

Amwell Scheduled Video Visit Checklist

Amwell Scheduled Video Visits Project

Document and forward any additional questions that you are unable to answer to the appropriate member of the team. Do not leave concerns open-ended; YOU are responsible for following up.

Please note the following are priorities during your time with the staff:

- This workflow is for staff in Primary Care, Integrated Behavioral Health embedded in Primary Care, and Specialty Practices (Rheumatology, Cardiology, and Neurology)
- Initiate Amwell Scheduled Video Visit
- Navigate within the Amwell Platform
 - “Just in Time” Invite
 - Invite a participant
 - Chat function
- Discuss “pop out” feature and ability to chart and see patient on one monitor.
- Discuss leaving visit versus ending visit

Date: _____

CI/Support Name: _____

Staff Member Name: _____

Staff Position: _____

Task	Yes	No	N/A
1. Ambulatory Organizer			
Navigate to the Ambulatory Organizer to view Amwell Scheduled Video Visits. <ul style="list-style-type: none"> ▪ Note the video camera icon indicates telehealth visit. 			
Select scheduled patient to enter chart			
Click Telehealth component within the Amb 2018 MPage			
2. Connecting with Patient			
Patient Portal- if the patient is connecting via their patient portal, they will automatically arrive to the visit without needing to “invite” or send patient a link to the visit.			
“Just in Time” Invite- if patient is joining by email or text, you can send an invite by selecting the appropriate phone or email listed in the Invite drop down.			
Participant- Once you have started the visit, you can utilize the “Invite Participant” icon to invite additional guests to the visit or enter a new cell phone or email that was not listed in the “Invite” drop down.			
3. Amwell Platform			
Options within Amwell <ul style="list-style-type: none"> ▪ Participant: Clinical staff can add addition guests to the telehealth patient visit. 			

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<ul style="list-style-type: none"> ▪ Chat: Clinical staff can use the chat feature to let patient know if there are any technical issues like patient’s microphone is mute or video not displaying. Chat can also be used if patient wants to share any personal information rather than share on camera/microphone. 			
<ul style="list-style-type: none"> ▪ Pop Out: Allows MA/Provider to chart while maintaining video contact by decreasing size of patient view and being able to chart on the different components in patient’s Chart. 			
<ul style="list-style-type: none"> ▪ Patient Record Button: Allows the provider to see patient’s conditions, medications, allergies, and lab results alongside the patient video 			
4. Leaving Visit vs. Ending Visit			
<p>Leaving Visit button allows the clinical staff to temporarily leave the patient visit and come back into the visit if needed. This feature is typically used when the MA finished documenting, and the provider joins the visit.</p> <ul style="list-style-type: none"> ▪ Click the Red End button and then click Leave Visit button after completing documentation and provider is ready to see patient and begin documentation. 			
<p>End Visit Button completes the video visit.</p> <ul style="list-style-type: none"> ▪ click the End Visit button to end the Telehealth Session with the patient and complete the visit. Once the End Visit button is clicked, the appointment is over. The virtual visit can still be documented on but will complete and end the patient session. 			
17. Weird Gotchas			
18. Review where to find more materials			
<p>CI Educational Library: Clinical Informatics Education (northernlighthealth.org)</p>			
19. Comments/Concerns			