Staff User Guide

AMG-Staffed Practice

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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:

- Access to your Secure Inbox
- 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**.
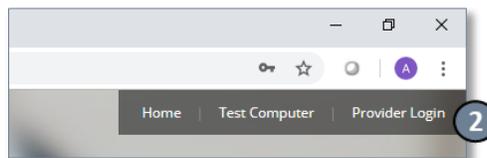
Home Page

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 and permissions (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.

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.

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.
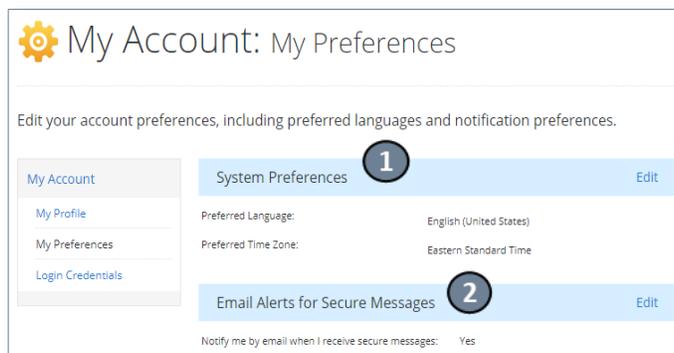
Login Credentials

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.**
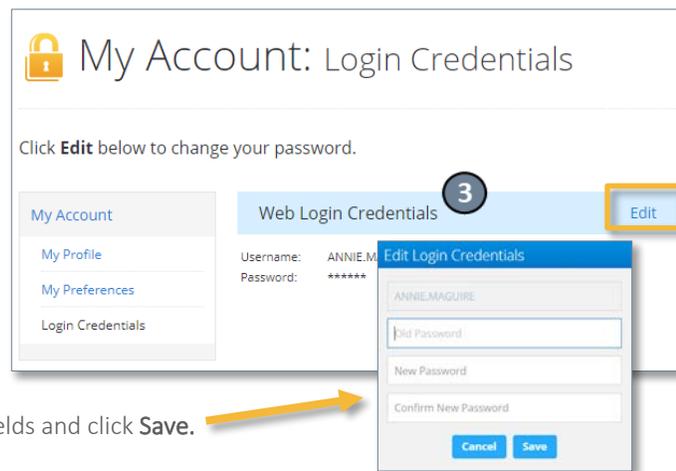
My Patients

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.

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 click on a patient's name to view their profile, please refer to the **Patient Profiles** section for more information.

5. 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.

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.
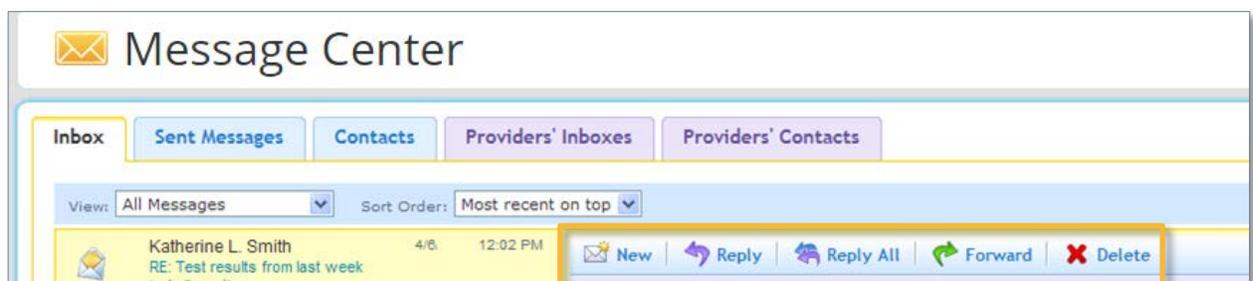
Create New Messages

1. To compose a new message, click **New**.
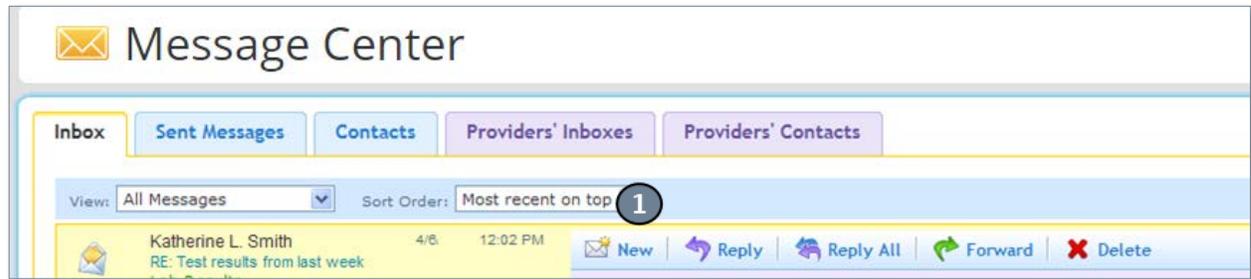
2. Within the pop up, Select **Add Recipients** to locate your contact.

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.

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. 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.
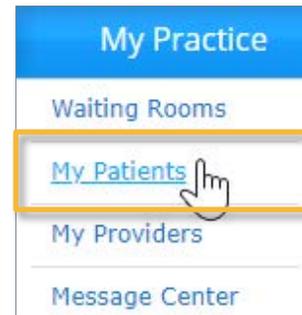
Patient Profiles

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.

Adding Patients to a Practice

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

- 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.**

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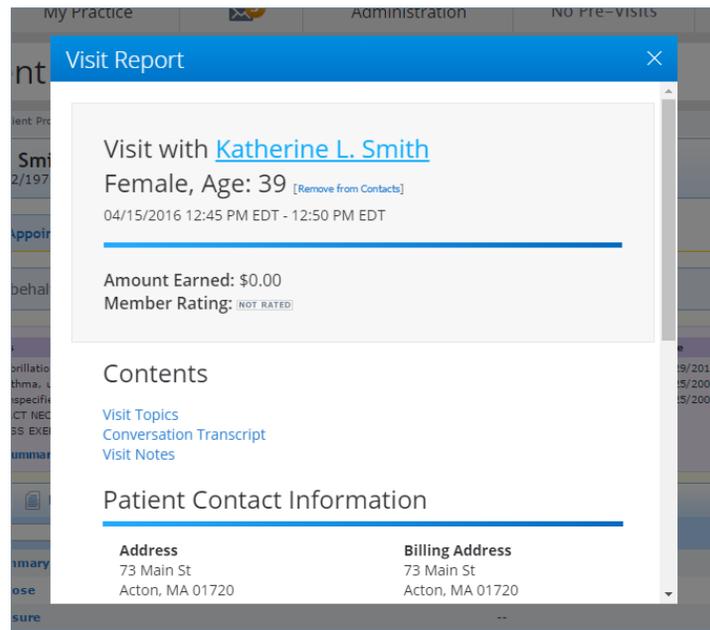
You may also export Visit Reports as described in the **Export Patient Data** section below:

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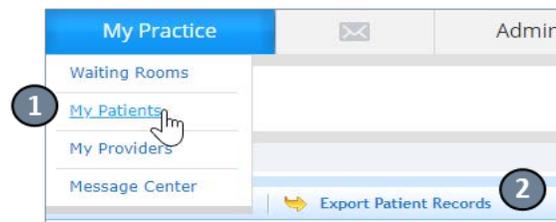
Exporting of health summaries is broadly done for selected providers in a preferred format. Content can be further specified to include all conversation reports, only those which have not yet been exported, or within a date range. Furthermore, health histories can be included in the export as well.

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**
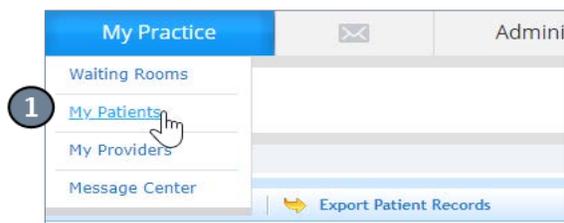
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