

Staff User Guide

Client-Staffed Practice

April 2020



Table of Contents

Overview	3
What is American Well?	3
About this Guide.....	3
Getting Started.....	4
Logging into your Account	4
Home Page	5
My Account	6
My Profile	6
My Preferences	7
Login Credentials.....	7
Updating your Web Login Credentials	7
Managing Waiting Rooms.....	8
Waiting Rooms	9
Individual Provider Waiting Room	9
Patient Labels	9
Types of Patients	9
Changing Provider Availability.....	10
My Patients.....	11
Supporting your Providers	13
Provider Profile.....	13
Provider Availability.....	15
Secure Message Center	18
Inbox	18
Create New Messages.....	19
Provider Inboxes.....	20
Administrating Patient Records	21
Patient Profiles	21
Scheduling Appointments	21
To Cancel an Appointment.....	25
To Reschedule an Appointment:.....	25
Viewing Patient Health History	27
Adding Patients to a Practice	30
Visit Reports	35
Export Patient Data	35

Overview

What is American Well?

American Well allows patients to connect with health care providers for live, clinically informed video visits from the comfort of their home, office, or when traveling. The platform also increases the convenience of healthcare delivery for providers and staff, allowing them to care for patients in a more efficient manner.

Providers can make themselves available for video and phone consultations at any time, from any location and for as long as they choose. They can also schedule appointments to see patients at their convenience. During the visit, patients and providers can see and talk to one another using live audio and videoconferencing. Providers, who have access to the patient's clinical information, can answer questions, take clinical notes, diagnose the patient, prescribe medication if appropriate, or refer the patient to another provider for a specific concern.

About this Guide

This guide is intended to serve as a reference for the various features and tools available to Practice Staff within American Well.

This guide will review these features and tools:

- Managing Waiting Rooms
- Scheduling Appointments & Updating Availability
- Access to the Secure Inbox of your assigned provider
- Administrating Patient Records
- Exporting Patient Data

Practice Staff

As a Practice Staff user, you will be assigned permissions which will grant you access to different features and tools within your practice domain. Your access may be limited.

Getting Started

Logging into your Account

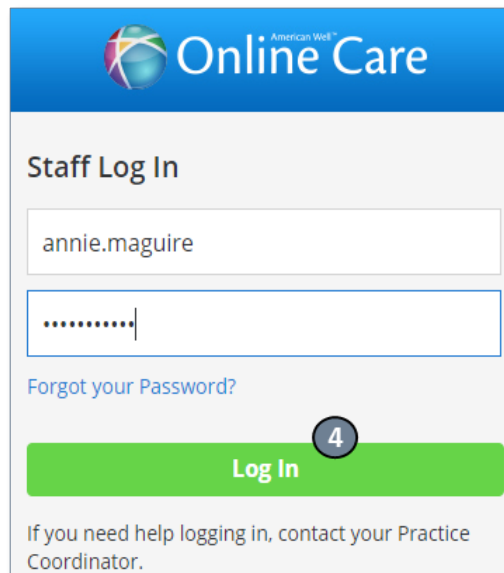
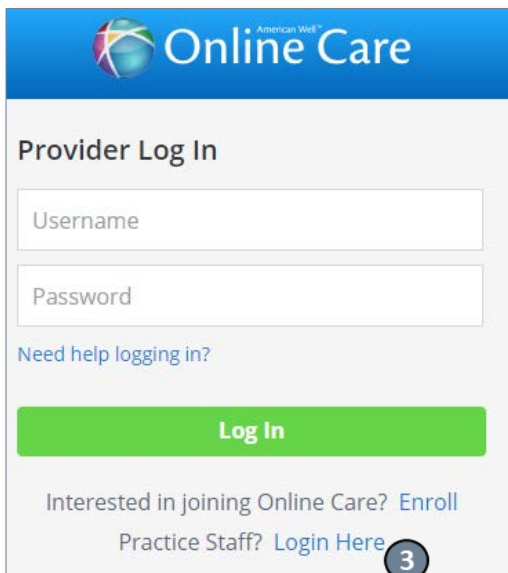
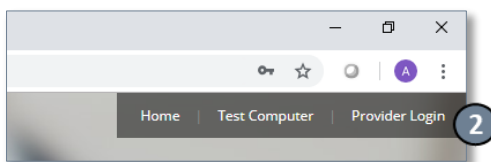
Your Practice Coordinator will set up an American Well account for you and provide you with a username and password to log in to the American Well System.



You may change your password at any time, and it is strongly recommended that you change your password after your first login. Please refer to the **Changing your Password** section for more details.

Follow the steps below to log in.

1. Follow the link Provided by your Practice Coordinator or Platform Administrator.
2. In the upper right corner, select **Provider Login**.
3. Next, select **Login Here** for Practice Staff.
4. Populate your *Username* and *Password* and select **Log in**.



Home Page

The home page functions as the hub that connects you to a variety of tools and features of American Well. Your access to these tools and features is dependent upon the permissions granted to you. Your Home Page may appear differently if your permissions are limited.

1. The left side of the screen displays the calendar and current day's scheduled appointments for all providers of your practice. You can view appointments for other days by clicking on a specific date in the calendar.
2. The main panel contains quick links to core tools of the system.
3. The navigation bar across the top of the home page contains links to features of the system and frequently used tools such as the Message Center and Pre/Post-Visit Waiting Rooms. The Corresponding icons on the navigation bar are dynamically updated as new messages are received or new patients enter the waiting room.
4. The white utility bar along the top of the page contains links to your profile settings, permissions, and assign providers (My Account) and system log out (Log Out).

Current Practice: **Medical Online Services** Change Practice Total for all practices: 67

Annie Maguire Last Login 01/10/2019 My Account Log Out

Home My Practice Administration No Pre-Visits No Post-Visits

Schedule Appointment

January 2019

S	M	T	W	T	F	S
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Today's Appointments View All >

Tools at your fingertips

Waiting Rooms
Manage the list of patients waiting for online conversations with your providers.

Message Center
No New Messages
Help your providers manage incoming and outgoing messages with their patients.

My Providers
Manage the scheduled availability and profile settings for the providers you support.

My Patients
Schedule appointments, assign providers, and manage health histories for patients in your practice.

My Account

The **My Account** area is accessed from the upper right-hand corner of the screen and allows you to manage your preferences for your American Well profile.



My Profile

The My Profile section will allow you to update your personal information and view your permissions and assigned providers.

1. Personal Information

Click the **Edit** button to modify your Personal Information such as Name, Email, and Gender.

2. Role and Permissions

Your account permissions are managed by the Practice Coordinator. You may be given certain or all practice and provider level permissions.



Practice – Level Permissions Include:

Add Patients

This gives you access to add new patient profiles to the panels of any providers of your practice.

Schedule Appointments

This gives you access to schedule appointments for patients with any providers of your practice.

Provider - Level Permissions include:

Manage Waiting Room

This gives you access to the Online Waiting Rooms of your assigned providers. You can also review the details of the conversation request of the patients in the Waiting Rooms. You can communicate with the patients via secure chat and conduct Pre-Visits and Post-Visits for your providers.

View/Edit Patient Health Info

This gives you access to view a patient's health history on behalf of an assigned provider. You can also export patient health histories.

Manage Inbox/Msg

This gives you access to send and respond to messages in your assigned providers inboxes. You can also manage the contacts list of your assigned providers.

Edit Cover Settings

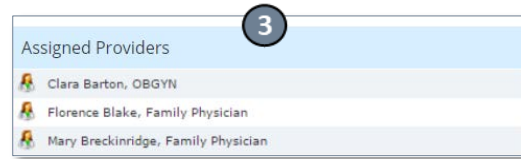
This gives you access to add covering providers for each of your assigned providers. You can also enable/disable the Covering Providers.

Edit Calendar Availability

This gives you access to set future availability for each of your assigned providers. Setting calendar availability informs patients of a provider’s availability so that they can schedule web appointments.

3. Assigned Providers

The Practice Coordinator may assign you to certain providers from your practice. Based on the size and setup of your practice, you may be assigned to all or a subset of your practice providers. This screen displays the list of providers to which you are currently assigned.



Based on the permissions given to you, you will be able to manage patient panels, calendar availability, secure messages, and waiting rooms of the assigned providers.

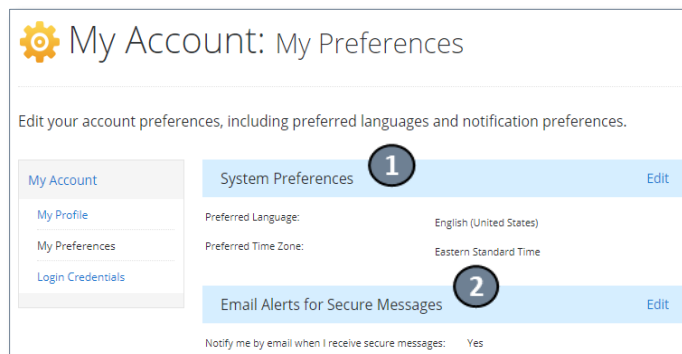


Please note that there may be multiple Practice Staff members assigned to a given provider.

My Preferences

The **My Preferences** section contains your preferred language and email alerts.

1. The **System Preferences** will allow you to view and edit your preferred language and Time Zone
2. The **Email Alerts for Secure Messages** feature will send an automatic notification to your external email address each time you receive a Secure Message.

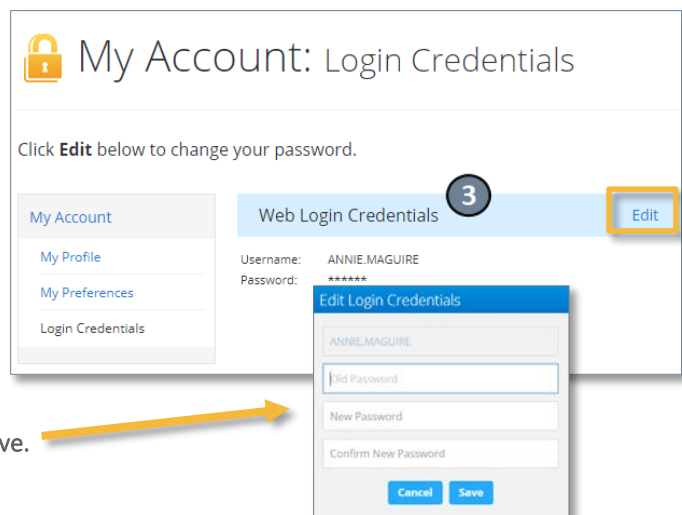


Login Credentials

3. The **Login Credentials** section will allow you to change your password.

Updating your Web Login Credentials

You can change your password at any time through the **Login Credentials** section of *My Account*. It is recommended that you change your default password upon initial login. Simply click **Edit**, and then enter your current password in the Old Password field. Enter and confirm your new password in the New Password fields and click **Save**.

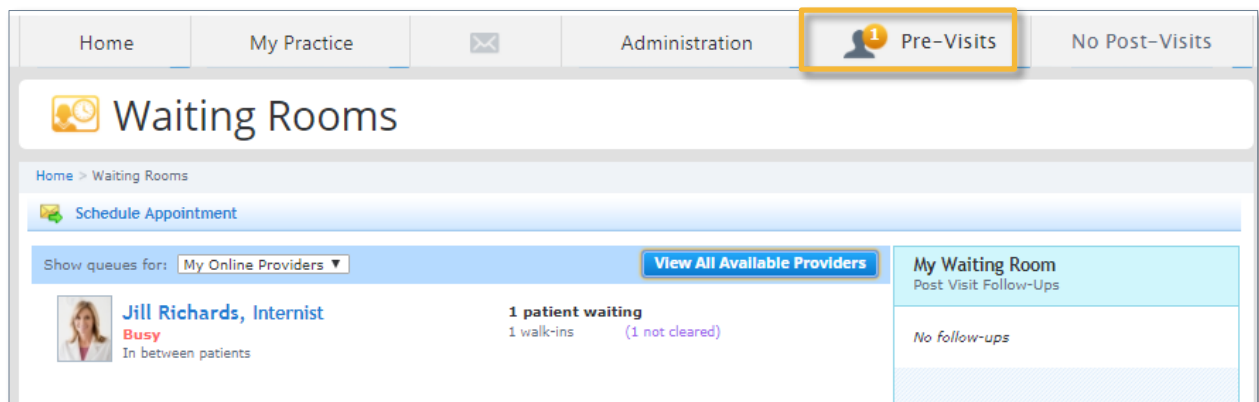


Managing Waiting Rooms

A *Waiting Room* is an area where you can view and interact with patients waiting to speak with providers. You can access the Waiting Rooms from your Home Page through the Waiting Rooms quick link in the main panel or through the navigation bar. See below:



When patients enter one of your provider’s Waiting Rooms, you will see the patient count incremented in the **Pre-Visits** box in the Navigation Bar. When a provider sends a patient to a post-visit, the **Post-Visits** count will increment.



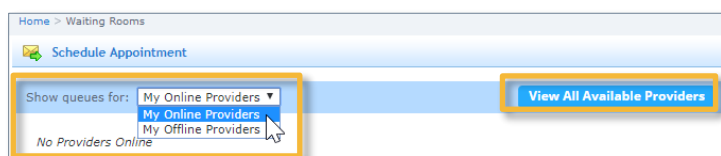
Waiting Rooms

With appropriate permissions you access the Waiting Rooms of your assigned providers. From here, you can view a summary of each provider’s queue, including:

- Current Availability status
- Number of patients waiting (including walk-ins and non-cleared)
- Waiting room status (Open/Closed)

To see waiting rooms for offline providers as well, select *My Offline Providers* in the *Show queues for:* drop down list.

You may also view information about all providers in your practice. Click **View All Available Providers** to see the availability status and the number of patients waiting for each provider.



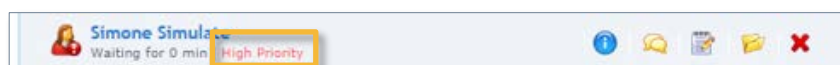
Individual Provider Waiting Room

From the Waiting Rooms, click on a provider’s name to view the list of patients waiting for that provider and the amount of time that each has been waiting.

Patient Labels

A patient may have one or several labels next to their name:

- *New Patient* – indicates a new patient (i.e., there is no existing relationship between the provider and the patient)
- *Ready for Visit* – indicates that either you or another staff member supporting this provider has cleared the patient by clicking the *Ready for Visit* checkbox.
- *High Priority* – indicates that either you or another staff member supporting this provider has marked the patient as urgent by clicking the *High Priority* checkbox.



- *Appointment* – indicates patient has a scheduled appointment with this provider. The appointment time will also be listed. Patients without an appointment are referred to as Walk-ins.

Types of Patients

Other types of patients in the Waiting Room include:

- There may be patients that are requesting a phone conversation with the provider. You will see a phone icon next to these patients. You will not be able to chat with these patients, however, you can review the intake information and make notes for the provider.
- There may be patients in the queue who are minor dependents. The parent or guardian requesting the consultation on their behalf will be specified. You will see the label, *Minor with Guardian*, underneath the patient’s name in the queue.

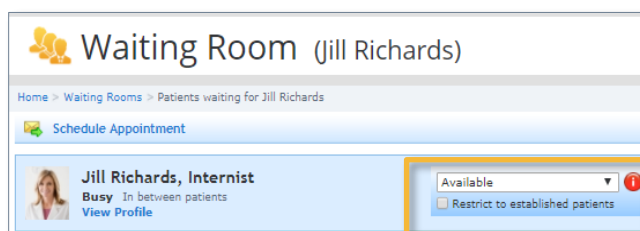
- There may be patients in the queue that are guest patients, these patients do not have any demographic or health information.
- There may be other providers requesting a conversation on behalf of their patients (Team Edition only). These providers will be labeled with a *Doctor* icon and the requesting provider's name and specialty will also be listed.



You may see some providers where the Waiting Room is CLOSED but there are patients in the Waiting Room. This indicates that either the provider is online with availability status set to "Unavailable (Appts. Only)", or that the provider has recently gone offline. If the provider has gone offline, the patients will be automatically removed after a period of time.

Changing Provider Availability

You may change a provider's availability status from the Waiting Room. The provider's current availability status is listed underneath the provider's name.



The following availability statuses can be set:

- **Available:** The provider is currently accepting patients into their waiting room.
- **Unavailable (Appts. Only):** The provider is online but only accepting patients with scheduled appointments.

The following availability statuses may also be seen:

- **Ask Me:** The provider is available for on-demand visit requests – or “uber” type requests – when a patient selects *First Available* provider. This is a read-only status for practice staff. Providers control the *Ask Me* status.
- **On Call:** The provider is accepting patients into their waiting room but may not be at their desk. This status is used for extended provider availability with low patient volume. This is a read-only status for practice staff as it is controlled by the provider.

Select *Available* or *Unavailable (Appts. Only)* from the drop-down list to change the status. An Explanation of the various availability statuses can also be obtained by clicking the information icon next the availability drop-down (red circle with an exclamation point!). Here you can also see the last time this provider's availability was changed and by whom. Note that you will not be able to change the availability status of a provider who has set themselves to *On Call*.

You may also select *Restrict to known patients*, which will only allow patients in the provider's online panel to request conversations. Note that this option will not be available if the provider's global account setting is to see only known patients.

When the provider is engaged in conversations with patients, you may notice the following additional statuses:

- **Busy – In between patients:** The provider is accepting conversation requests and is not currently in a conversation but does have at least one patient waiting for a conversation.
- **Seeing [patient name]:** The provider is currently in an online conversation with a patient.

- **Busy - Consulting with another provider:** The provider is currently in an online conversation with another provider.
- **Offline:** The provider has recently logged off but still has patients waiting for online conversations.

My Patients

Each provider in your practice will have certain patients associated to them. This makes up their online panel. When a patient has an American Well conversation with a provider, they are automatically added to the provider's online panel.

Patients can also be manually added to a provider's panel individually or as part of an import list – please see the [Adding Patients to a Practice](#) section for more details.



With appropriate permissions you can access these patient panels for the providers in your practice.






1. Select **My Patients** from the main panel or select **My Patients** from *My Practice dropdown* in the navigation bar.

The screenshot displays the American Well staff user interface. At the top, there is a navigation bar with tabs for 'Home', 'My Practice', 'Administration', 'No Pre-Visits', and 'No Post-Visits'. The 'My Practice' dropdown menu is open, showing options for 'Waiting Rooms', 'My Patients', 'My Providers', and 'Message Center'. A hand cursor is pointing at the 'My Patients' option. Below the navigation bar, there is a calendar for January and a section for 'Today's Appointments'. The main content area features a large banner with a woman working at a laptop and the text 'Tools at your fingertips'. Below the banner are four dashboard tiles: 'Waiting Rooms' (Manage the list of patients waiting for online conversations with your providers.), 'Message Center' (No New Messages. Help your providers manage incoming and outgoing messages with their patients.), 'My Providers' (Manage the scheduled availability and profile settings for the providers you support.), and 'My Patients' (Schedule appointments, assign providers, and manage health histories for patients in your practice.). The 'My Patients' tile is highlighted with a yellow border and a circled '1' next to it.

2. Once on the **My Patients** page, select a provider's name from the *Patients of* dropdown list.
3. Select **Find** to access the patient panel of that provider.

4. You may add a patient to panels of one or multiple providers. Please refer to the [Adding Patients to a Practice](#) section for more information.
5. You may click on a patient’s name to view their profile, please refer to the [Patient Profiles](#) section for more information.
6. The patient panel of a provider can also be accessed via the **View Patient Panel** link in the Provider’s Profile.

 Some patients may have a Home icon  next to their name; which indicates that the patient has a Medical Home.

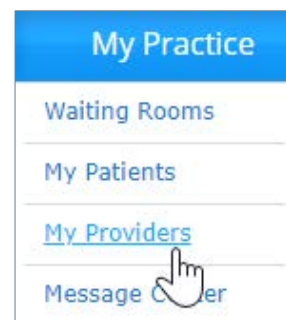
	Name	DOB	Enrolled?	Invited?	MRN	
	Elif Eracar	08/28/1972	Yes	No		Schedule Appt.
	Katie Ruigh	04/22/1981	Yes	No		Schedule Appt.
	Katie Ruigh	04/22/1981	Yes	No	123	Schedule Appt.
	Veronica O'quinn	03/28/1976	Yes	No		Schedule Appt.
	Lauren Meyer	10/10/1986	Yes	No		Schedule Appt.

Supporting your Providers

In this section you will learn how to administer the online availability, schedule, and patients of your assigned providers. If you have questions about the providers listed here, please contact your Practice Coordinator.

To view a list of your providers and their current online status:

- Select **My Providers** in the main panel of the home page
- Select **My Practice** → **My Providers** in the top navigation bar.



Provider Profile

Each provider’s profile contains information about their current status, scheduled availability, and American Well settings. To view a provider’s profile from **My Providers**, click on the provider’s name. Here, you can see the provider’s current availability status and patient ratings.

My Providers	
Provider	Current Status
Mary Jones, Family Physician	AVAILABLE
Ryan Lowe, Family Physician	UNAVAILABLE
Jill Richards, Internist	AVAILABLE
Sam Smith, Internist	OFFLINE

Results 1-4 of 4 PREVIOUS | NEXT

From here, you can also link to the Provider’s *Patient Panel*, *Waiting Room* and *Inbox*. The number next to the Inbox link indicates the number of new messages in this provider’s Secure Message Center. You can also preview a copy of the provider profile that is visible to patients and other providers in the American Well network by clicking on **View Full Public Profile**.

Provider Profile (Julie Thomson)

Home > My Providers > Provider Profile (Julie Thomson)

Julie Thomson
Psychiatrist
 ★★★★★ [62 Ratings]
 Gender: Female
 Location: Littleton, MA
 Languages: Spanish, English
[View Full Public Profile >](#)

Status: Offline

- [View Waiting Room](#)
- [View Inbox \(10\)](#)
- [View Patient Panel](#)

Schedule

Edit Recurring Availability | Remove Availability | Schedule Appointment | My Time Zone (EST)

March 2016

Friday, March 11, 2016

Time	Availability	Action
11:00 AM		
11:15 AM		
11:30 AM		
11:45 AM	Available	×
12:00 PM	Available	×
12:15 PM	Available	×

Viewing & Scheduling Appointments

With appropriate permissions you can setup patient appointments with the providers of your practice and you can view appointments for a specific date, patient or provider.

- To view appointments for a specific date, select the date from the calendar in the left hand panel of the homepage.

Home | My Practice | Administration | No Pre-Visits | No Post-Visits

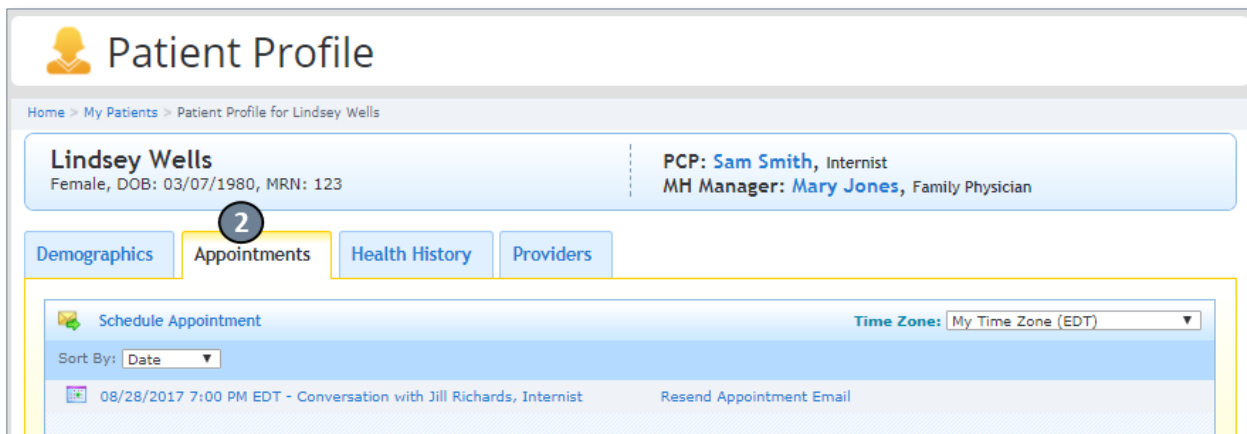
Schedule Appointment

January 2019

S	M	T	W	T	F	S
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

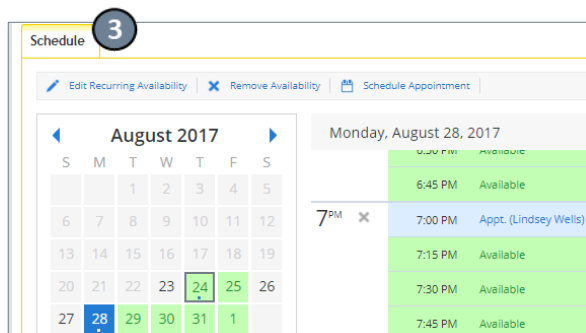
Tools at your fingertips

- To view appointments for a specific patient, click on **My Practice > My Patients > Patient Profile > Appointments (tab)**.



- To view appointments for a specific provider, select the **Schedule** tab of the **Provider's Profile** and click on the date within the calendar to see the appointments that are scheduled for that day.

 A small appointments icon appears next to each day on the calendar, where the provider has scheduled appointments. Staff members may view and publish the provider's availability and schedule appointments across all accounts of the provider. Time zones can also be normalized for appointments and scheduling across the various calendar views. Changes made to availability may be applied across all of a provider's enrolled accounts.



Provider Availability

The American Well System allows providers to publish future availability so that patients can set up appointments in the available timeslots.

The *Schedule* tab of the *Provider Profile* page shows the dates and times the provider is available for online appointments. Click on a specific date on the calendar to see the provider's availability as well as any scheduled appointments for that day.

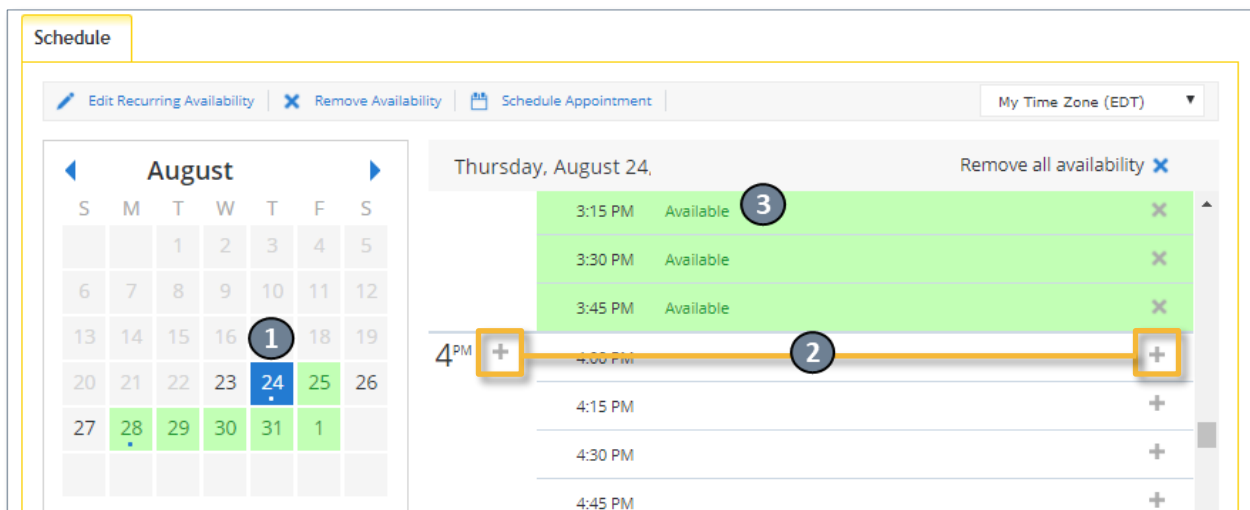
Setting Availability

With the appropriate permissions you can set a provider's availability from the **Schedule tab** in the *Provider's Profile*. You can add availability by day or by week.

Adding Daily Availability:

- Select the date from the calendar in the left-hand side of the screen.
- On the right-hand side, select the timeslots. You can click on the **+** sign next to a blank timeslot or click on the **+** next to an hour to select hourly blocks.

- The timeslot(s) turns green and will be marked with **Available**, indicating that you have successfully added the availability.

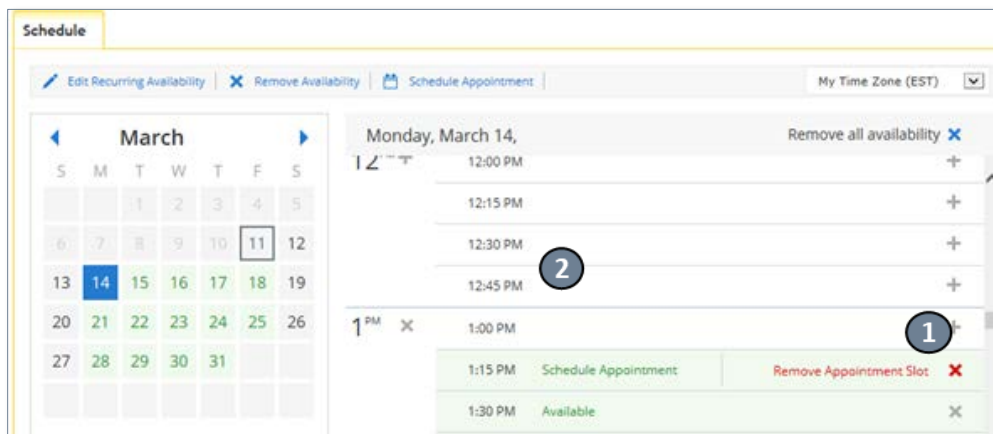


Changing Availability

To change a block of previously added availability, you must remove the previous block and add the new availability. There are four ways to remove availability from a provider’s calendar. The steps for removing availability are described below.

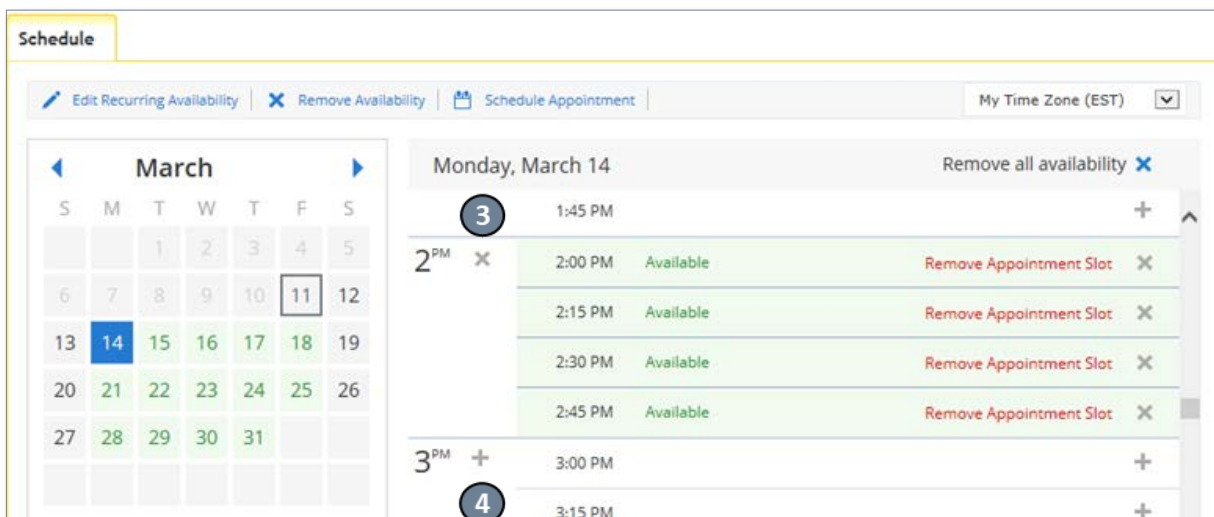
Removing a single timeslot

- Click on the red X next to an Available timeslot or the **Remove Appointment Slot**.
- The timeslot turns from green to white, confirming that you have successfully removed the availability.



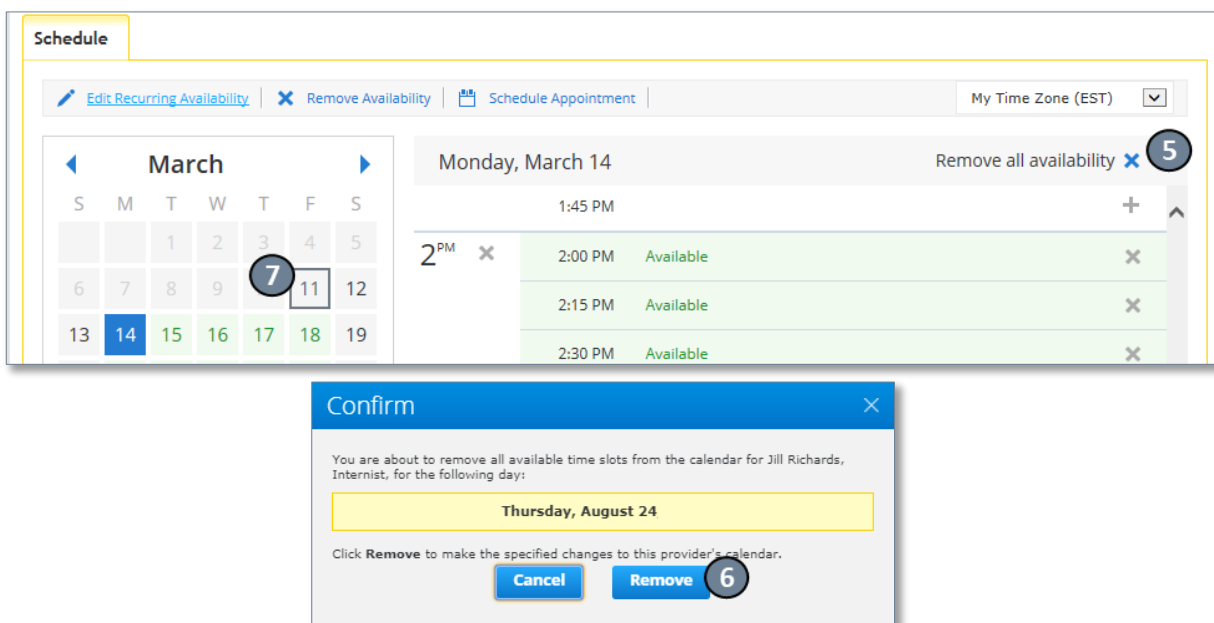
Removing hourly timeslot:

3. Click on the X next to an Available hour block.
4. The timeslots in the hour block will turn from green to white, confirming that you have successfully removed the availability.



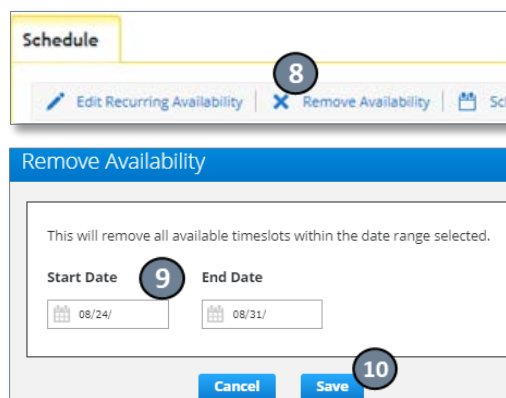
Removing daily availability:

5. Click on **Remove all availability** next to the date in the right corner.
6. Confirm that you would like to remove availability and cancel all appointments for this day by selecting **Remove**.
7. The date in the calendar on the left-hand side will no longer have a green background, confirming that you have successfully removed the availability.



Removing weekly timeslot

8. Select **Remove Availability** on the top toolbar of the Schedule tab.
9. Select the **Start & End Dates**. If you would like to Cancel any appointments that are scheduled during these times, check *Cancel all affected appointments*.
10. Click Save.
11. You may remove additional blocks by repeating the step above.



Secure Message Center

American Well has a built-in Secure Message Center that you can use to correspond with patients, providers, and staff in your practice. The Message Center is HIPAA-complaint and functions like an e-mail service. Please be aware that secure messages cannot be sent outside of the American Well System.

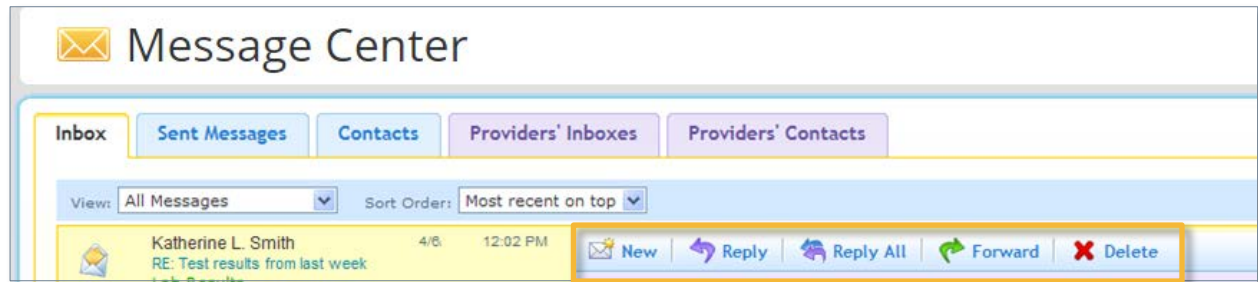
Inbox

You may access your personal *Secure Message Center* in one of several ways:

- Click on the Envelope icon on the top navigation bar
- Navigate to the **Message Center** in the main panel of the homepage
- Go to **My Practice > Message Center** from the top navigation bar.

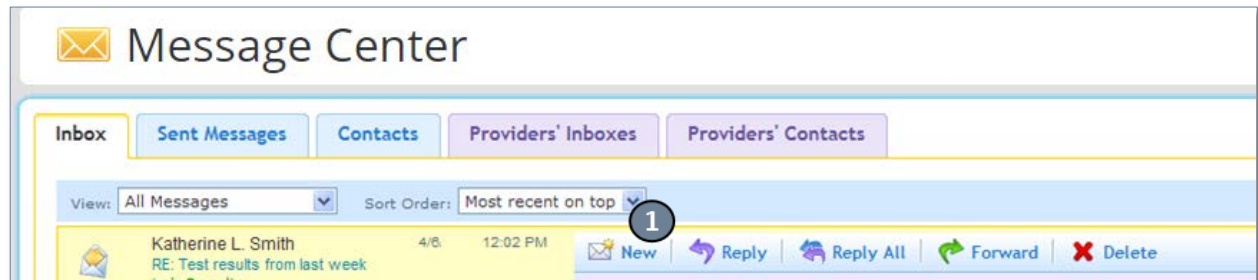


The **Inbox** tab contains all messages. You can Create new messages, reply to messages, reply all and forward messages. You can also delete messages from your inbox.




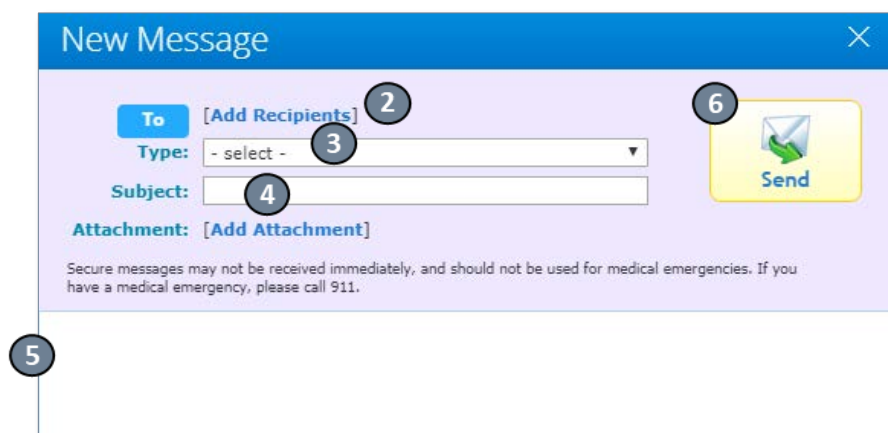
Create New Messages

1. To compose a new message, click **New**.



2. Within the pop up, Select **Add Recipients** to locate your contact.
3. Select the **Type** for the message. This field is used to categorize the message as it informs the recipient about the nature of your message.
4. Populate the message subject and attach any files if desired.
5. Type out your message in the text field.
6. Lastly, select **Send**.

 Copies of all of the sent messages will be saved within the **Sent Messages** tab. From here, you can change the view to see the messages you have sent on behalf of your assigned providers. Refer to the **Provider Inboxes** section below for additional details.



Provider Inboxes

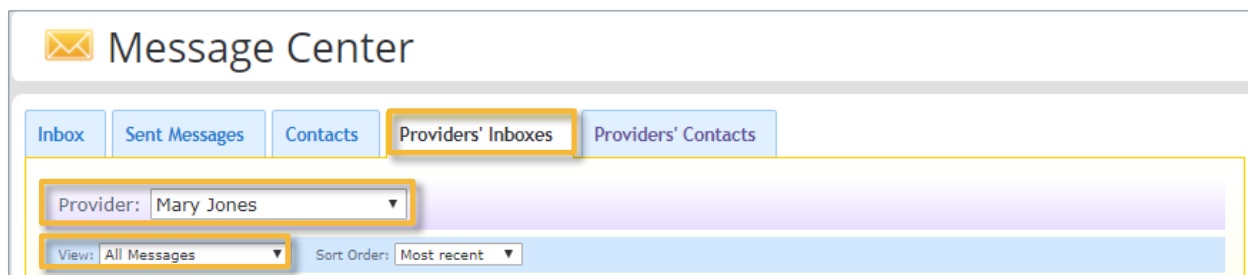
American Well features a *Secure Message Center* through which providers can send or receive messages from patients, providers and staff. If you have the appropriate permissions, you are able to view, manage, send and respond to messages in the Inboxes and Contact Lists of your assigned providers.

To access a Provider’s Secure Message Center follow one of the steps below:

- Click on the Envelope icon on the top navigation bar
- Navigate to the **Message Center** in the main panel of the homepage
- Go to **My Practice > Message Center** from the top navigation bar

Within the Message Center, select the **Providers’ Inboxes** Tab and using the **Provider** dropdown, select the Provider’s name.

The **View** dropdown will allow you to view messages of a particular type, for example: Referral Request, Prescription Refill, etc. Messages with patient payment details will have a \$ dollar sign icon next to them.



Messages sent from the provider’s Inbox will be clearly labeled for recipients as having been sent by you, on behalf of the provider. The provider will also be automatically copied on all messages you send from their inbox.

Sending Messages on Behalf of Providers

You may send messages to a provider’s Contacts List. With the Provider’s Mailbox open, follow the steps to [Create New Messages](#) above.

Responding to Messages on behalf of Providers

1. Open the message to which you would like to respond.
2. Select **Reply**, **Reply All** or **Forward** commands, as appropriate.
3. Select the **To** button to *add or remove* recipients.
4. Write the reply in the text box and add any attachments.
5. Click **Send**.



Administrating Patient Records

American Well has a variety of administrative features to help manage patient records for your online practice if you have the appropriate user rights. You can invite patients to join your online practice and schedule web appointments with providers. You can use the import and export functions to transfer patient data between American Well and your other practice management systems, EMRs, or other clinical systems as needed.

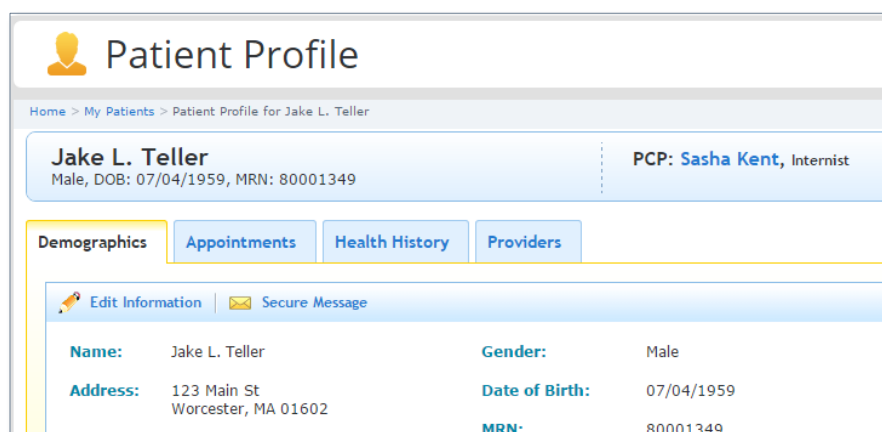
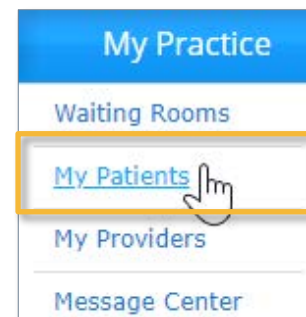
To access the **Patient Panels**:

- Go to **My Practice > My Patients** from the top navigation bar.

You may use any combination of filters to locate and view a specific patient.

Patient Profiles

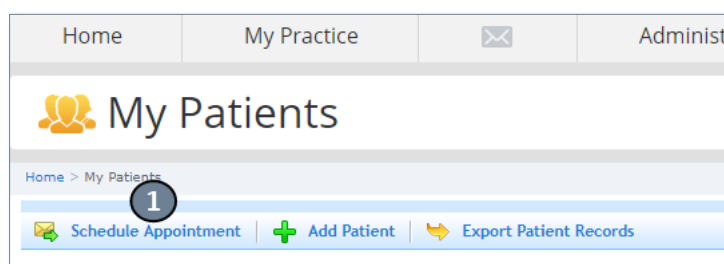
Once you have located your patient, you can view additional information by clicking on their name in the results. In the patient profile, you can view and edit basic information about the patient and view the patient's Primary Care Physician, if known.



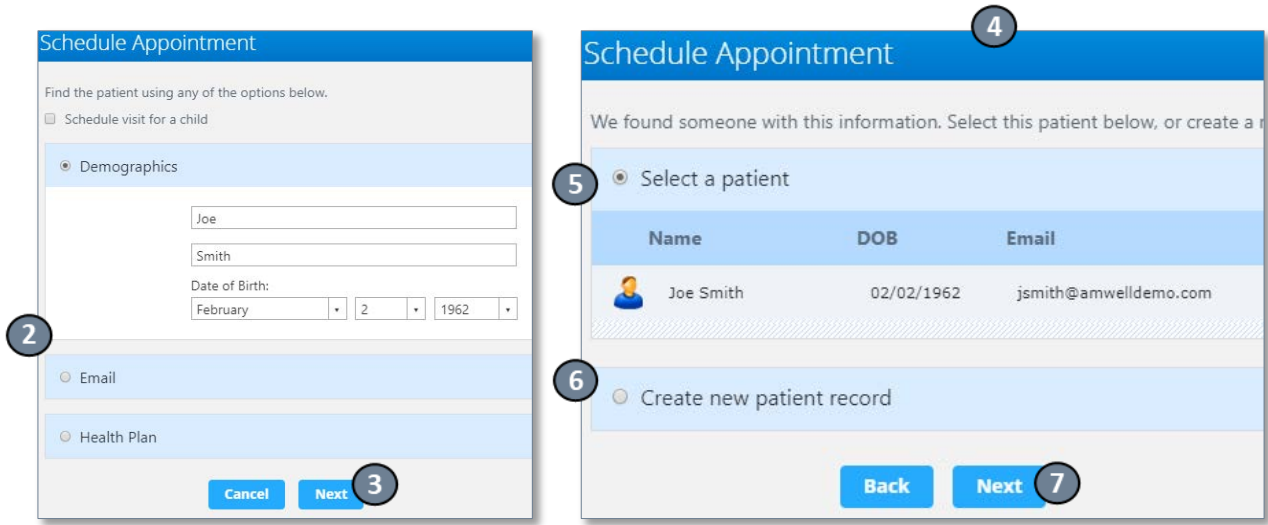
Scheduling Appointments

You can schedule web consultations for patients with the providers of your practice if you have the appropriate permissions.

1. Click on the **Schedule Appointment** button from the *My Patients* area or click **Schedule Appt.** next to a patient's name.
2. Enter the patient's demographics, email, or health plan information.
3. Click **Next** to proceed.
4. If the system finds a patient based on the information you have entered, the existing patient record will be displayed. Otherwise, the system will notify you that the patient is not yet registered and you may complete registration on their behalf.
5. Either click **Select a patient.**
6. Or select **Create New Patient Record.** If this option is selected, you will be brought to a new page where you can populate the new patient's details. Once complete, you can continue with the scheduling process.

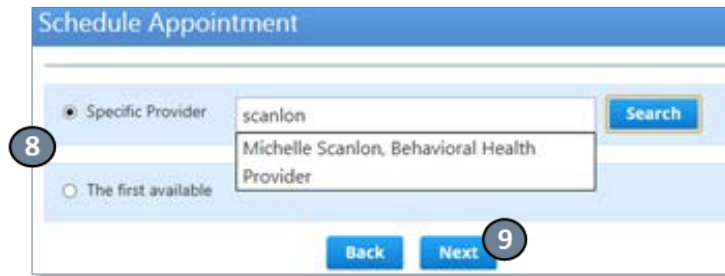


7. With the Patient selected, select **Next** to proceed.



8. You may choose a specific provider within your practice or schedule the patient with the first available provider in a given specialty. If you schedule with the first available provider, the system will find the first available provider *at the time the patient starts the visit*. At that point, they will be directed to the provider.

9. Select **Next**.



10. Select the date and time for the appointment.
11. An appointment email will automatically be sent to the patient once the appointment is scheduled and you can choose to send them an additional reminder. You can also send the provider an appointment email and/or reminder about the visit. Simply select the boxes you would like to apply.
12. Select **Next**.

Schedule Appointment

Select a date and time Schedule for right now

10 ◀ March ▶ Friday, March 11

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Provider's Time Zone (EST) ▼

- 12:30 PM
- 12:45 PM**
- 1:00 PM
- 1:15 PM
- 1:30 PM
- 1:45 PM
- 2:00 PM

Friday, March 11, at 12:45 PM

Email patient reminder 15 minutes ▼ before visit

Email provider reminder 15 minutes ▼ before visit

Email provider appointment

11

Back **Next** **12**

13. The final screen will display a summary of the appointment details. Here, you can add a note to the patient, which will be included in the email invitation.

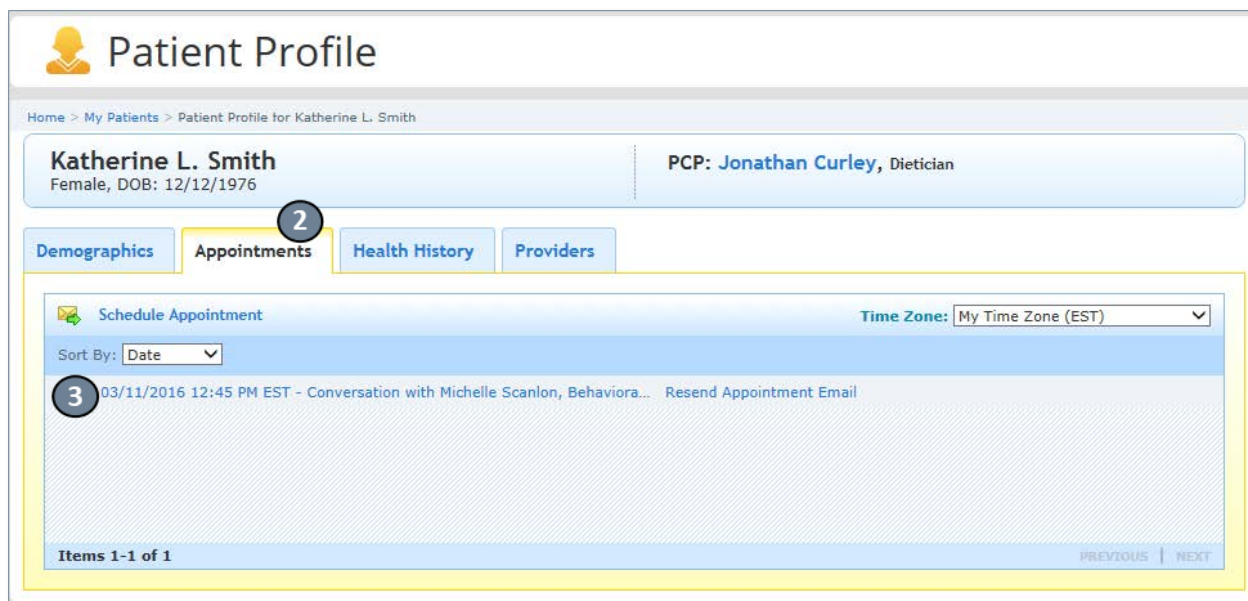
14. Select **Send Invitation** once the details are reviewed.

15. Click **OK** to confirm.

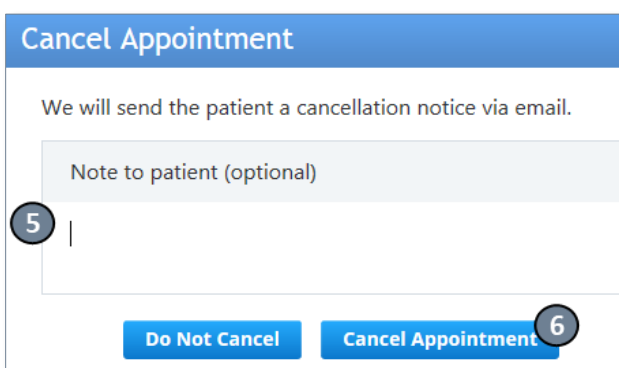
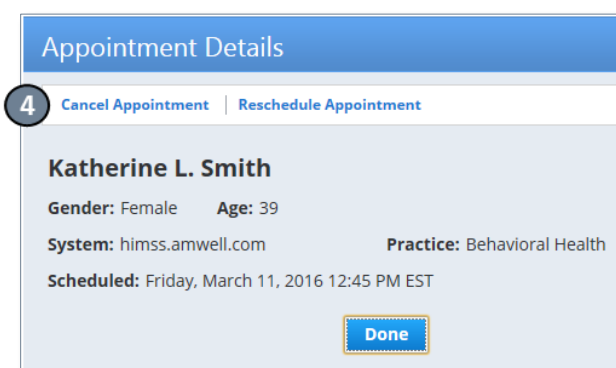
16. Once the appointment has been scheduled, the patient will receive an email invitation.

To Cancel an Appointment

1. Locate the appointment date in the calendar from either the left-hand panel of your Home Page or from the calendar in the Schedule tab of the Provider Profile, or from the Patient Profile *Appointments* tab.
2. Click on the appointment to open the profile.



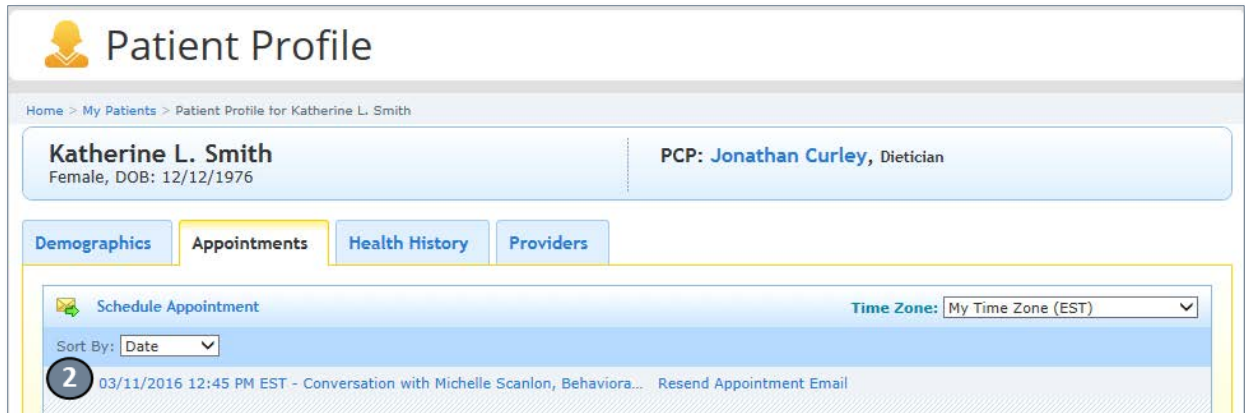
3. Determine the appointment you would like to cancel and click the **Appointment Date** link.
4. Select **Cancel Appointment**.
5. Include an optional note if necessary.
6. Click **Cancel Appointment**. The patient will be notified of the appointment cancellation by email.



To Reschedule an Appointment:

1. Click on the appointment date in the calendar from either the left-hand panel of your Home Page, from the calendar in the Schedule tab of the Provider Profile or from the Patient Profile *Appointments* tab. See above.

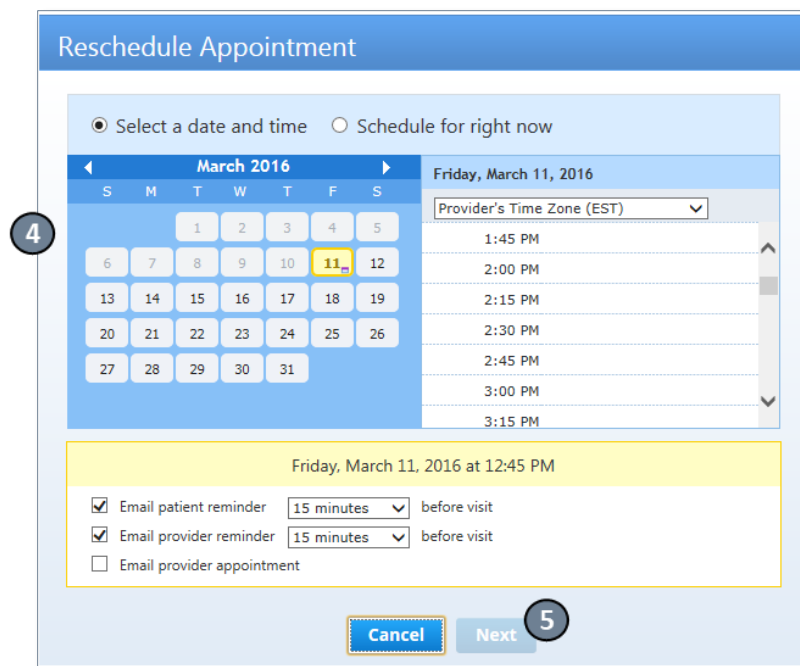
- Locate the appointment you would like to reschedule and click the **Appointment Date** link.



- Select **Reschedule Appointment**.



- Select the updated appointment time and any applicable patient / provider reminders.
- Click **Next** when a new time has been selected.



- You may include an optional note to be included in the patient’s appointment rescheduling email.

- Select **Next**.
- Click **OK**. The patient will be notified of the updated time, and the provider’s calendar will reflect the update.

Viewing Patient Health History

With the appropriate permissions you can access the Health History of a patient on behalf of one of your assigned providers. The amount of information available in a patient’s Health History depends on a provider’s relationship type with their patient.

To view a Patient’s Health History:

- Select the **Health History** tab in the patient’s profile.
- Select the provider’s name in the **View Profile on behalf of** dropdown list. This is the list of your assigned providers with whom the patient has a relationship.

Based on the selected provider’s relationship with the patient, you will have full or limited access to the patient’s Health History. If the provider has limited access to the record but has an ongoing care relationship with the patient, you may certify the relationship by clicking the **Confirm Relationship to Patient** link.

Confirming the provider’s relationship to the patient will upgrade the relationship to *Treating Physician* and access to the patient’s full Health History.

A secure message will also be sent to the patient informing them that the provider you selected has been granted access to their Health History.

Patient Profile

Home > My Patients > Patient Profile for Katherine L. Smith

Katherine L. Smith
Female, DOB: 12/12/1976

PCP: **Jonathan Curley**, Internist

1

Demographics | Appointments | **Health History** | Providers

2

View Profile on behalf of: Mary Jones

Recent Conditions	Last Diagnosis	Recent Medications	Date	Status
ACUTE STRESS REACT NEC	05/27/2016	Cyclobenzaprine	02/25/2006	Prescribed
EXHAUSTION-EXCESS EXERT	05/27/2016	Ibuprofen	02/25/2006	Prescribed
COR ATH UNSP VSL NTV/GFT	05/22/2007			
ASTHMA NOS	04/22/2007			
DMII WO CMP NT ST UNCNR	03/05/2006			

[View Full Health Summary >](#)






Attach a File | Export to CCR | Secure Message


View: All Entries | Sort By: Type

Health Summary	--
Blood Glucose	--
Glycosylated Hemoglobin (HbA1c)	--
Visit with Mary Jones, Family Physician	05/24/2016
Article: Gestational Diabetes	05/19/2016
Article: Living With CAD	05/19/2016
Article: Home Pregnancy Tests	05/16/2016

Items 1-7 of 7 PREVIOUS | NEXT

The Health History may contain the following types of information:

-  Health Summary – This is a summary of the patient’s most recent Conditions, Medications, Allergies, Immunizations and Procedures.
-  Health Measurements – These are self-tracking tools offered to the patient within American Well, which can help patients keep track of health metrics such as body weight, blood glucose levels, etc.
-  Visit Reports – These are comprehensive summaries of online consultations the patient has had with providers.
-  Assessment Reports – These are generated when the patient completes a pre-defined American Well assessment/questionnaire. The report contains the question responses and results of the assessment, which may include follow-up recommendations, patient education materials, and suggested conversations.
-  Media – These media items may include educational articles or videos.

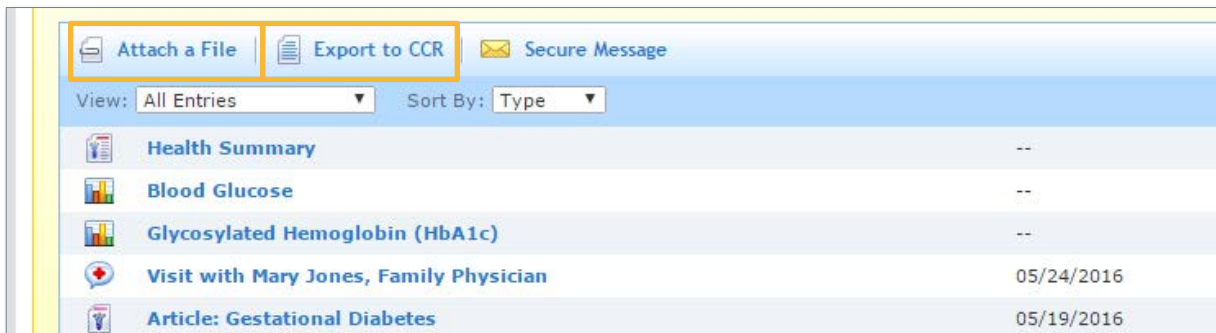
- 
 Other – The patient may have other files attached to his/her record, including lab results, x-rays, etc.

To attach a file to the patient’s health record:

1. Click **Attach a File**.
2. Click **Browse** to open a window to locate the file on your computer.
3. Select the file *Type* from the dropdown list; for instance, “Laboratory Studies”.
4. Specify the date relevant to the file; for instance, the date lab test was conducted.
5. You may add a description about the file in the optional *Summary* field.
6. Click **Attach**.

Once the file is attached it will appear in the patient’s Health History. The patient will be notified via secure message.

You also have the option to export the patient’s entire Health History. Click on **Export to CCR** (note that your practice may have specified a different format, other than CCR). This will produce an XML document containing the patient’s Health History that you can use to transfer information to your other clinical systems.



Adding Patients to a Practice

There are several ways to link patients to your telehealth practice including:

- Through scheduling an appointment, which will create a profile for the patient in question.
- By dissemination of a Service Key, which allows patients to enroll directly into your telehealth practice.
- Or, you can add patient profiles individually using the Add Patient option below.

You can use the **Add Patient** tool to add a patient profile to your panel. With this tool you can fill in the patient's information yourself. The system will check if there is an existing patient record that matches the information you have provided. If a matching record is not found, a new patient record will get created and a welcome email sent to his/her email address.

1. Enter the patient information within the *Add Patient* window.
2. Select **Add Additional Info** to enter address and phone information
3. Click **Add**.

Depending on whether a patient's record is found you can follow either the *Existing Patients* or *New Patients* workflow outlined in the sections below.

Add Patient

1 Please provide all of the following information (Health Plan information is optional), and click **Add**:

*** First Name:**

*** Last Name:**

*** Date of Birth:**
(mm/dd/yyyy)

*** Gender:** Male Female

*** Email:**

*** Re-enter Email:**

*** Location:**

Health Plan:

Subscriber ID: **Suffix:**

Service Key: ⓘ

2 [Add Additional Info >](#)

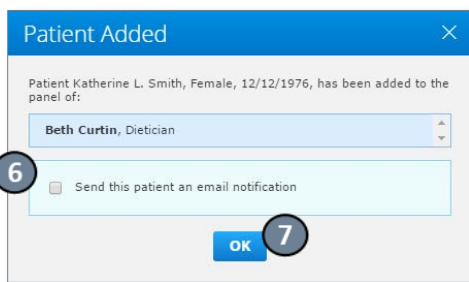
3

Existing Patients

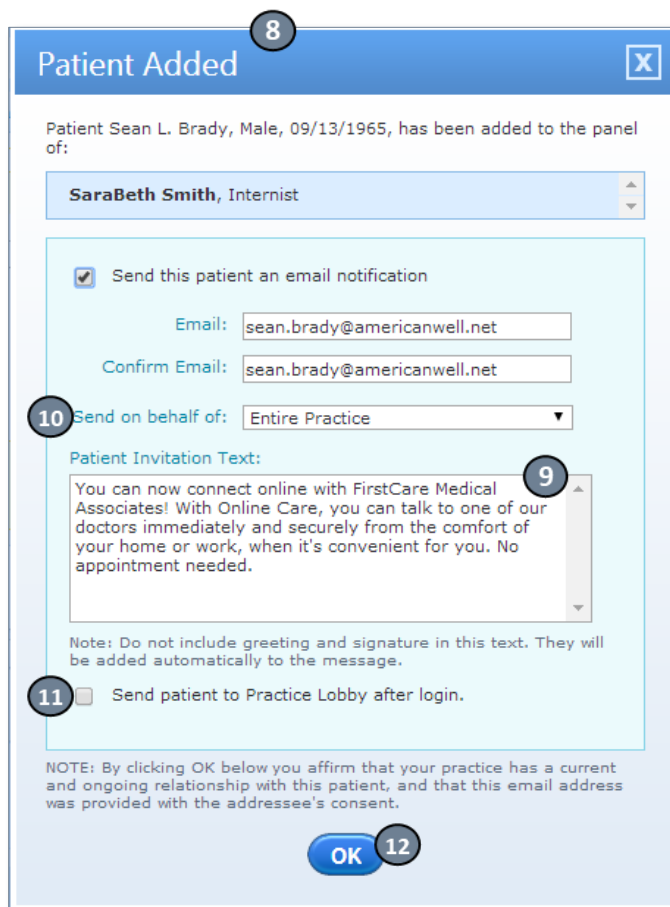
Patients who are covered by the sponsoring health plan or care delivery network and those who have already enrolled in American Well will have an existing account in the system. For these patients, the system will prompt you that a match has been found by displaying the *Patient Found* screen. Here you can simply add existing patients to the appropriate patient panels.

1. If desired, you may assign an MRN to this patient.
2. In the **Add to Panel – Select a Provider** section, type the First and/or Last name of a provider in your practice you would like to associate this account with.
3. Click **Find**.
4. Providers who the patient is not currently associated with will be selectable in the results below. Select the appropriate provider from the search results and they will appear in the **Add patient to this provider’s online panel** section.
5. Click **Confirm**.

6. You have the option to send an email notification to this patient informing them that they have been added to your patient panel.
7. Click **OK**.



8. If you checked the **Send this patient an email notification** box, you will be presented with a screen with the default invitation text from your practice.
9. You may change this text or the email address prior to sending the email.
10. You also have the option to send the invitation on behalf of a particular provider or your Entire Practice.
11. If you choose, a hyperlink can be included in the email to direct the patient to your practice’s lobby (i.e. Practice Home page), the next time they login.
12. Click **OK**. You will be taken to the patient’s profile that exists in the system.



New Patients

For new patients or those who are not covered by the sponsoring health plan or care delivery network, the system will display the *Create Patient Account* screen. Here you can add a new patient to the appropriate patient panels and invite them to join American Well.

1. If desired, enter the patient's *MRN*.
2. In the *Add to panel – Select a Provider* section, type the First and/or Last name of a provider in your practice you would like to associate this account with and click **Find**.
3. Providers who the patient is not currently associated with will be selectable in the results below. Select the appropriate provider from the search results.
4. They will appear in the **Add Patient** to this provider's online panel section.
5. Repeat your search until all desired providers have been added.
6. Click **Confirm**.

The screenshot shows the 'Create Patient Account' window. At the top, a blue header contains the title and a close button. Below the header, a yellow box displays the patient's details: 'Robert Clark, Male', 'DOB: 01/31/1970', and 'Email: Robert.Clark@aw.net'. A text prompt asks the user to select at least one provider's panel and click 'Confirm'. The 'Add Patient to Practice' section includes an 'MRN (optional)' field (callout 1), an 'Add to Panel - Select a Provider:' section with a search input (callout 2) and a 'Find' button (callout 5), and a list of search results (callout 3) showing 'Charlie Jones - Family Physician'. Below the results is a section 'Add patient to this provider's online panel:' with a yellow box containing 'Charlie Jones - Family Physician' (callout 4). At the bottom, there are 'Cancel' and 'Confirm' buttons (callout 6).

7. An invitation email will be generated at the end of this process, inviting the patient to enroll in American Well.
8. You have the option to send the invitation on behalf of a particular provider or the Entire Practice through the Send on behalf of dropdown list.
9. You can also edit the body of the email through the Patient Invitation Text field.
10. If you choose, a hyperlink can be included in the email to direct the patient to your practice's lobby (i.e. Practice Home page), the next time they login. To do this, check off Send patient to Practice Lobby after enrollment.
11. Click **Finish**.
12. Click **OK** for the confirmation message.

You will be taken to the newly created patient's profile. Note that the profile will only contain the minimal information that was entered during the account creation process.

Create Patient Account ✕

7 An email invitation containing instructions for enrolling will be sent to this patient on behalf of your practice. You may choose to include a personal message from your practice. You may also designate a specific provider as the sender.

8 **Email:** Robert.Clark@aw.net

8 **Send on behalf of:** Entire Practice

Patient Invitation Text:

9 With Online Care, you can talk to one of our doctors immediately and securely from the comfort of your home or work, when it's convenient for you. No appointment needed.

Note: Do not include greeting and signature in this text. They will be added automatically to the message.

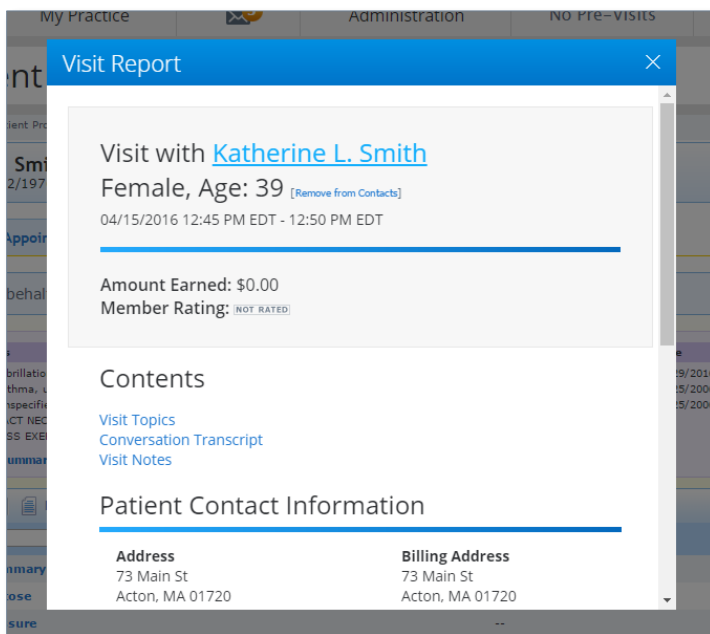
10 Send patient to Practice Lobby after enrollment.

NOTE: By clicking FINISH below you affirm that your practice has a current and ongoing relationship with this patient, and that this email address was provided with the addressee's consent.

11 **Cancel** **Finish**

Visit Reports

Visit Reports are generated when a patient has an American Well consultation with a provider. Each report includes information about the patient’s conversation request, the conversation transcript, provider diagnosis, prescriptions and follow-up recommendations.



You may also export Visit Reports as described in the **Export Patient Data** section below:

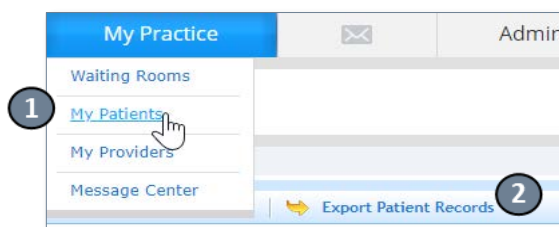
Export Patient Data

Through American Well, you are able to export patient data in a format that can be imported into your other clinical systems. Please note that you will only be able to export records on behalf of Treating Physicians for the patient.

There are two ways to export data: Export Health Histories AND Export to CCR

Export Health Histories:

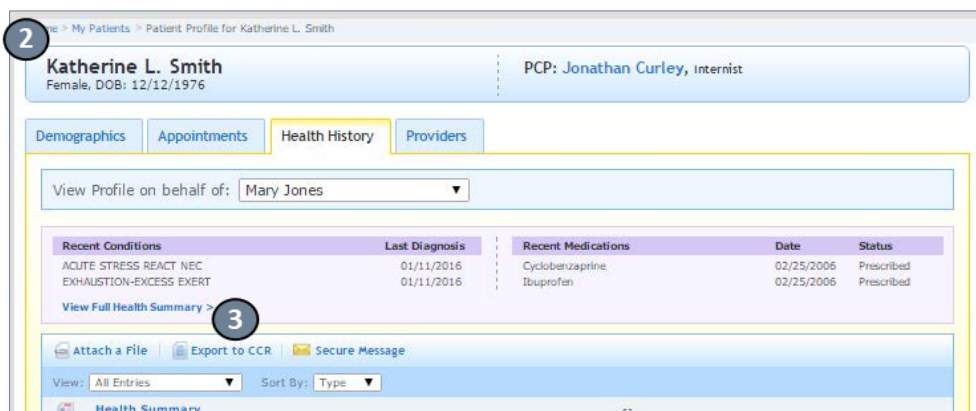
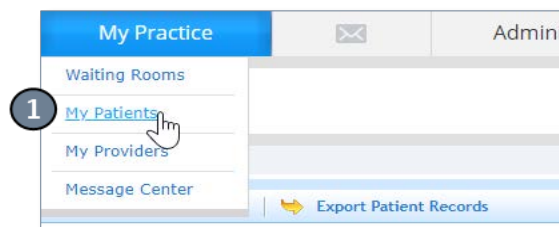
1. Go to **My Practice > My Patients**
2. Select **Export Patient Records**



Exporting of health summaries is broadly done for selected providers in a preferred format. Content can be further specified to include all conversation reports, only those which have not yet been exported, or within a date range. Furthermore, health histories can be included in the export as well.

Export to CCR:

1. Go to My Practice > My Patients
2. Locate the Patient and click on their name to open their profile.
3. Select Export to CCR



Notice of Ownership

All materials contained herein are the property of American Well Corporation and are copyrighted under United States law and applicable international copyright laws and treaty provisions. The materials contained herein are not work product or “work for hire” on behalf of any third party. The materials contained herein constitute the confidential information of American Well Corporation, except for specific data elements provided by third parties, which are the confidential information of such third parties. The content contained herein results from the application of American Well proprietary processes, analytical frameworks, algorithms, business methods, solution construction aids and templates, all of which are and remain the property of American Well Corporation.

Trademark Notice

All of the trademarks, service marks and logos displayed on these materials (the "Trademark(s)") are registered and unregistered trademarks of American Well Corporation or third parties who have licensed their Trademarks to American Well Corporation. Except as expressly stated in these terms and conditions, you may not reproduce, display or otherwise use any Trademark without first obtaining American Well Corporation's written permission.