third Party Participant dialog.



Invite Third Party Related Person×

Participants



Test User 4
example@gmail.com

Copy Invite Link Copy Invitation

Change Third Party Invitation


Add Existing PatientInvite New Patient

- ***Attempting to invite a second participant will replace the currently invited third party patient.***

Third Party Invitation – New Patient

1. Choose the Invite New Patient button to launch the New Patient Creation Screen

Invite Third Party Related Person×



Confirm that this individual has provided permission to receive electronic communications via email

CancelCreate Patient

2. Enter the following required data to create a new patient account

- First Name
- Last Name

- Date of Birth
- Email - the email address that the patient will use to login to the session and receive the email invitation to join the Telehealth session.
- Check patient's 'Demographics / Choices' selections and verify the participant has given permission to receive HIPAA communications via email
- Click 'Create Patient' button

3. The system will add the participant as a new patient, create their patient portal credentials, and send the participant an email with their patient portal credentials and an email with the link to join the Telehealth session.

Third Party Invitation – Existing Patient

1. On the Third Party Participant Dialog screen (picture above) choose the Existing Patient button.

Invite Third Party Related Person ×

External ID

Or

First Name

Last Name

Date of Birth YYYY-MM-DD

Email Address (Exact Match)

Cancel Search Patients

2. Search for an existing patient by:

- pid - The patient identifier number if you know it; it is different from an 'external ID' which may be issued by the practice. Exact matches only.
- First or last name - matches text appearing anywhere in the name
- date of birth - search by different formats:

- year (YYYY)
- year and month (YYYY-MM)
- complete DOB (YYYY-MM-DD)

3. Click 'Search' button to display a list of the matching patients


4. Select the Invite Patient button to invite that patient (arrow below)

The patient will receive an email for them to join the session.

Email Address (Exact Match)

Cancel Search Patients



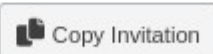
 Test User 4 (1)
 2000-01-01 example@gmail.com
 Invite Patient

 Test User 5 (2)
 2014-01-02 example+t5@gmail.com
 Invite Patient

Copy Participant Invitation Link

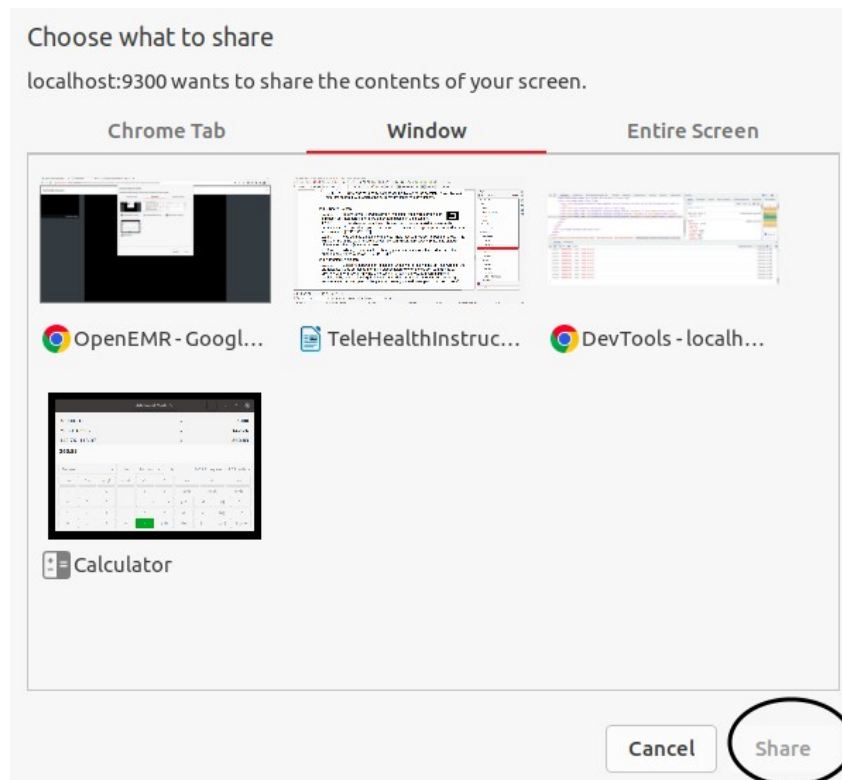
If you wish to use your own email service to send the invitation link or invitation message to a patient you can do so by selecting the Copy Invite Link button or Copy Invitation button to copy the link the participant can use to join the Telehealth session.

Participants

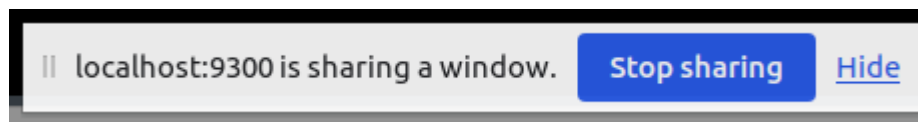
 Test User 4
 example@gmail.com
 

Share Screen

1. To share your viewing screen first select the share screen icon.
 - This icon only appears if there are other participants in the session.
2. Click on the the screen you wish to share
3. Click 'Share.' (oval below)



- A dialog will appear to state that your screen is being shared. Its position will depend on your browser.



4. Click the blue 'Stop Sharing' button (above) when you are finished sharing your screen.
 - Sharing not available on tablets.

Pinning Participant

Note: different browsers have different methods to remember sharing status. This applies to Chrome.

Selecting a participant's session window or pressing the pin icon



will lock the participant's video screen to the main presentation view of the screen so that you will always see them speaking while the session remains pinned. You can unpin the participant by again selecting their session window or pressing the pin icon. Pinning another session participant will unpin the currently pinned participant.

End Telehealth Session

1. Click the hangup button:



- You will be asked to confirm that you wish to close the session (not pictured)

2. Press the Confirm button in the dialog

Update the appointment status.

As with any other appointment, once it is completed you should update the appointment status.

Select the appropriate status from the options displayed or select a different one of these] 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.

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

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

Conclusion

This module is undergoing improvements so this documentation will be updated periodically. Feel free to email if you find discrepancies between the application and the docs!

- htuck@mi-squared.com

Quick Reference Guide to the Comlink Telehealth Module

Create telehealth appointment

A telehealth appointment is made in the same manner as any other appointment.

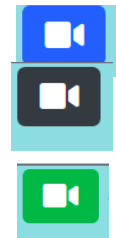
- use either of the two telehealth appointment categories:
- Telehealth sessions may be launched within 2 hours before or after their scheduled appointment time



On the Calendar: the launch icons show the status of the session.



- Blue sessions are available to be launched
- Black sessions that have passed the two hour launch period
- Green sessions are completed and can no longer be launched.



Launch the telehealth appointment

1. Open the the calendar screen
2. Click the video launch icon
3. Grant Access to your local microphone and camera.
4. Press the 'Join Now' button to start the Telehealth session
 - You are now in the Telehealth Appointment waiting room where you can wait for the patient to join the call.

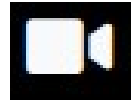
Telehealth Session Conference Room Controls

Show / Hide Room Controls

- Controls disappear after five seconds of inactivity. Move the cursor to display the controls again.

Enable / Disable Video

- Click the video camera icon to toggle your camera off or on.



Enable / Disable Microphone

- Click the microphone icon to toggle your microphone off or on.

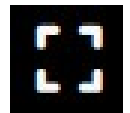


Minimize / Maximize Session For Note Taking

- Click the notes clipboard icon to minimize the video window and view the encounter form.



- Click the expansion icon to restore the video window.



- You can drag the minimized window to a new location for the session and it will remember your settings during the current video session.

Inviting Third Party Participant

- Once the session has begun one (and only one) additional participant may be invited to join the session.
- This can be an existing patient or a new patient whose record will be created in the EMR

Click the 'invite Participant' icon :



Third Party Invitation – New Patient

1. Click the 'Invite New Patient' button
2. Provide all information to create the new patient record

Third Party Invitation – Existing Patient

1. Click the 'Existing Patient' button.
2. Search for an existing patient by:

- pid – if known; it is different from an ‘external ID’ which may be issued by the practice. Exact matches only.
- First or last name – matches text appearing anywhere in the name
- date of birth – search by different formats:
 - year (YYYY)
 - year and month (YYYY-MM)
 - complete DOB (YYYY-MM-DD)

3. Click ‘Search’

4. Select the ‘Invite Patient’ button to invite that patient

- The patient will receive an email for them to join the session.

Share Screen

1. Click the share screen icon

- This icon only appears if there are other participants in the session.



2. Click on the the screen you wish to share

3. Click ‘Share.’

- A dialog will appear to state that your screen is being shared.

4. To stop sharing click the blue ‘Stop Sharing’ button

End Telehealth Session

1. Click the hangup button:



2. Click ‘Confirm’

Update the appointment status.

Optional but recommended

On closing the session a panel will appear offering status update.

Choose the appropriate status