Staff User Guide

Mixed Practice

April 2020

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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:

- Scheduling Appointments
- Access to the Secure Inbox of your assigned providers
- 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

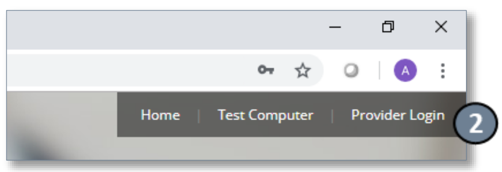
Logging into your Account

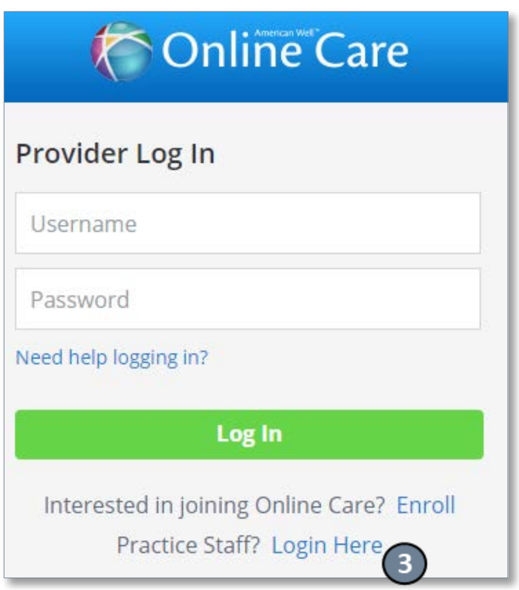
Your Practice Coordinator will set up an American Well account for you and provide you with a username and password to log in to the American Well System.

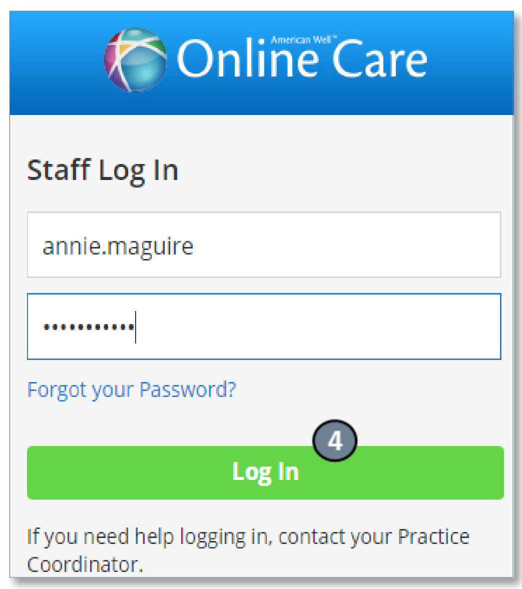
> You may change your password at any time, and it is strongly recommended that you change your password after your first login. Please refer to the **Changing your Password** section for more details.

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**.







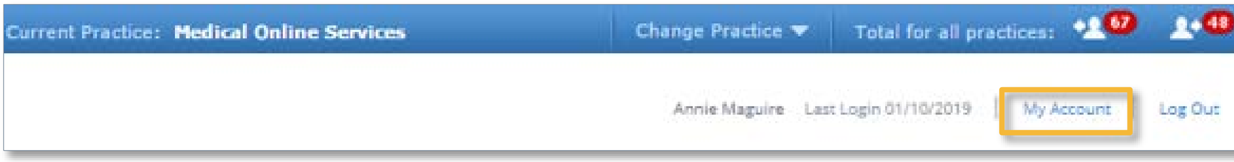
Home Page

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 assigned providers (My Account) and system log out (Log Out).

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:

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.

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.

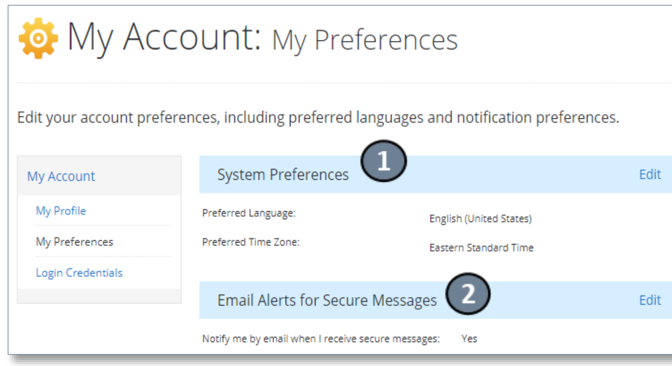
3. Assigned Providers

   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 and-secure messages of the assigned providers.

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

My Preferences



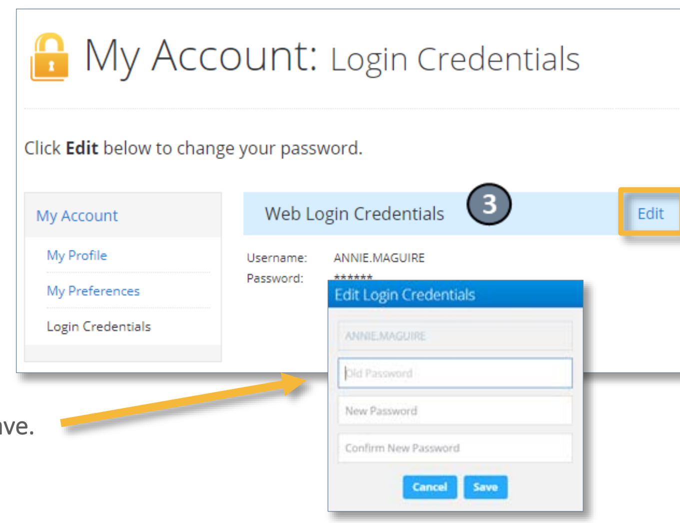
The **My Preferences** section contains your preferred language and email alerts.

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**.

My Patients

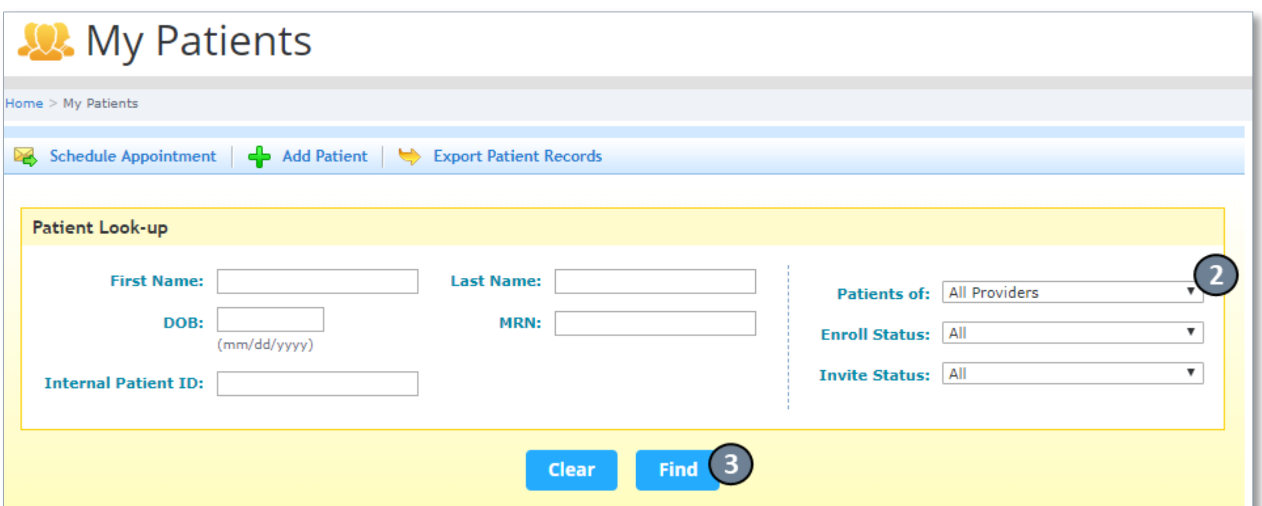
Each provider in your practice will have certain patients associated to them. This makes up their online panel. When a patient has an American Well conversation with a provider, they are automatically added to the provider's online panel.

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.

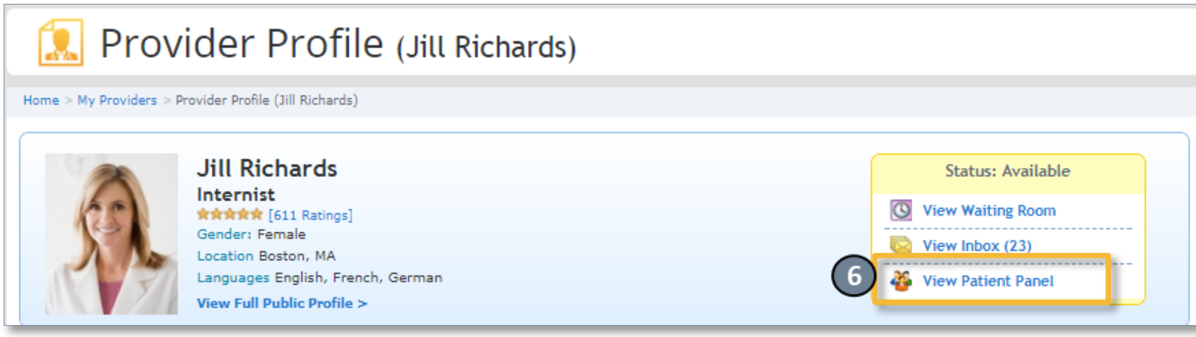
With appropriate permissions You can access these patient panels for the providers in your practice.

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

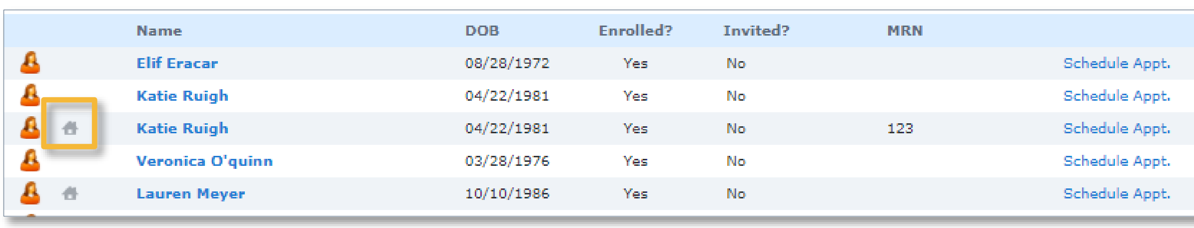
2. Once on the **My Patients** page, select a provider's name from the *Patients of* dropdown list.
3. Select **Find** to access the patient panel of that provider.



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 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.

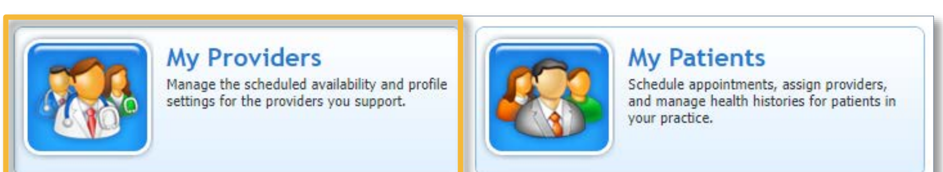
Supporting your Providers

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

***Note, this section applies only to your organization's providers**. Amwell Medical Group providers are supported by the Amwell Medical Group.

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

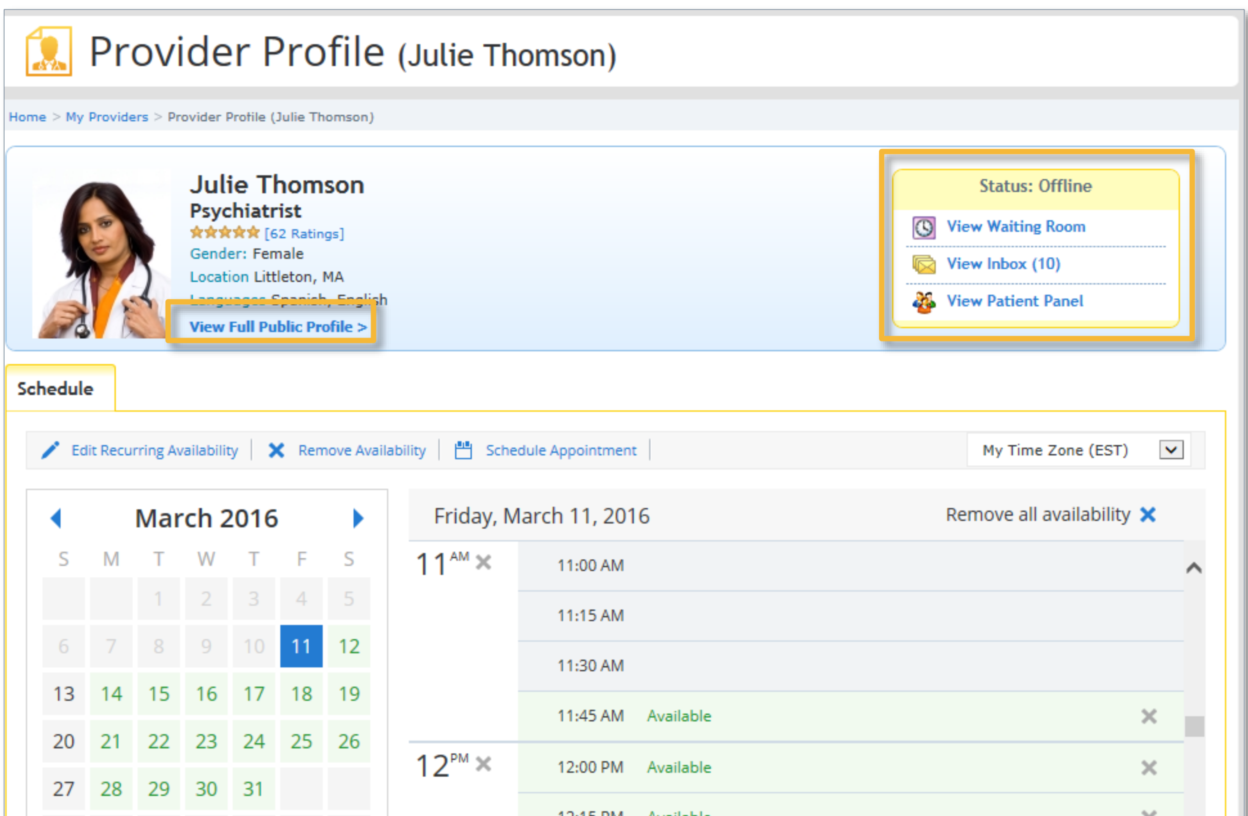
- Select **My Providers** in the main panel of the home page
- Select **My Practice → My Providers** in the top navigation bar.



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.

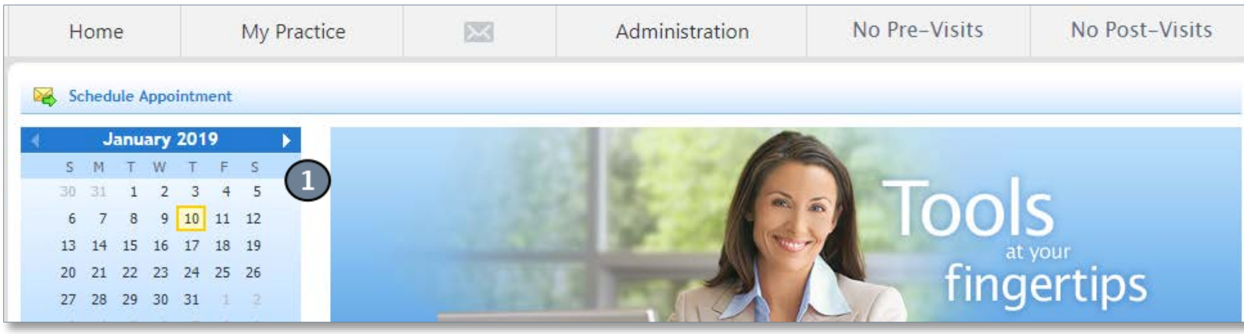
From here, you can also link to the Provider's *Patient Panel* and *Inbox*. The number next to the Inbox link indicates the number of new messages in this provider's Secure Message Center. You can also preview a copy of the provider profile that is visible to patients and other providers in the American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



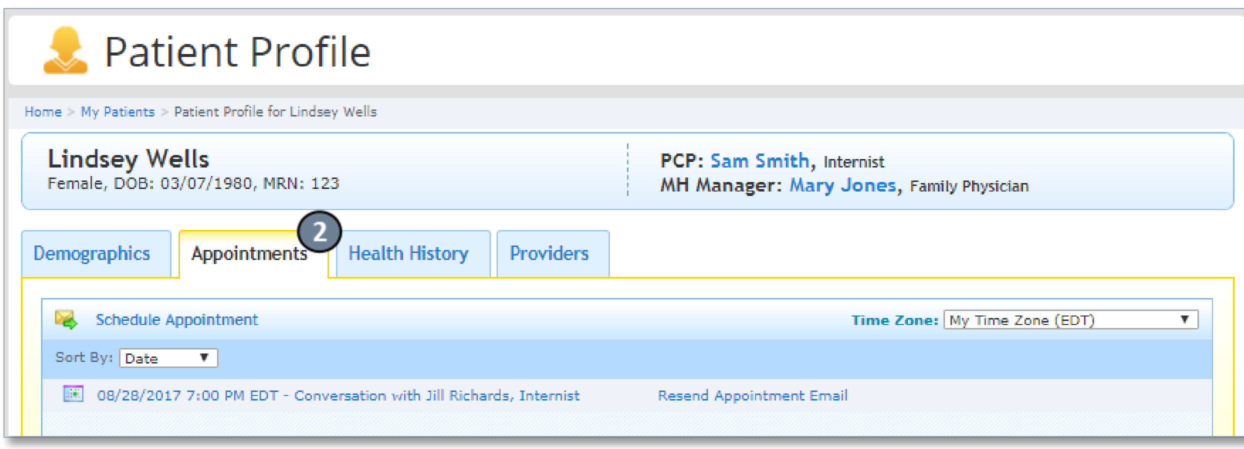
Viewing & Scheduling Appointments

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.

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

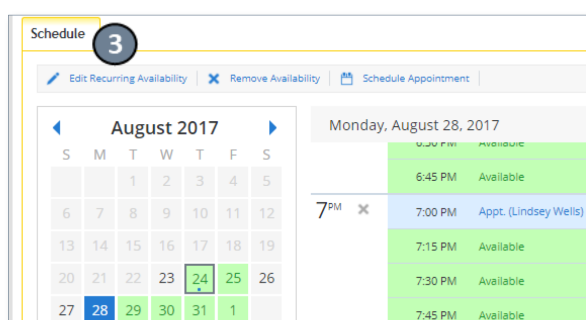


2. To view appointments for a specific patient, click on **My Practice** > **My Patients** > *Patient Profile* > **Appointments (tab)**.



3. 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 schedule appointments across all accounts of the provider. Time zones can also be normalized for appointments and scheduling across the various calendar views.



Secure Message Center

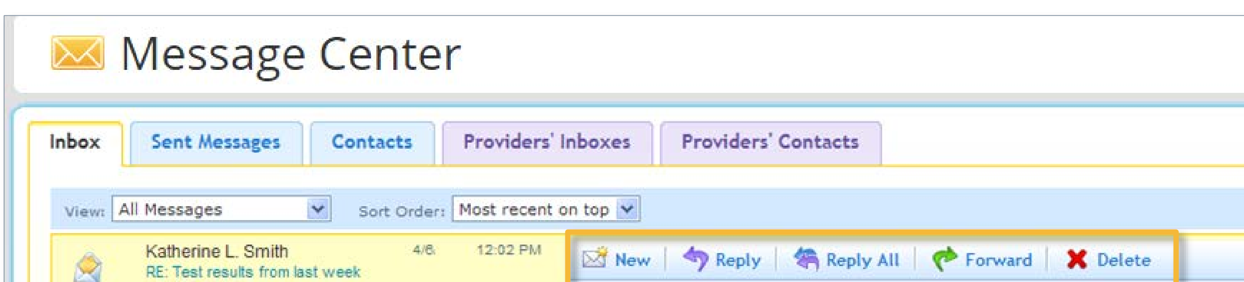
American Well has a built-in Secure Message Center that you can use to correspond with patients, providers, and staff in your practice. The Message Center is HIPAA-complaint and functions like an e-mail service. Please be aware that secure messages cannot be sent outside of the American Well System.

Inbox

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

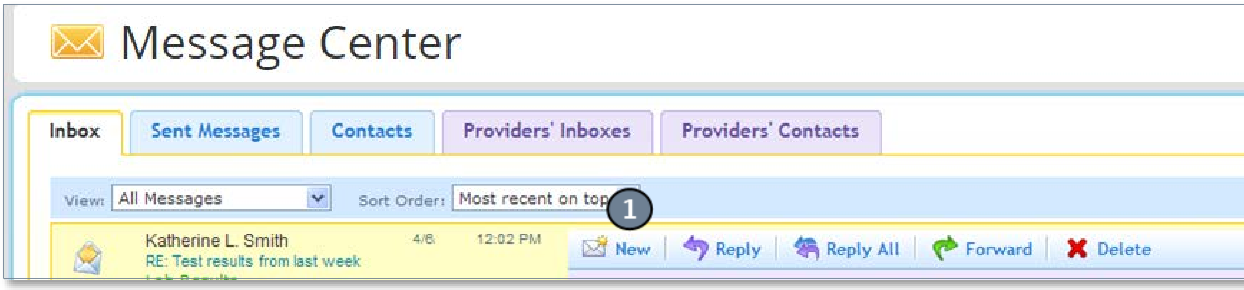
- Click on the Envelope icon on the top navigation bar
- Navigate to the **Message Center** in the main panel of the homepage
- Go to **My Practice > Message Center** from the top navigation bar.

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.

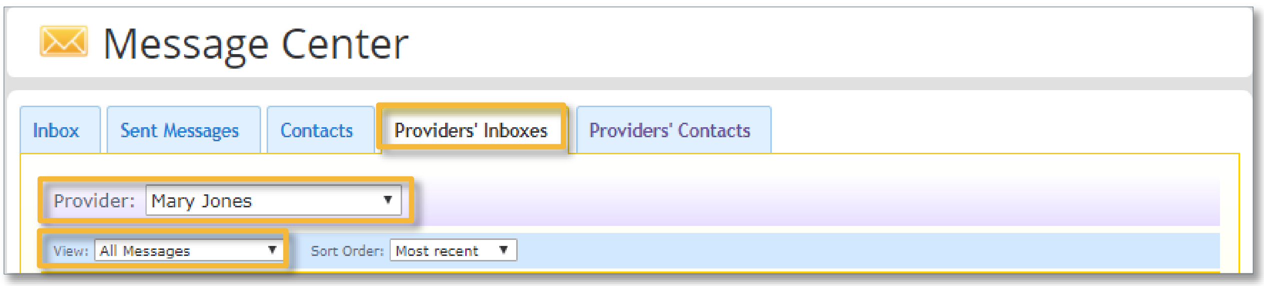
***Note, this section applies only to your organization's providers**. Amwell Medical Group provider inboxes are solely managed by the Amwell Medical Group.

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

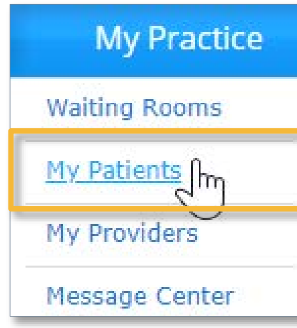
You may send messages to a provider's Contacts List. With the Provider's Mailbox open, follow the steps to *[Create New Messages](#)* above.

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.



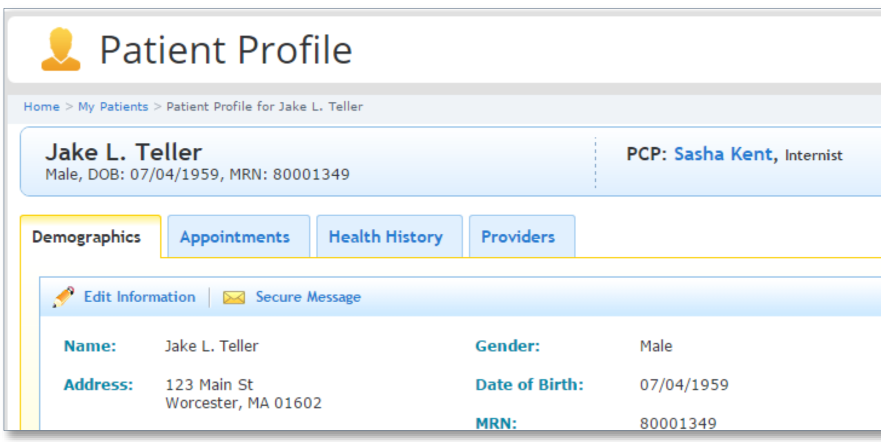
To access the **Patient Panels:**

- 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

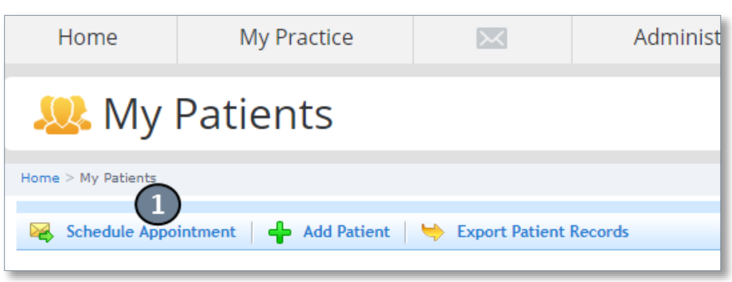
Once you have located your patient, you can view additional information by clicking on their name in the results. In the patient profile, you can view and edit basic information about the patient and view the patient's Primary Care Physician, if known.



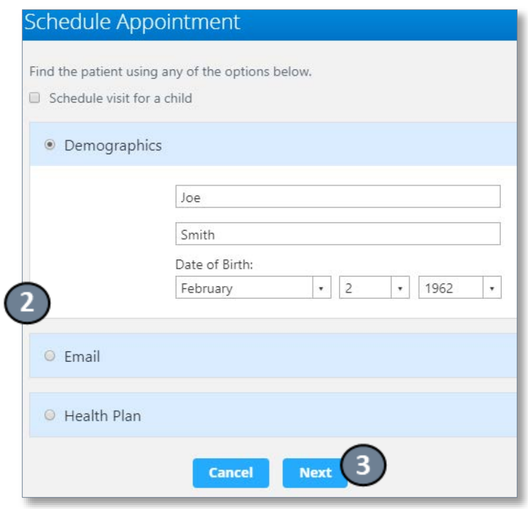
Scheduling Appointments

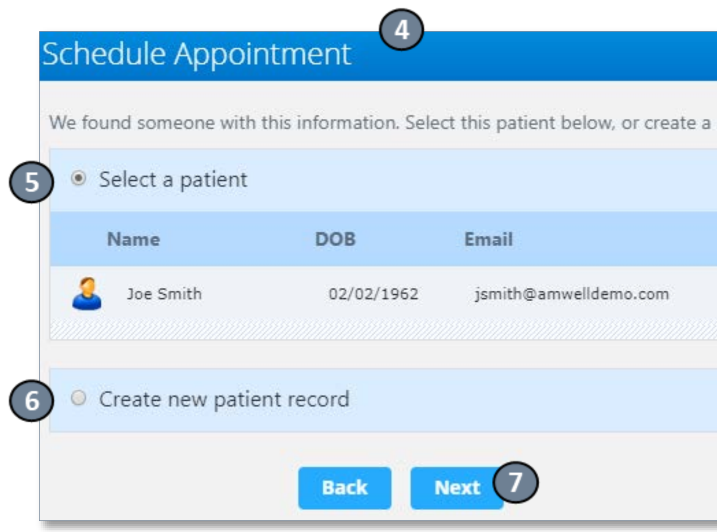
You can schedule web consultations for patients with the providers of your practice if you have the appropriate permissions. ***Note, this section applies only to your organization's providers**. Amwell Medical Group provider inboxes are solely managed by the Amwell Medical Group.

1. Click on the **Schedule Appointment** button from the *My Patients* area or click **Schedule Appt**. next to a patient's name.

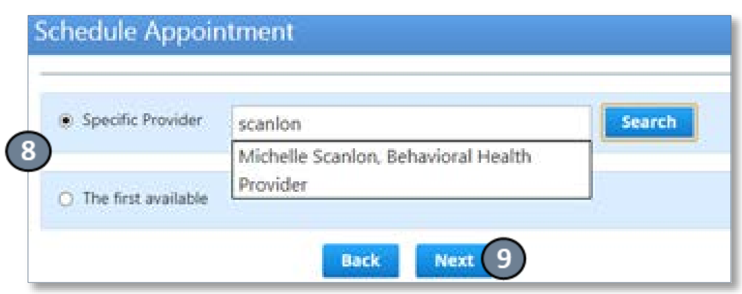


2. Enter the patient’s demographics, email, or health plan information.
3. Click **Next** to proceed.
4. If the system finds a patient based on the information you have entered, the existing patient record will be displayed. Otherwise, the system will notify you that the patient is not yet registered 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.

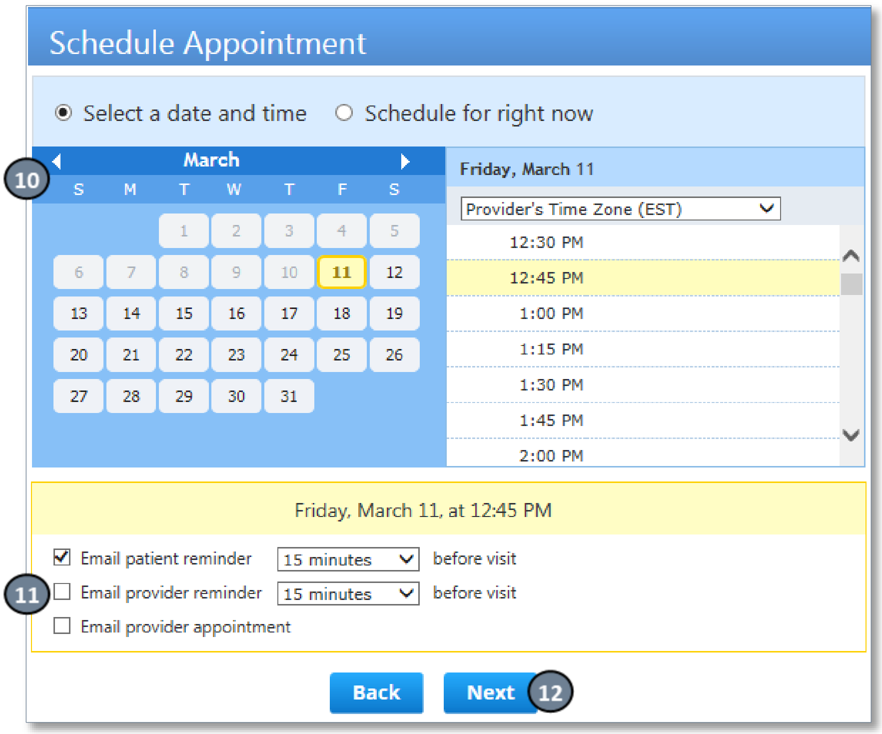




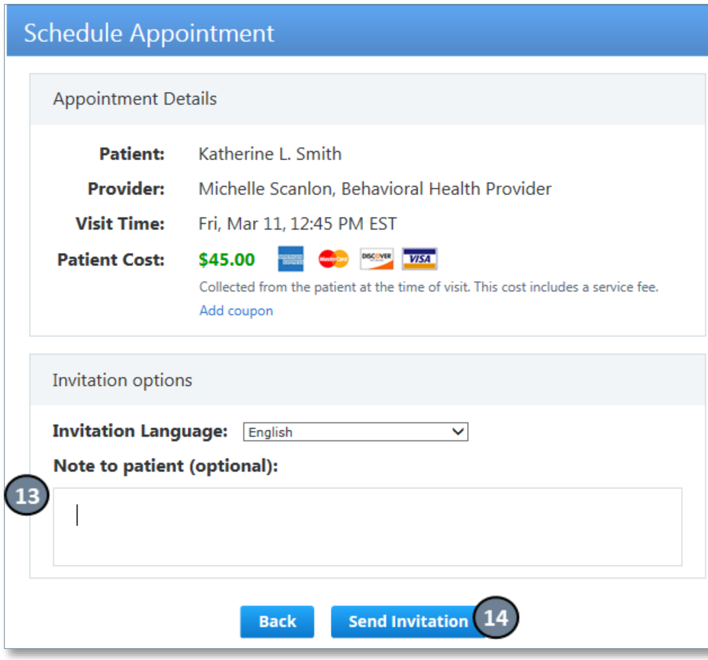
8. You may choose a specific provider within your practice or schedule the patient with the first available provider in a given specialty. If you schedule with the first available provider, the system will find the first available provider *at the time the patient starts the visit*. At that point, they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



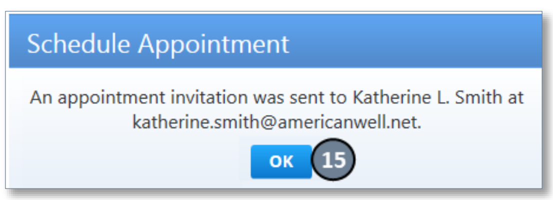
10. Select the date and time for the appointment.
11. An appointment email will automatically be sent to the patient once the appointment is scheduled and you can choose to send them an additional reminder. You can also send the provider an appointment email and/or reminder about the visit. Simply select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



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.

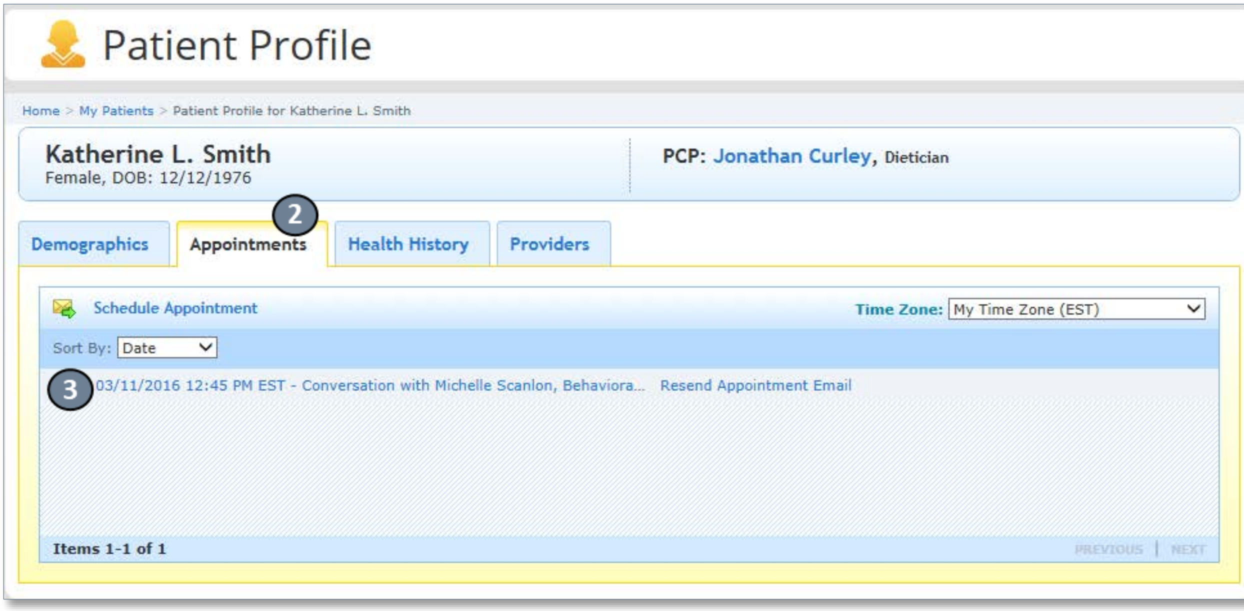


14. Select **Send Invitation** once the details are reviewed.
15. Click **OK** to confirm.
16. Once the appointment has been scheduled, the patient will receive an email invitation.

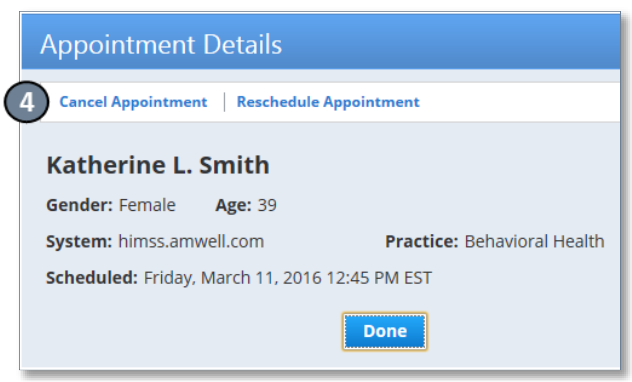


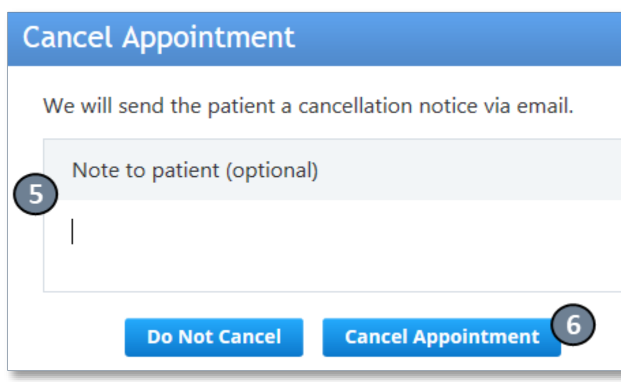
To Cancel an Appointment

1. Locate the appointment date in the calendar from the 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.

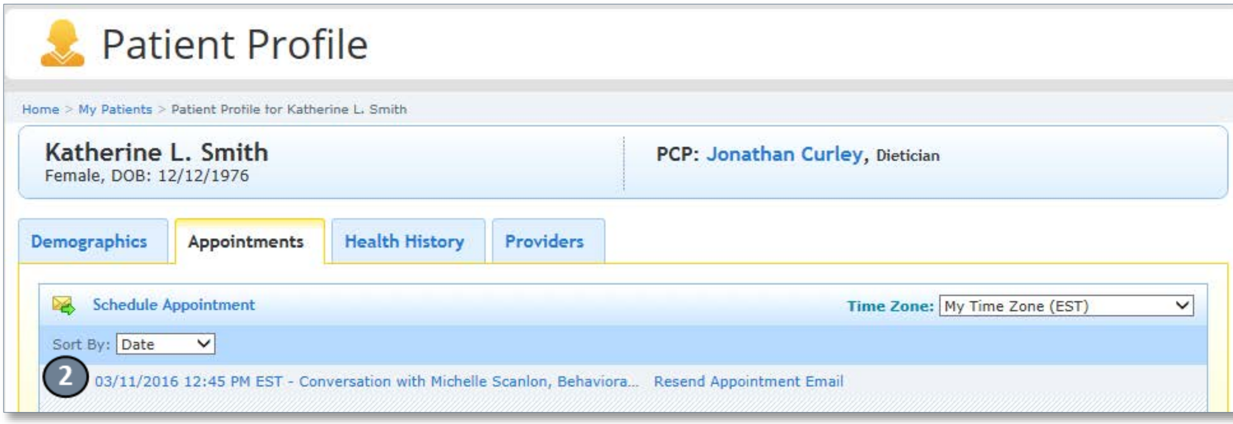




To Reschedule an Appointment:

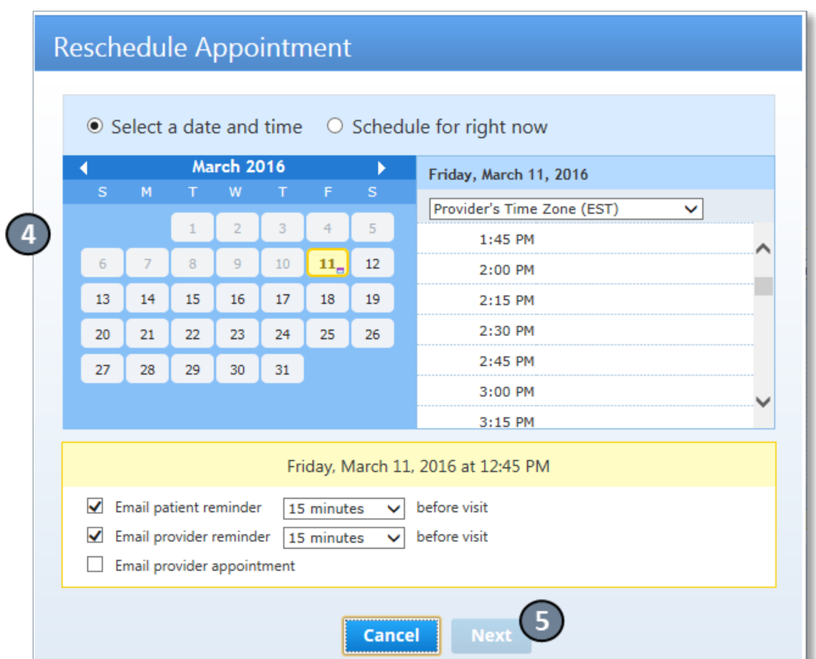
1. Click on the appointment date in the calendar from either the left-hand panel of your Home Page, from the calendar in the Schedule tab of the Provider Profile or from the Patient Profile *Appointments* tab. See above.

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

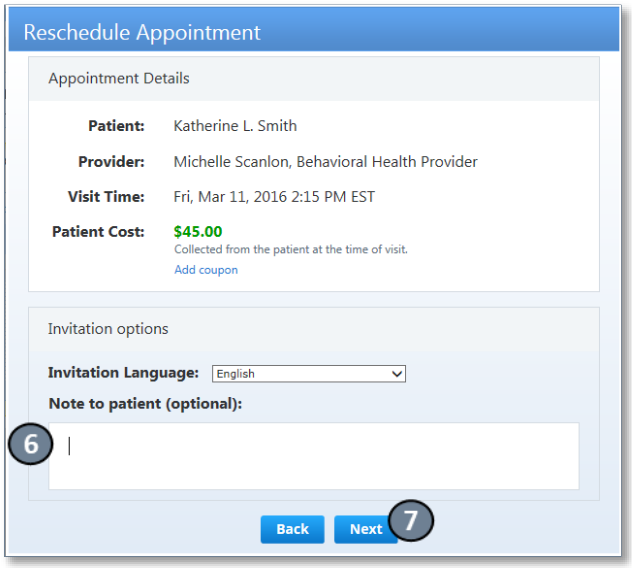


3. Select **Reschedule Appointment**.

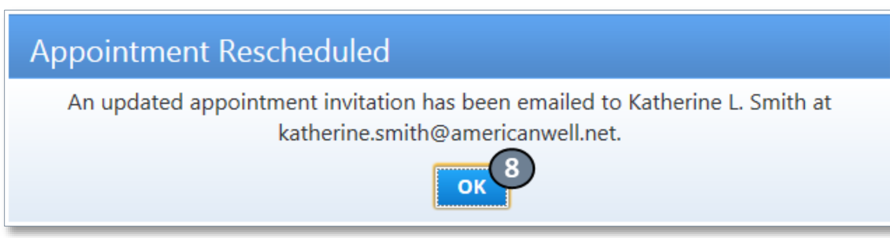
4. Select the updated appointment time and any applicable patient / provider reminders.
5. Click **Next** when a new time has been selected.



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



7. Select **Next.**
8. 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.

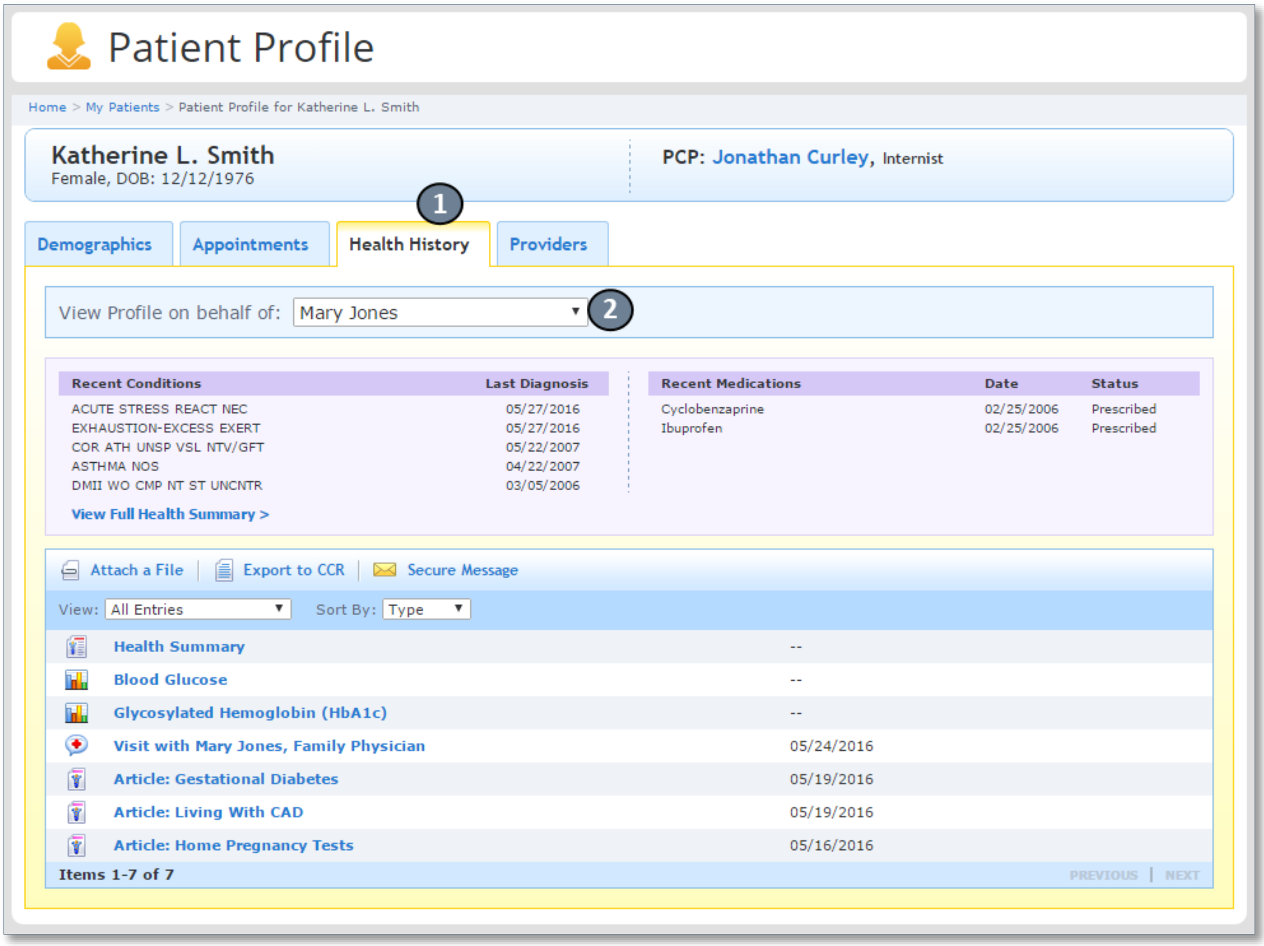
To view a Patient's Health History:

1. Select the **Health History** tab in the patient's profile.
2. 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.



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

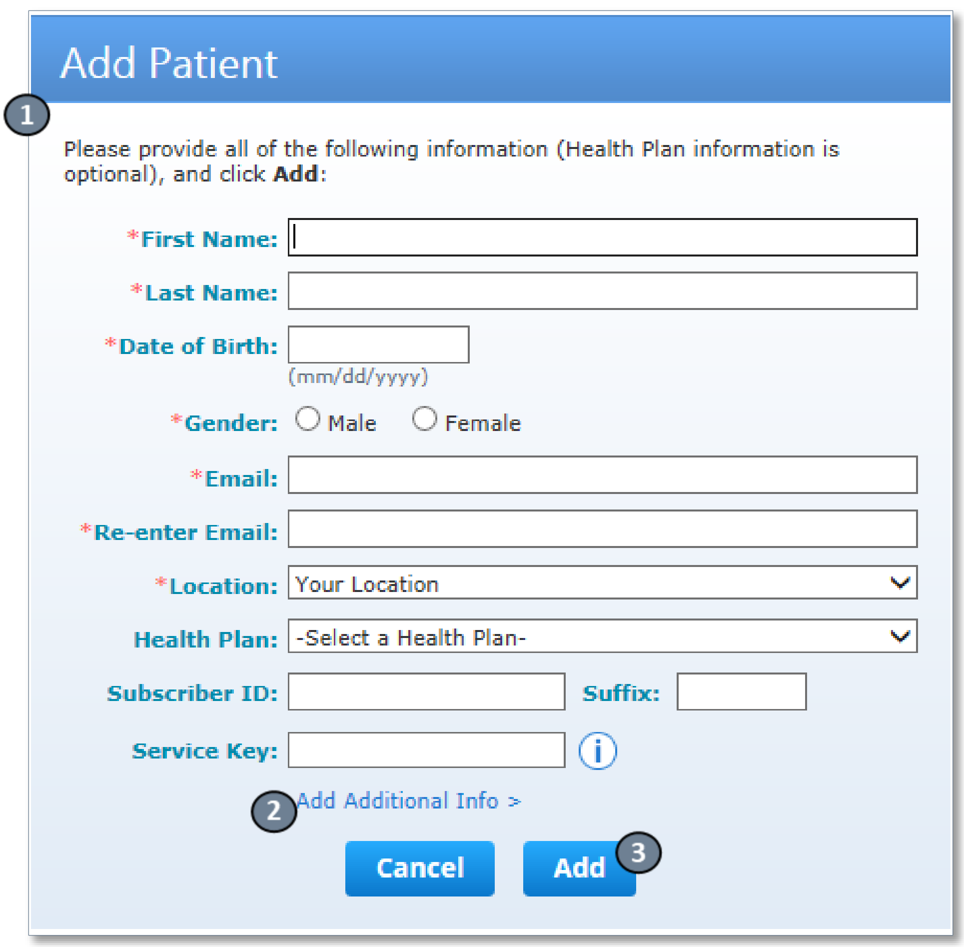
There are several ways to link patients to your telehealth practice including:

- 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.**

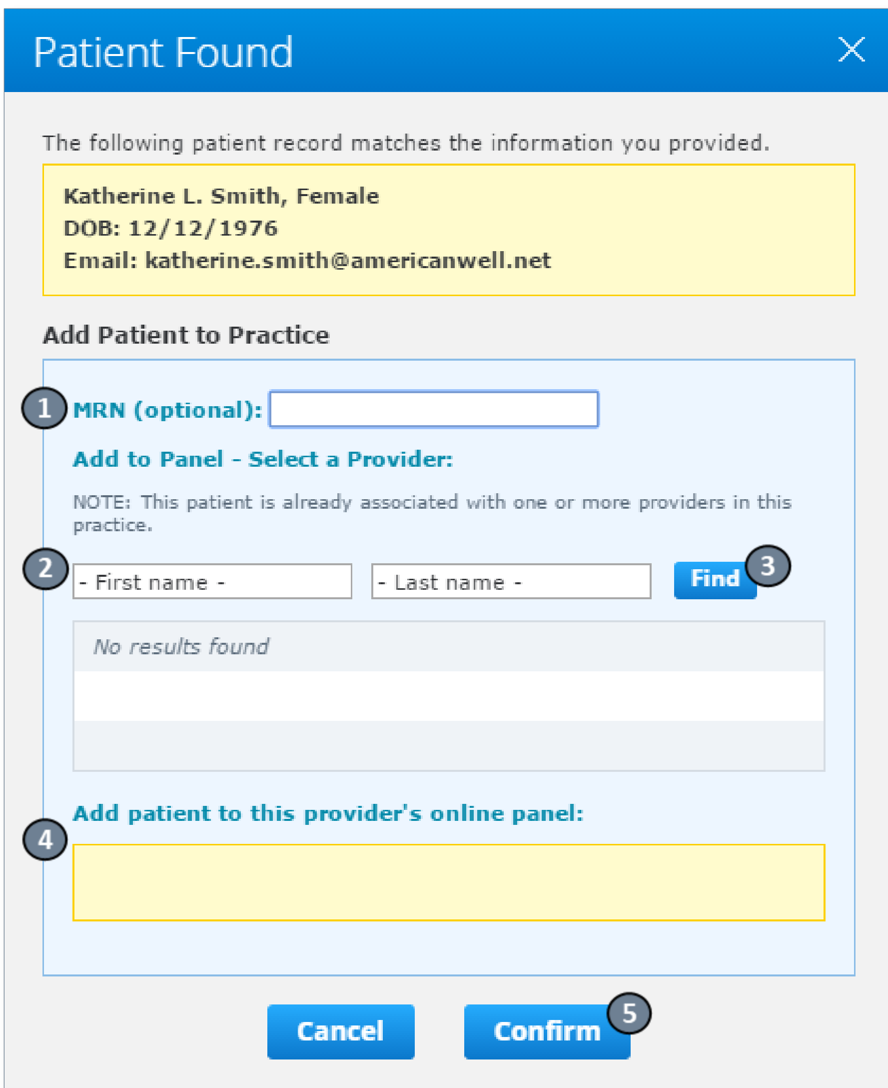
Depending on whether a patient's record is found you can follow either the *Existing Patients* or *New Patients* workflow outlined in the sections below.



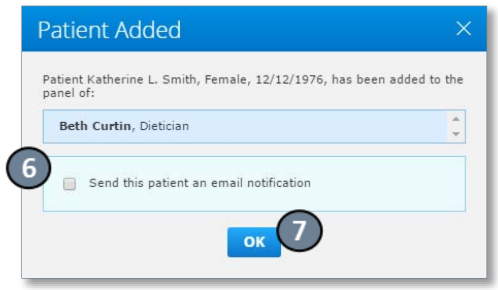
Existing Patients

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.

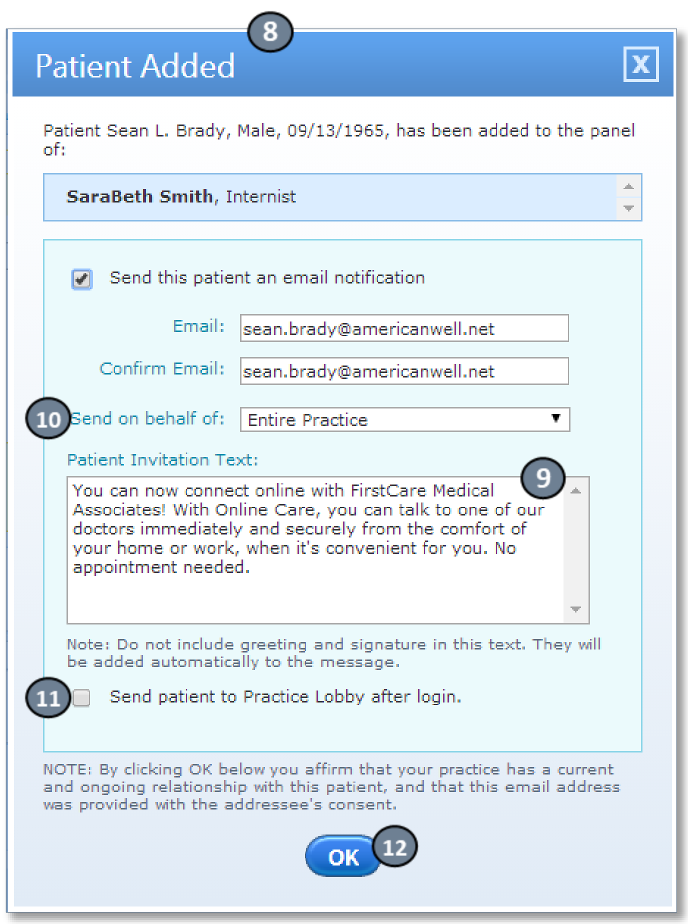
1. If desired, you may assign an MRN to this patient.
2. In the **Add to Panel – Select a Provider** section, type the First and/or Last name of a provider in your practice you would like to associate this account with.
3. Click **Find.**
4. Providers who the patient is not currently associated with 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**.



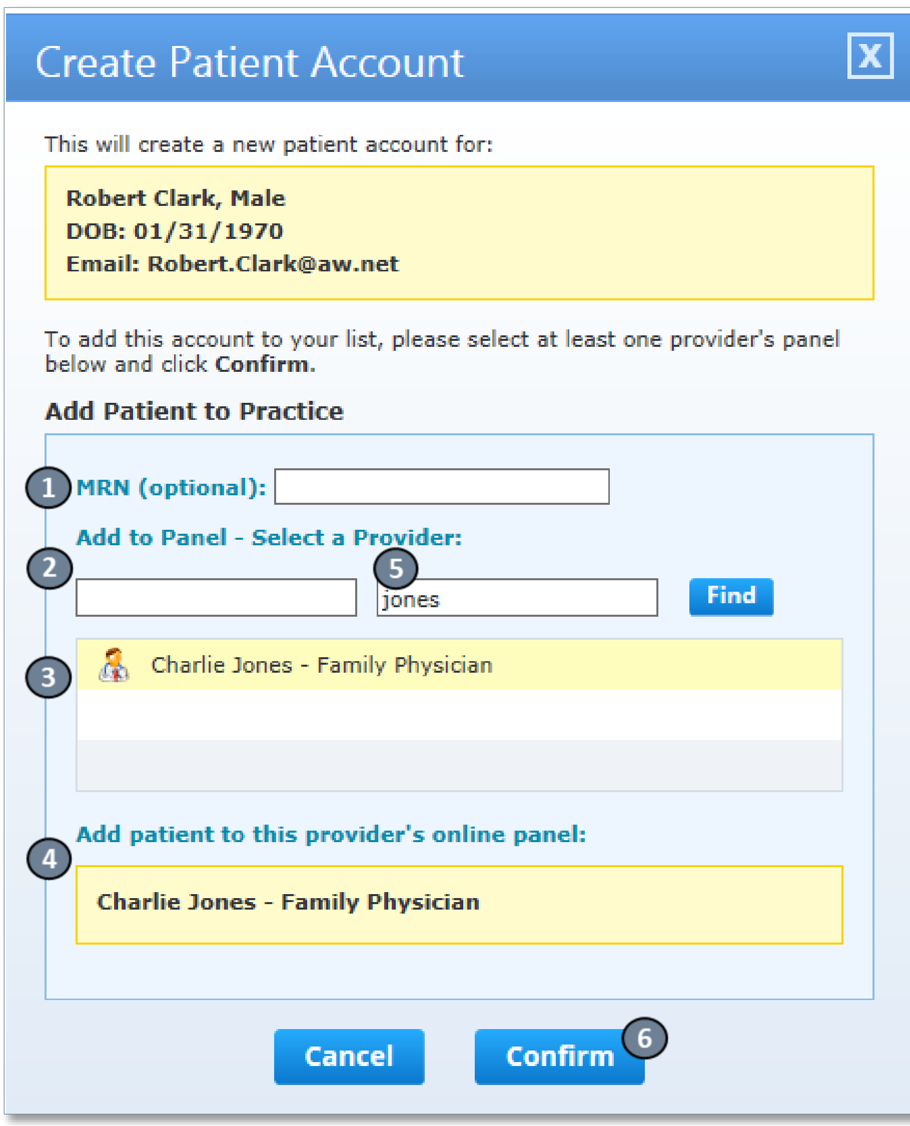
8. If you checked the **Send this patient an email notification** box, you will be presented with a screen with the default invitation text from your practice.
9. You may change this text or the email address prior to sending the email.
10. You also have the option to send the invitation on behalf of 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

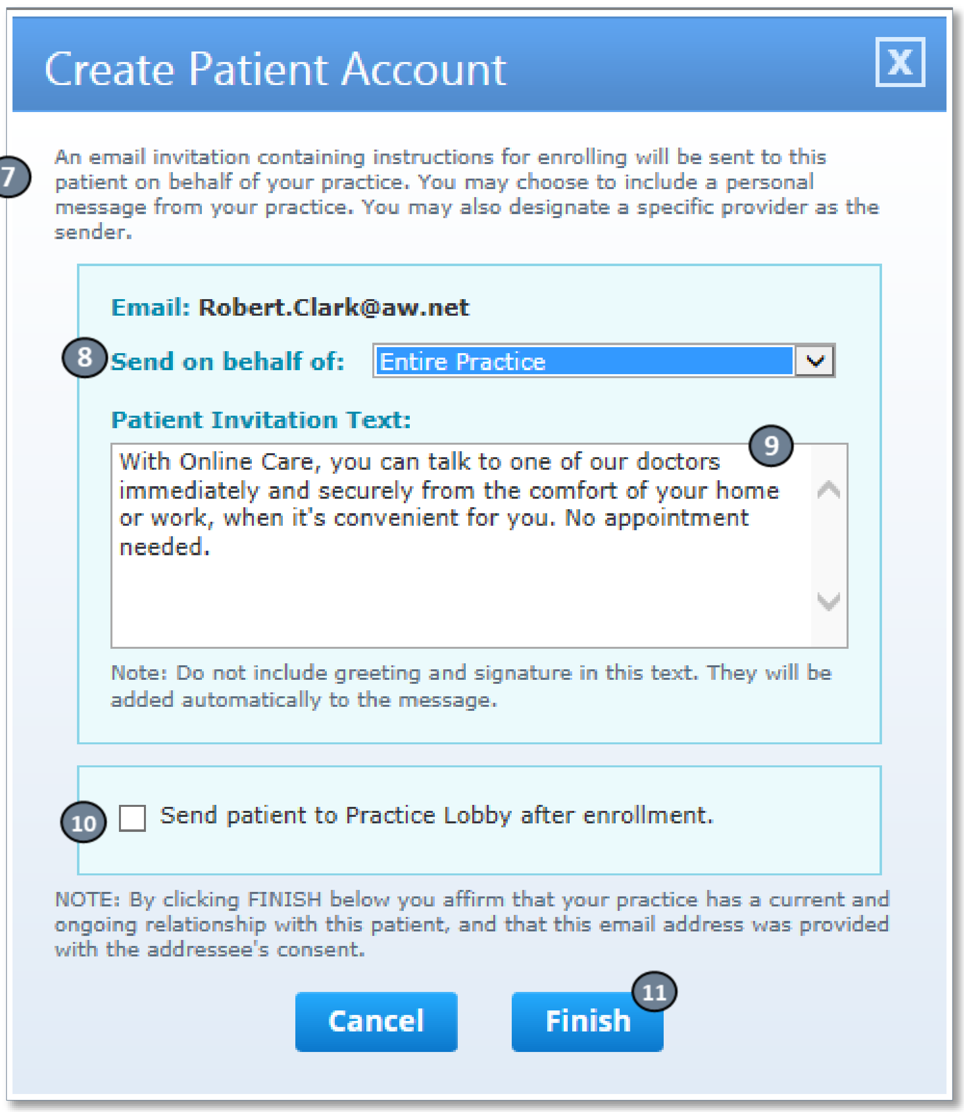
For new patients or those who are not covered by the sponsoring health plan or care delivery network, the system will display the *Create Patient Account* screen. Here you can add a new patient to the appropriate patient panels and invite them to join American Well.

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.**



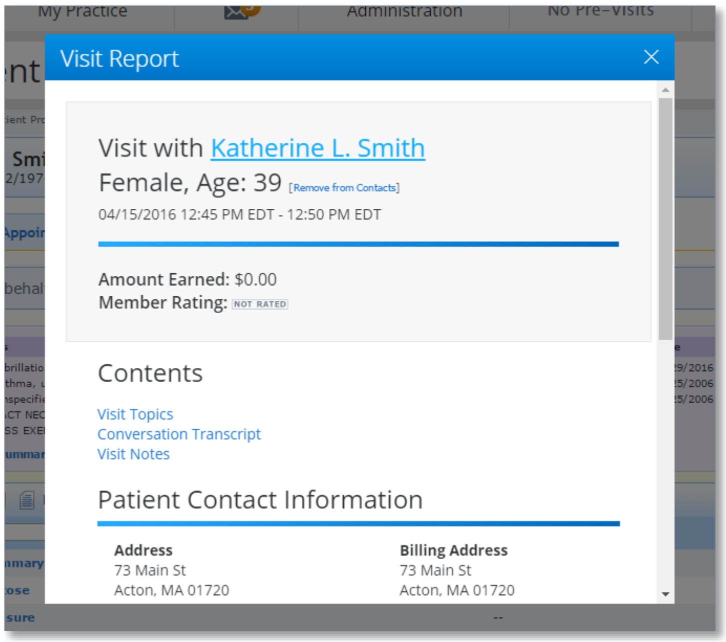
7. An invitation email will be generated at the end of this process, inviting the patient to enroll in American Well.
8. You have the option to send the invitation on behalf of a particular provider or the Entire Practice through the Send on behalf of dropdown list.
9. You can also edit the body of the 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.



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:

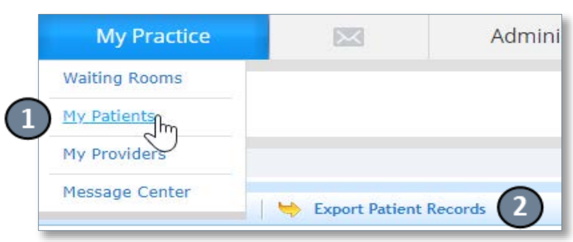
Export Patient Data

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

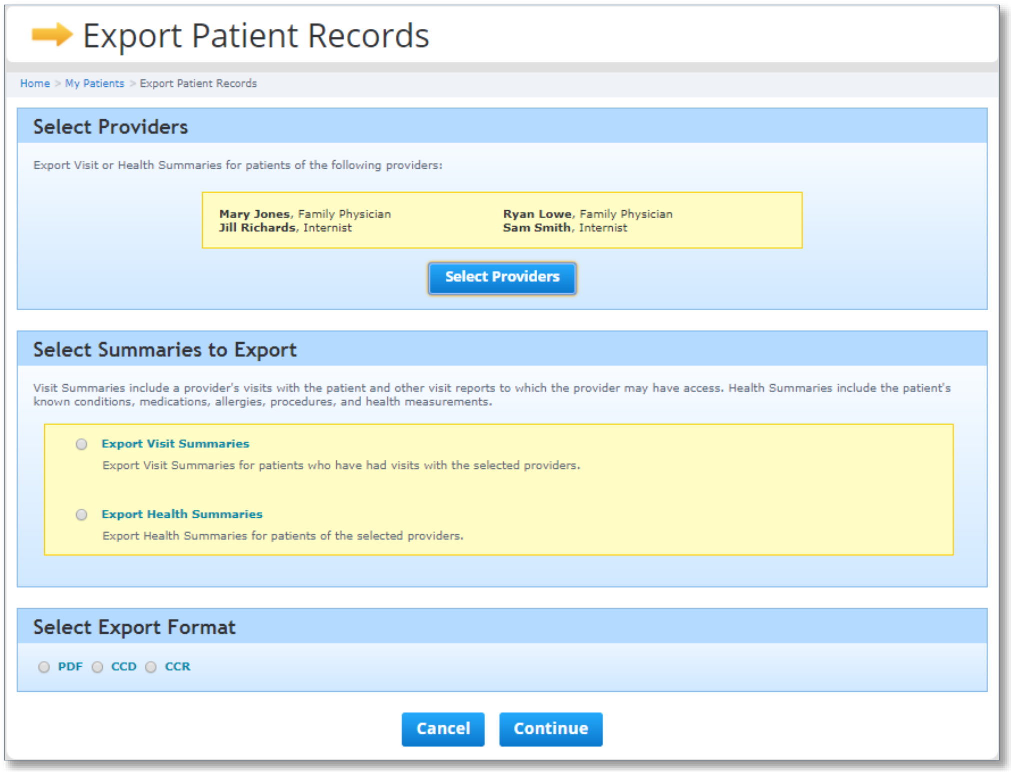
Export Health Histories:

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