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ABOUT THIS GUIDE

This guide explains the use of healow™ TeleVisits and the configuration required to perform the tasks related to healow TeleVisits in eClinicalWorks® Version 10. This guide describes the provider and patient views of healow TeleVisits.

This guide also contains an additional section on enhancements related to healow TeleVisits in eClinicalWorks Version 10e.

Product Documentation

The eClinicalWorks documentation supports the eClinicalWorks Electronic Medical Record (EMR), Practice Management (PM), and/or additional software features.

eClinicalWorks Documentation is available from:

- my.eclinicalworks.com Customer Portal https://my.eclinicalworks.com
  - click the Documents and Videos widget on the Knowledge tab to display the documents available in PDF format
  - click the HelpHub widget on the Helpdesk tab to display the documents available in the HelpHub
- eClinicalWorks application - from the Help menu, click the HelpHub link.

For more information, refer to the sections:

- Webinars
- eClinicalWorks Newsletter

Webinars

For more information, take advantage of the free unlimited eClinicalWorks Webinars—interactive seminars conducted Online. These courses are presented by product trainers who are experts with eClinicalWorks and all of its capabilities. To sign up for an eClinicalWorks Webinar, go to:


To view and register for Webinars, click the Knowledge tab and then click the Webinars widget.
eClinicalWorks Newsletter

To receive important, timely, and informative product notifications, subscribe to the eClinicalWorks Newsletter e-mailing list.

To subscribe to the newsletter:
- click the link available on the Customer Portal: https://my.eclinicalworks.com
- OR
- click the link available on the eClinicalWorks website: http://eclinicalworks.com/
- OR
- click the direct link: eClinicalWorks newsletter

Getting Support

For support-related issues, open a Support Case on the eClinicalWorks Customer Portal at: https://my.eclinicalworks.com

You may also call or e-mail eClinicalWorks Support:
- Phone: (508) 475-0450
- E-mail: support@eclinicalworks.com

Conventions

This section lists typographical conventions and describes the icons used to call out additional information and to indicate item keys, new features, and enhancements to the application.

- Typographical conventions:

<table>
<thead>
<tr>
<th><strong>Bold</strong></th>
<th>Identifies options, keywords, and items in a description.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Italic</strong></td>
<td>Indicates variables, new terms and concepts, foreign words, or emphasis.</td>
</tr>
<tr>
<td><strong>Monospace</strong></td>
<td>Identifies examples of specific data values, and messages from the system, or information that you should actually type.</td>
</tr>
</tbody>
</table>

- Icons are used to highlight new features and indicate enhanced features and item keys:
## About This Guide

### Conventions

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Indicates a Patient Safety feature.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Indicates an item key.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Identifies new features, suggested by clients, from the eCWideas website: <a href="http://ecwideas.eclinicalworks.com">http://ecwideas.eclinicalworks.com</a>.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Identifies new features.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Indicates enhanced features.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Points out helpful tips or additional information.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Indicates the feature meets a Meaningful Use requirement.</td>
</tr>
</tbody>
</table>

**Note to Cloud/SaaS Users:** When accessing the eClinicalWorks application via RDP (Remote Desktop Protocol) as a backup, be advised that Microsoft® Office® applications such as Excel® and Word® will not be supported.
healow TELEVISITS

healow™ TeleVisits provides a platform for a secure two-way video visit between the patient and the provider, enabling patient access to clinical healthcare from a distance. eClinicalWorks® practices can use healow TeleVisits to provide improved healthcare to their patients, by eliminating the hurdles of distance.

Providers can access healow TeleVisits from the eClinicalWorks application or from the healow agent on their system. Patients can access healow TeleVisits from the eClinicalWorks Patient Portal.

This section describes the setup and workflow for healow TeleVisits in eClinicalWorks Version 10. For an overview of healow TeleVisits and activation, refer to Overview. For more information on healow TeleVisit appointments, refer to healow TeleVisit Appointments.

Overview

The following sections describe the configuration required to access healow TeleVisits:

- Activating healow TeleVisits
- Activating Provider for healow TeleVisits
- Configuring healow TeleVisits Visit Type
- Associating Questionnaires
- Configuring E-mail Message Settings
- Downloading the healow Agent
- Configuring the healow Agent
- healow Agent General Settings
- Accessing the healow Agent

Activating healow TeleVisits

healow TeleVisits can be activated on demand by the practice from the Admin band in the eClinicalWorks EMR product. For more information about on-demand activation of eClinicalWorks products, refer to the eClinicalWorks On-Demand Product Activation Guide.
To activate healow TeleVisits:

1. From the Admin Band in eClinicalWorks, click the Product Activation icon.
   The Product Activation window displays.
2. Click Activate next to healow TeleVisit:
   
   ![Activation Screen]

   The healow TeleVisit Status window opens and the activation process begins. The activation process and the status of the activation displays.

   **Note:** An EMR/Portal upgrade may be required if the healow TeleVisits option does not display in the Product Activation window. Contact your eClinicalWorks Strategic Account Manager (SAM) if the healow TeleVisits option is not available.

3. Once the activation process is complete, a confirmation message displays.
4. Click OK.

   healow TeleVisits is activated.

   When healow TeleVisits is activated, the TeleVisit Compatibility Test menu changes to Show under the Admin band > Patient Portal Settings > Menu Settings:
The **Show** menu enables the **TeleVisit Compatibility Test** option to display on the Portal. Patients can run the healow TeleVisit compatibility test ahead of the healow TeleVisit appointment.

### Activating Provider for healow TeleVisits

Rendering providers that conduct the healow TeleVisits must be activated first before they can use the healow TeleVisits feature.

**To activate a provider for healow TeleVisits:**

1. From the Admin Band in eClinicalWorks, click the **Product Activation** icon.

   The Product Activation window displays.

2. Click **Settings** next to healow TeleVisits:
The healow TV Provider Activation window displays:

3. Enter the e-mail ID, NPI number, and the ZIP Code for the provider, and then click Register.

The provider is activated and the status displays as Active.

For more information on downloading the healow agent, refer to Downloading the healow Agent.

Configuring healow TeleVisits Visit Type

To display healow TeleVisits on the Chart Panel of the Progress Notes, the healow TeleVisits option for the visit type must be enabled. The healow TeleVisit visit type also triggers the questionnaire for patients to complete on the healow TeleVisit.

The healow TeleVisits check box in the Visit Type window will be visible only to providers that have been activated and registered for healow TeleVisits from the Product Activation window.
To enable the healow TeleVisits visit type:

1. From the Admin band, click the Admin icon.
   The Admin login window opens.
2. Enter the administrator username and password, and then click Login.
   The Admin window opens.
3. Click the User Admin heading in the left pane, and then click Visit Type Codes.
   The Visit Type Codes window displays.
4. Click Add to add a new visit type.
   To update an existing visit type, click the visit type.
   The Visit Codes window displays:

5. Enter a name and description for the healow Televisit.
6. Enter information in the other fields as required.
   For more information on these fields, refer to the System Administration Users Guide.
7. Check the healow TeleVisit box.
8. Click Save.
The healow TeleVisit visit type is configured.

**Associating Questionnaires**

The Form Settings window enables the practice to select the questionnaires and/or immunization forms to be filled out by patients in the Portal, and to map the questionnaire to the appropriate healow TeleVisit visit type.

**Note:** Questionnaires must be selected in the *Questionnaires to be uploaded to portal* section before they can be mapped to the healow TeleVisits visit type.

For more information on form settings for questionnaires and immunizations and designing questionnaires, refer to the section *Form Settings for Questionnaires and Immunizations* in the *Patient Portal Users Guide*.

**To select a questionnaire and map the healow TeleVisit visit type with the questionnaire:**

1. **From the Admin band, click** *Patient Portal Settings*.
   
   The Patient Portal Settings window displays.

2. **Click** *Form (Ques & Imm) Settings* in the left pane.
   
   The Questionnaire Setting window displays in the right pane.

3. Click the down arrow to the right of the *Number of Questionnaires* field and select the number.
   
   The columns on the left side of the panel reconfigure to enable the selection of the same number of questionnaires as have been chosen to be uploaded.

4. In the first *Selected Questionnaire* field, click the down arrow, and then select the questionnaire to be associated with healow TeleVisits.

5. **Click in the Portal Menu Name field beside your selected questionnaire, and then type the name of the questionnaire that the patient will see in the menu, such as healow TeleVisit questionnaire.**

   Using the same process, select the remaining questionnaires and assign a name for each.

6. Click the down arrow in the *Visit Type* field and select the healow TeleVisit visit type:
7. Click Add.

The Visit Type-Questionnaire Mapping window displays:
8. Check the boxes for the required questionnaires that are to be associated with the healow TeleVisit visit type.

9. Click Submit.

The questionnaire is associated to the healow TeleVisit visit type.

The associated questionnaire will display on healow for the healow TeleVisit.

Configuring E-mail Message Settings

E-mail appointment notifications for healow TeleVisits can be configured from the Patient Portal Settings. These notifications can be sent automatically from the practice to the patient and include appointment reminders. Templates are provided for these message types, ensuring consistency in communicating with patients.

To configure e-mail message settings for healow TeleVisits appointment reminders:

1. From the Admin band, click Patient Portal Settings.

   The Patient Portal Settings window displays.

2. Click E-mail Message Settings in the left pane.

   The e-mail settings display on the right pane.

3. Click the down arrow next to healow TeleVisit E-mail Appointment Notification, and then click Yes.
4. Click **Save**.
5. Click **Settings**:

![Patient Portal Settings](image)

The healow TeleVisit Appointment Reminder Settings window displays:

![TeleVisit Appoint Reminder Settings](image)

6. Enter information in this window as described below:
   - **Reminder 1** - Enter the number of minutes before the appointment that the appointment reminder notification will be sent to the patient.
healow TeleVisits Overview

- **E-mail Subject** - Enter the subject of the e-mail.
- **E-mail Content** - Assign appropriate text to the message type using the HTML editor.

  For more information on the HTML editor and its functions, refer to the section *Applying Text to E-Mail Messages using HTML Editor* in the *Patient Portal Users Guide*.

7. Click **Save**.

   The appointment reminder e-mail for healow TeleVisits is configured.

**Downloading the healow Agent**

The healow agent can be downloaded on the system from the healow TV Provider Activation window. The healow agent can be used to view and initiate healow TeleVisit appointments.

**To download the healow-TV agent:**

1. From the Admin band in eClinicalWorks, click the **Product Activation** icon:

   The Product Activation window displays.

2. Click **Settings**, and then click **Download healow-TV agent**:

   ![](image)

3. Follow the instructions to complete the download.

** Configuring the healow Agent**

The healow agent must be configured correctly before it can be used to initiate healow TeleVisits.
To configure the healow agent:

1. Double-click the healow agent icon on your computer.

   The healow Agent Login window displays:

2. Click the Settings icon:

   The healow Agent Settings window displays:

3. To change the path for the configuration.xml file, click Browse, and then select the path where the configuration.xml file for eClinicalWorks is located.

4. (Optional) To restore the default path, click Restore Default.

5. Click Close to close the healow Agent Settings window and return to the healow Agent Login window.

6. Enter the provider username and password.

   **Note:** The provider that is activated for healow TeleVisits must log in to the healow agent with the same credentials as the eClinicalWorks application so they can view their healow TeleVisit appointments.

7. Click Login.

   The Setup Preference window displays:
8. Check the *I want to use this agent for televisit* box.

9. Click *Next*.

The TeleVisit System Compatibility Check window displays. If the system is not compatible for healow TeleVisits, a *Plugin Unavailable* message displays.

Click *Download* to download the healow TV plugin:

The following window displays:
10. Click the *accept end-user license agreement* box, click *Download Plugin*, and continue the installation process.

11. Once the healow plugin is installed, click *Refresh Browser*:

The TeleVisit System Compatibility Check window displays, notifying the user that their browser is compatible for TeleVisits:

The user is logged in to the healow agent, and the healow icon displays in the desktop task bar:
healow Agent General Settings

This section describes the general settings required for the healow agent.

**To configure settings for healow:**

1. Right-click the healow agent, point to Tools, Settings, and then click *General Settings*.

   The General Settings window displays:

   - The information in the JTN Server, healow Server, and the eCW Configuration xml fields displays by default.
   - To change the path entered in the eCW Configuration XML field, click *Browse*, and then select the path where the configuration.xml file for eClinicalWorks is located.
   - To restore the default path, click *Restore Default*.
     
   To change the path, follow the steps described in the section *Configuring the healow Agent*.

2. Click the *TeleVisit* tab and enter information as described below:

   - **Enable TeleVisit for healow agent** - Check this option to enable access to the healow TeleVisits feature from the healow agent.
   - **Show pop-up notification when patient enters virtual waiting room** - Check this option to display a pop-up message when the patient is online. Providers can click the pop-up message to initiate the healow TeleVisit.
   - **Open Progress Notes on EMR when appointment is clicked on healow agent** - Check this option to open the Progress Notes when the provider clicks the healow TeleVisit appointment on the healow agent.

     **Note:** The provider must be logged in to eClinicalWorks with the same credentials that are used for the healow agent.

3. Click *Save*. 
Accessing the healow Agent

Providers can view healow TeleVisit appointments from the healow agent and start the two-way video visit from the healow agent.

To access the healow agent:

1. Double-click the healow icon on the computer:

   ![healow Icon]

   The eClinicalWorks Login window displays:

2. Enter the provider username and password, and then click Login.
   
The provider is logged into the healow agent.

3. Right-click the healow agent, and click one of the following options as required:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TeleVisit Appointments</td>
<td>Click to view the healow TeleVisit appointment for the logged-in provider. The healow roster opens, displaying the TeleVisit Appointment for the current date.</td>
</tr>
<tr>
<td><strong>Note</strong>: If the provider is not activated for healow, the View TeleVisit Appointment option is disabled.</td>
<td></td>
</tr>
<tr>
<td>Tools</td>
<td>Point to Tools and click one of the following options:</td>
</tr>
<tr>
<td></td>
<td>- <strong>TeleVisit Compatibility Check</strong> - Click to test compatibility for healow TeleVisits.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Settings</strong> - Refer to the section healow Agent General Settings.</td>
</tr>
</tbody>
</table>
Create healow TeleVisit appointments on the provider’s schedule. Once the appointment is created, an appointment confirmation e-mail is sent to the patient. Patients can log in to healow and complete the questionnaire before the appointment. Once the patient is online, the provider can start the healow TeleVisit at the scheduled time from the healow agent, the healow pop-up message, or the Office Visits.

For more information on creating and viewing healow TeleVisit appointments, and initiating healow TeleVisits in provider and patient view, refer to the following sections:

- Creating healow TeleVisit Appointments
- Viewing healow TeleVisit Appointments - Provider View
- Viewing healow TeleVisit Appointments - Patient View

### Creating healow TeleVisit Appointments

healow TeleVisit appointments can be created in the same way as any other appointment in the Resource Schedule. However, users must select the appropriate visit type to trigger the healow TeleVisit icon in the Chart Panel, and to display the mapped questionnaire on healow.

**To create a healow TeleVisit appointment:**

1. From the Practice band in the left navigation pane, click *Resource Scheduling*.
2. On the calendar, click the date the patient wants to schedule the appointment. *(Select Details to display the calendar).*
3. Open the appointment window:
   - Double-click the time slot for the appointment.
   - OR
   - Click the Single Appointment icon.
   The Appointment window displays.
4. Click the SEL button and select the patient.
5. Click the down arrow in the Visit Type field, and then select the healow TeleVisits-enabled visit type:

6. Click **OK**.

The appointment is saved and displays in the Resource Schedule.

**IMPORTANT!** Patient Portal tasks must be synchronized from the Admin band, under Patient Portal Settings, after a healow TeleVisit appointment is created.

For more information on synchronizing tasks, refer to the *Patient Portal Users Guide*.

**Viewing healow TeleVisit Appointments - Provider View**

Providers can view their healow TeleVisit appointments from the following locations:

- **Office Visits** - Click the S Jelly Bean to display the Office Visits window.

  healow TeleVisit appointments display a Video Camera icon:

- **healow Agent** - Right-click the healow agent, and then click **View healow TeleVisit appointment**.
healow TeleVisit appointments for the current date display.

**Note:** The Providers must be logged in to the healow agent to view their appointments.

For more information on starting healow TeleVisit appointments on the provider side, refer to **Starting healow TeleVisit Appointments**.

**Starting healow TeleVisit Appointments**

Once the patient is online, the provider can start the healow TeleVisit on the scheduled time. The healow TeleVisit can be started in three different ways:

- From the Pop-up message in the healow agent
- From the healow agent TeleVisit appointment
- From the Office Visit - Progress Notes

**Note:** A web camera must be installed on the machine that is used for healow TeleVisits.

**To use healow TeleVisit:**

1. Click one of the following options:
   - **healow pop-up message** - When the patient is online, a pop-up message displays:

     ![Pop-up message](image)

     Click the pop-up message to display a dialog box, and then click the Plus (+) icon to display the Progress Notes in the active EMR:

     ![Progress Notes](image)
- **healow agent** - When the patient is online, a green dot displays next to the patient name in the healow agent.
  
a. Right-click the healow agent, and then click **View healow TeleVisits Appointments**.

  The appointments display:

  ![healow TeleVisits screenshot]

  b. Click the appointment to display a dialog box, and then click the Plus (+) icon to display the Progress Notes in the active EMR.

- **Office Visits** - The patient's healow TeleVisit appointment status changes from *Pending* to *Checked In*, and the arrival time displays for the appointment when the patient is online and enters the virtual waiting room:

  ![Office Visits screenshot]

  2. Double-click the healow TeleVisit appointment.

    The Progress Notes display.

  3. Click the *TeleVisit* icon in the Chart Panel:

    ![TeleVisit icon in Chart Panel]

    - *CDSS Alerts*
      - Alcohol use screening
      - Body Mass Index
      - Cervical cancer screening
      - Depression screening
      - HIV screening
      - Sexual history taken
      - Smoking status
The healow TeleVisit window opens, displaying the Questionnaire and Vitals tabs:

![TeleVisit Window]

- **Note**: The responses to the vitals do not become part of the Progress Notes but are saved in the Patient Documents.

4. Click the **Questionnaire** tab.
5. Click the **Actions** button, and then click one of the following options:
   - **Import Current** - Click to import the questionnaire to the Progress Notes.
A confirmation message displays. Click OK to continue.

- **Reject** - Click to reject the questionnaires.
- **Next** - Click to display the next set of questionnaire.
- **Complete** - Click to complete importing the questionnaire.

6. Click the *Start TeleVisit* button to initiate the video.

   The status displays as *Waiting for patient to broadcast*:

![Waiting for patient to broadcast](image)

At this point the patient sees a message on the healow website, asking them to allow camera and microphone. When the patient clicks *Allow* for camera and microphone, the provider can view the patient.

The healow TeleVisit window displays:

![TeleVisit window](image)
The following list describes the features available in the healow TeleVisit window:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🕒 00:01:40</td>
<td>Displays the total time of the video call.</td>
</tr>
<tr>
<td>🔴</td>
<td>Click to pause the provider-facing camera. Click again to start the provider-facing camera.</td>
</tr>
<tr>
<td>🔊</td>
<td>Click to mute the microphone. Click again to enable the microphone.</td>
</tr>
<tr>
<td>📸</td>
<td>Click to capture a screenshot of the entire window. Once captured, the captured photo displays on the right pane. Select the picture to display a gray check mark, and then click <em>Upload to Patient Docs</em> to save the picture in Patient Documents. To delete the picture from the right pane, click the red X button next to the picture.</td>
</tr>
</tbody>
</table>
Users can capture a selected area of the window using this button.

**To capture:**

1. Click the camera button. The TeleVisits window expands and displays the Image Upload area in the right pane.
2. Drag the cursor to select an area, and then release the cursor to capture the screenshot. Once captured, the captured photo displays on the right pane.
3. Select the picture to display a check mark, and then click the following icon to save the picture in Patient Documents:

   ![Image](image.png)

   The captured image displays in Progress Notes under Images:

   **Billing Information:**
   - **Visit Code:**
   - **Procedure Codes:**

   **Images:**
   - ![Image](image.png)

Other options for the Image Upload area are:

- To hide the Image Upload pane, click the following icon:

  ![Icon](icon.png)

- To refresh the Image Upload pane, click the following icon:

  ![Icon](icon.png)

- To delete an image, first select the image, and then click the Trash Can icon:

  ![Icon](icon.png)

  A confirmation message displays. Click Yes to delete.
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
</table>
| ![Chat](chat.png) | 1. Click to open the Chat window.  
2. Start typing the text and click the arrow button:  

![Chat](chat-notification.png)  
The patient receives a chat notification. |
| ![End Call](end-call.png) | Click to end the video call. The following message displays; click Yes to continue:  

![End Call](end-call-dialog.png)  
When the provider clicks the Yes button, the patient sees the following message:  

*Your call has completed.* |
| ![Expand](expand.png) | Click to expand the TeleVisits window. |
| ![Collapse](collapse.png) | - Click the square button on the top right corner of the window to collapse or expand the view.  
- Click the Minus (-) button on the top right pane of the healow TeleVisit window to minimize the window. The provider can minimize the healow TeleVisit window to document clinical information in the Progress Notes.  
When the healow TeleVisits window is minimized, a small healow TeleVisit dialog box displays.  
Click the Plus (+) button in the dialog box to maximize the healow TeleVisit window. |
| ![Questionnaire](questionnaire.png) | Click the Questionnaire and Vitals tab to review the responses entered by the patient. |
Patients that cannot travel, or live in remote areas, can take advantage of eClinicalWorks healow to visit their doctor through a two-way video visit. Patients must be Web-enabled to access healow. They can log in to healow using their eClinicalWorks Patient Portal credentials.

### Viewing healow TeleVisit Appointments - Patient View

<table>
<thead>
<tr>
<th>Feature</th>
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</tr>
</thead>
</table>
| ![Close button](image.png) | Click to exit the TeleVisits session. When the provider clicks this button, the following message displays: Are you sure you want to end this TeleVisit?  
- **Yes** - Click to end the TeleVisit session and to change the patient's appointment status in the Office Visits window to *Checked Out*.  
- **No** - If the provider clicks *No*, the following message displays: Would you like to exit the TeleVisit without checking out the patient? (You may re-join the TeleVisit after exiting)  
  - **No** - Click to continue with the current TeleVisits session.  
  - **Yes** - Click to rejoin the TeleVisits session later. However, the patient must remain in the virtual waiting room for them to display online. The provider can click *Join TeleVisit* on the healow TeleVisits window later to rejoin the TeleVisits session.  
When the provider clicks *Yes*, the patient sees the following message: The provider has disconnected unexpectedly. Would you like to wait for the provider to rejoin or exit the TeleVisit?  
  - **Wait** - Click to remain in the virtual waiting room, and display as *online* on the provider side.  
  - **Exit** - Click to leave the session. The patient will display as *offline* on the provider's side. |
Once an appointment is created for the healow TeleVisit, the patient will receive an e-mail with an appointment confirmation.

**Note:** A webcam must be installed and functioning on the machine that is used for healow TeleVisits.

For more information on accessing healow TeleVisits Help, refer to Accessing healow TeleVisits Help.

**To start a healow TeleVisit:**

1. Log in to healow with the eClinicalWorks Patient Portal credentials.
   
The healow window opens, displaying any upcoming appointments:

2. Click *Join TeleVisit*.
   
The Intake Questionnaire linked to the visit displays.

3. Enter the responses, and then click *Submit Questionnaire*:
The Vitals check displays.

4. Enter the vitals, and then click **Submit Vitals**.

**Note:** The responses to the vitals do not become part of the Progress Notes but are saved in the Patient Documents.

A system compatibility check is performed to detect the software and hardware required to conduct healow TeleVisits.

5. On the top left corner of the Compatibility Test window, click *Allow* in the pop-up message to use the patient-facing camera.

The next pop-up message displays.

6. Click *Allow* in the pop-up message to use patient-facing microphone:
7. Once the compatibility check is complete, click *Proceed*.
A confirmation message displays, indicating that the questionnaire and vitals have been submitted successfully.

The link to the healow TeleVisit waiting room displays. The *Start TeleVisit* button displays in orange 30 minutes before the scheduled appointment time:

8. Click *Start TeleVisit*.
A message displays:
Waiting for the provider to join.

To review the questionnaire and vitals, click Review.

Once the provider joins, a message displays asking the patient to allow camera and microphone:

9. Click Yes, allow access for camera and microphone.
   The TeleVisit window displays and the video call begins:
The provider name, date, and time display on top, and the duration of the visit displays on the bottom.

The following list describes the features available in the healow TeleVisit window for patients:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
</table>
| ![Gear Icon](image) | The Gear icon enables the patient to switch on the camera and microphone before joining the call. Click the Gear icon display the following options:  
  - **Switch Camera** - Click this button to display the name of the webcam driver. Click the name of a webcam driver to switch the webcam.  
  - **Switch Microphone** - Click this button to display the name of the microphone driver. Click the name of a microphone driver to switch microphones. |
<p>| <img src="image" alt="Pause Icon" /> | Click to pause the patient-facing camera. Click again to start the patient-facing camera. |</p>
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🎤</td>
<td>Click to mute the microphone. Click again to enable the microphone.</td>
</tr>
</tbody>
</table>
| 📩 | 1. Click to open the Chat window.  
2. Start typing the text and click the arrow button:  

The patient receives a chat notification. |
| 📞 | Click to end the video call.  
When the patient clicks this button, the following message displays on the patient side:  
Are you sure you want to end the call?  
- **No** - Click to continue the session.  
- **Exit** - Click to end the session.  
  When the patient clicks *Exit*, the following message displays on the provider side:  
  *Your call is completed.*  
  The patient displays as *Offline* on the healow TeleVisits window for the provider. |
| 🔍 | Click to open the eClinicalWorks Live Chat window. Patients can chat directly with an eClinicalWorks representative if they encounter any problems during the healow TeleVisit session. |
Accessing healow TeleVisits Help

Patients can review FAQs and important information about healow TeleVisits from the TeleVisit Help tab on the healow website.

To access healow TeleVisits help:
1. From the left pane, click TeleVisit Help tab.
   The healow TeleVisit Support and FAQ window displays.
2. Click a link to expand the information in that section.
   To test compatibility for healow, click the Find Now button:
The compatibility test displays.

- To return to the TeleVisit Support and FAQ window, click the *Help* button on the top right corner of the window.
- If the patient clicks the *Help* button on the top right corner of the healow TeleVisit window during a live healow TeleVisit session, the eClinicalWorks Live Chat window displays, enabling the patient to chat with an eClinicalWorks representative.
This section describes the enhancements for healow TeleVisits in eClinicalWorks Version 10e.

healow TeleVisits Visit Type

Path: Main Menu > Admin Menu > Admin > User Admin > Visit Type Codes

The Visit Type Codes window can be accessed from Main Menu > Admin Menu > Admin > User Admin > Visit Type Codes and has a different look and feel.

To display healow TeleVisit on the Chart Panel of the Progress Notes, the healow TeleVisit option for the visit type must be enabled. The healow TeleVisit visit type also triggers the questionnaire for patients to complete on the healow TeleVisit.

The healow TeleVisits check box in the Visit Type window be visible only to providers that have been activated and registered for healow TeleVisits from the Product Activation window.

To enable healow TeleVisit visit type:

3. From the Visit Type Codes window, click Add to add a new visit type.

To update an existing visit type, click the visit type.

The Visit Codes window displays:
4. Enter a name and description for the healow Televisit.
5. Enter information in the other fields as required.
   For more information on these fields, refer to the System Administration Users Guide.
6. Check the **healow TeleVisit** box.
7. Click **Save**.
   The healow TeleVisit visit type is configured.

### Questionnaire Visit Type Mapping

In Version 10, the **Questionnaire Visit Mapping** options are located under the **Admin band > Patient Portal Settings > Form (Ques & Imm) Settings**.

In Version 10e, the Questionnaire Visit Mapping options are located under the **Main menu > healow icon > Patient Portal Settings > Questionnaire Visit Mapping**.
To associate a healow TeleVisit visit type to a questionnaire:

1. From the Patient Portal Settings window, click **Questionnaire Setting**:

![Patient Portal Settings](image)

2. Click **Add** to display the Add Questionnaire window:

![Add Questionnaire](image)

3. Select the healow TeleVisit visit type from the **Visit Type** drop-down list.
4. Check the box(es) next to the questionnaire to associate them with the visit type.
5. Click **Save** to save the settings.
The questionnaire is associated to the healow TeleVisit visit type. The associated questionnaire will display on healow for the healow TeleVisit.

**E-mail Message Settings**

**Path:** Main menu > healow icon > Patient Portal Settings > E-mail Message Settings

The following enhancements have been made to the E-mail Message Settings:

- The E-mail Message Settings window can be accessed from the healow band under Patient Portal Settings
- The look and feel of the E-mail Message Settings and the TeleVisit Appnt Reminder Settings windows have changed.

**To configure e-mail message settings for healow TeleVisits appointment reminders:**

1. From the healow band, click *Patient Portal Settings* to display the Patient Portal Settings window:
2. Click the *E-mail Message Settings* tab on the left pane.
3. Click *Yes* for the *TeleVisits E-mail Appointments* option.
4. Click *Setting* to display the TeleVisit Appnt Reminder Settings window:

5. Enter information in this window as described below:
   - **Reminder 1** - Enter the number of minutes before the appointment that the appointment reminder notification will be sent to the patient.
   - **E-mail Subject** - Enter the subject of the e-mail.
   - **E-mail Content** - Assign appropriate text to the message type using the HTML editor.
     
     For more information on the HTML editor and its functions, refer to the section *Applying Text to E-Mail Messages using HTML Editor* in the *Patient Portal Users Guide*.

6. Click *Save*.

   The appointment reminder e-mail for the healow TeleVisits is configured.

---

**healow TeleVisits from the TV Quick-Launch Button**

A drop-down list has been added to the healow TeleVisits (TV) Quick-Launch (Jelly Bean) button displaying healow TeleVisit appointments for today for the logged-in provider. If a patient is online, the TV Quick-Launch button displays in red and a green icon displays next to the patient that is online.
A *Start TeleVisit* button displays on the top right pane in Progress Notes when the patient is online. The Page icon enables providers to import questionnaires completed by the patient into the Progress Notes. The Stethoscope icon displays the vitals entered by the patient.

**To access healow TeleVisit appointments for today:**

1. **Click the TV Quick-Launch button.**
   
   A list displays, showing the healow TeleVisit appointments scheduled for the logged-in provider for today:

   ![Appointment List](image)

   When a patient is *online*, the TV Quick-Launch button displays as red, and a green icon displays next to the patient that is *online*:

   ![Online Patient](image)

2. **Click the patient appointment with the green icon.**
   
   The Progress Notes display.
   
   The following icons display next to the *Join TeleVisits* button:
To import a questionnaire, click the Page icon next to the Join TeleVisit button, and then click Import. The provider can also click the orange arrow next to each question to import specific responses. Once the responses are imported, a green check mark displays next to the questions and the responses are added to the Progress Notes:

To view the vitals entered by the patient, click the Stethoscope icon. The vitals information entered by the patient cannot be imported to the Progress Notes.

3. Click the Join TeleVisit button:

The patient sees a prompt to enable camera and microphone. Once the patient enables the camera and microphone, a prompt displays for the provider to allow the camera and microphone. Once the provider enables the camera and microphone, the healow TeleVisits window displays:
The following table describes the features available on the healow TeleVisits window:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Move the healow TeleVisits Window</strong></td>
<td>Click inside the healow TeleVisits window, hold the cursor, and drag the window anywhere on the screen. Similarly, the provider self-view box can be dragged anywhere inside the healow TeleVisits window.</td>
</tr>
<tr>
<td><strong>Expand the Window</strong></td>
<td>Click on the outside edges of the healow TeleVisits window, hold the cursor, and drag the window out to expand the view. OR Click the Expand icon to expand the window.</td>
</tr>
<tr>
<td><img src="image" alt="Questionnaire" /></td>
<td>Click this button and then click <em>Import</em> to import the questionnaire completed by the patient. The provider can also click the orange arrow next to each question to import specific responses. Once the responses are imported, a green check mark displays next to the questions and the responses are added to the Progress Notes.</td>
</tr>
<tr>
<td><img src="image" alt="Vitals" /></td>
<td>Click this button to view the vitals entered by the patient. The vitals information entered by the patient cannot be imported to the Progress Notes.</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
</tr>
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<td>---------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| ![Chat](image) | 1. Click to open the Chat window.  
2. Start typing the text and click the arrow button. |
| ![Trackers](image) | Click this button to display the patient's health tracker data, if available. |
| ![Button](image) | Click the arrow button and then click *Sticky Note* to document information in the Progress Notes while reducing the size of the healow TeleVisits window.  
The healow Televisits window displays near the sticky notes in Progress Notes:  
 Providers can click anywhere on the TeleVisits window to revert to the original view. |
| ![Progress Notes](image) | Click this button to display the Progress Notes. |
| ![Screenshot](image) | Click this button to capture a screenshot of the entire window.  
Once captured, the captured photo displays on the right pane. Select the picture, and then click *Upload* to save the picture in Patient Documents.  
To delete the picture from the right pane, click the red X button next to the picture. |
### Feature

<table>
<thead>
<tr>
<th>Feature</th>
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</table>
| ![Camera](camera.png) | Users can capture a selected area of the window using this button. **To capture:**
1. Click the camera button. The TeleVisits window expands and displays the Image Upload area in the right pane.
2. Drag the cursor to select an area, and then release the cursor to capture the screenshot. Once captured, the captured photo displays on the right pane.
3. Select the picture, and then click the **Upload** button to save the picture in Patient Documents.

**The captured image displays in Progress Notes under Images:**

**Billing Information:**
- **Visit Code:**
- **Procedure Codes:**

**Images:**
- ![Image](image.png)

Other options for the Image Upload area are:
- To hide the Image Upload pane, click the following icon:

| ![Microphone](microphone.png) | Click to mute the microphone. Click again to enable the microphone. |
| ![Camera](camera.png) | Click to pause the provider-facing camera. Click again to start the provider-facing camera. |
The healow TeleVisits icon displays to the left of the visit type in the Office Visits window. The icon indicates that the visit is associated to a healow TeleVisit:

<table>
<thead>
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</tr>
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<tbody>
<tr>
<td><img src="image" alt="Phone" /></td>
<td>Click this button to display the following message:</td>
</tr>
<tr>
<td><img src="image" alt="Options" /></td>
<td>- Click <em>Checkout</em> to end the call and change the patient's visit status to <em>Checkout</em>. When the provider clicks this button, the patient sees the following message: Your call has completed.</td>
</tr>
<tr>
<td><img src="image" alt="Options" /></td>
<td>- Click <em>End Call</em> to temporarily suspend the call without affecting the visit status.</td>
</tr>
<tr>
<td><img src="image" alt="Options" /></td>
<td>- Click <em>Cancel</em> to remove the message.</td>
</tr>
</tbody>
</table>

Double-click the visit to display the Progress Notes and then click the *Join TeleVisit* icon to start the healow TeleVisit.
APPENDIX A: NOTICES

The following section lists the Trademarks contained in this document.

Trademarks

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