Provider Telehealth Guide

Introduction

At least fifteen minutes before the session, verify that your device is functioning properly and can access the necessary portal. If you have difficulties, contact the Stepworks IT department immediately. If technical difficulties will delay the patient's appointment, contact the patient and attempt to reschedule before the appointment start-time.

How to Schedule a doxy.me Session

- When the patient calls to schedule an appointment, our team will determine whether their visit is appropriate for telehealth.
- If a telehealth visit is chosen, note that it is a telehealth session in the appointment block on the schedule.
- On the business day before their appointment, the receptionist will send the patient an email with the sign-in link, the appointment time, the provider they will be seeing, and the phone number of the practice.

Instructions for a doxy.me Session

1. Go to https://stepworks.doxy.me/sign-in and enter your login credentials.
2. Identify the patients in the queue in the top-left of the screen and the amount of time they have been waiting.
   a. If multiple patients are waiting, acknowledge the presence of the other patients waiting in line by clicking the three vertical dots next to their name and selecting the "Chat" feature.
   b. This will generate a text box so you can communicate with the patient without initiating a session.
3. Before initiating the session, open the patient's chart in the EMR and verify that a telehealth consent form has been signed.
4. Hover the mouse cursor over the patient's name and click "Start Call."
5. The session will begin once documentation (detailed below) is completed.
6. At the end of the session, close out the visit with any pertinent follow-ups or information.
7. Disconnect the call using the red "Hang Up" button at the bottom center of the screen.

New Patient Documentation

1. Take a picture of the patient for their medical record.
   a. Select "Photo Capture" from the left-hand menu.
   b. In the pop-up window, press "Download Image."

      c. Upload the downloaded image to the EMR.

      d. Close the pop-up window.

2. Check the EMR to ensure the telehealth consent is in the chart. If not…

      a. Begin the doxy.me call and select "Teleconsent" in the left-hand menu.

      b. In the pop-up window, click "Share." (This sends the document to the patient to review and sign.)

      c. Enter "Stepworks" into the provider field, and scroll down so the patient can sign the signature field. (Patients cannot scroll the document themselves.)

      d. Download the file and upload it to the patient's chart in the EMR.

Established Patient Documentation

1. If the established patient does not have a photo, take a picture for their medical record.

      a. Select "Photo Capture" from the left-hand menu.

      b. In the pop-up window, press "Download Image."

      c. Upload the downloaded image to the EMR.

      d. Close the pop-up window.

2. If they do not have a photo, also make sure their teleconsent form is in the EMR. If not...

      a. Begin the doxy.me call and select "Teleconsent" in the left-hand menu.

      b. In the pop-up window, click "Share." (This sends the document to the patient to review and sign.)

      c. Enter "Stepworks" into the provider field, and scroll down so the patient can sign the signature field. (Patients cannot scroll the document themselves.)

      d. Download the file and upload it to the patient's chart in the EMR.

Payment

1. To collect payment, click the three vertical dots next to the patient's name.

2. Select the "Payment" option.

3. In the pop-up window, input the total charge amount and submit it to the patient.

Emergencies

Should an emergency arise during the telehealth session, instruct the patient to carry out emergency procedures relevant to the situation. This could include having the patient call emergency services. If the patient is incapacitated or unable to call, call emergency services and provide the patient's demographic information from the EMR.

Troubleshooting

If you have technical issues immediately before or during a session, contact the patient immediately. Then create a support ticket with the Stepworks IT department. If the patient is having trouble connecting remotely, ask them to call the office. You can also discuss alternative methods for conducting their session.