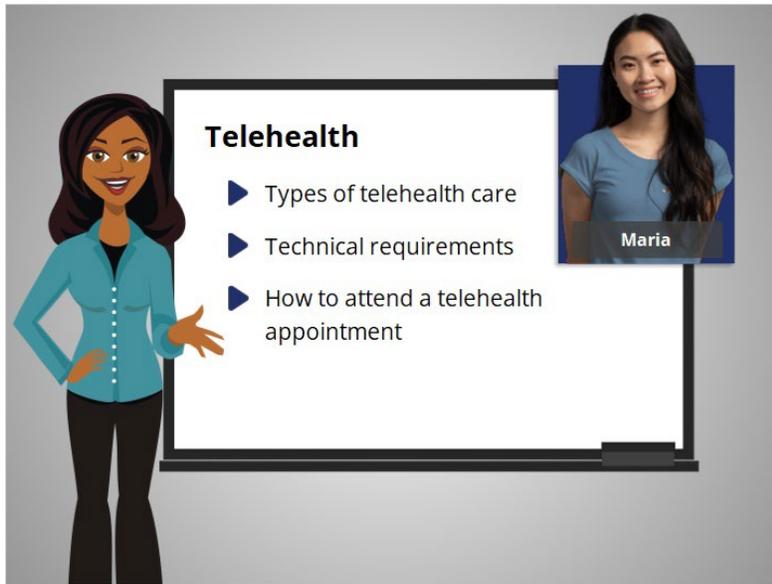# Getting Started with Telehealth
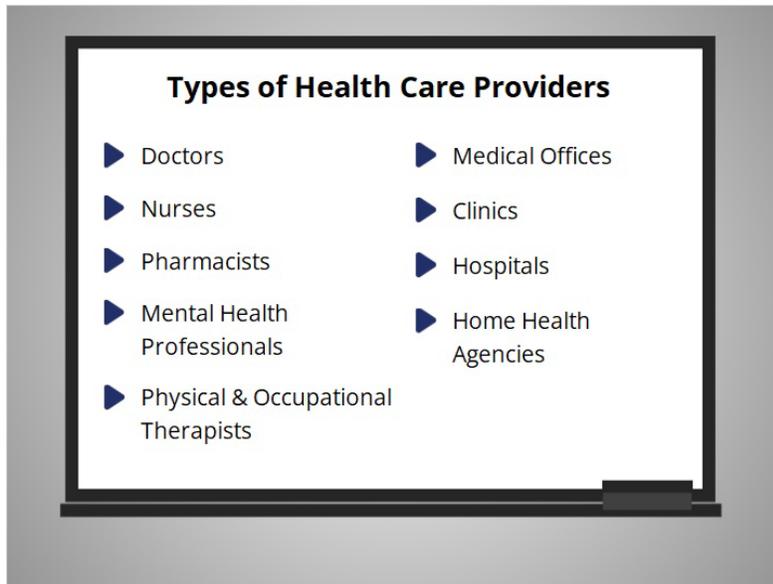## What is Telehealth?

Hi! I'm Belle. I'm here to help you get started with telehealth.

In today's lesson, we'll follow along with Maria as she learns about telehealth, including different types of telehealth care, technical requirements for participating in telehealth, and how to attend a telehealth appointment.

So, what is telehealth? Telehealth is a way to see your health care provider using a computer, tablet, or phone, without visiting their office. Think of it like a phone call or a video call with your doctor. Telehealth services may also include managing different aspects of your healthcare online.
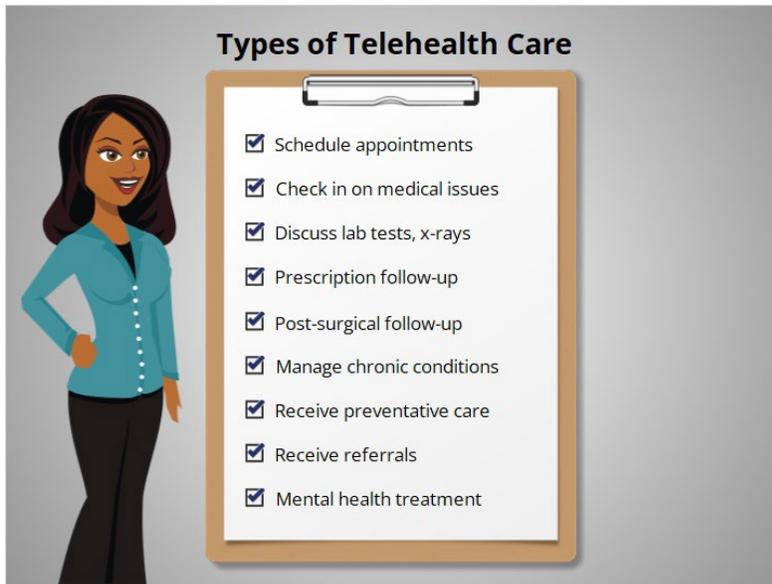
A health care provider is the person or organization that provides medical care or treatment.

Types of Health Care Providers

- Doctors
- Nurses
- Pharmacists
- Mental Health Professionals
- Physical & Occupational Therapists
- Medical Offices
- Clinics
- Hospitals
- Home Health Agencies

Some examples of people who provide telehealth services include doctors, nurses, pharmacists, mental health care professionals, and physical and occupational therapists.

Organizations also support telehealth. Examples include medical offices, clinics, hospitals, and home health agencies.

In this course, we will use the word "provider" when talking about health care providers.

Types of Telehealth Care

- ☑ Schedule appointments
- ☑ Check in on medical issues
- ☑ Discuss lab tests, x-rays
- ☑ Prescription follow-up
- ☑ Post-surgical follow-up
- ☑ Manage chronic conditions
- ☑ Receive preventative care
- ☑ Receive referrals
- ☑ Mental health treatment

You can get many types of care through telehealth. You can schedule appointments, check in on medical issues, discuss lab tests or x-ray results, follow up on prescription medications, receive post-surgical follow-up, manage chronic conditions, receive preventive care like nutrition counseling, receive referrals to specialists, and receive mental health treatment, including therapy and counseling.

There are a lot of reasons why people are deciding to get their health care through telehealth. Telehealth is convenient. It allows you to receive care where you are, like work, home, or your car; you do not need to travel to and from your appointment, and it's easier to see providers who may be far away.
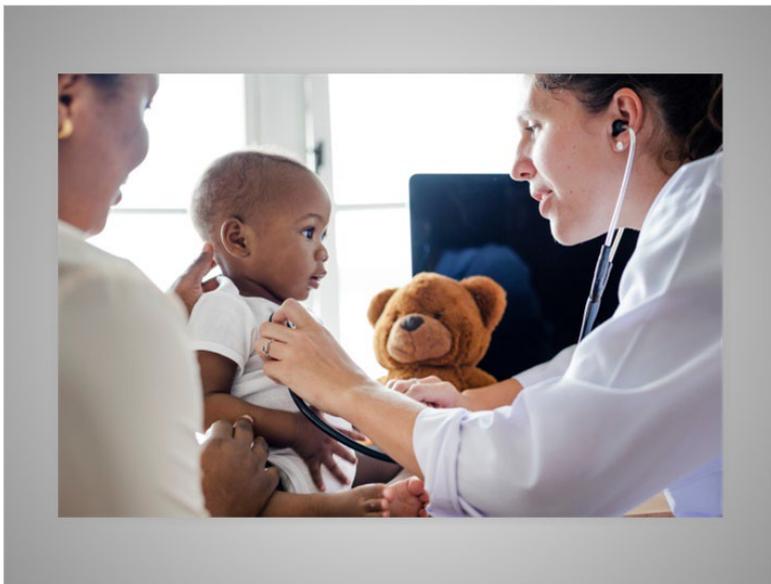
There are still times that you may need to see your provider in person. Talk with your provider to decide which type of appointment is right for you - in the office, or online through telehealth.

When to Meet in Person

While there are benefits to telehealth, here are some reasons why you may need to meet with your provider in person.

When to Meet in Person

Provider may want a **face-to-face visit**.

If this is your first visit or you just started seeing a new doctor, they may want a face-to-face visit so you can get to know each other better.

When to Meet in Person

Provider needs to conduct a **hands-on physical examination**.

As part of the appointment, your provider may need to conduct a physical examination.

When to Meet in Person

Provider needs to use **specialty equipment**.

Your provider may need to use specialty equipment that is available at a health care facility during the appointment, like an X-ray machine, ultrasound, or ECG machine.

When to Meet in Person

Insurance may not cover your telehealth appointment but may cover an in-person visit.

Insurance may not cover your telehealth appointment but may cover an in-person visit. Insurance coverage for telehealth visits varies based on the type of health insurance you have and where you live. Contact your insurance company or your doctor's office before your telehealth visit to find out if the care you need is covered and how much you'll have to pay out of pocket.

Types of Telehealth Care

▶ Video visits
▶ Audio-only visits
▶ Secure messaging
▶ Remote monitoring
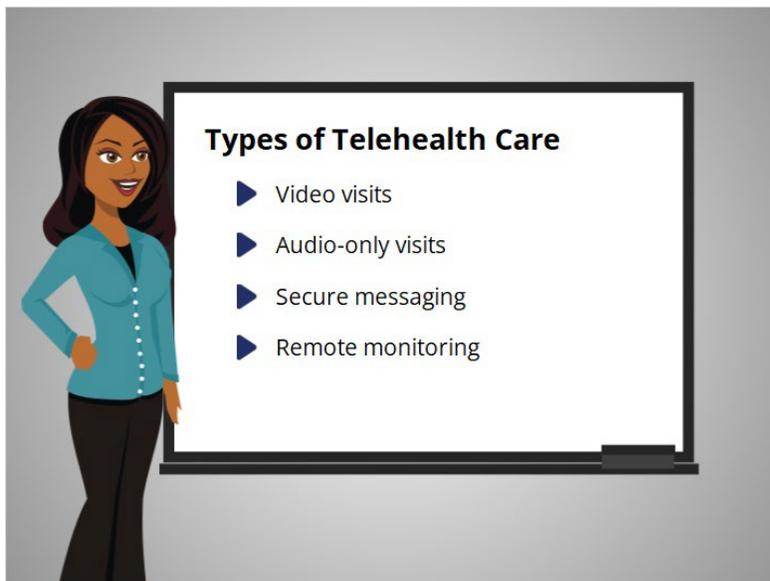
There are different types of telehealth care, including video visits, audio-only visits, secure messaging, and remote monitoring. Let's learn more about each option.

Live video visits. This is a live video conferencing appointment between you and a provider, for example, your doctor or nurse practitioner.
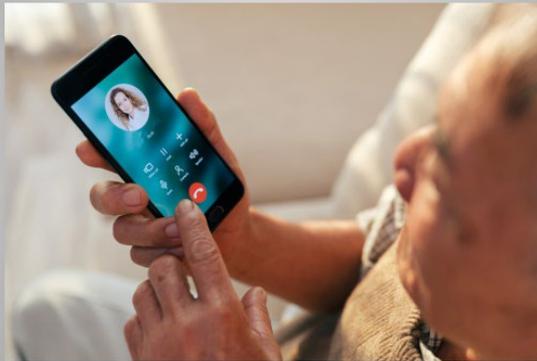

Audio Visits. The appointment with your health care provider is a phone call.
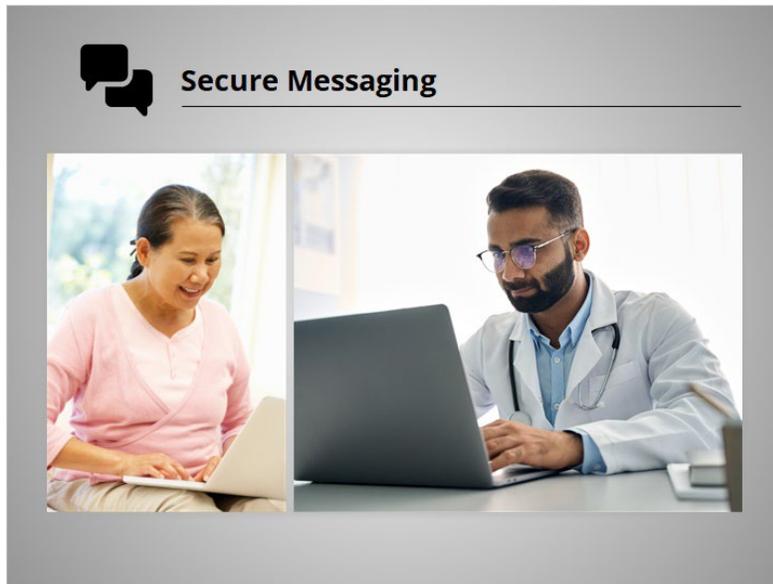
Secure Messaging

Secure messaging. Sometimes a provider will share information with you, for example, the results of medical tests like an X-ray. Or they may ask you a question. Other times, you may have a question you want to ask your provider. For example, you have a new prescription, and you don't understand the instructions on the label. This back-and-forth communication is done through secure messaging.

Remote monitoring. A provider may want to monitor certain health conditions over time. In these cases, you might use a medical device with an internet connection to share information with your doctor, like your blood pressure, glucose levels, and more.
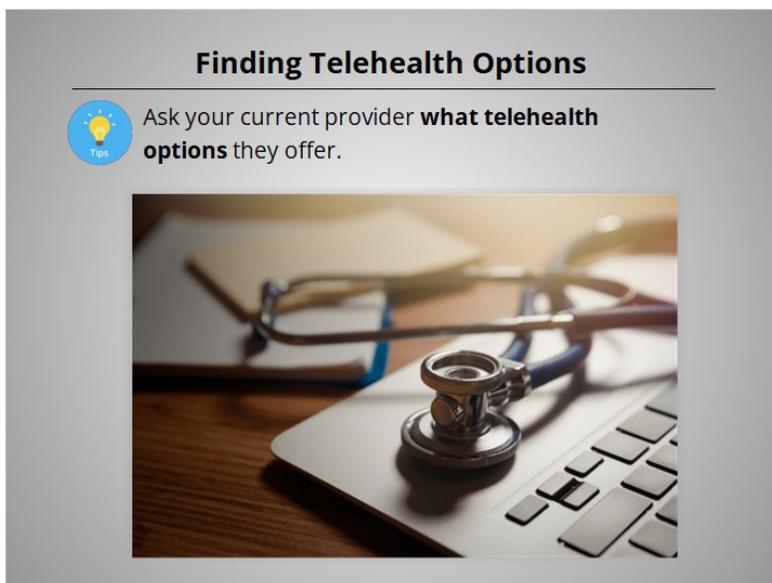
How can you find a health care provider who supports telehealth?

Ask your current provider what telehealth options they offer.

Finding Telehealth Options

Contact **health insurance** to see if they have a **list of providers** who offer telehealth services.

Contact your health insurance company, Medicare or Medicaid, to see if they have a list of providers who offer telehealth services.

Finding Telehealth Options

If you don't have health insurance, see if a **health care center** in your area **provides telehealth services**.

https://findahealthcenter.hrsa.gov
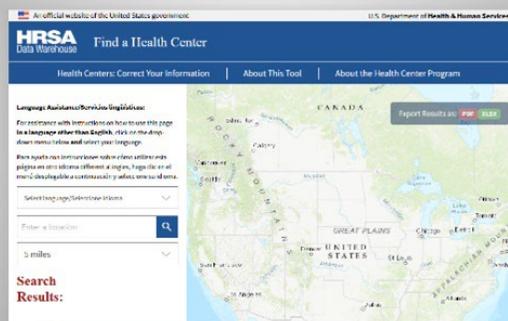
If you don't have health insurance, there may be health care centers in your area that provide telehealth services regardless of a patient's ability to pay. The Health Resources & Services Administration has locations across the US that provide free or low-cost health care. They have a tool to find health centers in your area. The link is available in the Additional Resources section on the lower right-hand side of the screen.
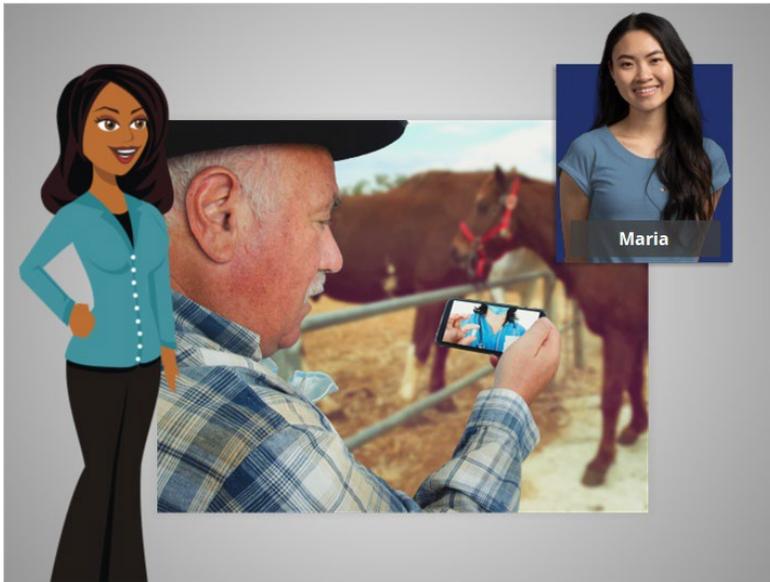
In this lesson, we learned what telehealth is, the potential benefits, when you need to meet with your provider in person, options for receiving telehealth care, and how to find telehealth services. In the next lesson, Maria will learn how to use her provider's patient portal to receive care using secure messaging.

# Getting Started with Telehealth
Using the Patient Portal

In this lesson, Maria uses her doctor's patient portal to receive medical care. We'll follow along as she creates an account, logs in, and communicates with her daughter's pediatric nurse using the patient portal.
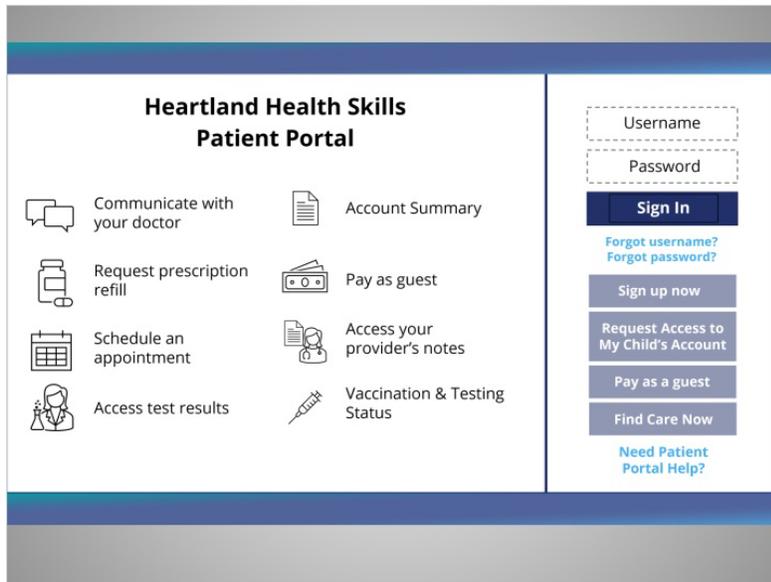
While you can still talk to your doctor on the phone, you can also use the patient portal to communicate with your provider.

What is a patient portal? It is a secure website that allows you to access your medical information and communicate with your health care providers online using an internet browser or app on a computer, laptop, tablet, or smartphone.
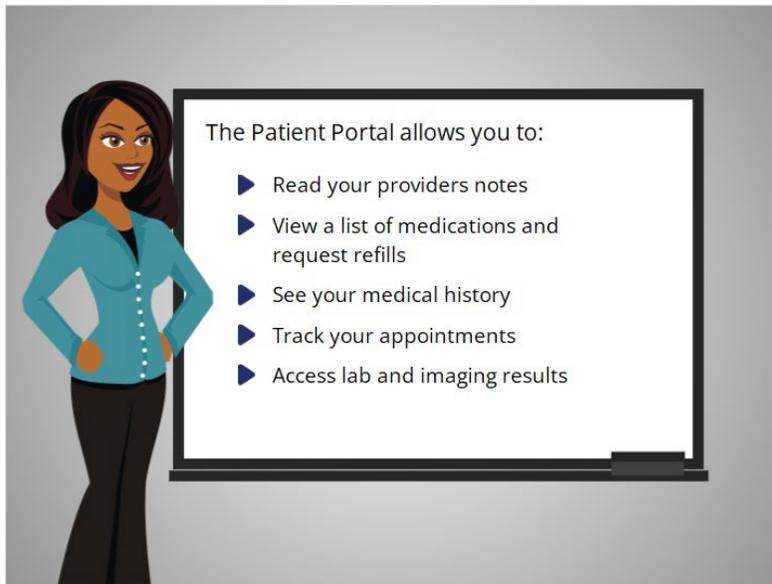
The patient portal allows you to:
- Read your provider's notes about your medical visits.
- View a list of your medications and request refills.
- See a history of your medical care.
- Track which appointments you need to schedule and which ones you have already scheduled.
- And access lab and imaging results.
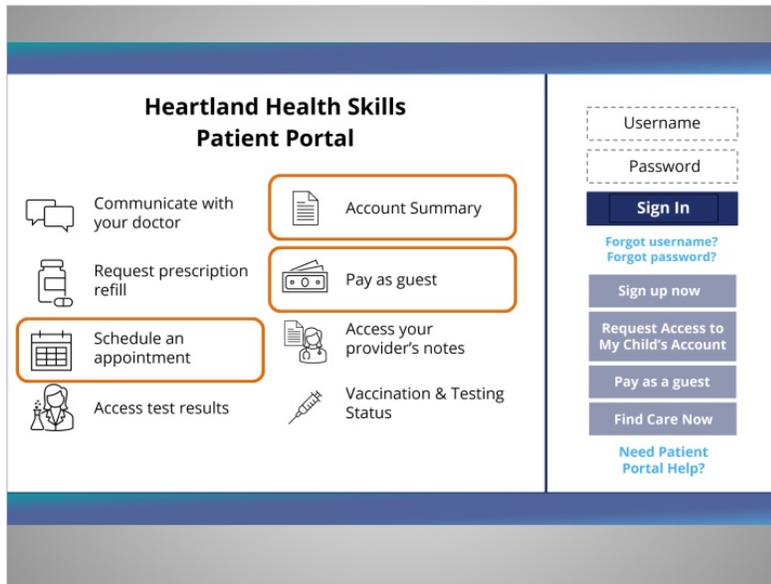
You can also use the patient portal to schedule appointments, view and pay your bills online, and more.

When you send information to your provider, it is recommended that you use your patient portal instead of using your personal email or sending a text message. Only you and your medical team can see information in your medical record. Messages sent outside of the portal may not protect your information because the communication is not secure.

Heartland Health Skills
Patient Portal

Communicate with your doctor

Account Summary

Request prescription refill

Pay as guest

Schedule an appointment

Access your provider's notes

Access test results

Vaccination & Testing Status

Maria and Elena

Sign up now

Request Access to My Child's Account

Pay as a guest

Find Care Now

Need Patient Portal Help?

Maria wants to ask her daughter Elana's pediatrician a question using the patient portal. Maria already has her own patient portal account, but she needs to create an account for her daughter.

Because Maria is an authorized caregiver, she can create an account on her daughter's behalf. Note if you receive medical care from different health care systems, you may need to create an account for each portal.

While each system is different, here are the steps Maria takes to create an account for her daughter. You can also ask your provider questions about their specific portal.

To create a patient portal account, you will need a computer, laptop, tablet, or smartphone, internet access and a web browser.

Maria is using a laptop to create her daughter's portal account. The steps should be similar if you use a different device like a computer, tablet, or smartphone.
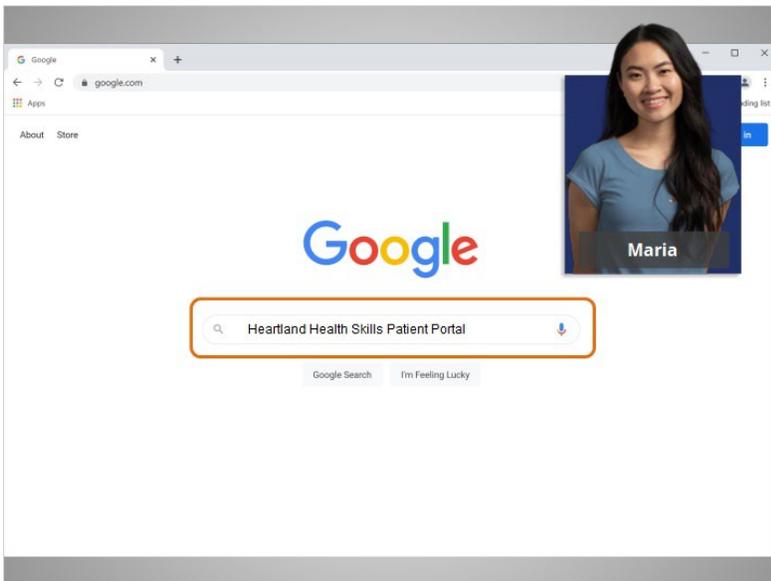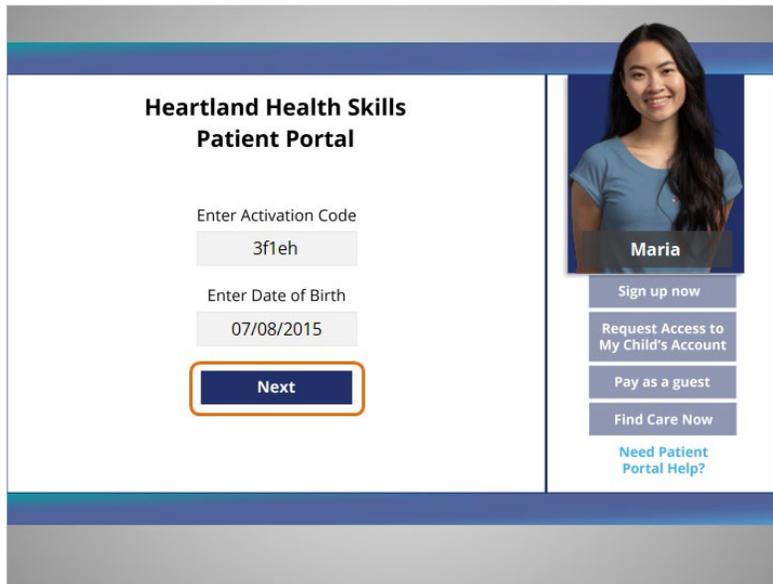

Maria opens the browser on her laptop. In the search box, she types in the name of the health care system and "patient portal" and clicks enter on the keyboard.
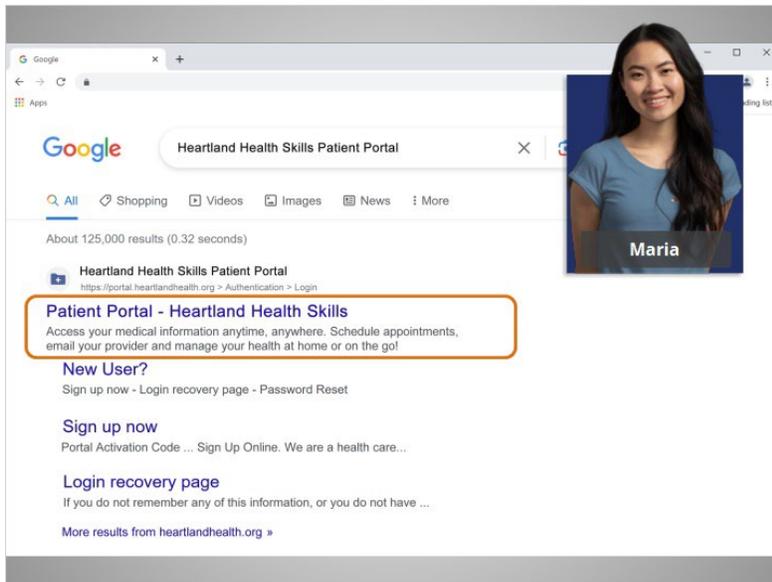
The first result in the browser window is the patient portal she searched. Maria clicks on the link and is taken to the portal's web page.
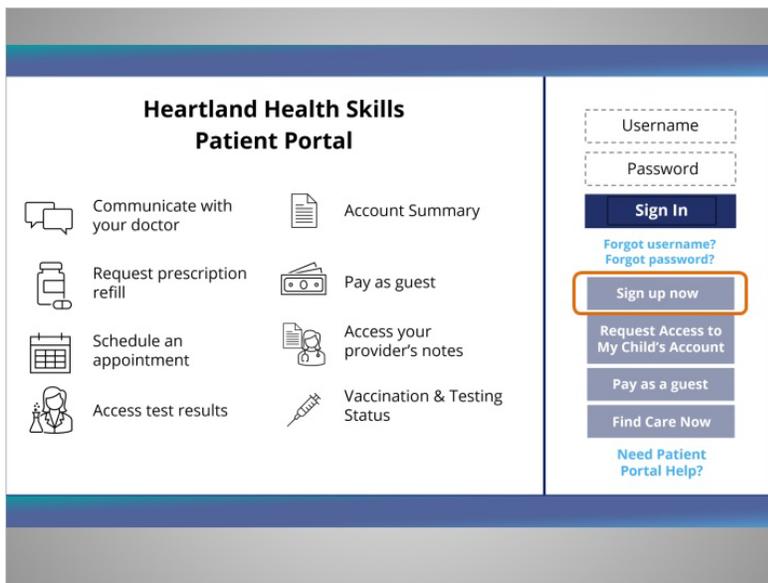
She clicks on the Sign up now button.

She is then asked to enter an activation code and the date of birth for the account owner. If you are required to enter an activation code to create a portal account, your provider should send you the code in advance. Contact your provider if you need help.

Maria received an email with the activation code to create her daughter's account. She enters it into the text box and then adds her daughter's birthday. Then she clicks the Next button.
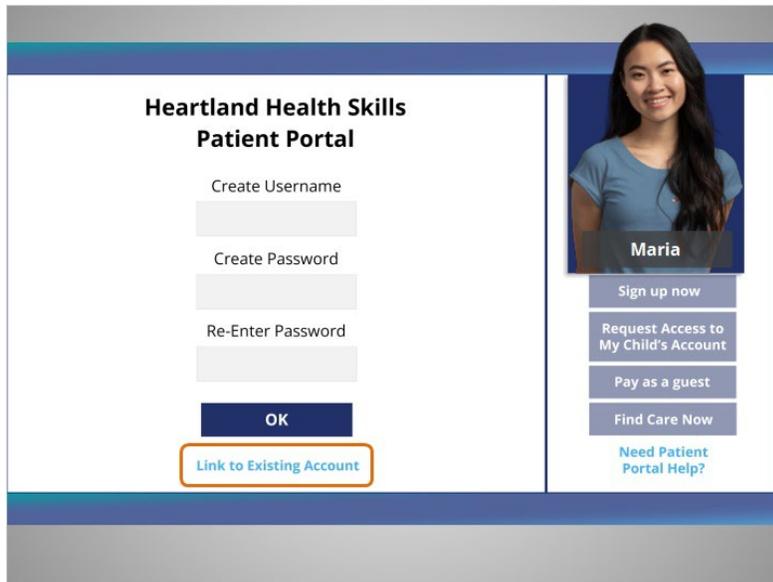
Maria already has an account, so she clicks "Link to existing account." This will allow her to use her username and password to log in to both her and her daughter's accounts.

Please note when you create an account, you will use it each time you log into the portal website. It is important to pick a username and password that you'll remember.
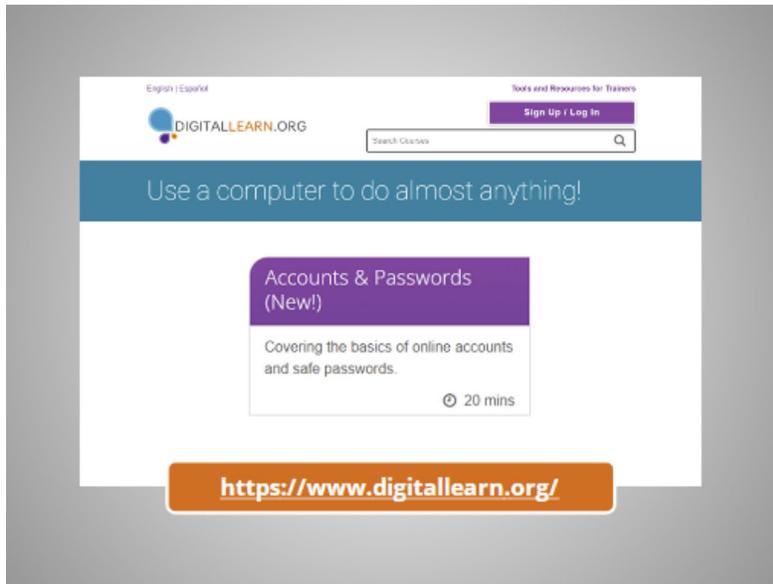
To learn how to create online accounts that are safe and secure, watch the PLA DigitalLearn course "Accounts and Passwords." See the Additional Resources on the lower right-hand side of the screen for a link to the course.
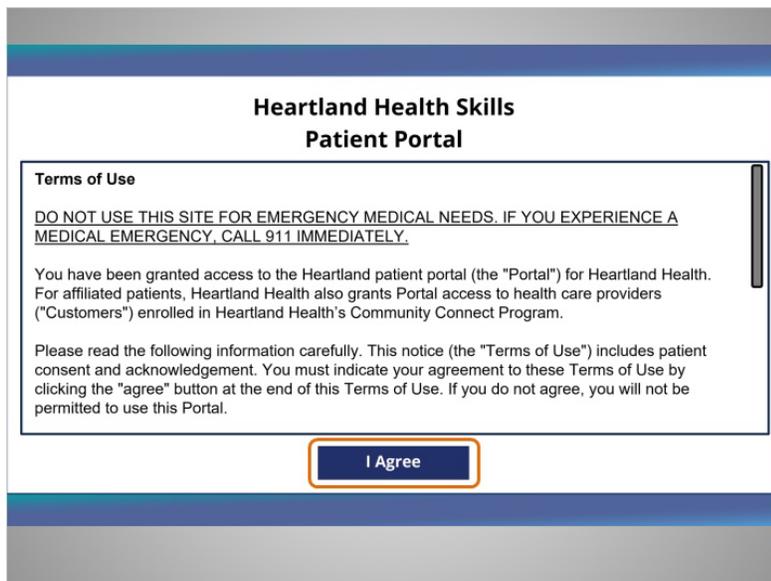
A web page with the Terms of Use displays. It explains how the health care system can use Maria's information in the portal. Maria needs to agree to the Terms to use the portal. After reading it, she clicks "I Agree."
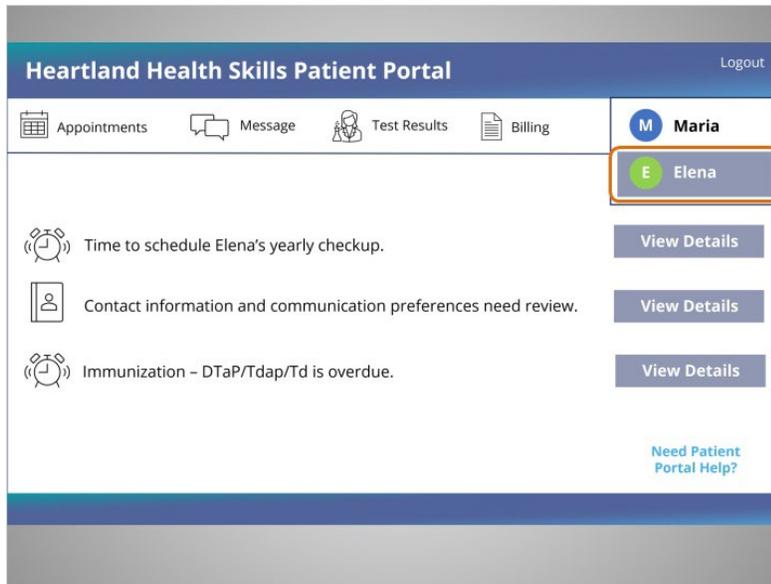
The account has been created and Elena's account appears on the screen.
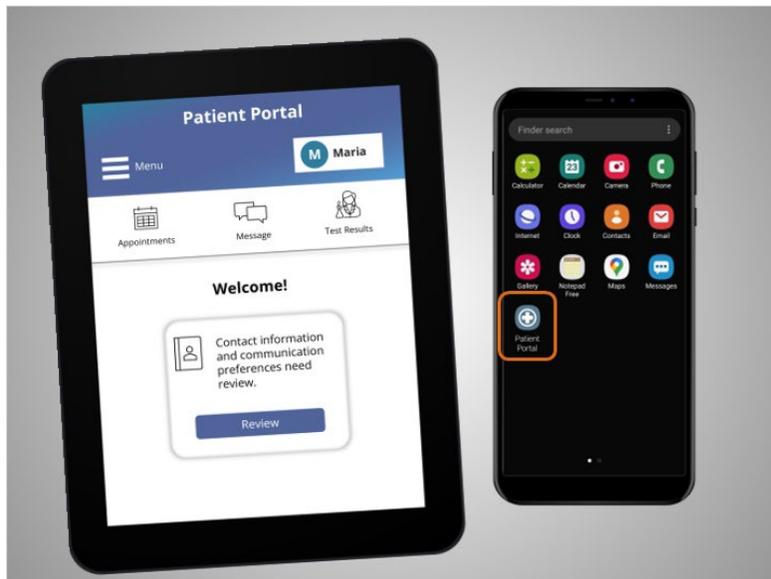
If you use your tablet or smartphone to create an account or log into the patient portal, you can use that device's web browser. Some health care systems may also have an app. You will need to download and install the app on your phone. Ask your provider how to find their app. To open the app, tap the portal icon, then the portal app will open.

To learn more about how to find, download and install an app on your smartphone, watch PLA DigitalLearn's course "Using a Mobile Device," Lesson 5, for help. See the Additional Resources on the lower right-hand side of the screen for a link to the course.
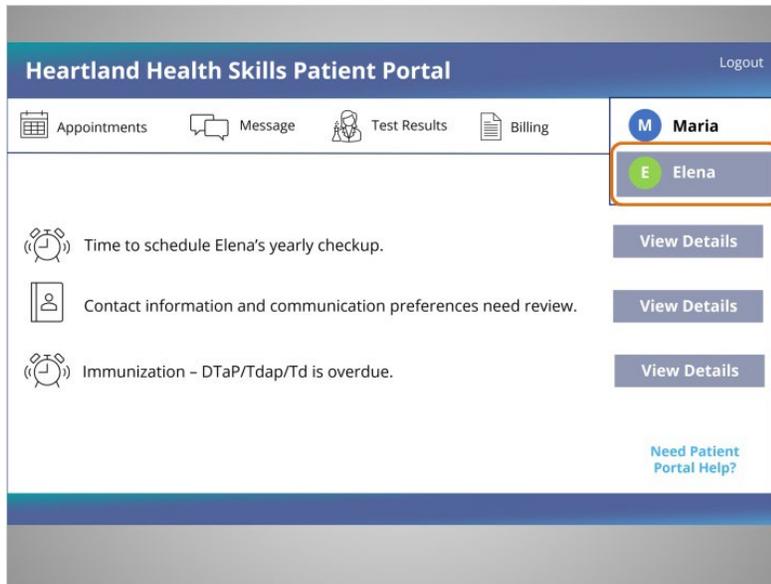

Maria's 8-year-old daughter Elena has a rash, and Maria does not know what to do. They live more than 40 miles away from the doctor's office, so Maria decides to contact the pediatrician using the patient portal for help.
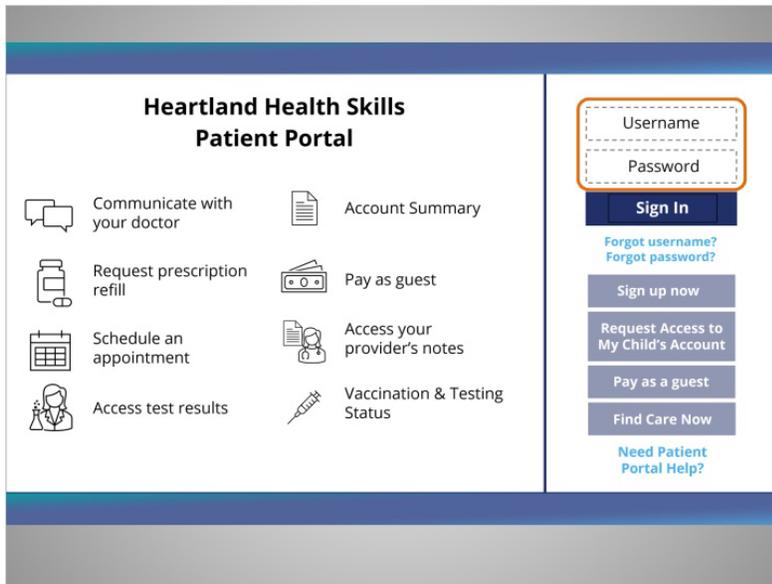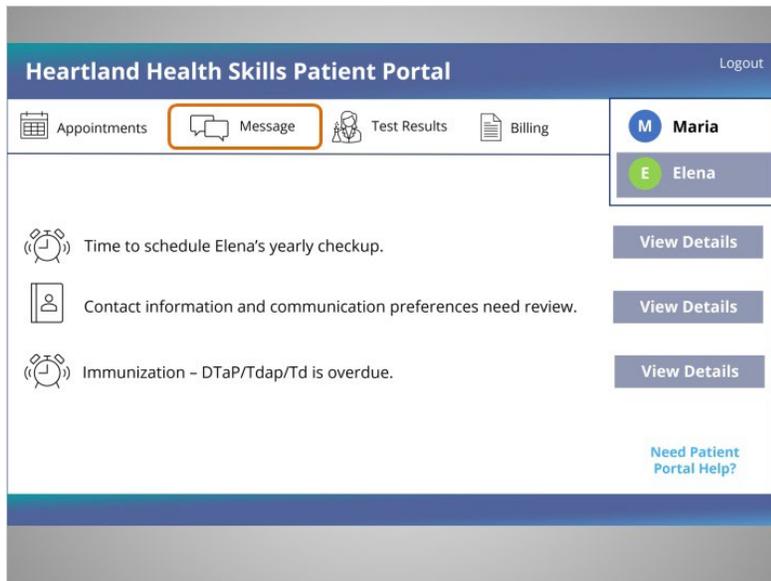
Using her laptop, Maria opens the web browser to access the portal, enters her username and password,
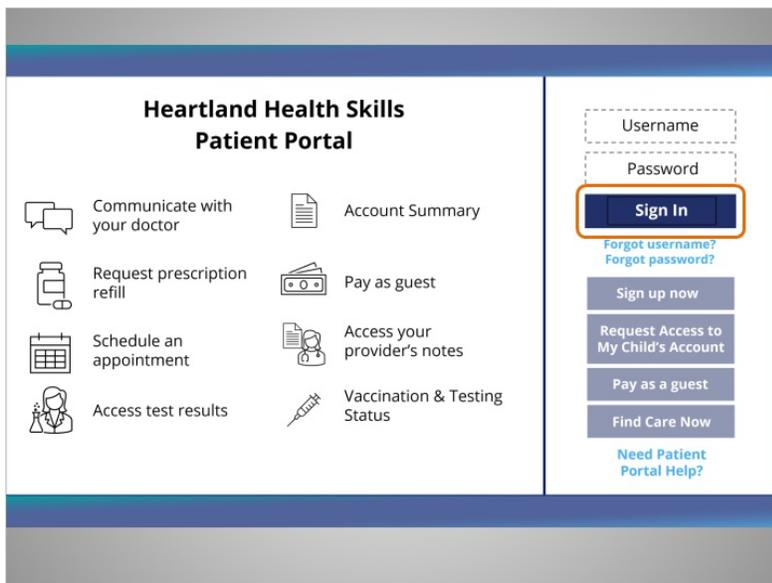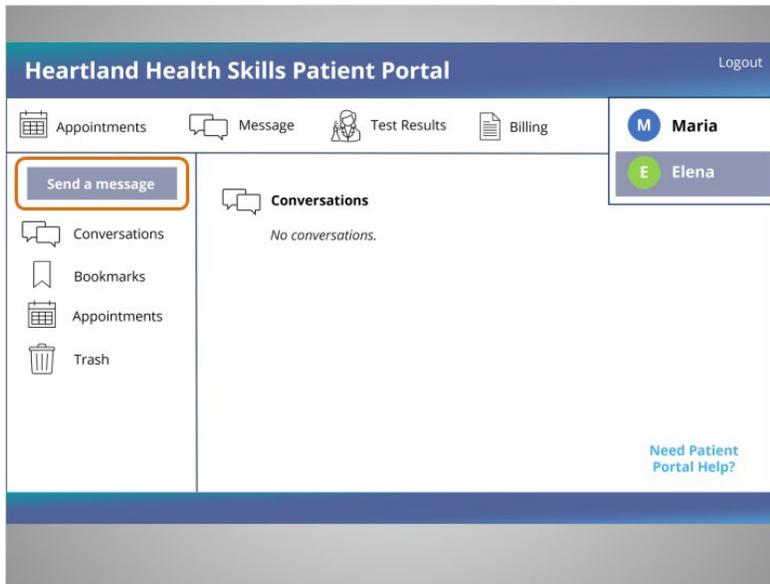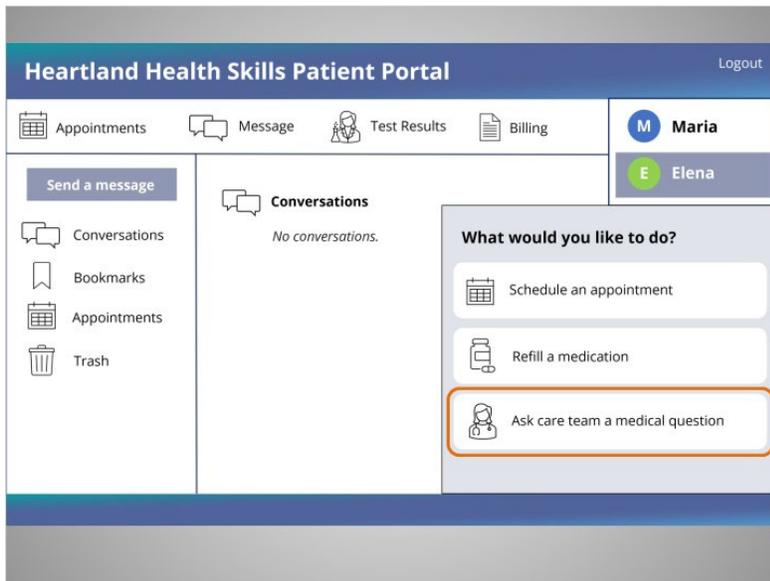

and clicks Sign In.

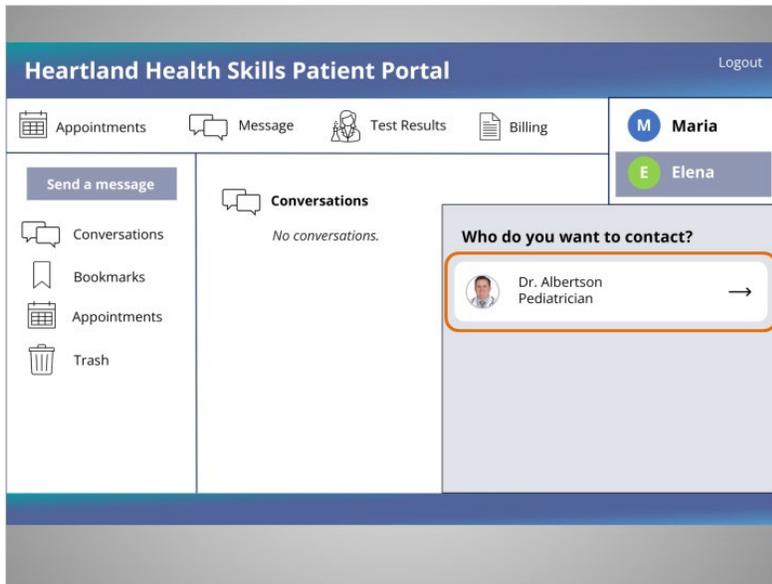After she logs in, Maria selects her daughter's name,

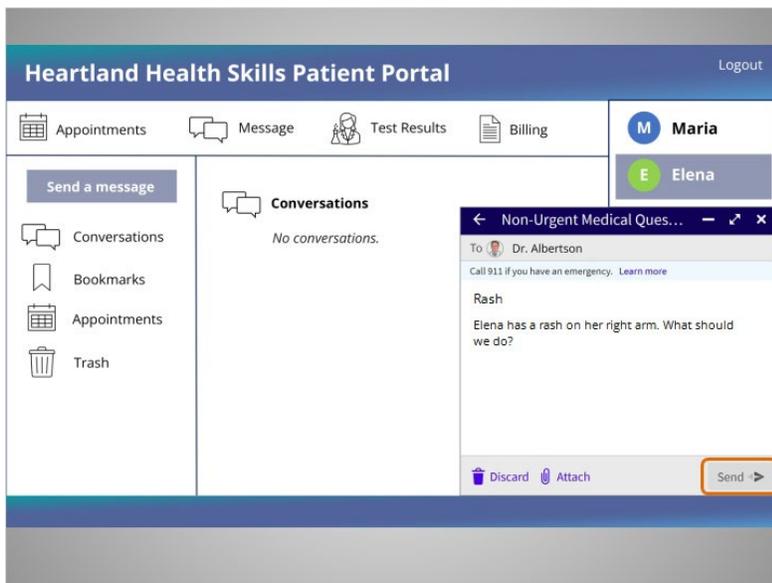then clicks "Message" to send a question to her pediatrician.
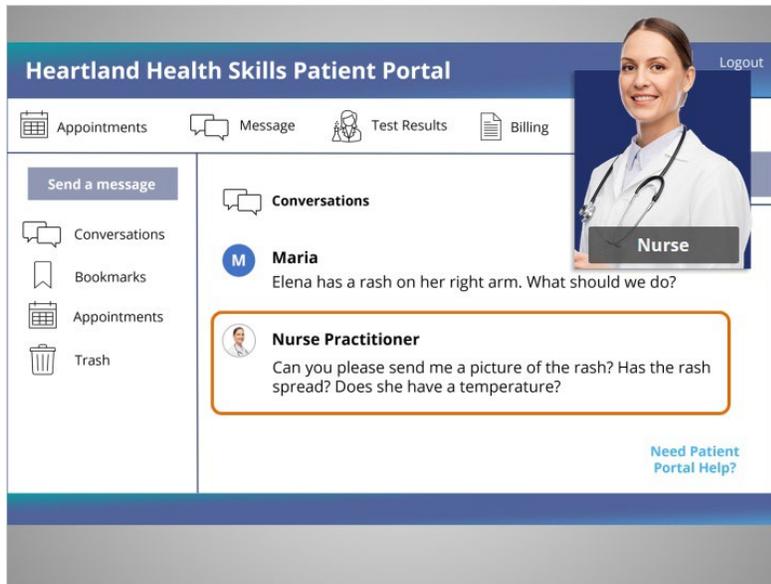
After Maria clicks on "Send a Message",

a menu appears asking" What would you like to do?" Because Maria has a question about her daughter's rash, she selects "Ask care team a medical question."

Maria is then asked, "Who do you want to contact?" Maria selects her daughter's pediatrician, Dr. Albertson.


Maria enters her question into the message box and clicks send.

Heartland Health Skills Patient Portal — Logout

Appointments · Message · Test Results · Billing

Send a message

- Conversations
- Bookmarks
- Appointments
- Trash

Conversations

M Maria
Elena has a rash on her right arm. What should we do?

Nurse Practitioner
Can you please send me a picture of the rash? Has the rash spread? Does she have a temperature?

Nurse

Need Patient Portal Help?

A nurse responds with questions and asks Maria to send a picture of the rash. Maria takes a picture using her smartphone, uploads it to the portal, and answers the nurse's questions. The nurse recommends treatment and informs Maria to contact the office if the symptoms worsen.
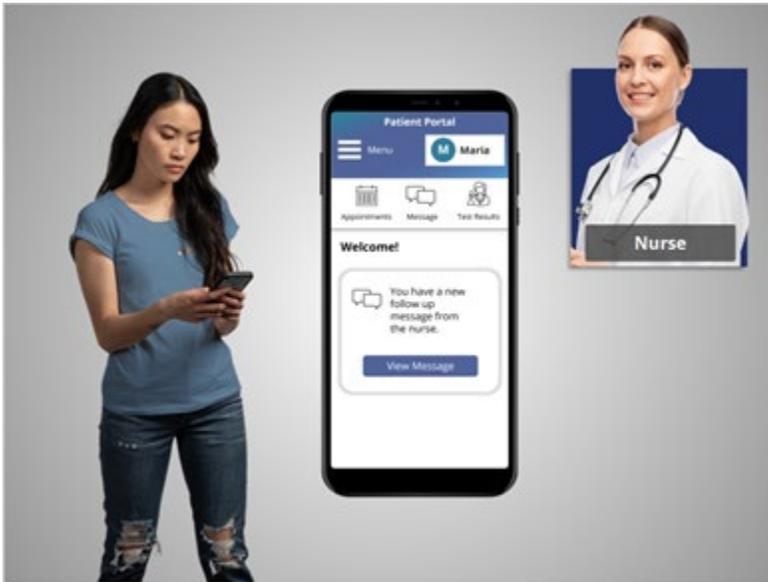
The next day, Maria is out running errands and sees an email notification that she's received a message from the nurse. Since the patient portal is available using the web browser on her phone, Maria taps the link in the email to open the patient portal, logs in, and views the message. Maria responds to the nurse using her smartphone and lets her know that Elena's rash is getting better.
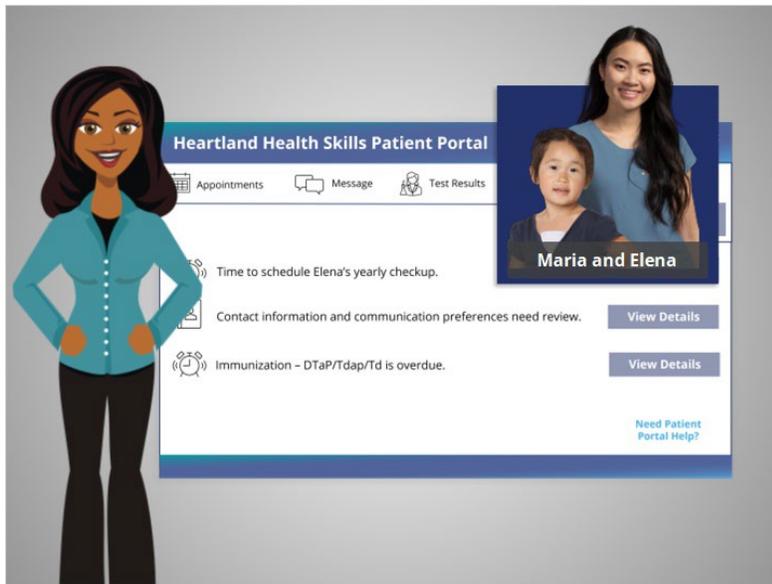
Using the patient portal was convenient for Maria. It helped her get Elena the care needed, without traveling to the doctor's office.

In the next lesson, Maria will explore what type of technology she needs for a telehealth appointment.
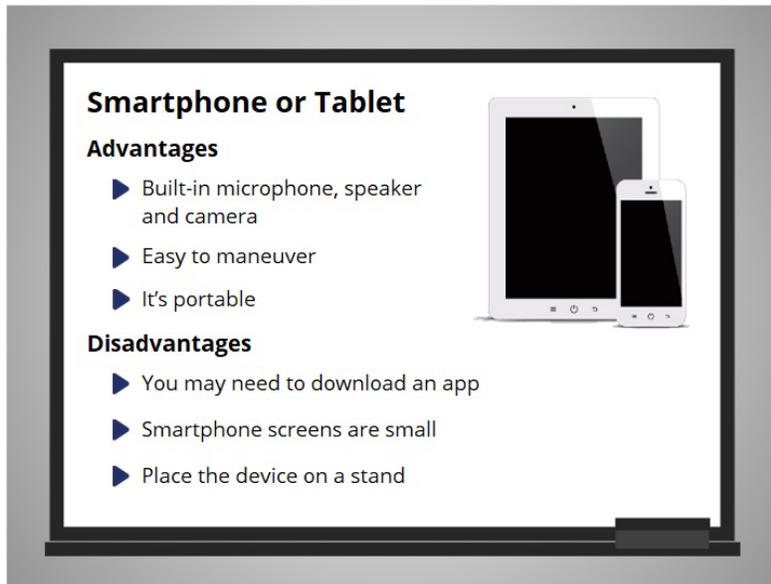
Getting Started with Telehealth
Telehealth Appointment Technical Requirements
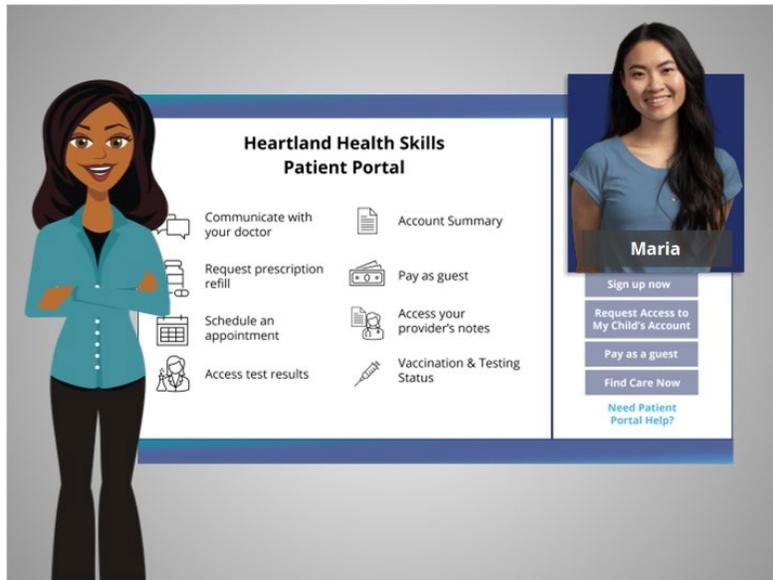
In the previous lesson, Maria learned how to create an account, log in, and connect with her daughter's pediatrician using the patient portal. In this lesson, we'll follow along with Maria as she explores the technical requirements for a telehealth visit using a video connection.

To connect to a telehealth visit using a video connection, Maria needs to pick a device with a camera, microphone, and speaker. Let's explore what computing device Maria should pick, and learn about the pros and cons of using a smartphone, tablet, computer, or laptop for telehealth visits.

Smartphone or Tablet

Advantages

▶ Built-in microphone, speaker and camera

▶ Easy to maneuver

▶ It's portable

Disadvantages

▶ You may need to download an app

▶ Smartphone screens are small

▶ Place the device on a stand

Some of the benefits of using a smartphone or tablet include it has a built-in microphone, speaker, and camera. They are easy to move so that you can easily show the provider something like a rash on your arm. And it's portable, so you can easily move the device to the place you want to have the meeting.

While there are many benefits to using a smartphone or tablet, there are some disadvantages as well.

For instance, you may need to download an app to connect to the appointment. Also, smartphone screens are small, so it may be hard to see the person on the screen or any documents shared with you. You may also want to place your device on a stand, so you don't have to hold it during the appointment. This will allow you to take notes and make sure your image on the screen does not move.

Desktop or Laptop

Advantages

▶ Screen is large; easy to see provider and what they share

▶ Most devices include built-in microphone, speaker, camera

▶ Laptops are portable

Some of the reasons why you might choose to use a desktop or laptop include the screen is large, so it is easy to see the health care provider and any documents they share. Most laptops and desktop computers include a built-in microphone, speaker, and camera. If you use a laptop, it is portable, so you can meet where it's convenient for you.

There are some disadvantages to think about as well. For instance, desktop computers are not portable. If the computer is in a shared area, you may not have the privacy you need. Older desktop and laptop computers may not have a built-in camera, microphone, or speakers. However, you can attach an external camera and headphones with a built-in microphone to your device.

Depending on the device you choose, the technical requirements differ.

Desktop or Laptop

Maria has decided to use the family laptop to connect to her telehealth appointment. She feels confident she has the skills she needs because she uses it multiple times a week and is usually able to fix problems she experiences. She also knows it has a built-in camera, speaker, and microphone that works.

Now that Maria has decided she will use a laptop for the appointment, she needs to check her internet connection. When you attend your telehealth appointment, you should find a quiet, private, well-lit spot that has a strong internet connection. Use a website like Speedtest to test your internet connection.
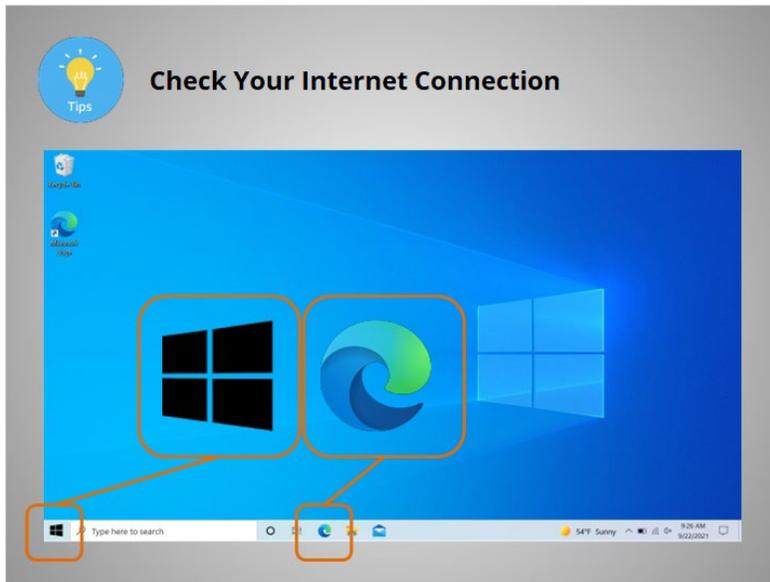
Maria's laptop is running the Windows operating system. To test her internet speed, Maria opens the Edge web browser on her laptop in the room where she plans to meet with her provider.

The browser can be found in the Taskbar, or by clicking on the Start menu on the lower left-hand side of the screen.
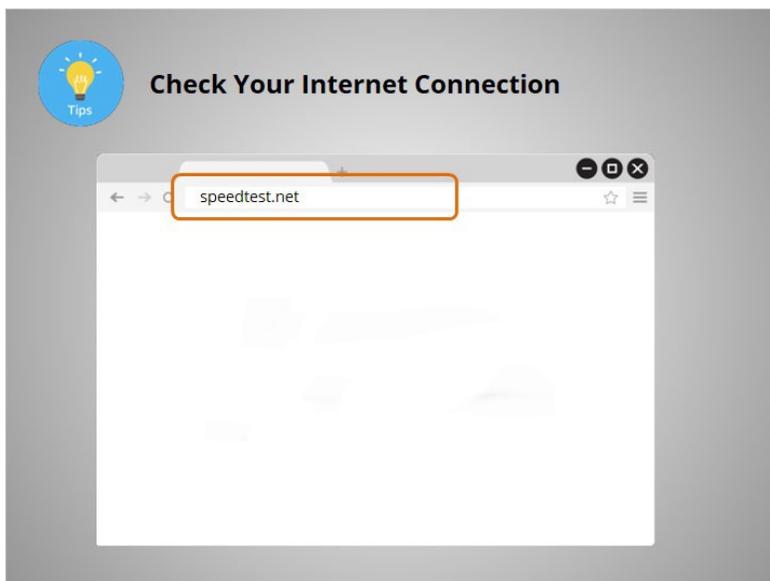
She opens the web browser and types speedtest.net in the search bar, and clicks enter on the laptop keyboard.
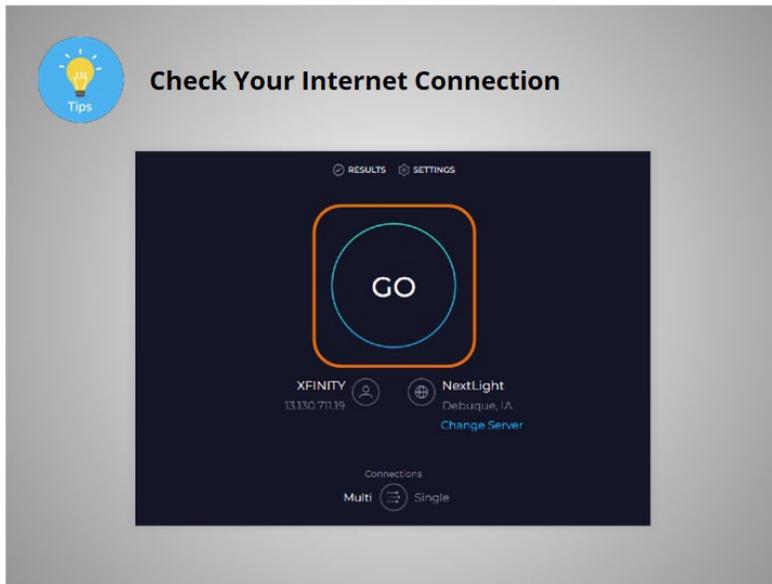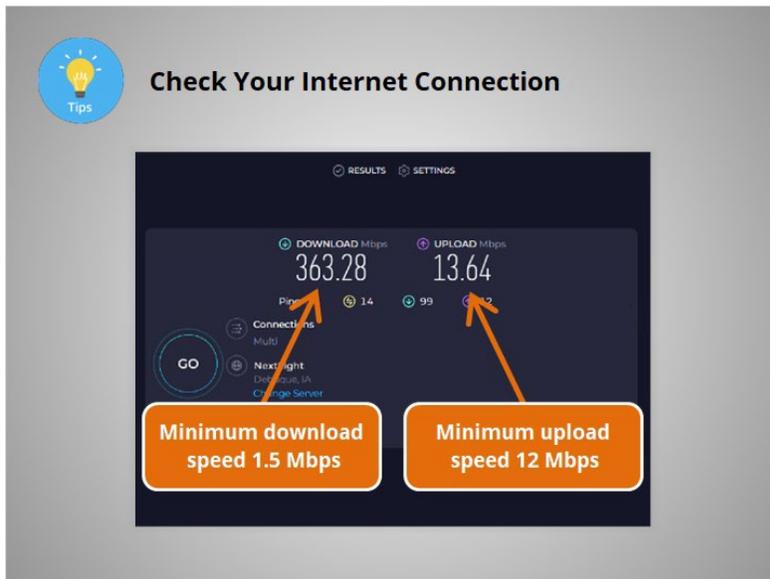
The page appears. To test the speed, she clicks the Go button.

If you are using a computer running the Mac operating system, a link to the Safari web browser can be found in the dock,
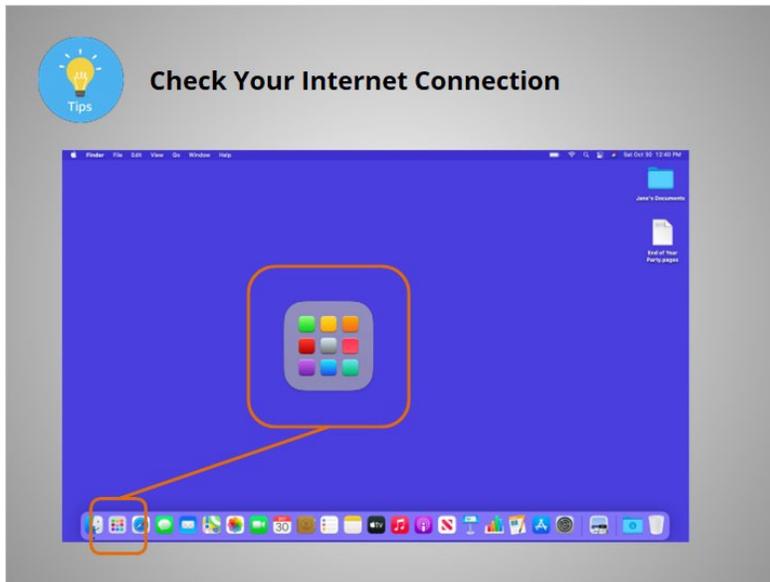
or by clicking on the Launchpad icon.

To attend a video telehealth appointment, you should have a minimum download speed of 1.5 megabits per second, and a minimum upload speed of 12 megabits per second. Maria's internet speed has passed the test. Her internet is strong enough to support her telehealth appointment. Note if there is more than one device in your location using the internet service at the same time as your appointment, you may need a higher upload and download speed to ensure that all the devices connecting to the internet during your appointment have adequate internet access.

Sometimes all you will need to connect to your appointment is a web browser. Make sure you have the recommended browser installed on your computer and that it is up to date. Sometimes you will need to download and install an application on your device. Your provider should send you instructions. Install and test the software before your appointment so you have time to fix problems before your appointment begins.
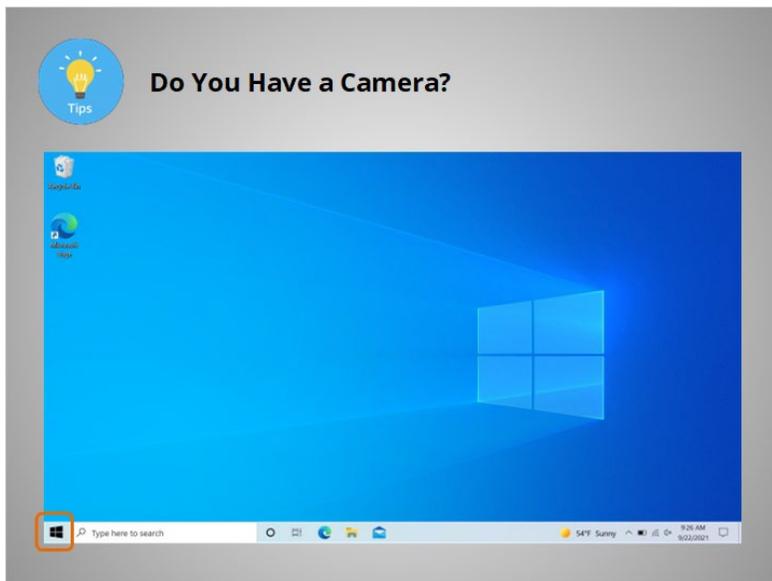
Do You Have a Camera?
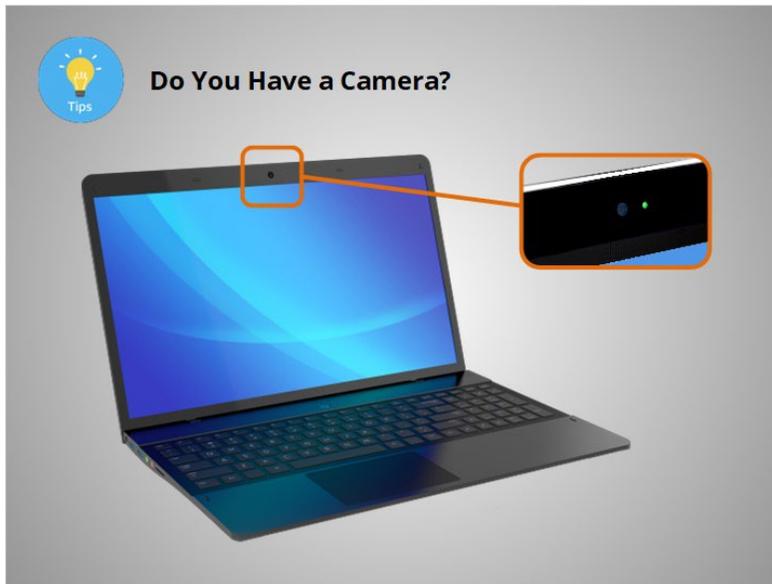
For a video appointment, you will need to use a device that has a camera. While most desktop computers and laptops include an internal camera, some devices may not. One way to check if your device has a camera is to look for a small camera lens, which is usually located at the top edge of the monitor. Maria checks her laptop monitor and sees the camera.
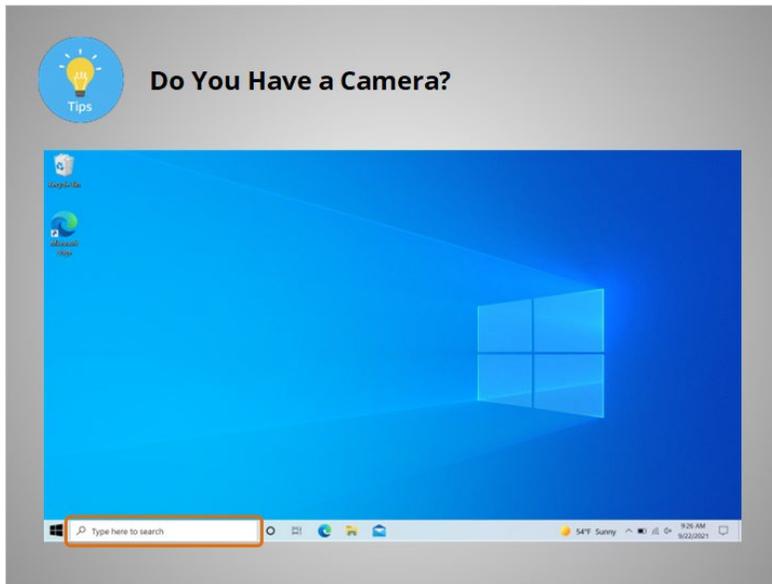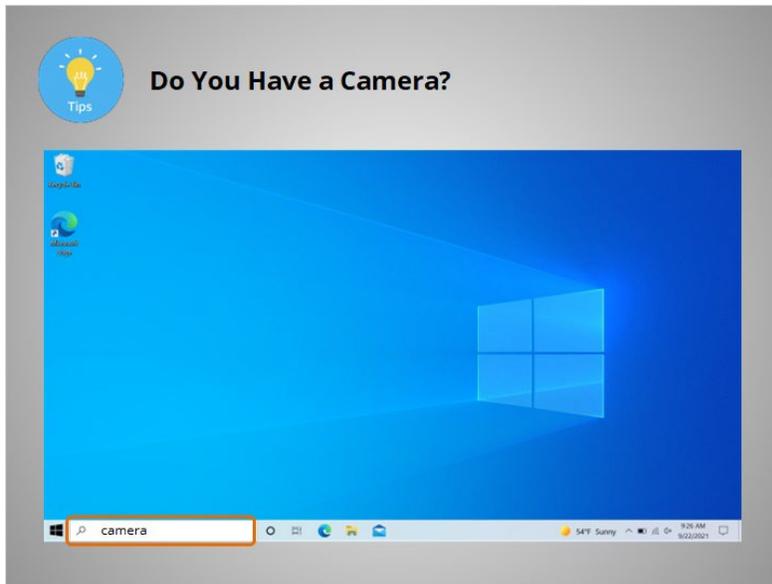
If you can't find the camera lens, check to see if your computer or laptop includes software to run a camera.
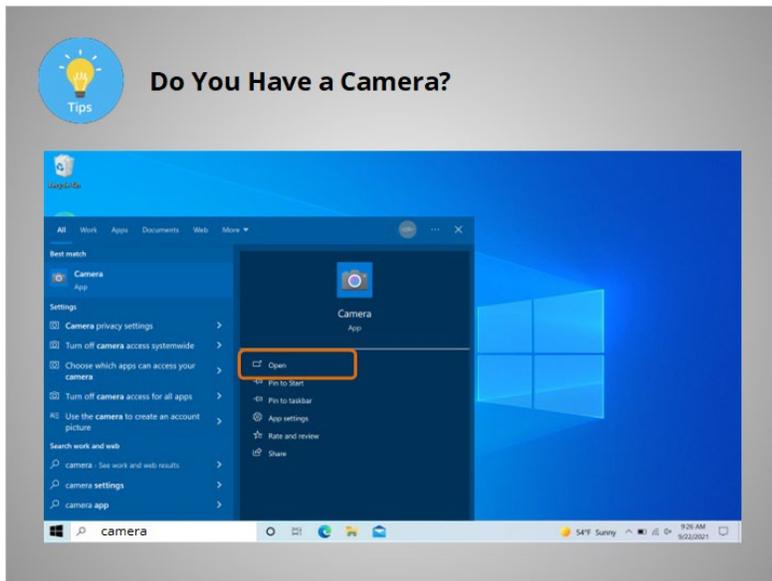
If you're using a Windows operating system, try searching for the software on your computer. Some Windows computers include a search box in the taskbar,
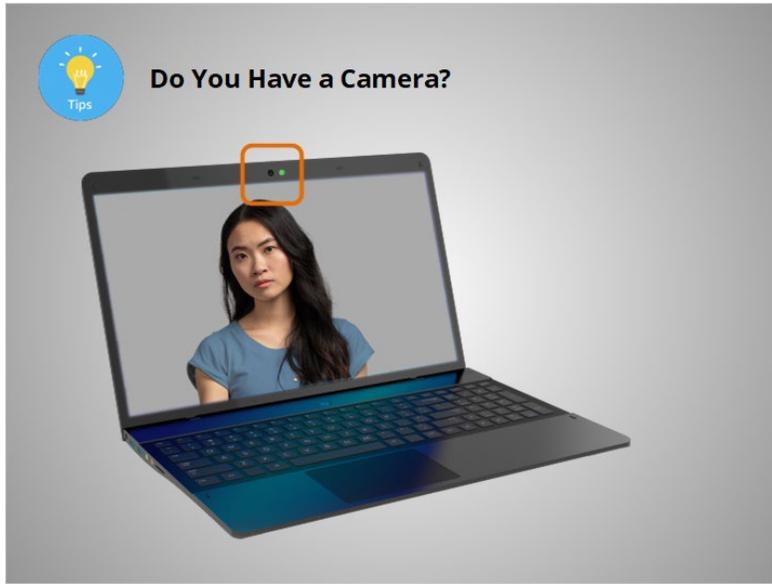

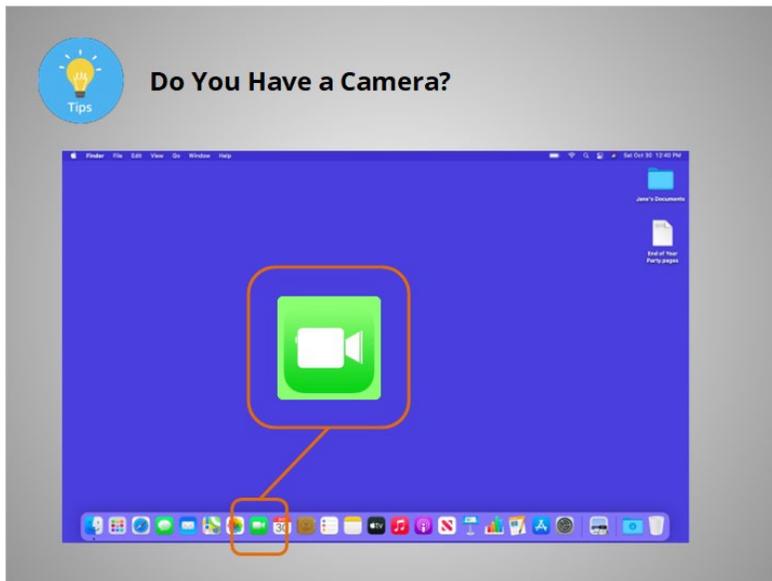or, you may need to click on the Start Menu to find the search box.

Type "camera" in the search box and click enter on the keyboard.

If the Windows Camera icon appears in the search result, click Open.

If you have a camera installed on your device, it should turn on when you click the link.


Most Apple laptops come with a built-in camera. A simple way to check if your Mac computer has a camera is to click on the FaceTime icon in the dock. The camera should automatically turn on when the FaceTime application opens.
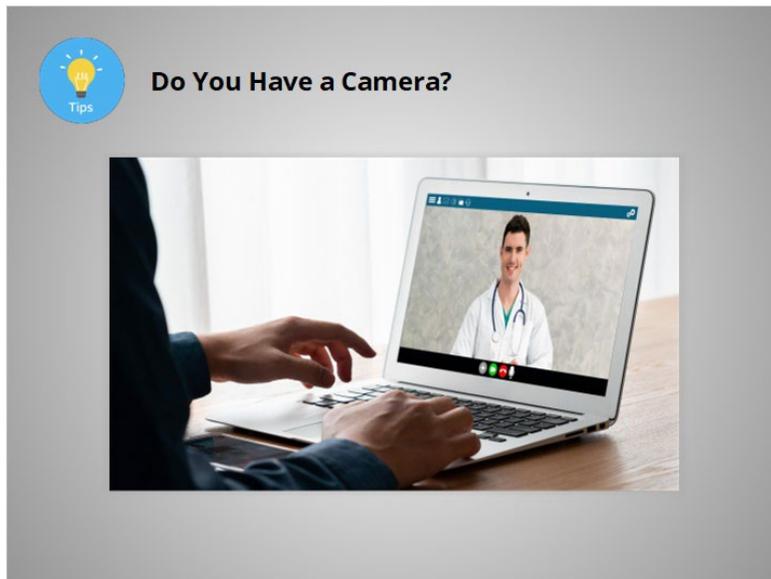
Do You Have a Camera?

If these steps do not work, you should check the laptop or computer manufacturer's website for more information.
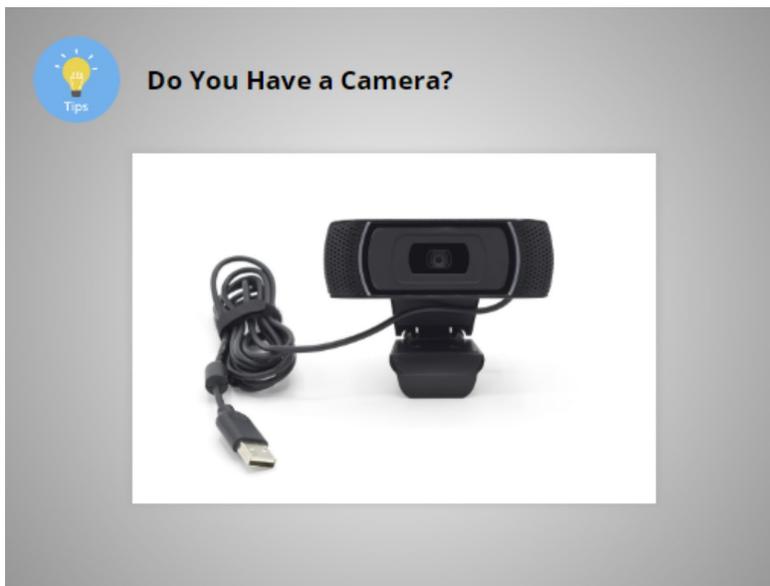
Do You Have a Camera?

If the device does not have a camera, you can attach an external camera,

Do You Have a Camera?
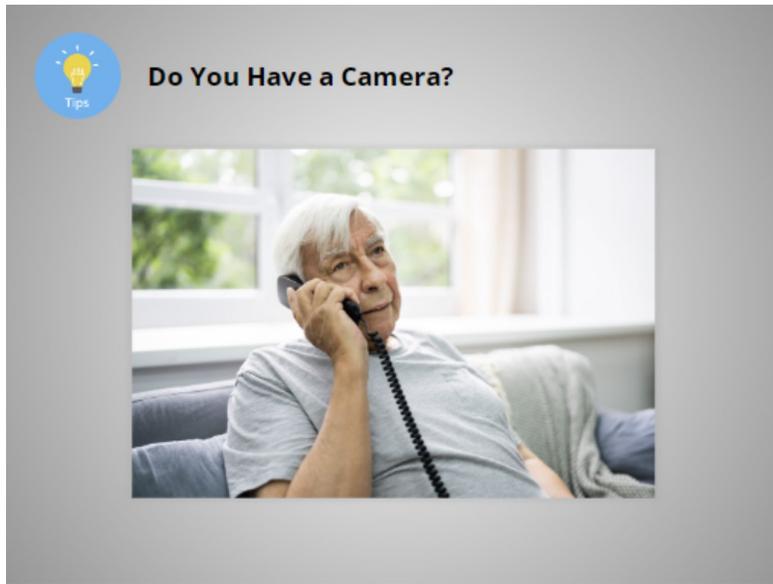
or, ask your health care provider if an audio-only appointment is possible.

Do You Have a Camera?

When possible, make sure your device is on a stable surface, so your camera remains in the same position during your appointment.

You will also need a microphone and speaker to talk to your provider and hear their response. Many devices have a built-in microphone and speaker.
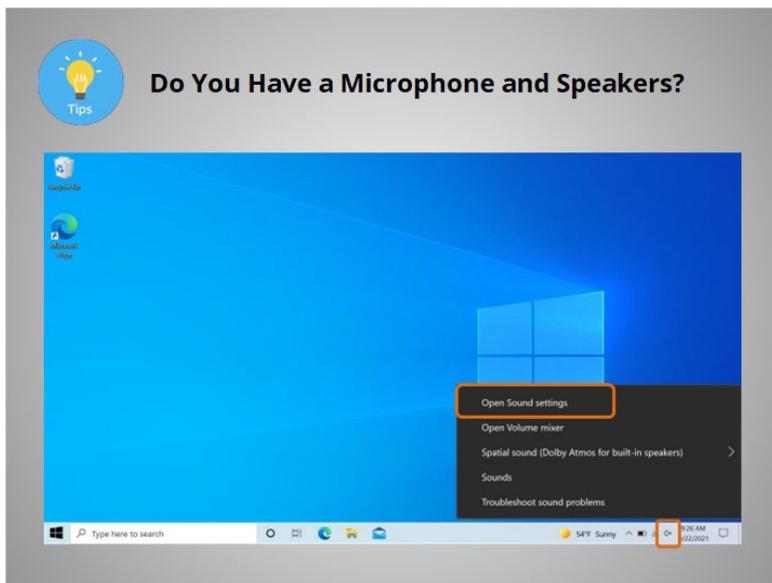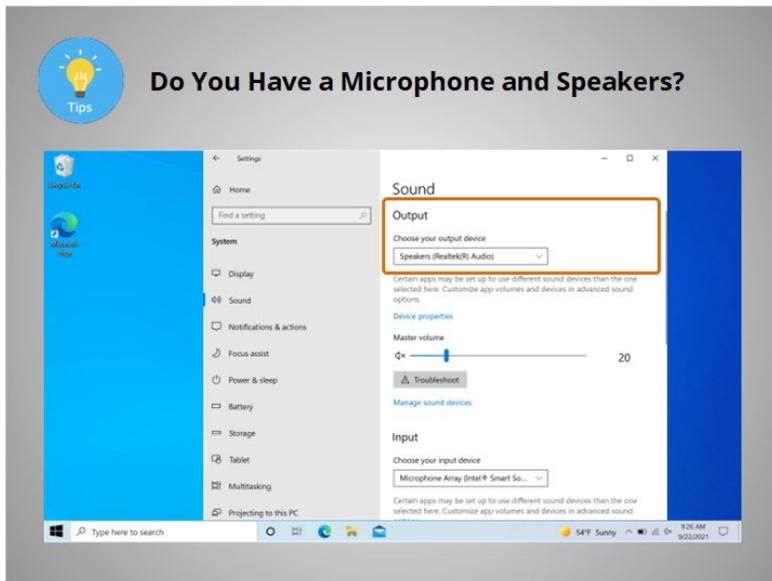

Before the appointment, Maria wants to check to see if her laptop has a built-in microphone and speaker and that they both work. To do this, she right-clicks the speaker icon on the taskbar. The icon is on the lower right-hand side of the screen.
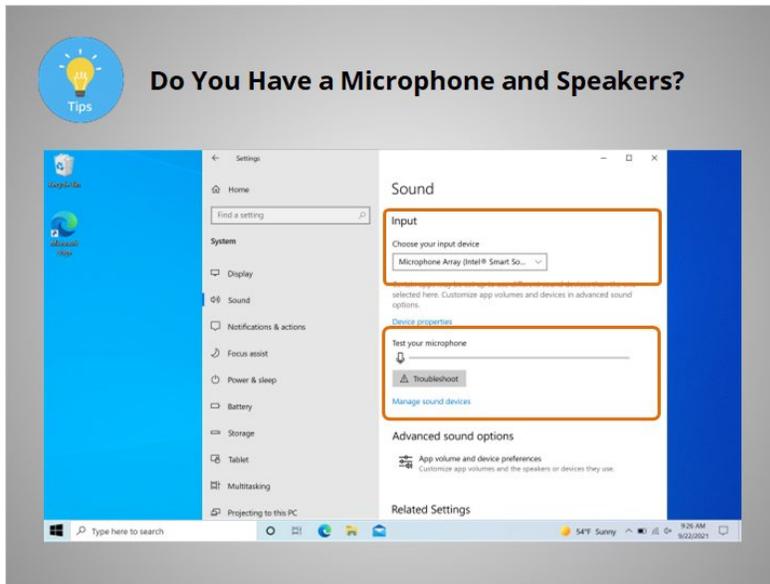
She then clicks on Open Sound Settings.
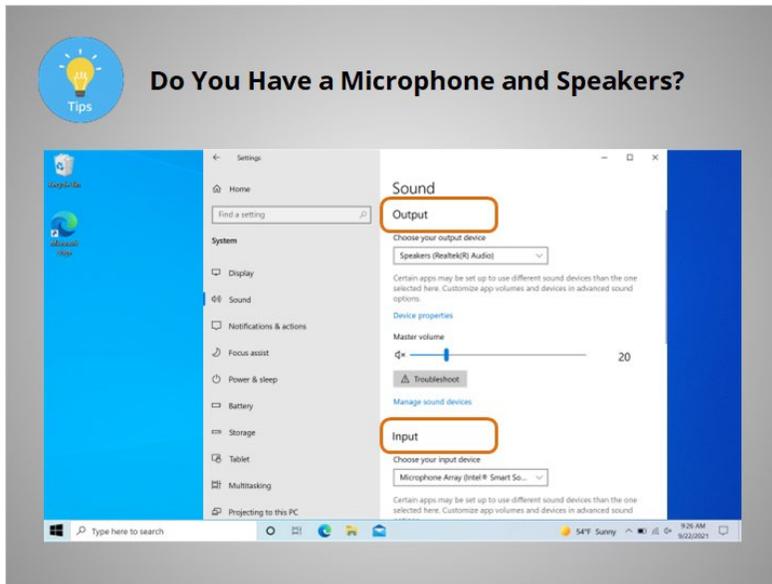
There should be two options on the menu: Output and Input.

If there is a built-in speaker, there will be a device listed in the Output dropdown menu.

Do You Have a Microphone and Speakers?

If there is a built-in microphone, there will be a device listed in the Input dropdown menu. There may also be an option to test the microphone to see if it is working.

Do You Have a Microphone and Speakers?
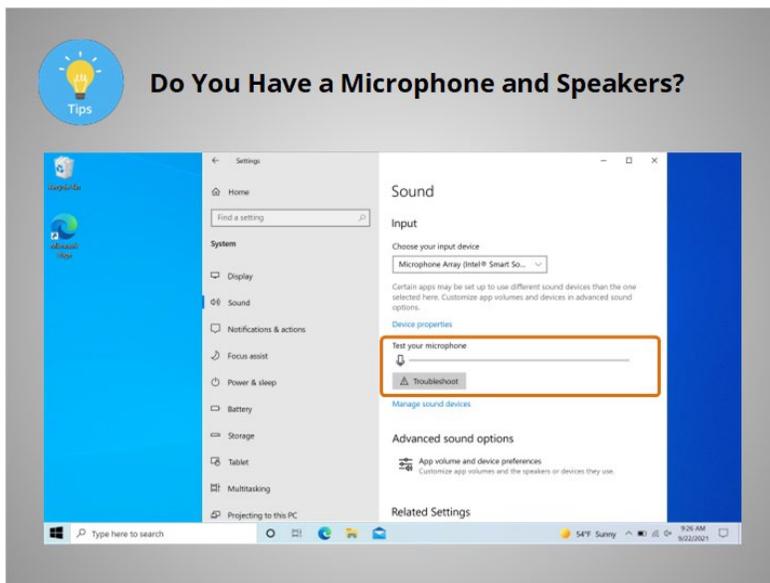
Maria's laptop includes both a microphone and a speaker. She clicks the test button to make sure it works.
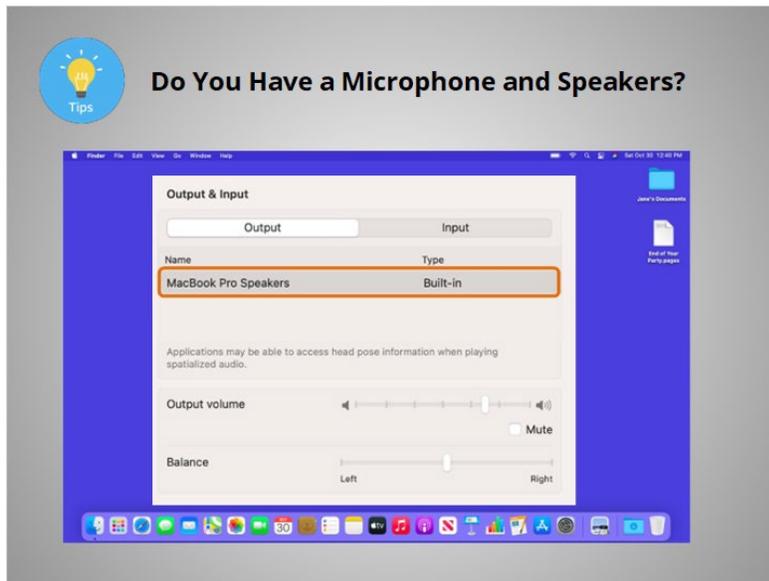
Most Apple laptops come with a built-in microphone and speaker. A simple way to check if your Apple laptop or desktop computer has a built-in microphone and speaker is to click on the Apple Menu, which is located at the top left-hand corner of the screen,
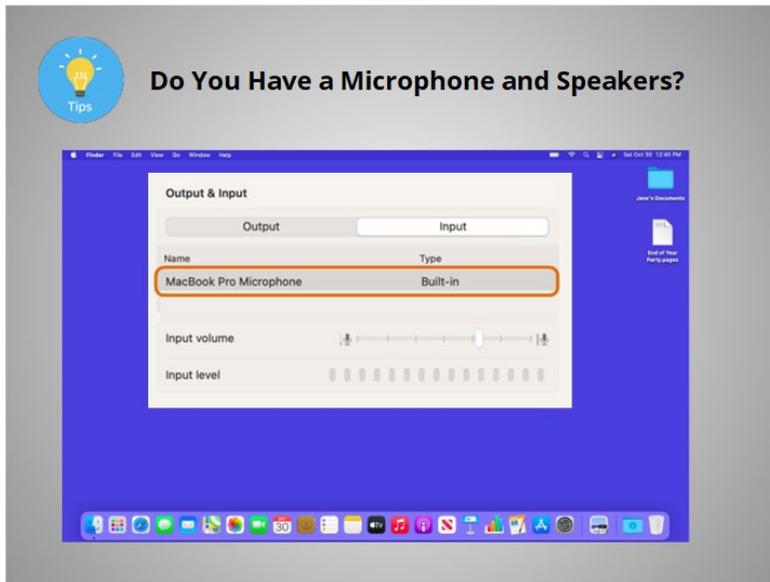

then click System Preferences or System Settings

and then click Sound.

If there is a built-in speaker, there will be a device listed in the Output menu.

If there is a built-in microphone, there will be a device listed in the Input menu.

You can attach external headphones with a built-in microphone to your device if it does not include a microphone or speaker. You may want to use headphones so that others around you cannot hear what the provider is saying.

If these steps do not work, check the laptop or computer manufacturer's website for more information.

If you have speakers but can't hear any sound, click on the volume button to increase the sound. The button may be on your keyboard
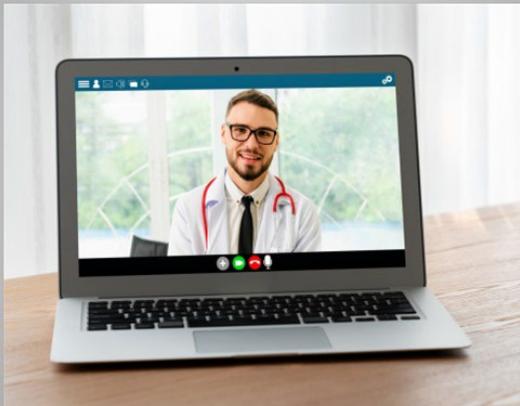

or on your screen.

Maria has completed the checklist given to her by her provider and confirmed her laptop will work for her next telehealth appointment.
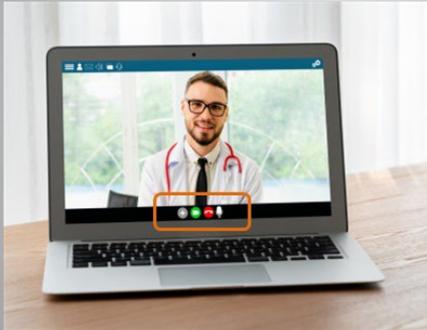

Now, let's explore how to fix some of the most common problems Maria may have with her laptop when she tries to connect to her telehealth appointment. If you experience problems connecting to your appointment, try these tips.

Tips for Troubleshooting Technical Problems

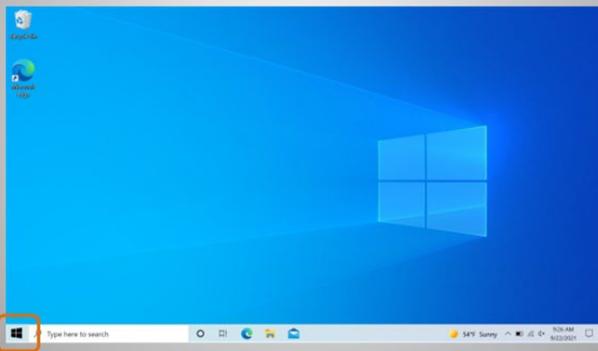Make sure your **camera and microphone** are **turned on.**

If the icons of a camera and microphone have a slash through them, it means they are turned off, and your provider can't hear or see you. To turn them on, click on the icon. The slash across the camera or microphone will disappear.

Tips for Troubleshooting Technical Problems
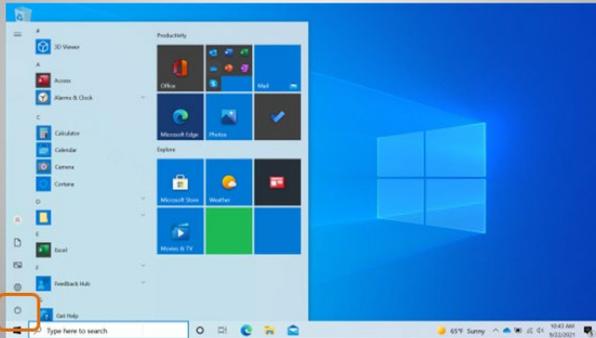
Restart your device.

If you have problems, try restarting your computer or laptop. Maria is using a computer running the Windows operating system, so she clicks on the Start menu on the lower left-hand side of the screen,

then Power,

then Restart.

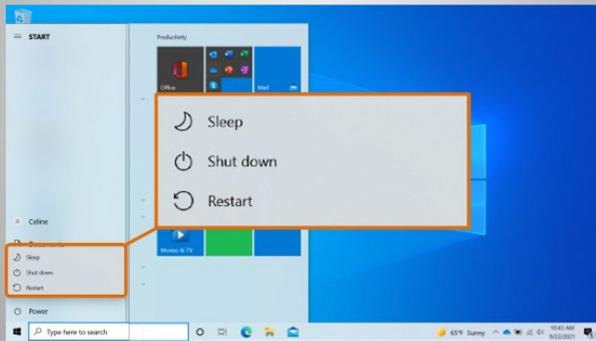## Tips for Troubleshooting Technical Problems

Restart your device.

If you are using a computer or laptop using the Mac operating system, click on the Apple Menu, which is located at the top left-hand corner of the screen, then click Restart.
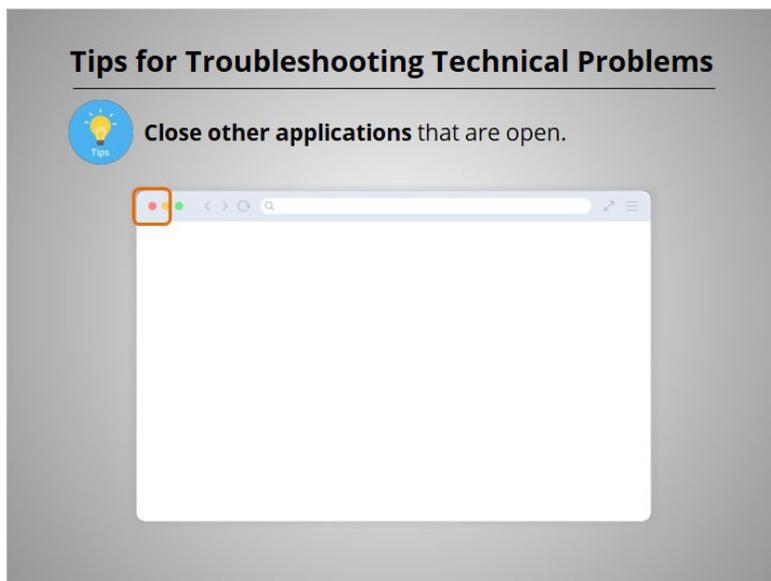

Tips for Troubleshooting Technical Problems

Make sure your device is fully **charged or plugged in**.

Make sure your device is fully charged or plugged in.

Tips for Troubleshooting Technical Problems

Close other applications that are open.
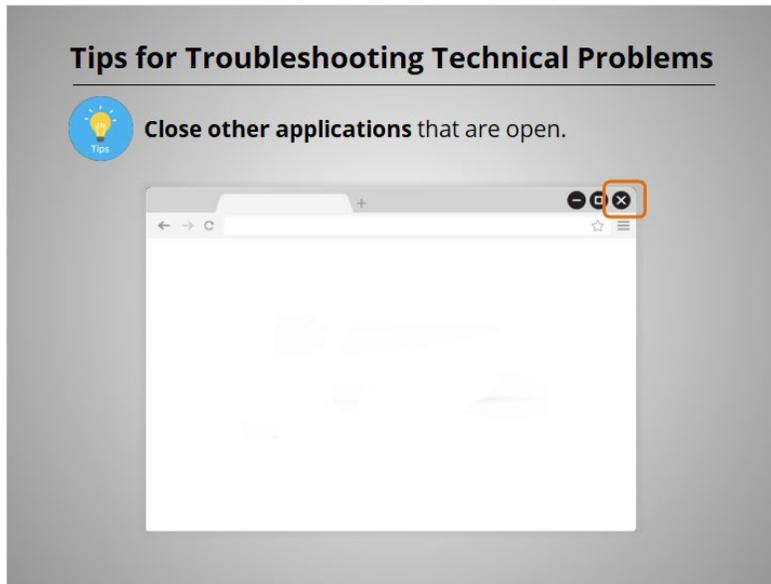
If you are having problems with your internet connection, try closing applications you are not using. Closing applications can lower the amount of internet your device needs.

If you are using a laptop or computer running a Windows operating system, click on the X at the top right side of the window to close it.

Tips for Troubleshooting Technical Problems

Close other applications that are open.

If you are using a laptop or computer running the Mac operating system, click on the red button at the top left of the window to close it.

Tips for Troubleshooting Technical Problems

Try **turning off your camera**.

Keep in mind that when the camera is on, it uses more bandwidth, so if the connection starts to break up, you may need to turn off the camera when it is not needed.

Tips for Troubleshooting Technical Problems

Make sure the application is **up to date**.

Make sure the software you need for the appointment is up to date. Some telehealth appointments only need a web browser. Others may need additional software to connect to the appointment. Check with your provider to make sure you have the software you will need to attend the appointment.

Tips for Troubleshooting Technical Problems

Try using **another device**.

If you can't connect to your visit on your device, try using another device if you have one.
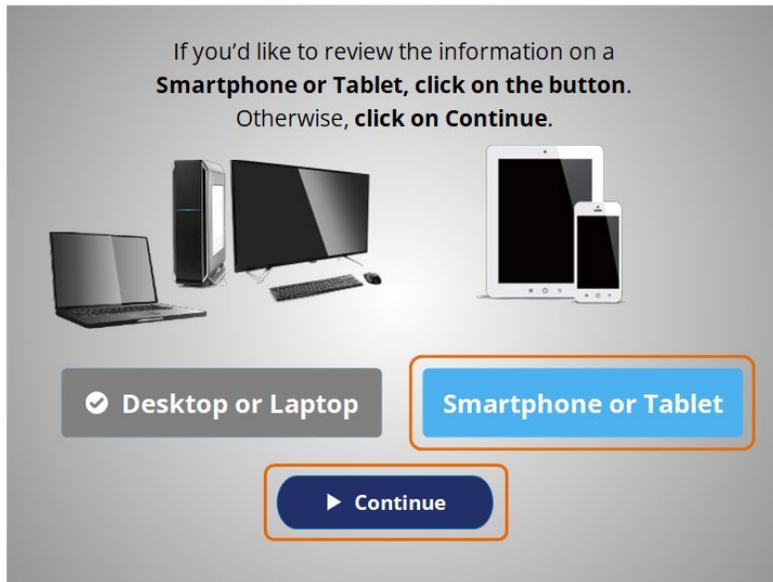
Tips for Troubleshooting Technical Problems

Contact your health care provider for help.

If none of the previous steps work for you, contact your health care provider for help. The number to call for assistance may be found in your confirmation email or on the health care provider's website.

If you'd like to review the information on a
Smartphone or Tablet, click on the button.
Otherwise, **click on Continue**.

**Desktop or Laptop**   **Smartphone or Tablet**

▶ **Continue**

You've completed the section on technical requirements for a laptop or desktop. If you'd like to review the section on requirements for a smartphone or tablet, click on the button. If not, click Continue.
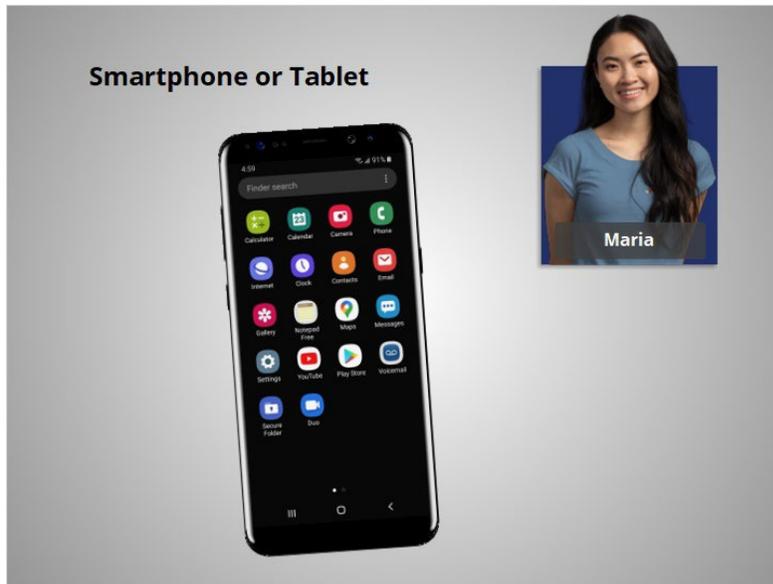
Smartphone or Tablet

Maria has decided to use her Android smartphone to connect to her telehealth appointment. She uses it multiple times a day, so she feels confident that she can use it to attend the telehealth visit. She also knows it has a built-in camera, speaker, and microphone that works.
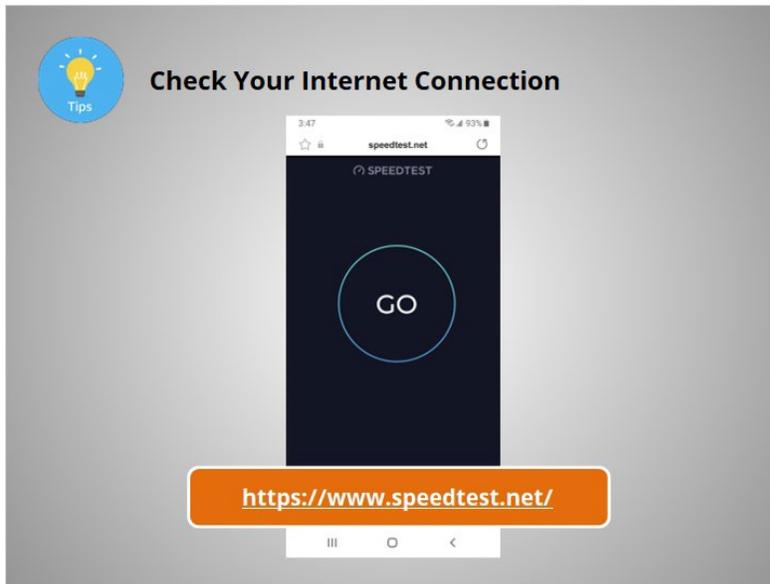
Now that Maria has decided she will use a smartphone for the appointment, she needs to check her internet connection. When you attend your telehealth appointment, you should find a quiet, private, well-lit spot that has a strong internet connection. Use a website like Speedtest to test your internet connection.
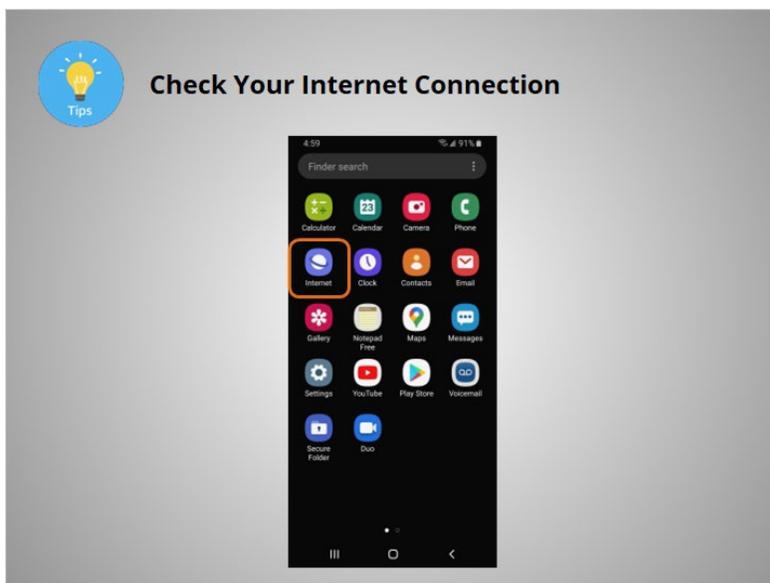
Maria is using a smartphone with the Android operating system. To test the internet speed, Maria takes her phone to the room where she plans to meet with the provider. She then runs the test. To do this, she taps the web browser icon, which may be a Chrome icon or an Internet icon, depending on which Android device she is using.
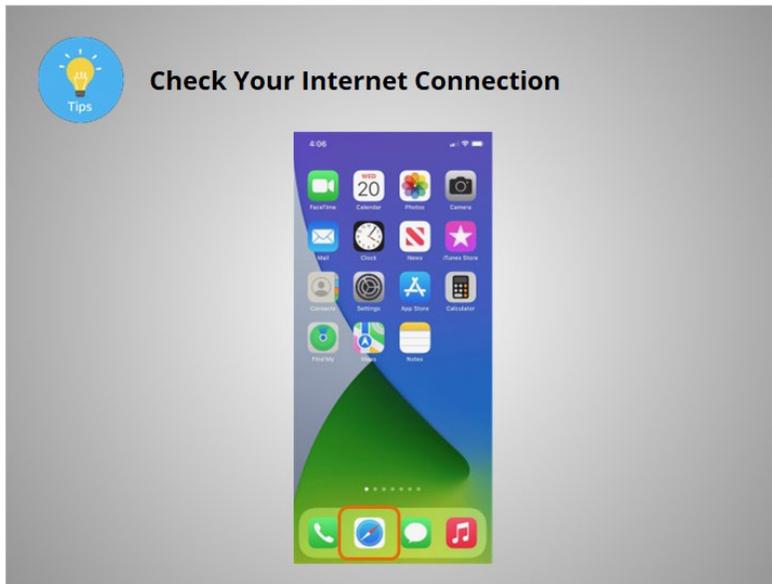
If you are using an iPhone or iPad, tap the Safari icon to open the web browser.
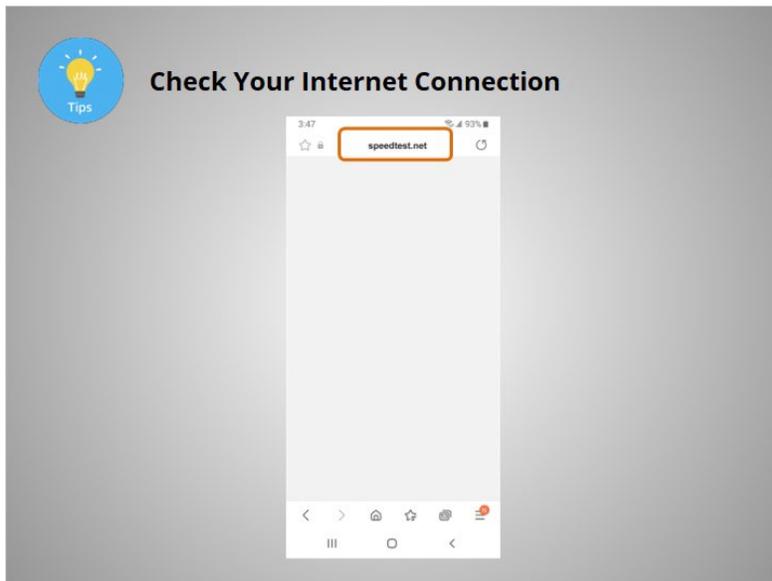
Maria then types "speedtest.net" in the search bar. The page appears.
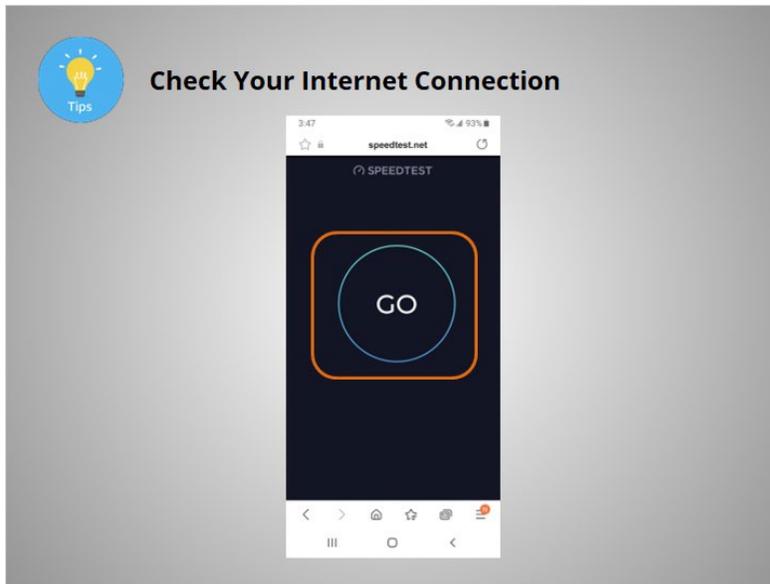
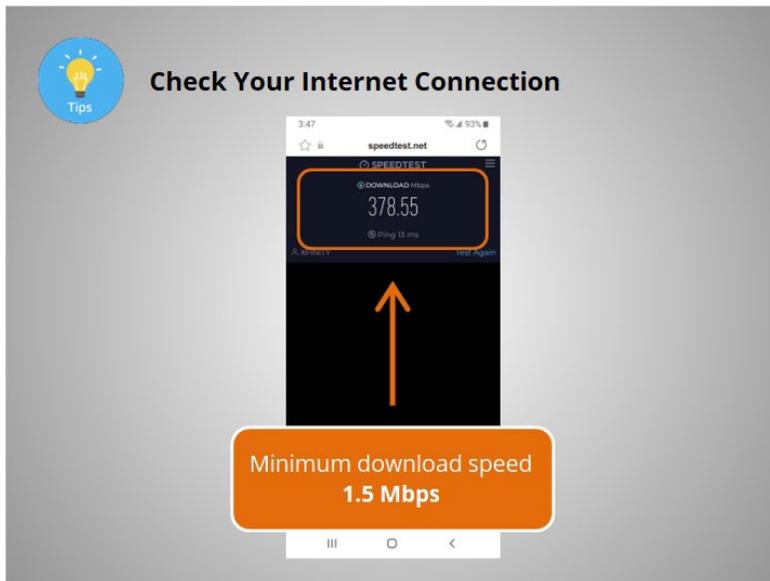To test the speed, she taps the Go button.

To attend a video telehealth appointment, you should have a minimum download speed of 1.5 megabits per second and a minimum upload speed of 12 megabits per second. Maria's internet speed has passed the test. Her internet is strong enough to support her telehealth appointment. Note if there is more than one device in your location using the internet service at the same time as your appointment, you may need a higher upload and download speed to ensure that all the devices connecting to the internet during your appointment have adequate internet access.

Do You Have the Required Software?

Google Chrome

Mozilla Firefox

Microsoft Edge

Apple Safari

Sometimes all you will need to connect to your appointment is a web browser. Make sure you have the recommended browser installed on your device and that it is up to date. Sometimes you will need to download and install an app on your device. In this case, your provider should send you instructions. Install and test the app before your appointment so you have time to fix any problems before the appointment. If you would like more information on how to install an app, see the Additional Resources section on the lower right-hand side of the screen for a link to the "Using a Mobile Device" course.

**Do You Have a Camera?**
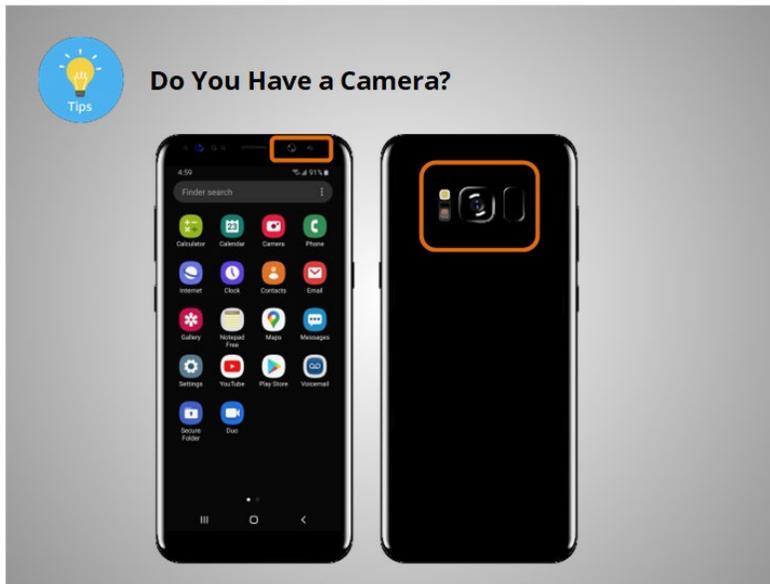
For a video appointment, you will need to use a device that has a camera. Smartphones and most tablets include an internal camera. One way to check to see if your smartphone or tablet has a camera is to check for a small camera lens, which is usually located at the top edge of the screen or the back side of the device. Maria checks her smartphone and sees two cameras.

Do You Have a Camera?
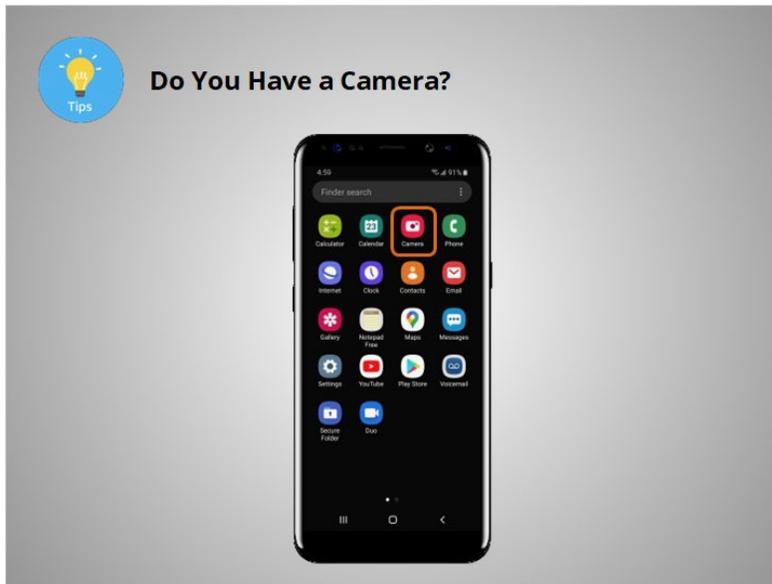
If you can't find the camera lens, check to see if your smartphone or tablet includes software to use a camera. If you are using a device running the Android operating system, look for an icon of a camera or a menu with the heading titled "Photo". Tap the camera icon or menu item.

Do You Have a Camera?
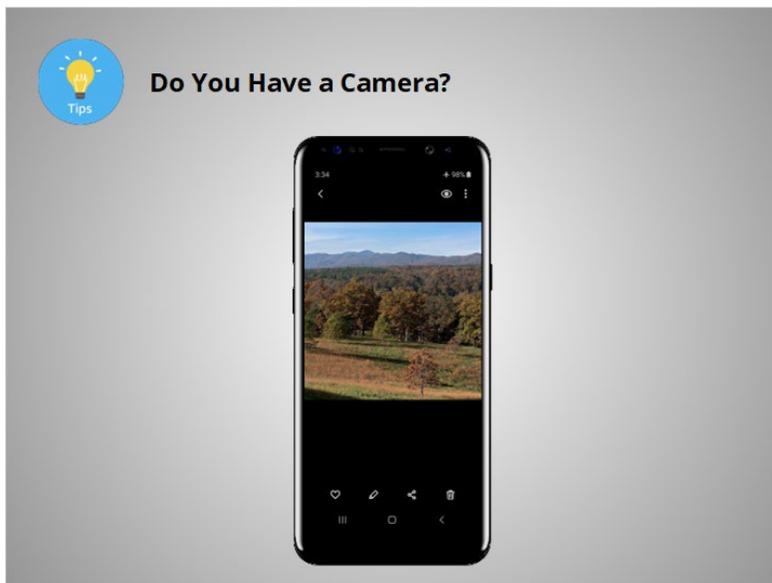
If the app that opens allows you to take a photo, your device includes a camera.
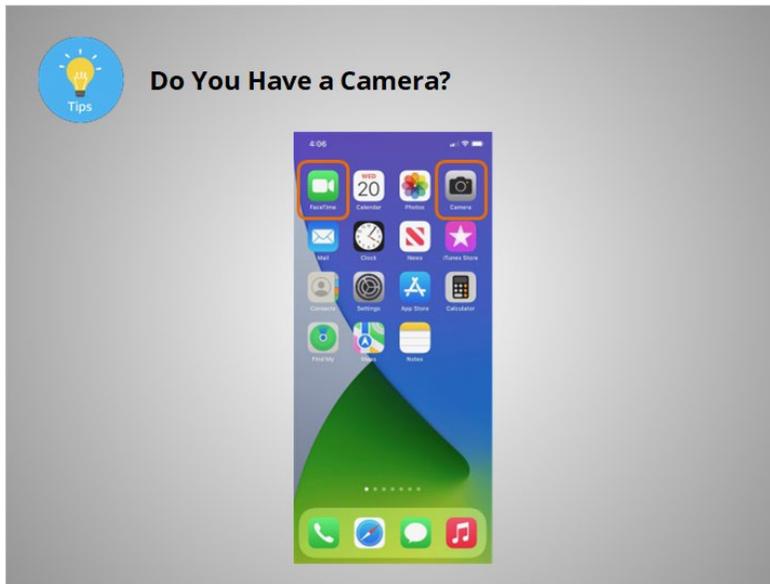
Apple smartphones and tablets include a camera. A simple way to check to see if your device's camera works is to tap on the FaceTime or Camera icon.
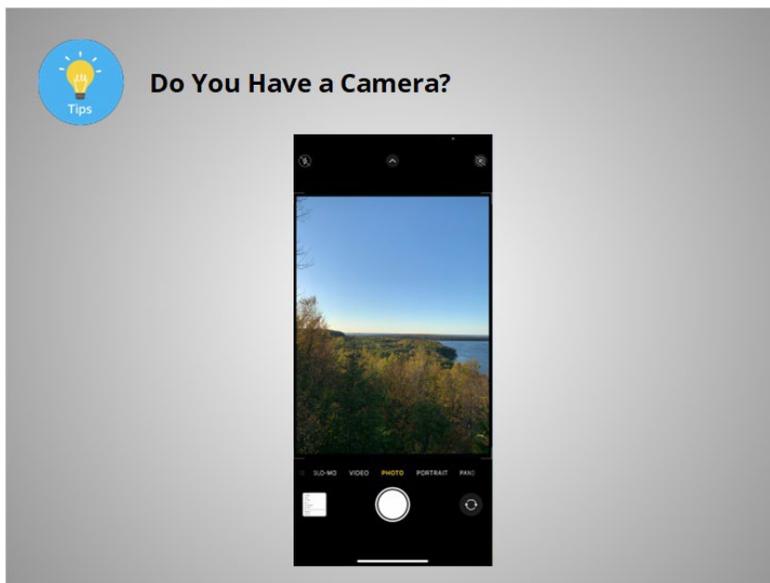
The camera should automatically turn on when these applications open.

Do You Have a Camera?

If these steps do not work, you should check the manufacturer's website for more information on how to troubleshoot your device's issues.

Do You Have a Camera?
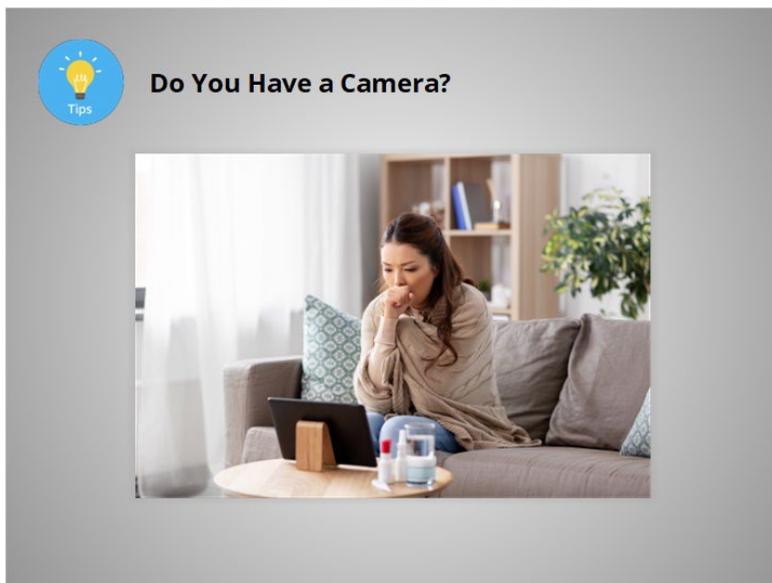
In addition, make sure the device with the camera is stable while on the call. Try placing your smartphone or tablet on a stand or stable surface so your camera remains in the same position during your appointment.
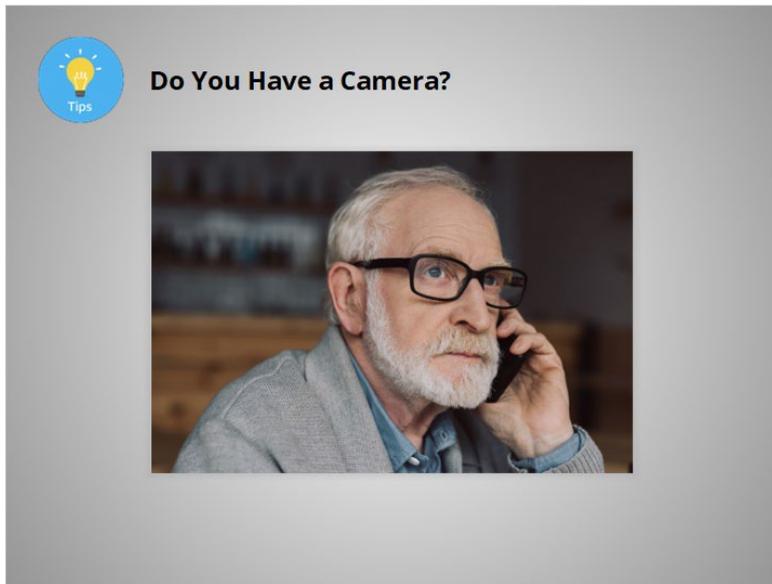
Do You Have a Camera?

If your smartphone or tablet does not have a camera, ask your health care provider if an audio-only appointment is possible.

Do You Have a Microphone and Speakers?

You will need a microphone and speaker to talk to your provider and hear their responses. All smartphones come with a built-in microphone and speaker.

While each smartphone and tablet is different, the microphone and speaker are usually located at the bottom of your device near where you plug in the device to recharge. The microphone and speaker may be a series of little holes or may look like a vent. Make sure you do not cover the speaker and microphone when using your device.


If you can't hear sound through the speakers, make sure the volume is turned up. There are usually one or two buttons on the side of the device that are used to control the volume.

Do You Have a Microphone and Speakers?

You can attach external headphones with a built-in microphone to your device if it does not include a microphone or speaker. Even if your device includes a built-in speaker, you may want to use headphones so that others around you cannot hear what the health care provider is saying.

If these steps don't work, check the device manufacturer's website for more information.
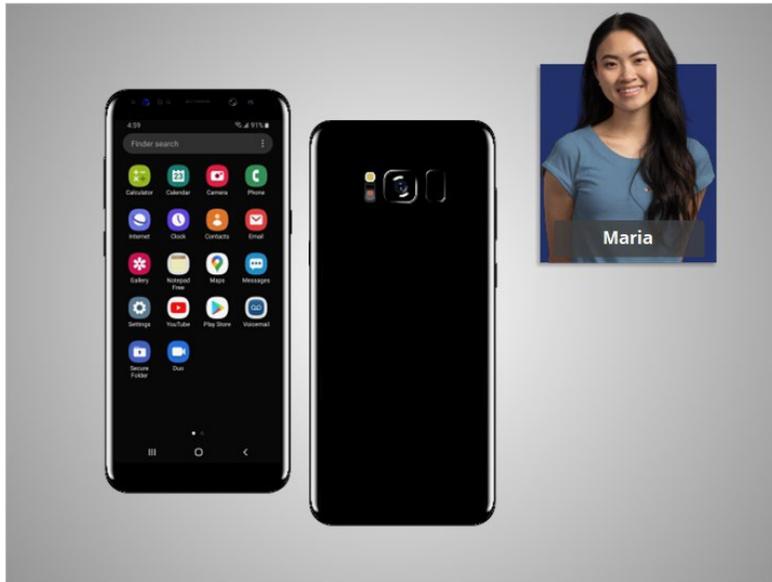
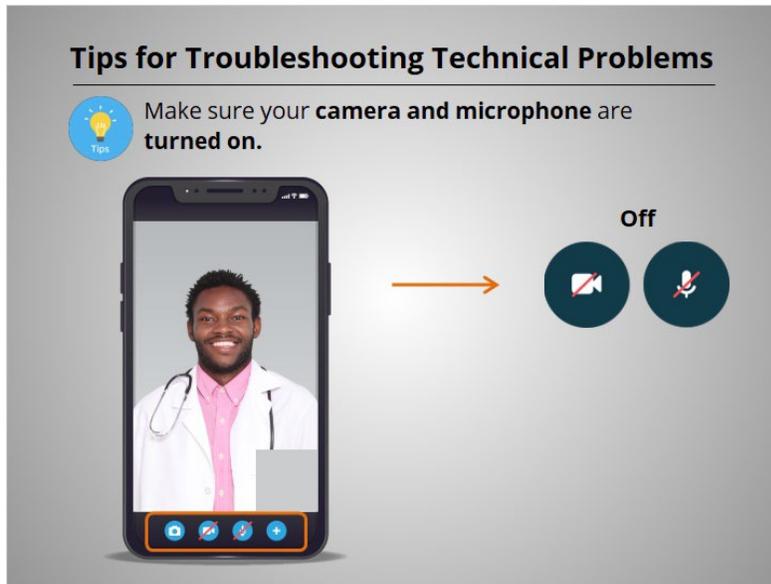Maria has reviewed the list her provider sent and confirmed that her device can be used for her telehealth visit.
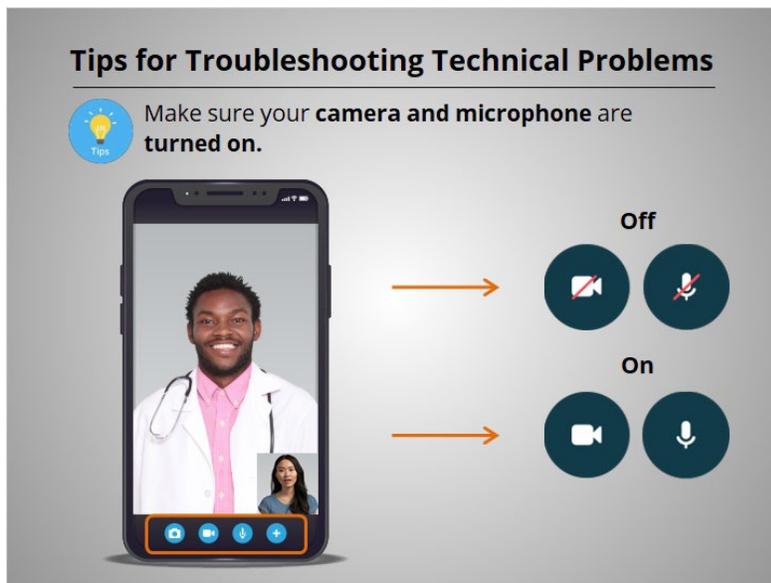

Now let's explore how to fix some of the most common technical issues Maria may experience when she tries to connect to her telehealth appointment.

If these camera and microphone icons have a slash through them, it means they are turned off, and your provider can't hear or see you.

To turn them on, tap on the icon. The slash across the camera or microphone will disappear.

Tips for Troubleshooting Technical Problems

💡 **Restart** your device.

If you are experiencing problems with your device, try restarting your smartphone or tablet. The steps vary depending on the manufacturer and model of your device. If needed, check the manufacturer's website for information on how to restart your particular device.

Tips for Troubleshooting Technical Problems

💡 Make sure your device is fully **charged or plugged in**.

Make sure your device is plugged in or the battery is fully charged.

Closing apps that you are not using can reduce the amount of internet bandwidth your device needs. To close an app on an Android device, tap the Overview button, which is usually located at the lower middle of the screen.

When you tap on this icon, it will display all the apps that are currently open. To close an app, tap the app and swipe up. You may notice differences between your device and what is shown. If that is the case, check with your device's manufacturer's website for more information.

Tips for Troubleshooting Technical Problems

💡 **Close other applications** that are open.

If you are using an Apple device, swipe up from the bottom of the screen to see all of the apps that are open. To close an app, tap the app and swipe up.

Tips for Troubleshooting Technical Problems

💡 Try **turning off your camera**.

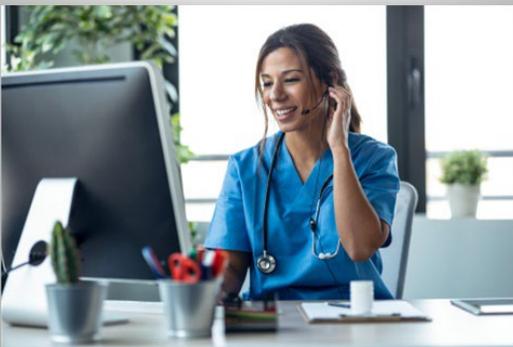Keep in mind that when the camera is on, it uses more bandwidth, so if the connection starts to break up, you may need to turn off the camera when it is not needed.

If you can't connect to your telehealth visit on your device, try using another device if you have one.

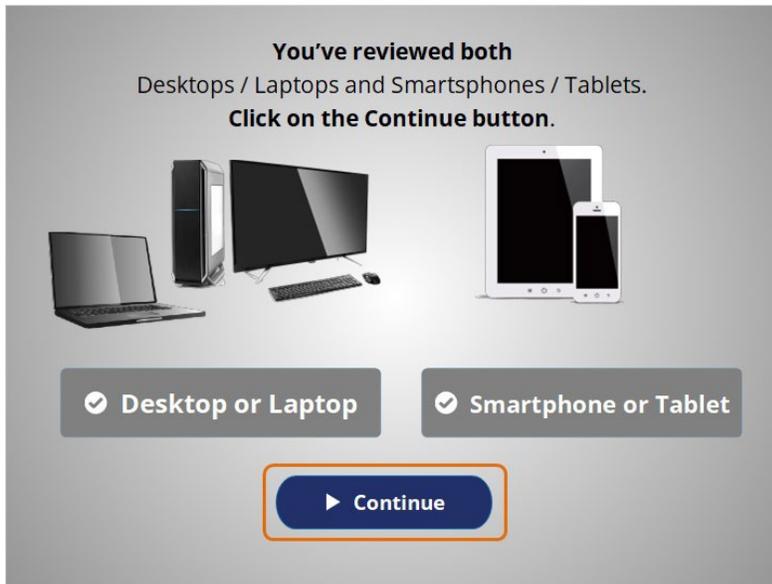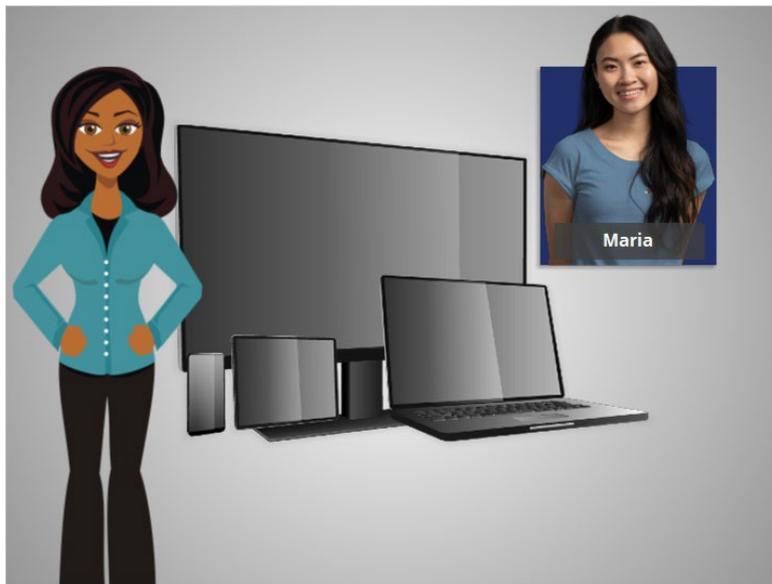If none of the previous steps work for you, contact your health care provider for help. The number to call for assistance may be found in your confirmation email or on the health care provider's website.

You have learned about the technical requirements of both a smartphone and tablet and a desktop and laptop. Click Continue.

In this lesson, Maria followed instructions from her provider to make sure she has the technology she needs for a telehealth appointment. In the next lesson, she will schedule and attend a telehealth appointment.

Getting Started with Telehealth
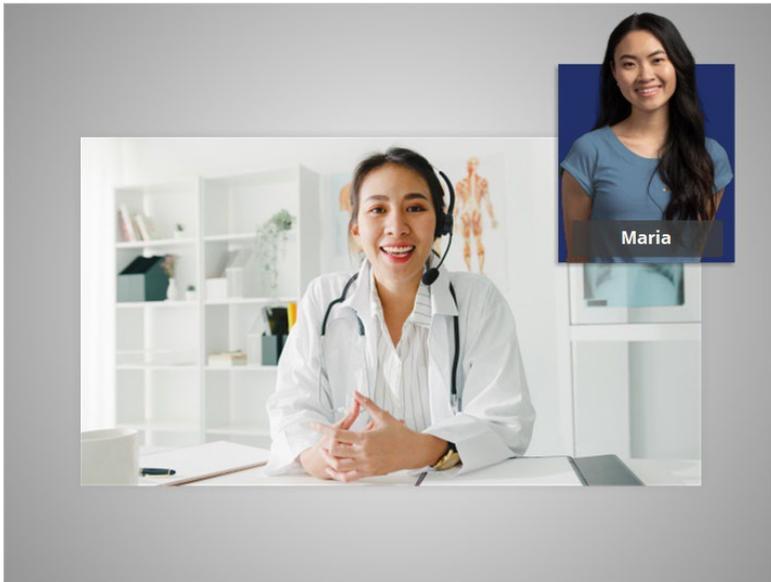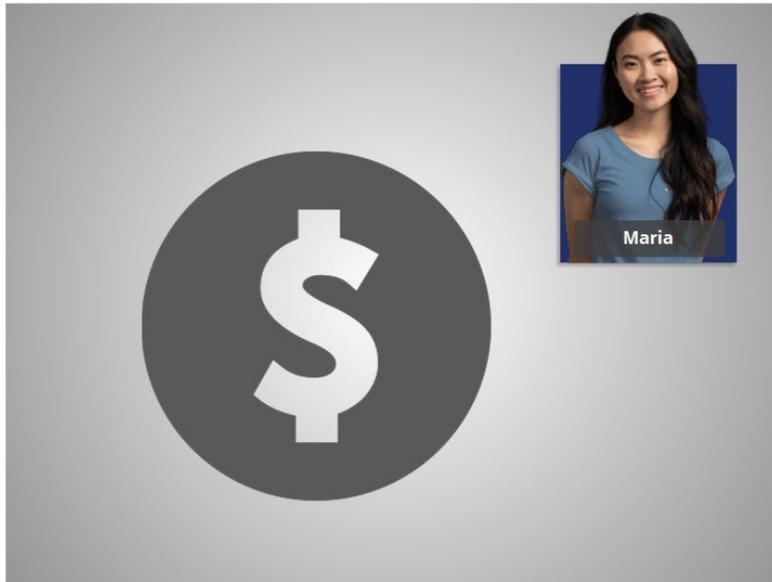## Attending a Telehealth Appointment
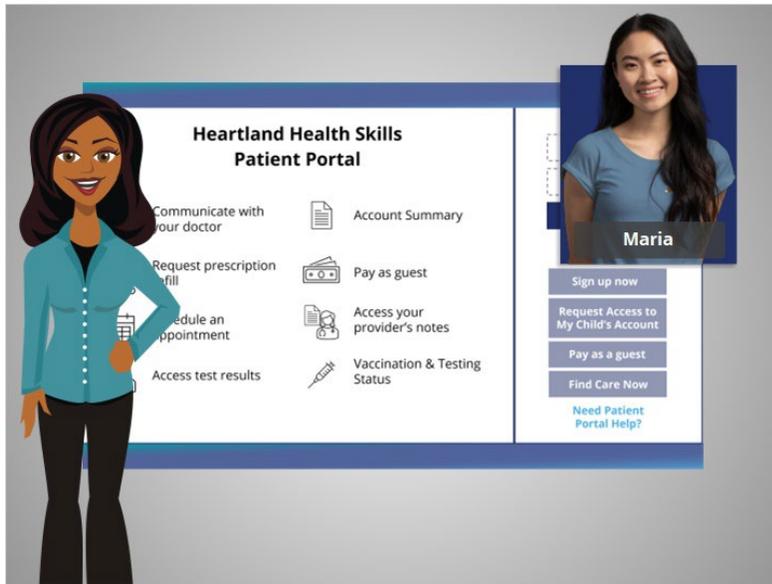
In the previous lesson, Maria followed instructions from her provider to make sure she has the technology she needs for a telehealth appointment. In this lesson, she will schedule and attend her telehealth appointment.

Maria recently had some medical tests, and her doctor wants to meet to discuss the results. Maria lives more than 40 miles away from the doctor's office. When she calls to schedule the appointment, she asks if it can be online instead of in person.

The person scheduling the appointment checks with the doctor and confirms it can be a telehealth visit. The scheduler then verifies with Maria that her device will work for an online visit. Maria confirms her device meets the technical requirements.

Maria then asks the scheduler if her insurance, Medicaid, will cover this telehealth appointment. Whether you have Medicare, Medicaid, private insurance, or a marketplace insurance plan, it's important to check if telehealth appointments are covered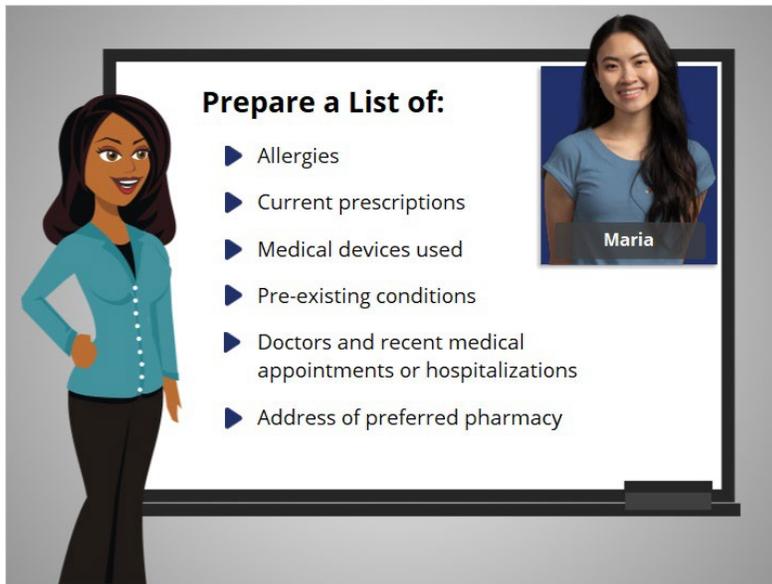. Maria's telehealth appointment is covered by Medicaid and she learns that she can pay her co-pay in the portal after her appointment.
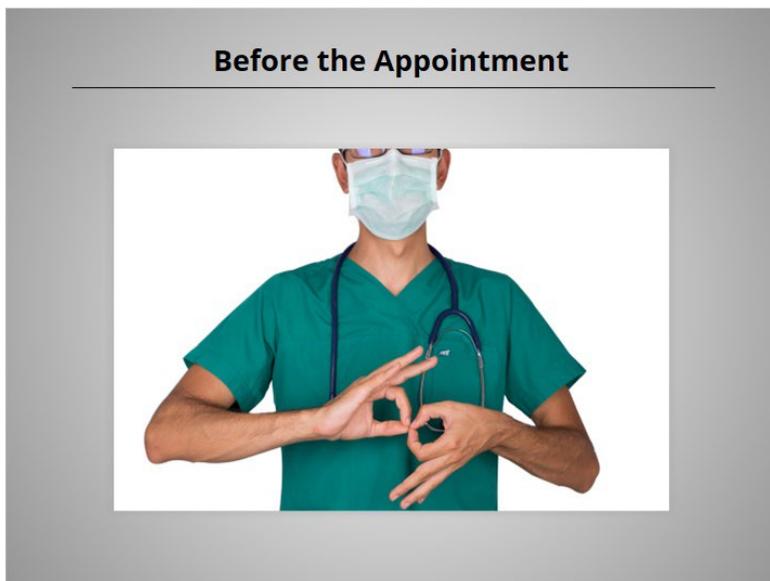
If you need an accommodation, let them know when you schedule the appointment. Accommodations include needing an interpreter, real-time captioning, telecommunications relay service, video relay service, or remote interpreting.

Two days before her appointment, Maria reviews the instructions to make sure she is ready for her appointment.

She writes down some of the information she may need during her appointment, including a list of her allergies, an up-to-date list of her prescriptions, a list of the medical devices she uses, a list of preexisting conditions, a list of her doctors and information about recent medical appointments or hospitalizations, and the address of her preferred pharmacy.

Before the appointment, log into the patient portal to:

▶ Make sure you remember your username and password

▶ Check that your information is up to date

▶ Check if health care provider has requested any information for the appointment
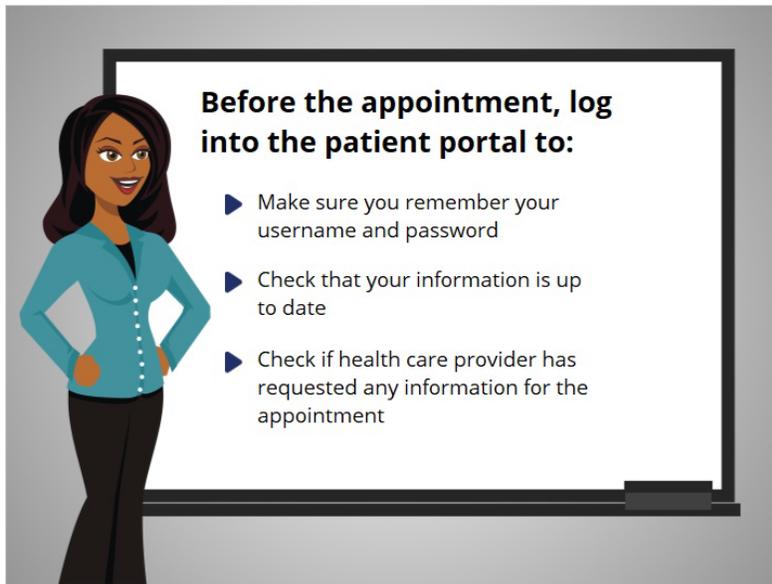
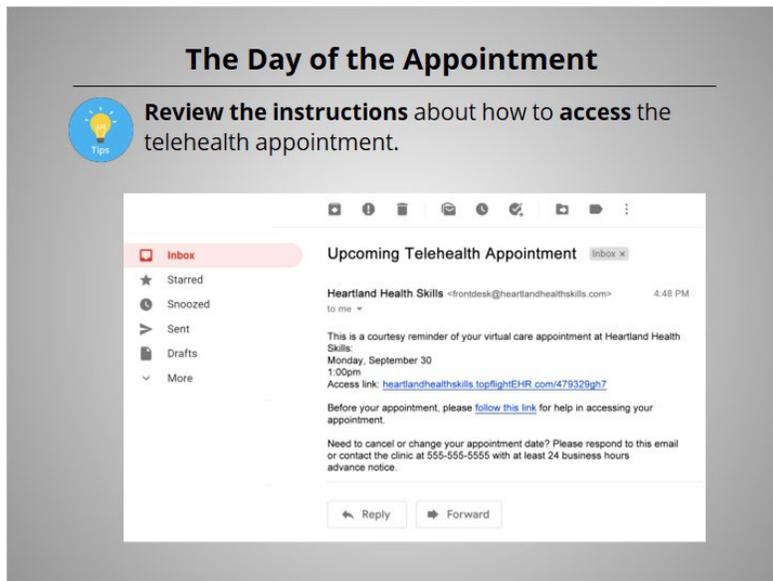She tries to log into her patient portal to make sure she remembers her username and password. Once she logs in, she checks that her information is up to date, and to see if her provider has asked for any information for the appointment.

Before the Appointment
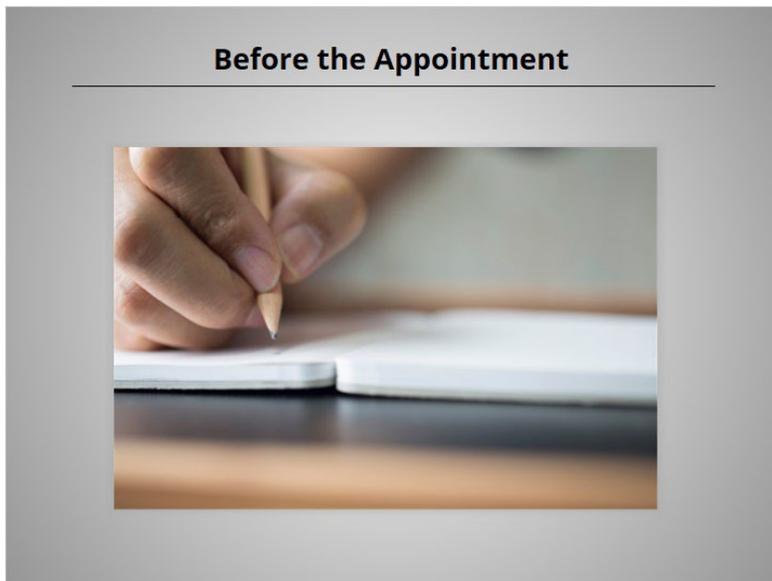
She also makes a list of her health concerns and questions she wants to discuss with her doctor during her appointment.

The Day of the Appointment

Verify you **received a link** to attend the telehealth visit.
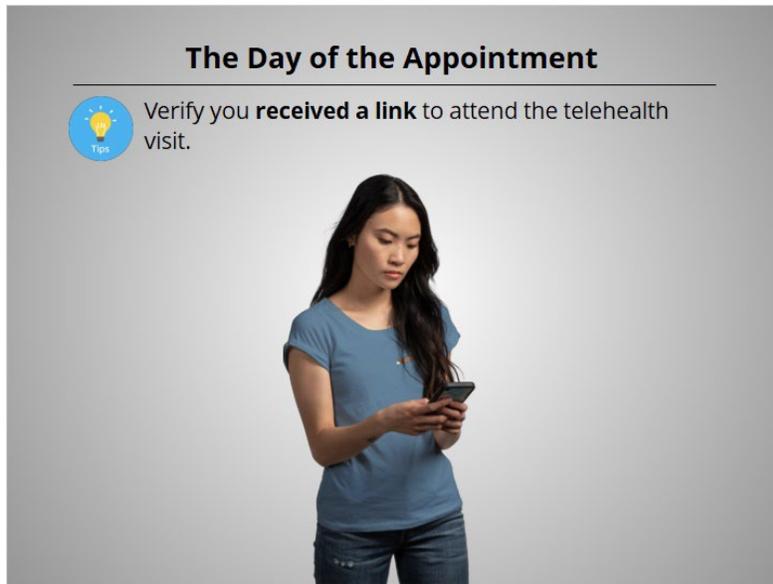
On the day of the appointment, there are several things to do to prepare. First, verify that you have received a link to attend the telehealth visit. It may be sent via text message, email, or in the patient portal.

The Day of the Appointment

Review the instructions about how to **access** the telehealth appointment.

Upcoming Telehealth Appointment Inbox ×

Heartland Health Skills <frontdesk@heartlandhealthskills.com>   4:48 PM
to me

This is a courtesy reminder of your virtual care appointment at Heartland Health Skills:
Monday, September 30
1:00pm
Access link: heartlandhealthskills.topflightEHR.com/479329gh7

Before your appointment, please follow this link for help in accessing your appointment.

Need to cancel or change your appointment date? Please respond to this email or contact the clinic at 555-555-5555 with at least 24 business hours advance notice.

Reply   Forward

Review the instructions about how to access the telehealth appointment.

The Day of the Appointment

Wear **clothing** that makes it **easy to show** areas of your body the provider may need to see.
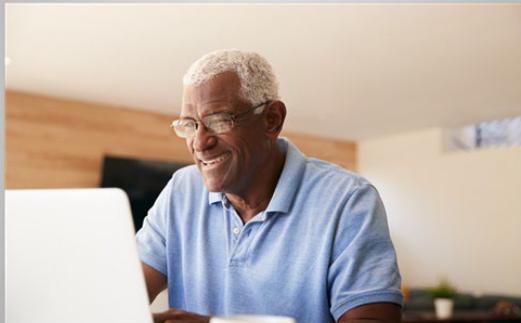
Wear clothing that makes it easy to show areas of your body your provider may need to see.

The Day of the Appointment

Find a quiet place, where you will **not be interrupted**, and will **not be overheard**.

Find a quiet place, where you will not be interrupted, and will not be overheard.

The Day of the Appointment

Tips: Verify that your **device works** and that the **internet connection is strong**.

SPEEDTEST
DOWNLOAD Mbps
Ping 13 ms
400.73 Mbps

Verify that your device works, and that the internet connection is strong. If your bandwidth is low, it's usually recommended to turn off the WiFi on other devices in the house.

The Day of the Appointment

Tips: Have your **provider's telephone number** in case you experience problems connecting to the appointment.

Make sure you have your provider's telephone number in case you experience problems connecting to your appointment.

The Day of the Appointment

💡 **Fill out any paperwork** that is required as part of the check-in process.

Fill out any paperwork that is required as part of the check-in process. Your provider will send you instructions on how to complete the paperwork before your appointment.
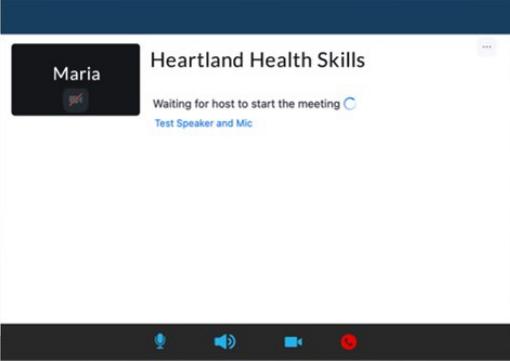

Tips for a Successful Appointment

💡 Arrive **15 minutes early** to resolve technical issues.

Approach your telehealth appointment the way you approach your in-person appointments. You should log in 15 minutes early to resolve technical issues.

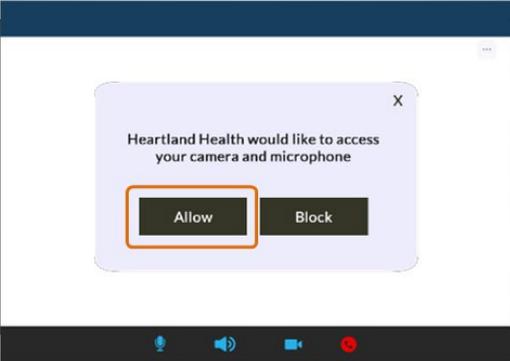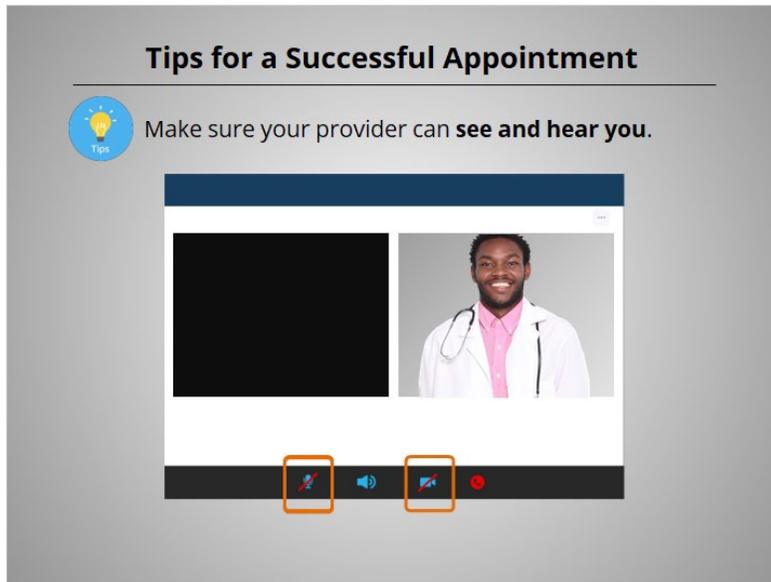Be patient. You may be put in a virtual waiting room until the provider is ready to see you.

When connecting to the appointment, a pop-up message may appear asking for access to your microphone and camera. Click "Yes" or "Allow".

Tips for a Successful Appointment

Make sure your provider can **see and hear you**.

If your provider can't see you, make sure that the video and audio icon do not have a slash through them. If there's a slash through the microphone, it is turned off and the provider can't hear you. If there's a slash through the camera, the camera is off and they can't see you.

Tips for a Successful Appointment

Make sure your provider can **see and hear you**.
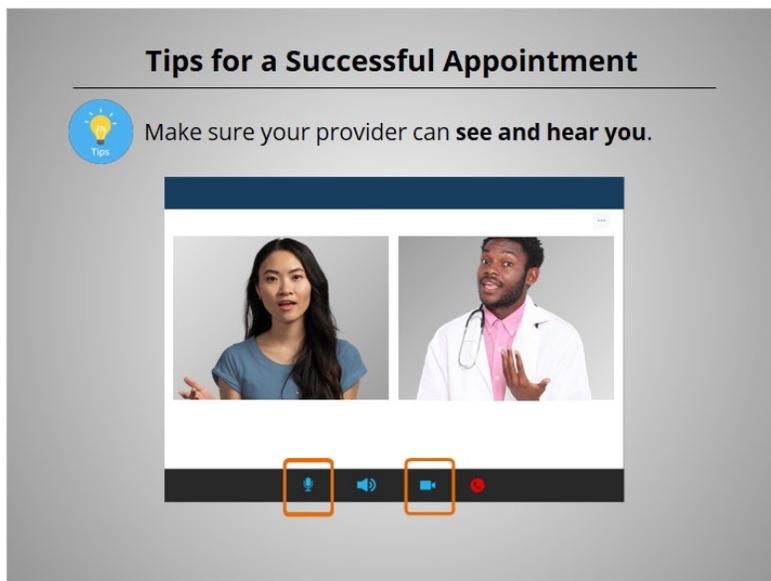
Click on the icons to turn the microphone and camera on.

If you bring another person to your appointment, you may need to fill out a consent form.

Let your health care provider know if you have problems seeing or hearing them.

Review your list of questions with your provider. Don't be afraid to ask more questions if you do not understand something or your questions were not answered.
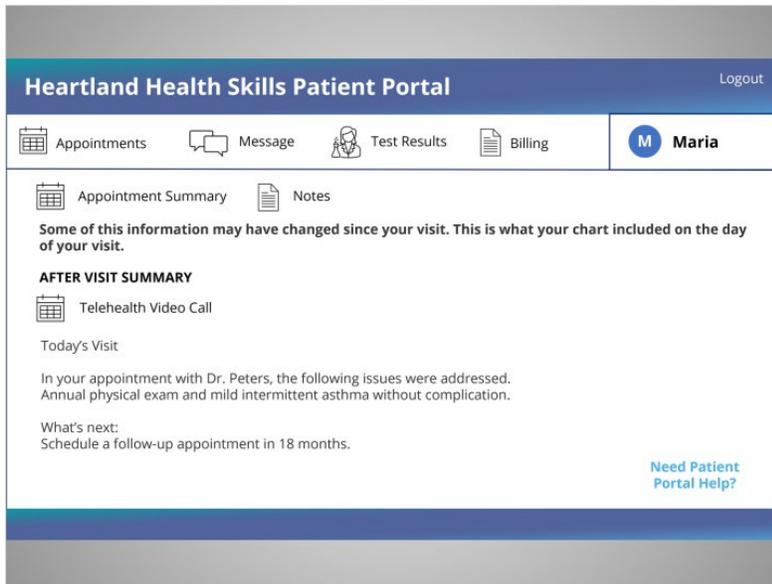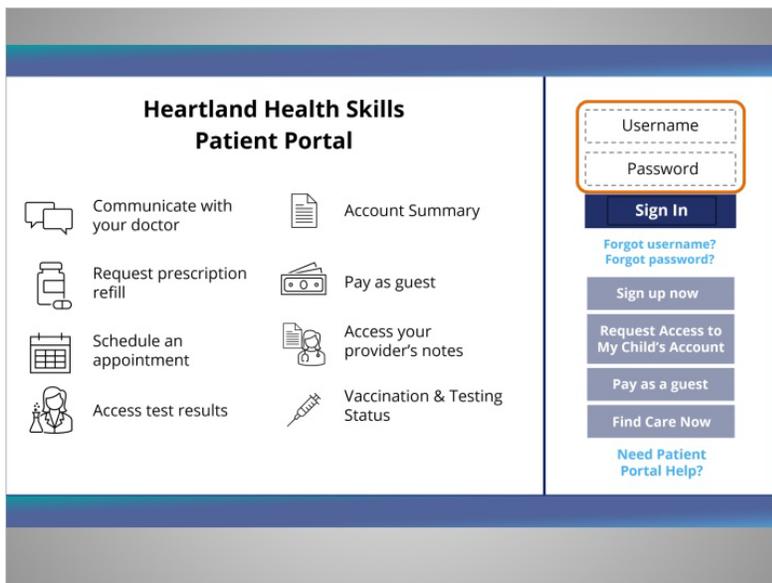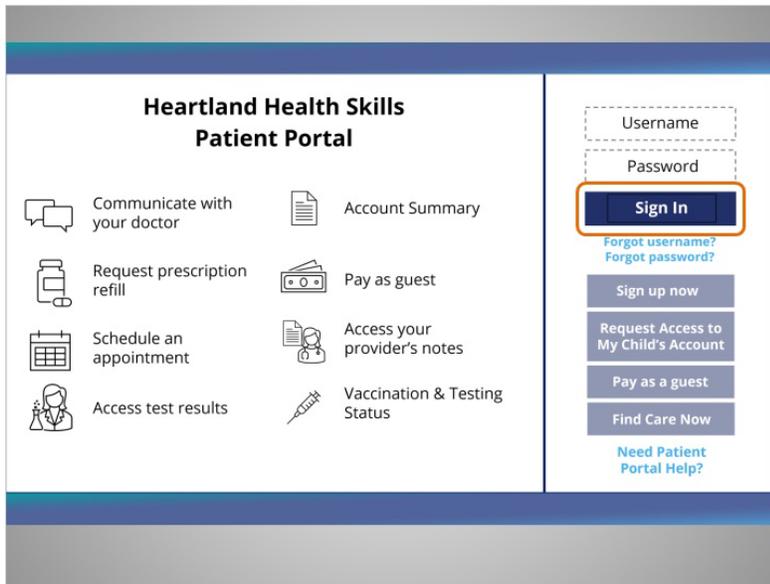

Take notes that you can review after the appointment is over.

At the end of Maria's appointment, the healthcare provider outlines the next steps, and a summary of her appointment is added to her medical record.
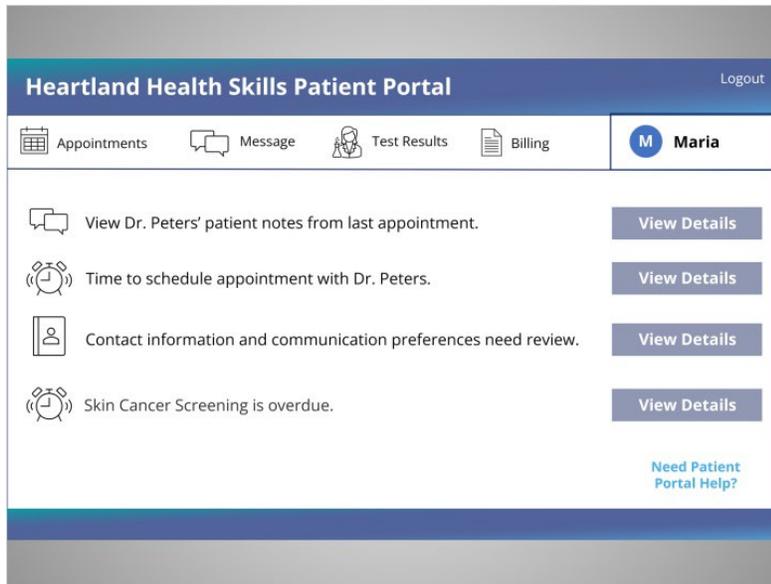

To access the doctor's summary, Maria opens her web browser and goes to the portal website. She then enters her username and password,

and then clicks Sign In.
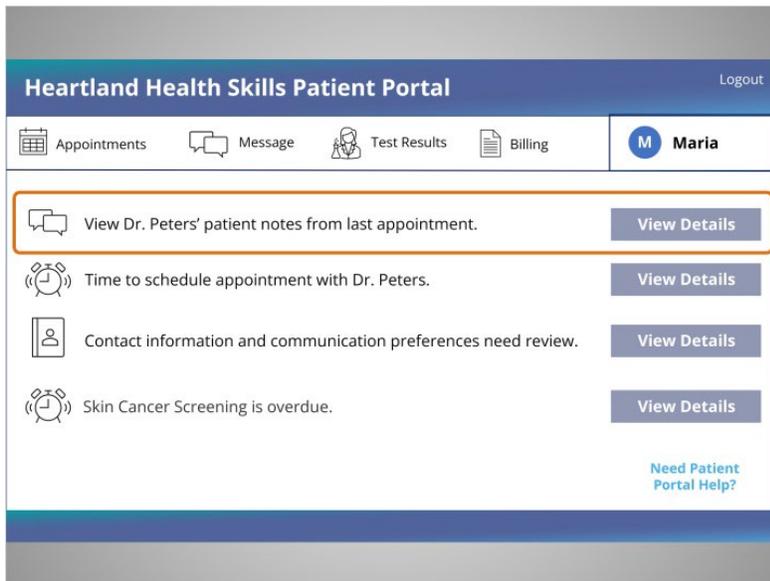
When she logs in, a link to the doctor's notes displays on the portal home page. She clicks "View Details" to see more information.

Heartland Health Skills Patient Portal   Logout

Appointments   Message   Test Results   Billing   M **Maria**

View Dr. Peters' patient notes from last appointment.   **View Details**

Time to schedule appointment with Dr. Peters.   **View Details**

Contact information and communication preferences need review. **View Details**

Skin Cancer Screening is overdue.   **View Details**

**Need Patient
Portal Help?**

If Maria has more questions about the appointment, she can call her provider or submit a question using the patient portal. Depending on the question, the provider may answer the question in the portal or give her a call. This care is usually considered part of your telehealth appointment. More difficult questions, questions not related to your appointment, or questions you have months after the appointment, may require payment.
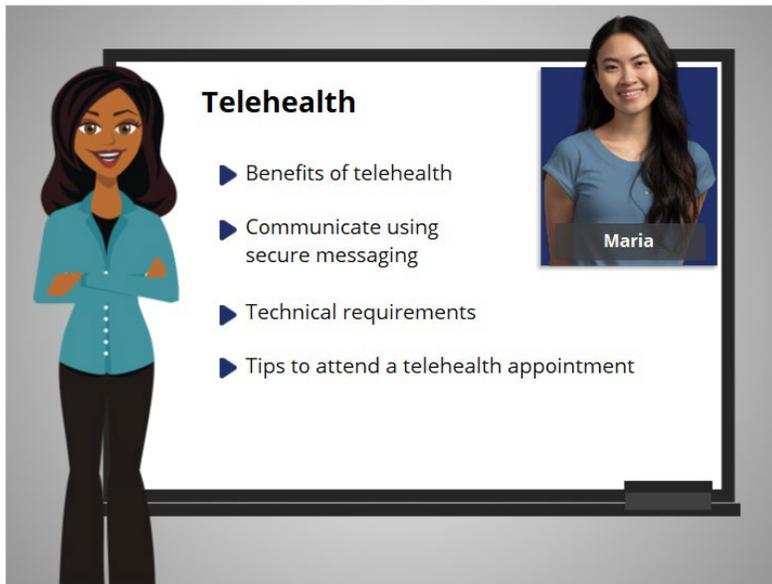
In this course, we followed along with Maria as she tried telehealth for herself and her family. We learned about the benefits of telehealth, how to communicate with a provider using secure messaging, the technology needed to attend a telehealth appointment, and tips for attending a telehealth appointment.

Contact your health care provider to explore which telehealth options are right for you.