

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 the workflows 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

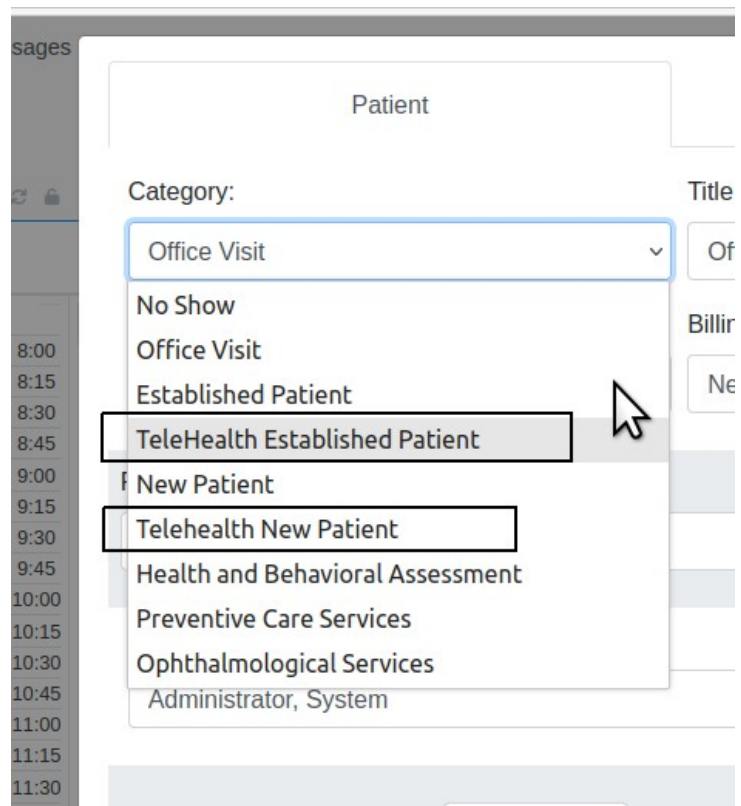
Provider's Session Instructions

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. When making the 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

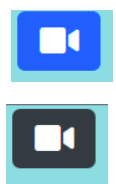
3. Click 'Save' at the bottom of the event dialog to create the appointment (not shown)

- The camera launch icon in the calendar's appointment listing designates 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 may be launched
- Black for sessions that have passed the two hour launch period

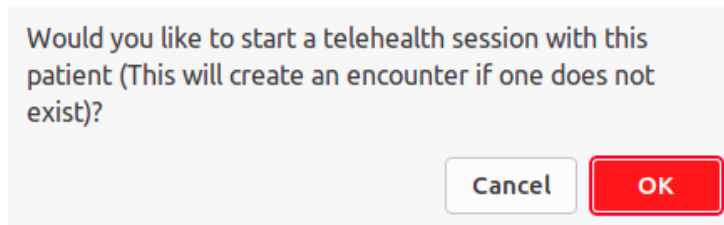


- Green for completed sessions that can no longer be launched.



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.

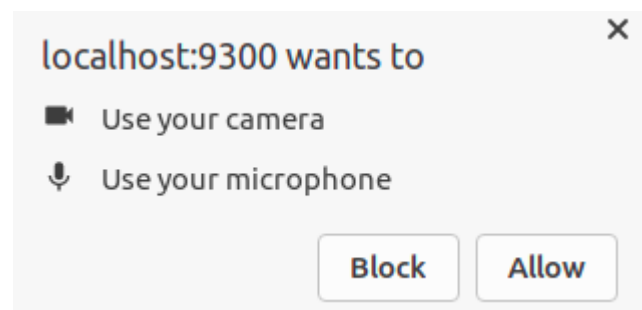


Note:

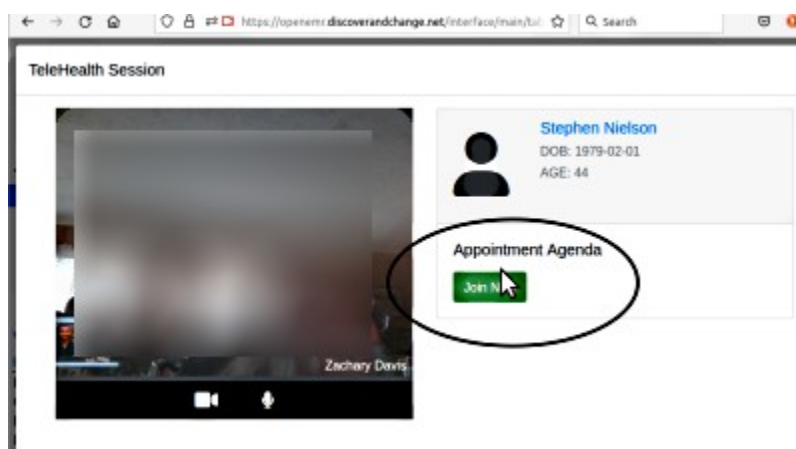
- If this is the client's first encounter of the day it will create a new encounter.
- If the appointment belongs to a different clinician than the one who opened it, the appointment will be copied into the opening user's calendar and marked in the original owner's calendar as having been transferred 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.

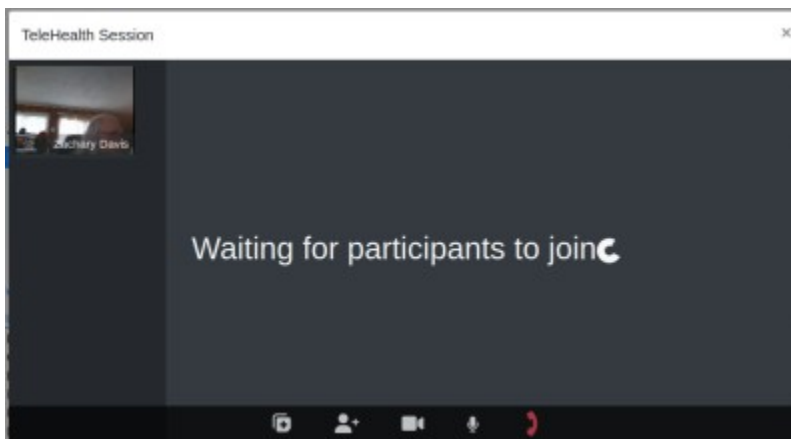
- You will be unable to join the session until you have granted access to at least one of these devices
- The permission request may look different on depending your browser



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 appear along the bottom edge of the session panel; see in picture above
- 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

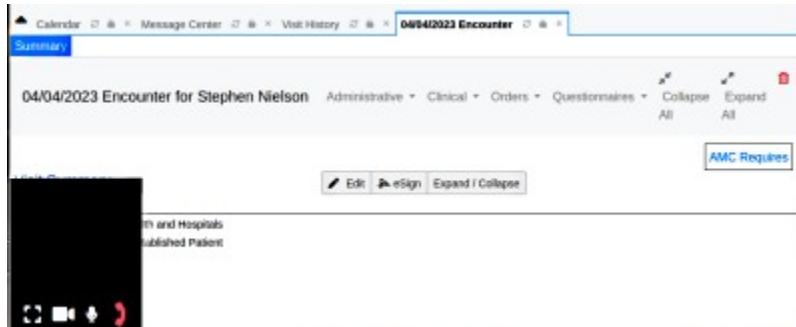
- Click the microphone icon to toggle your microphone off or on.



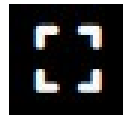
Minimize / Maximize Session For Note Taking

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.



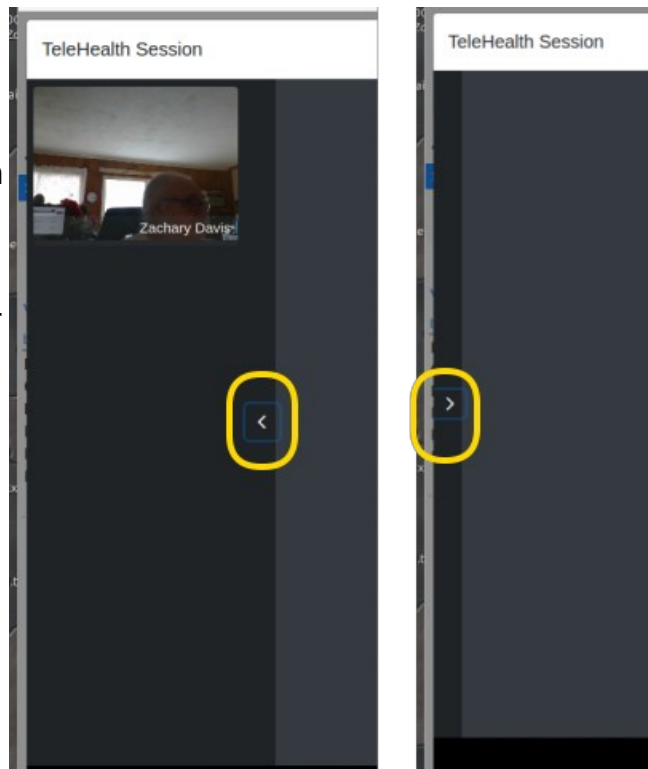
- Click the expansion icon to restore the video window.
- You can drag the minimized window to a new location for the session and it will remember your settings during the current video session.



Collapse participants / expand participants

On large screen display devices the participant list is automatically displayed in a sidebar

- Click the expand or collapse icons ('<' or '>') hide or show the sidebar



Invite 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.



- ***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 ×

First Name

Last Name

mm/dd/yyyy 📅

Email Address

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

2. Enter the following required data

- 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

The screenshot shows a 'Choices' tab with several options. The 'Allow Email:' option is circled in black. The options and their values are as follows:

Option	Value
Allow Voice Message:	YES
Allow Mail Message:	YES
Allow Email:	YES
Allow Immunization Info Sharing:	YES
Allow Patient Portal:	YES
CMS Portal Login:	
Immunization Registry Status Effective Date:	

- Click 'Create Patient' button

3. The system will:

- create a new patient record for the participant in the EMR
- create their patient portal credentials
- send the participant an email with their portal credentials and a link to join the Telehealth session.

Third Party Invitation – Existing Patient

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

The screenshot shows a dialog box titled 'Invite Third Party Related Person'. It contains the following fields and buttons:

- External ID (input field)
- Or
- First Name (input field)
- Last Name (input field)
- Date of Birth YYYY-MM-DD (input field)
- Email Address (Exact Match) (input field)
- Cancel (button)
- Search Patients (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 – search text found 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 to a patient:

1. click the ‘Copy Invite Link’ button or ‘Copy Invitation’ button
2. paste the contents into your email

Participants

Test User 4
example@gmail.com

Copy Invite Link Copy Invitation

Share Screen

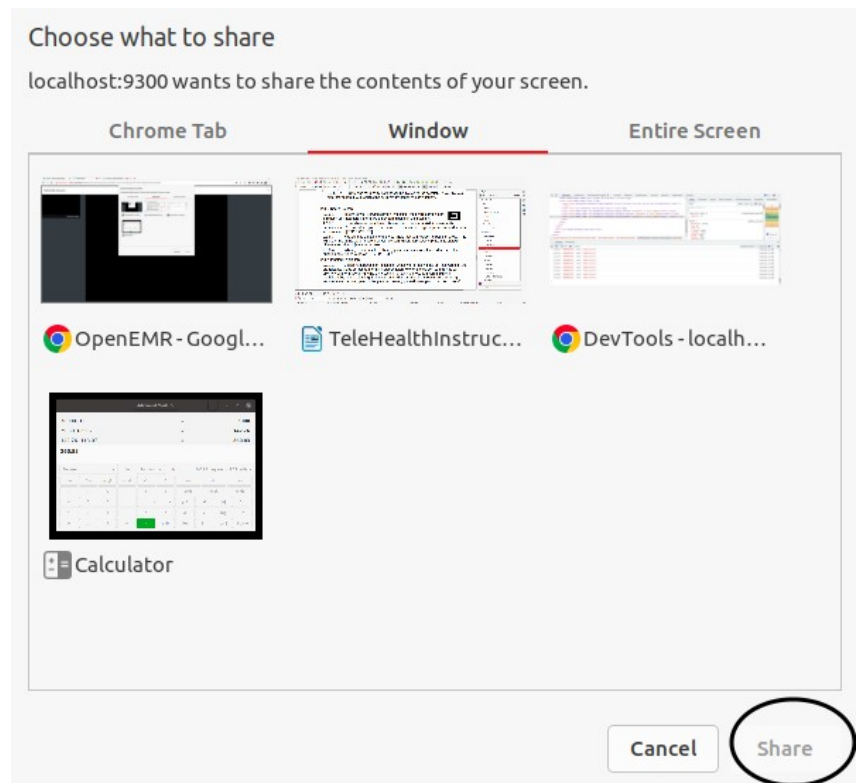
1. To share your viewing screen click the 'Share Screen' icon.

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

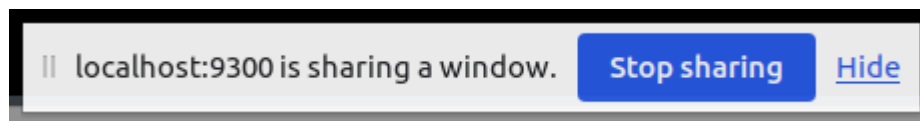


2. Click on the the screen you wish to share (at right)

3. Click 'Share.' (oval)



- A dialog will appear to state that your screen is being shared.
- Its position and wording 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.

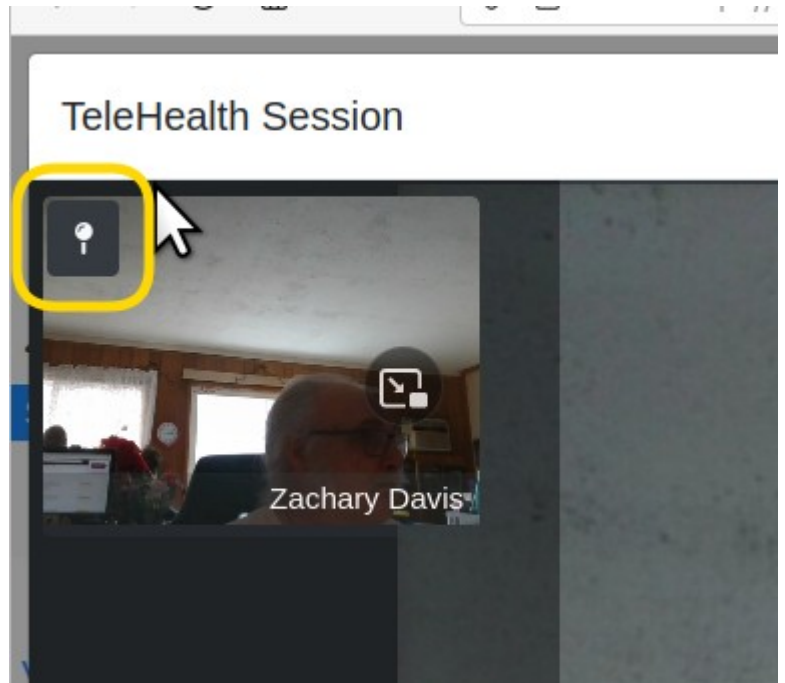
Pin a Participant

Click a participant's session window or click the pin icon

(yellow round rectangle)

This locks the participant's video window to the main presentation view so they remain visible as long as they are pinned

Click it again to un-pin.



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.

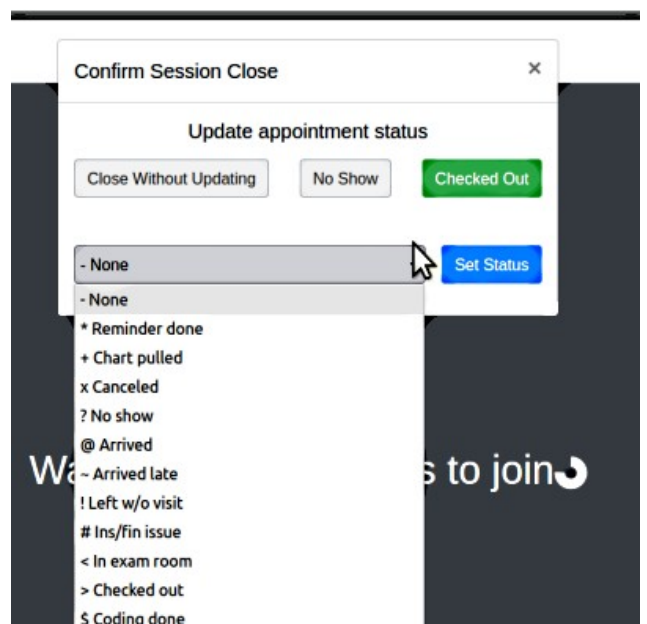
When you close the session a 'Confirm Session Close' dialog will display in which you may update the appointment status.

- Close without updating
- No Show
- Checked Out

The dialog will close immediately.

Or if another status fits, drop the list down and select it.

Click 'Set Status' (blue button at right) to close the dialog.



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


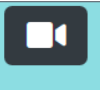

A telehealth appointment is made in the same manner as any other appointment.

- 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 EMR's calendar screen
2. Click the video launch icon
3. Grant Access to your local microphone and camera.
4. Click '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.

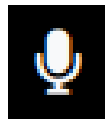
Enable / Disable Video

- 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.

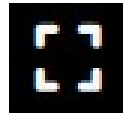


Minimize / Maximize Session For Note Taking

- 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 and it will remember its place during the current video session.

Invite 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. All information is required 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; 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 with an invite to join the session.

Share Screen

1. Click the share screen icon



- This icon only appears if other participants are 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