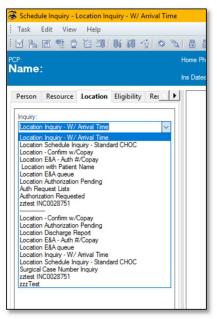


Amwell's Converge virtual platform will be replacing Zoom for Telehealth visits starting 01/24/2023. Some key benefits with the new telehealth platform are:

- 1. Amwell is integrated to Cerner (accessible through "Workflow" Mpage, "telehealth" tab, Table of Contents).
- 2. Meeting room is unique for that patient and that visit. There is no longer a shared waiting room where there is risk of privacy errors or patient identity confusion.
- 3. Meeting Room is patient centric and no longer linked to a provider host.
- 4. Ambulatory Organizer will display "Arrived" when patient has joined the session.
- 5. Interpretation services are just a few clicks away.

#### SchApptBook Workflow to Activate Encounter Prior to Check-In

- 1. Launch and log into Scheduling Appointment Book.
- 2. Navigate to the Scheduling Location Inquiry W/Arrive Time and select Locations.



3. Enter Filter criteria and select **Find**. Patient and appointment data returns.

Location Inquiry - W/ Arrival Time								
Task Edit View Help								
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ce. Name:							MBN:	
Name:	Ins Dates:						Age:	
Person Resource Location Eligibility Rec	BEG DATE 12/16/2022 - 11:30	ARRIVE DT TM	PERSON NAME ERMTESTCC, JAMES	STATE Confirmed	APPT TYPE Gastro Telehealth New	RESOURCE Appel, Keren L MD	ENCNTR TYPE PreReg OP Telehealth	ENCNTR HP Aetna PPO
Location Inquiry - W/ Antival Time   Location type: Ambulatory(s)  Location:								
ORG Gastroenterology         V           Start time:         12/16/2022         V         0000         End time:           End date:         End time:         12/16/2022         V         2055         End time:								





4. Right click on the appointment and select **Person**, then **Modify Encounter**.

12/16/2022-1130) ERMTESTCC. JAMES Contact   Contact Contact   Modify Contact   Modify Cancel   Modify Cancel   No Show Cancel   Check In Check In   Patient Seen Cancel   Batch Reschedule Cancel   Verify Cancel   Modify Patient Seen Cancel   Batch Reschedule Cancel   Verify Cancel   Modify Patient Seen Cancel   Batch Reschedule Cancel   Verify Cancel   Modify Person Cancel   Modify Person Modify Person	BEG DATE		PERSON NAME		APPT TYPE	RESOURCE			ENCNTR HP
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Allegies						> р	ost Encounter Payment		
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			Pers	on	> F	lealth Maintenance Organize			

- 5. Update the encounter. Ensure the Encounter Type = **Outpatient Telehealth**. Complete all necessary and required fields. Click Save.
- 6. Notice in the Encounter Type field of the Location Inquiry W/ Arrive Time, Outpatient Telehealth now displays the encounter is active.

🕏 Location Inquiry - W/ Arrival Time													ø	×
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Location type: Ambulatory(s)	2	12/16/2022 - 11:30		ERIMTESTCC. JAMES	Confirmed	Gastro Telehealth New	Appel, Keren L. MD	Outpatient Telehealth	vetna PPO	Aetna PPO				

Encounter has now been activated on day of service. Appointment remains in a **Confirmed** status until the patient arrives for the telehealth visit.





# Telehealth appointment has started, and the patient joins the visit.

7. Patient/parent/guardian joins the telehealth appointment. The appointment status on the Ambulatory Organizer automatically changes to **Arrived**.

PowerChart Organizer for Test, Medical Assistant					-	- 0 ×
Task Edit View Patient Chart Links Notifications Nav	igation Help					
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🔄 🚍 Person Management 🔚 Scheduling Appointment Book 🧾 Censu	s 🖪 Labels/Facesheets 📵 Transfer/	Discharge History 🕄 CURES 🖕				
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<ul> <li>Work Items (0)</li> </ul>	11:30 AM Appel, Keren L MD 1 hr	ERMTESTCC, JAMES	Gastro Telehealth New	Arrived	Reason for Visit : test	
Reminders	Appel, Kerell L MD	49 Years, Male		Orange HC		
Saved Documents						
Notifications						
Notify Receipts						

8. Within the Scheduling Appointment Book location inquiry, staff can now see when the patient has joined the telehealth appointment. The appointment now displays the **Arrival Date and Time**.

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tes:			MRN:		DOB
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G DATE ARRIVE DT TM			Age:		Sex
/16/2022 - 11:30 12/16/2022 - 12:45	PERSON NAME STATE ERMTESTCC JAMES Confirmed	RESOURCE Appel Keren L MD	ENCNTR TYPE	PERSON HP Aetna PPO	





9. MA/RN Checks In the appointment on the Ambulatory Organizer. Right click and select Check In.

PowerChart Organizer for Test, Medical Assistant							- 01 ×
Task Edit View Patient Chart Links Notifications Navig	gation Help						
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🚍 Person Management 🔚 Scheduling Appointment Book 🧾 Census	E Labels/Facesheets	er/Discharge Histor	y 😋 CURES 🕛				
🗞 Change 🇱 Suspend 🚕 Charges 🗐 Exit 📋 Calculator 🔒 PM Co	nversation 🝷 😹 Temporary Loca	stion 🔄 Communi	icate - 🕂 Add - 🎬 AdHo	c 🥩 Charge Entry 👸 Patient Pharma	acy 💿 Batch Charge Entry 度	Encounter Location History Viewer	
					ERMTE	STCC, JAMES 🔹 😁 Recent 🔹 Name	Q -
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Documents Orders Results	December 16, 20	122 📑 🕨	Patients for: Appel, Keren L MI	); 🗰 PAM Providers -			
Messages	Time Dur	ation	Patient	Details	Status	Notes	۲
Work Items (0)     Reminders     Saved Documents	11:30 AM Appel, Keren L MD 1 h		ERMTESTCC, JAMES 49 Years, Male	Gastro Telehealth New	Arrived Check In Cancel	Reason for Visit : test	
Notifications					No Show Hold		
Notify Receipts Trash Sent Items							

10. Scheduling Appointment window appears. Confirm the correct patient selected and the encounter type is **Outpatient Telehealth**. Click **OK**.

PowerChart Organizer for Test, Medical Assistant				– <b>O</b> I XI.
Task Edit View Patient Chart Links Notifications Navigation H	elp			
🚰 Home 🌃 POW 🛛 Tracking Board 🕴 Patient List 🖃 Message Center 🥅 Sched	uling 🌃 eCoach 🌃 Healthe Registries 🌃 MyExperience 🌃 My Case	List 🌃 Care Coordinator Organizer 🚯 Trac	king List 🌃 Inventory Management 🛛 Fire	st Responder Synchronization
🕄 🔍 Lexi-Comp 🔇 PFE HANDOUT 🖕				
🔚 Person Management 🔚 Scheduling Appointment Book 🧾 Census 🔳 Labels/	Facesheets 🍙 Transfer/Discharge History 💐 CURES 🖕			
👯 Change 🇱 Suspend 🔊 Charges 📲 Exit 📗 Calculator 🔒 PM Conversation	• 😸 Temporary Location 🔄 Communicate • 🛛 🕂 Add • 🎬 AdH	oc 🖻 Charge Entry 👸 Patient Pharmacy 🖲	Batch Charge Entry 📄 Encounter Loc	ation History Viewer
			ERMTESTCC, JAMES	• 🕋 Recent • Name 🔍 •
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		MRN: 6108209	DOB: 06/26/1973	
Display: Last 30 Days Name: ERMTESTCO	C, JAMES	Age: 49 Years	Sex: Male	
- Inbox Items (0)				
Documents	General Summary Details Orders Guidelines Notification	Conversation Summaries Itineraries L	ocks Eligibility Booking Notes	
Orders	Date:	Time: 1251		
Results		1251		(3)
Messages	Tracking location:			
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Reminders Saved Documents	zzDummy Field:			
- Notifications			~	
Notify Receipts	Comments:		~	
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	ERMTESTCC, JAMES Outpatient Telehealth			
	Guar Pmt Enc	Pmt View Modify	Set Enc Charges	
	Request Information			
د >	Medical record requested: No			1
L			OK Cancel	
				64 MATEST December 16, 2022 12:53 PST





11. Appointment state changes to **Checked In** and the row is highlighted in blue.

PowerChart Organizer for Test, Medical Assistant							– 01 ×
Task Edit View Patient Chart Links Notifications Na	vigation Help						
🗄 🚰 Home 🌃 POW Tracking Board  🛓 Patient List 🖃 Message Cent	ter 🥅 Scheduling 🌃 eCoad	h 🌃 Healthe Registr	ies 🌃 MyExperience 🌃 My Case List	🌃 Care Coordinator Organizer  🐧 Trac	king List  inventory Man	nagement First Responder Synchroniz	ation
🕄 🔍 Lexi-Comp 🔍 PFE HANDOUT							
🗄 🚍 Person Management 🔚 Scheduling Appointment Book 🧾 Censu	is 🔚 Labels/Facesheets 🔘	Transfer/Discharge Hi	story 🕄 CURES 🖕				
🙀 Change 🇱 Suspend 🚕 Charges 🗐 Exit 📗 Calculator 🔒 PM 🤅	Conversation 🔹 😹 Tempora	y Location 🔄 Comm	nunicate 🔹 🕂 Add 🝷 🎬 AdHoc 🚦	🦻 Charge Entry 🔥 Patient Pharmacy 🔅	Batch Charge Entry	ncounter Location History Viewer	
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Documents Orders Results	December 1		Patient		-		۲
Messages	Time	Duration	Pabent	Details	Status	Notes	
Work Items (0) Reminders Saved Documents	3:00 PM	15 mins	TESTAMWELL, THREE 7 Years, Male	Telehealth Primary Care CPM	Checked In Lobby 105	Reason for Visit : ANEM	IA
Notifications     Notify Receipts     Trash							

12. MA completes intake documentation, appointment status displays highlighted in green on the Ambulatory Organizer.

PowerChart Organizer for Test, Medical Assistant							
Task Edit View Patient Chart Links Notifications Navi	gation Help						
🚰 Home 🌃 POW Tracking Board  🛉 Patient List 🖃 Message Cente	r 🧰 Scheduling 🌃 eCoacl	h 🌇 Healthe Registries	🌃 MyExperience 🌃 My Case List	🌃 Care Coordinator Organizer  🐧 Tr	acking List 🌃 Inventory Manageme	nt First Responder Synchronizat	tion
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🚍 Person Management 🔚 Scheduling Appointment Book 🧾 Census	E Labels/Facesheets	fransfer/Discharge Histo	ory 🕄 CURES 🖕				
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Display: Last 30 Days	Ambulatory Organia	er					
Inbox Items (0)	Day View (1)	Calendar Open	Items (3) Upcoming				
Documents Orders	December 1	6, 2022	Patients for: Appel, Keren L MD ;	W PAM Providers 👻			
Results Messages	Time	Duration	Patient	Details	Status (as of 12:57)	Notes	۲
Work Items (0)     Reminders     Saved Documents	11:30 AM Appel, Keren L MD	1 hr	ERMTESTCC, JAMES 49 Years, Male	Gastro Telehealth New	Seen By Nurse Orange HC ACC- Gastro Waiting Rm #1	Reason for Visit : test	
Notifications	_						
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#### Workflow if Non-Clinical Staff Checks In Patient

1. Navigate to the appointment and select **Person**, then **Modify Encounter**.

Confirm	-		
Contact	-		
Modify			
Reschedule			
Hold	-		
Cancel	-		
No Show			
Check In	-		
Check Out			
Patient Seen			
Batch Reschedule			
Group Info			
Verify			
Med Nec Check		View Perso	
Lock		Modify Perso	
Unlock			
Add New Appointment		Add Encou	
Request	>	Modify Enco	
Inquiry	>		unter Payment
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Superbill		Allergies	
Person	>		intenance Organizer
Link	>		
Unlink			

- 2. Update the encounter. Ensure the Encounter Type = **Outpatient Telehealth**. Complete all necessary and required fields. Click Save.
- 3. Notice the Encounter Type field of the Location Inquiry W/ Arrive Time, Outpatient Telehealth now displays the encounter is active.

Location Inquiry - W/ Arrival Time										- 8
Task Edit View Help										
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Person Resource Location Eligibility Rec_	•			PERSON NAME		APPT TYPE		ENCNTR TYPE	PERSON HP	ENCNTR HP
Inquity:		12/16/2022 - 10:00		TESTAMWELL, SEVEN	Confirmed	Neurology Epileptic New Telehealth	Liu, Virginia MD	Outpatient Telehealth	United Healthcare Choice/Choice Plus	United Healthcare Choice/Choice Plus
	-									
Location type:										
Ambulatory(s)	~									
Location:										
COMM Neurology (350)	~									
Start date: Start time:										
12/16/2022 🔹 🗸 0000 🔹										
End date: End time:										
12/16/2022 • 2355 •										

Encounter has now been activated on day of service. Appointment remains in a **Confirmed** status until the patient arrives for the telehealth visit.





# Telehealth appointment has started, and the patient joins the visit.

4. Patient/parent/guardian joins the telehealth appointment. The appointment status on the Ambulatory Organizer automatically changes to **Arrived**.

Location Inquiry - W/ Arrival Time										- a
Task Edit View Help										
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lame:		hs Dates:					Age:		Sex:	
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5. Appointment Status on the Ambulatory Organizer displays a status of **Arrived**.

PowerChart Organizer for Test, Medical Assistant					- 0 ×
Task Edit View Patient Chart Links Notifications Nav	igation Help				
🚰 Home 🌃 POW Tracking Board 👌 Patient List 🖃 Message Centr	er 🛄 Scheduling 🌃 eCoach 🌃 Healthe Registries 👫	MyExperience 🌃 My Case List 🌃 Care Co	ordinator Organizer 🚯 Tracking List 🎆	Inventory Management First Resp	onder Synchronization
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🔚 Person Management 🔚 Scheduling Appointment Book 🧾 Censu	Elabels/Facesheets 📵 Transfer/Discharge History	CURES .			
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TESTAMWELL, SEVEN ×				ERMTESTCC, JAMES 👻 音	Recent - Name Q -
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Displays Last 30 Days	Ambulatory Organizer Day View (1) Calendar Open Iten	ns (3) Upcoming			
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Reminders Saved Documents		L TODIS, PRINC	Comme		
Notifications					
Notify Receipts					





6. To check in the appointment, navigate to the Scheduling Location Inquiry – W/ Arrive Time and select Checked In.

me: rson Resource Location Eligibility Rec	Ins Dates:				MBN:		DOB:	
rson Resource Location Eligibility Rec	ins Udles:				Age:		Sex:	
		ARRIVE DT TM	PERSON NAME	STATE APPT TYPE	RESOURCE	ENCNTR TYPE	PERSON HP	ENCNTR HP
quiry:	12/16/2022 - 10	3.00 12/16/2022 - 13:3	4 TESTAMWELL, SEVER	Confirm	ith Liu, Virginia M	D Outpatient Teleheal	th United Healthcare Choice/Choice F	Plus United Healthcare Choice/Choice Plus
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art date: Start time: 2/16/2022 🔹 🗸 0000				Check In				
				Check Out				
End date: End time:				Patient Seen				
2/16/2022 🗘 🧹 2355 🗘				Batch Reschedule				
				Group Info				
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				Lock				
				Unlock				
				Add New Appointment				
				Request	>			
				Inquiry	>			
				Notifications				
				Superbill				
				Person	>			
				Link.				
				Unlink	·			

7. Check-In window appears, click **OK** to save and the Check-In window closes. Refresh the scheduling inquiry and the appointment state now displays as **Checked In**.

Location Inquiry - W/ Arrival Time										- <b>a</b>
Task Edit View Help										
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<sup>rce:</sup> Name:		Home Phone:				MRN:			DOB:	
		ns Dates;					Age:		Sex:	
Person         Resource         Location         Eligibility           Inquiry:         Location         Inquiry: W/ Anival Time         Location           Location hype:         Anivalation         Location         Location           Anivalidation         Location         Location         Location           Location         Location         Location         Location           Continue         Location         Location         Location           COMM Neurology (DSD)         Location         Location         Location	Rec_ ▶		ARRIVE DT TM 12/16/2022 - 13:34	PERSON NAME TESTAMWELL, SEVEN		APPT TYPE Neurology Epileptic New Telehealth		ENCNTR TYPE Outpatient Telehealth	PERSON HP United Heathcare Choice/Choice Plus	ENCNTR HP United Heathcare Choice/Choice Plus
Start date:         Start time:           12/16/2022         •         ✓         0000         •           End date:         End time:         12/16/2022         •         ✓         2355         •										