

TELEHEALTH

TRAINING DOCUMENT



Update: 15 September 2020

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IMPORTANT TERMINOLOGY

TYPES OF CONSULTATION

- ***Nurse-based virtual care:*** A virtual consultation where the patient is with a nurse who facilitates a consultation with another healthcare provider e.g. a doctor.
- ***Direct to Patient virtual care:*** A virtual consultation that occurs directly between a doctor and a patient (no nurse involved)

NAMING OF USERS IN THE SYSTEM

- ***Presenter:*** The healthcare provider that *presents* to another healthcare provider. E.g. nurse. Please note in a direct to patient scenario in the summary of consultations it will reflect the patients' name.
- ***Provider:*** The doctor that *provides* healthcare advice to a patient, either directly or via nurse-based care.
- ***Support Staff:*** Secretarial or other administrative staff who work in the doctors rooms that need access to the system to book patient appointments.

WAITING ROOM VERSUS THE MEETING ROOM

- ***Virtual Waiting room:*** The virtual waiting room where a provider can see all the virtual consultations waiting for him/her. Similar to a reception.
- ***Meeting room:*** A virtual meeting room is where multiple doctors could join and discuss topics. There will be generic meeting rooms created for the Mediclinic organisation that can be utilised for this purpose.

TELEHEALTH TRAINING

MODULE 1

- **System requirements**
- **Access and login**
- **How to reset your password**
- **Understanding the landing page**

SYSTEM REQUIREMENTS



Operating System and Processor	Windows 8 or greater / 1.6 GHZ macOS 10 or greater / 1.2 GHZ
Memory	4 Gig
Storage	128 GB
Network	Internet connectivity at 2 Mbps or greater (run a speed test now)
Web Browser (PC)	Google Chrome (Download the Chrome Browser)
Web Browser (Mobile or Direct to Consumer)	Google Chrome Safari App
Video Input	Built in or external camera Any standard USB or UVC (USB Video Class) camera
Audio input/output	Built in or external microphone and speaker Any standard microphone and speaker

WEB BROWSER

- Please remember to use either **Safari** or **Google Chrome** as your web browser.
- Problems will arise for both the doctor and patient if different browsers are used.



ACTIVATING A TELEHEALTH ACCOUNT



- 1) Complete the application documentation
- 2) Receive an email from Pathways Africa with a link to complete the account registration
- 3) Click on the 'complete registration tab' and follow the prompts to create your password
- 4) You should now be able to access the telehealth platform at <https://telehealth.pathways.africa/accounts/login/>

Hello John Smith

Thank you for choosing **Pathways**.

Your account has been created, but you need to finalize the activation by clicking the *Complete Registration* button below.

Your username is johnsmith@gmail.com

You will create a password during the activation process.

Stone Three Healthcare recommends using the **Google Chrome** web browser. On *iOS* devices (*iPhone / iPad*) we recommend using the **Apple Safari** web browser. Other browsers may also work but are not fully supported at this time.

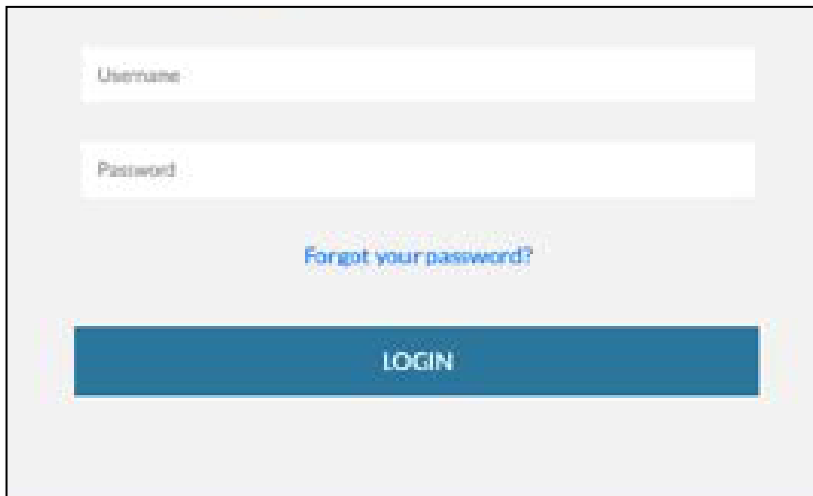
Please check with your IT staff to ensure that all necessary firewall ports have been opened ([Firewall Rules](#)) to ensure that your consultations will work properly before scheduling any telehealth appointments

COMPLETE REGISTRATION



LOGGING IN

- Through Google Chrome or Safari, go to the URL <https://telehealth.pathways.africa/accounts/login/>
- To login to your account simply enter your assigned user name (the registered email address) and password.
- Remember that both the password is case sensitive



A screenshot of a web login form. It features two input fields: 'Username' and 'Password'. Below the password field is a link that says 'Forgot your password?'. At the bottom of the form is a large blue button labeled 'LOGIN'.



HELPFUL HINT

Add the site as a favourite or make a desktop short cut to the website.

To add a short cut: Right click on your desktop, select 'new', then click 'add shortcut' and paste in the URL:

<https://telehealth.pathways.africa/accounts/login/>

FORGOT YOUR PASSWORD

- Forgotten your password? Click on the forgot password link to receive an email to reset your password or email servicedesk@mediclinic.co.za for assistance.



Hello Doctor John

A password reset has been requested for your doctor@gmail.com Pathways account. To start the process, click the *Reset Password* button below.

RESET PASSWORD

If you have problems with the button above, please copy and paste the following URL into your browser: <https://telehealth.pathways.africa/reset/Nw/5gg-503a288ed25a9906dbda/>

For enquiries or assistance, please call technical support at +27 86 012 2123.

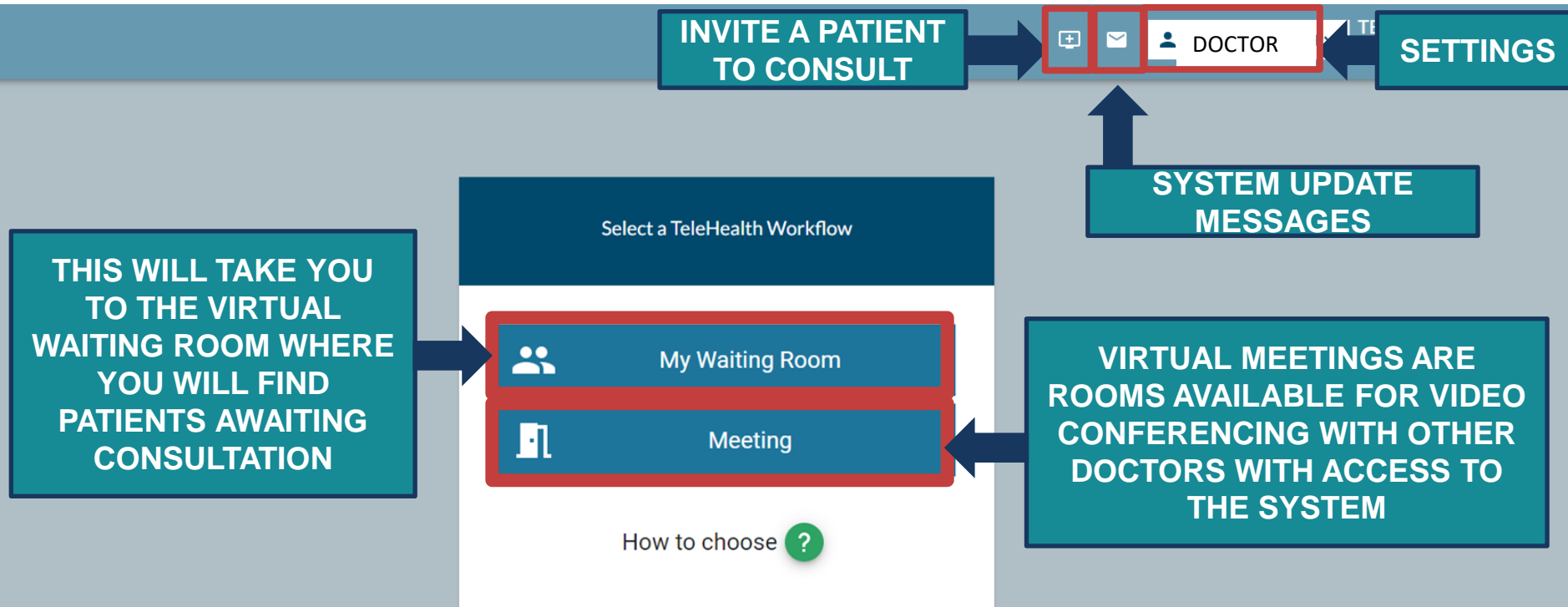
Do not reply to this email, it is not monitored for responses.

Enter email address

RESET PASSWORD

THE LANDING PAGE

DOCTORS VIEW



THE LANDING PAGE

SUPPORT STAFF VIEW



TELEHEALTH TRAINING

MODULE 2

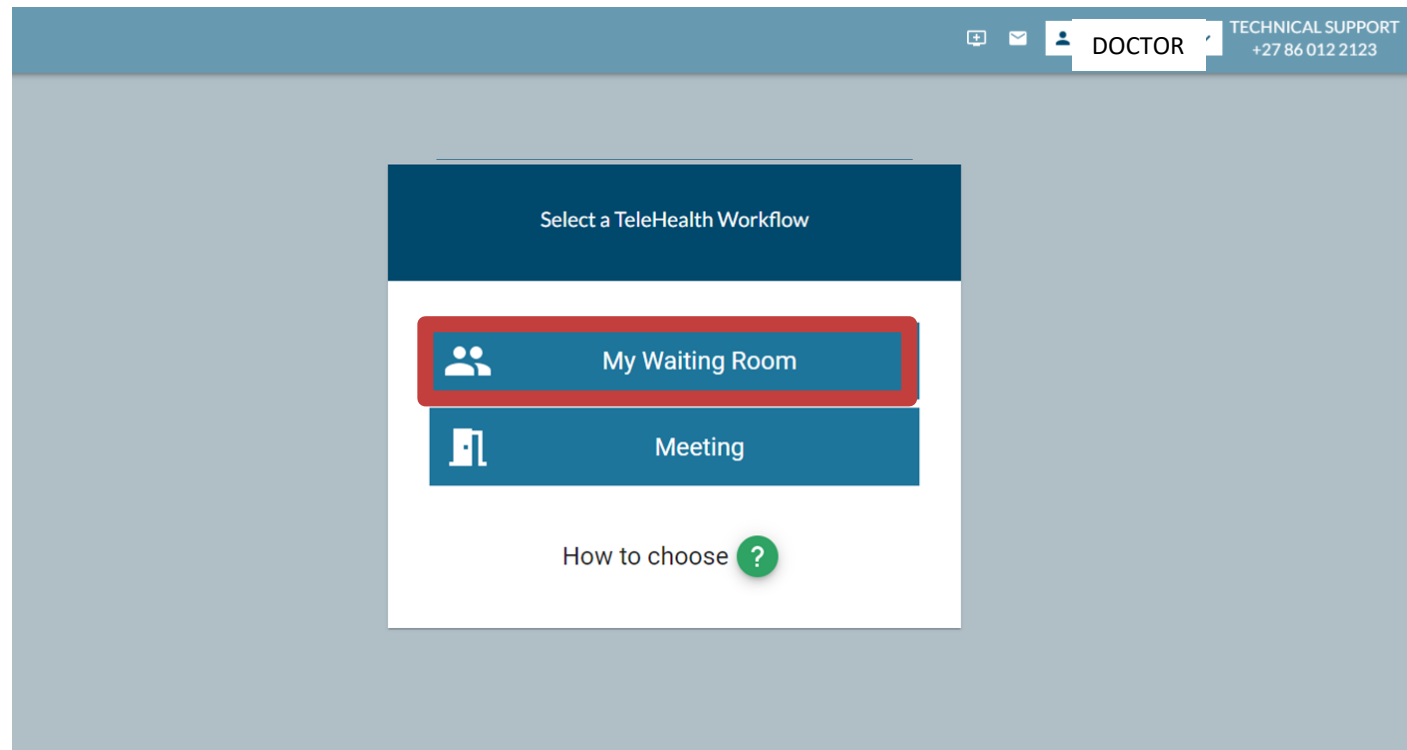
- **Sending Appointment Invites**
- **The Patient's workflow of the Consultation**
- **The Doctor's Workflow: Consulting a Patient**
- **Consultation Console**
- **Report Download**

DIRECT-TO-PATIENT TELEHEALTH

VIRTUAL WAITING ROOM TELEHEALTH WORKFLOW

- **Scenario :** You as the treating doctor are virtually consulting a patient who is at home self-isolating with suspected COVID-19.
- To consult directly with patients, we will be following the:

Virtual Waiting Room Telehealth Workflow



PATIENT APPOINTMENT

SEND AN INVITE A PATIENT BY SELECTING THE PLUS (+) BUTTON

The screenshot shows a web application interface for a doctor's office. At the top, there is a dark blue header bar with a red-outlined square containing a white plus sign icon, a mail icon, and a 'DOCTOR' button. Below the header, a white modal form titled 'Invite Guest to a Scheduled Consultation' is displayed. The form contains several input fields: 'First Name' (with a red underline and 'Required' text below it), 'Last Name', 'Email Address', 'Phone Number' (with a dropdown arrow and '+27' prefix), 'Waiting Room' (with a dropdown menu showing 'Kim Smith's Waiting Room'), 'Date' (07/05/2020), 'Time' (10:34 PM), and 'Message (Optional)'. At the bottom of the form are two buttons: 'CANCEL' and 'INVITE GUEST'. To the right of the form, there are two teal boxes with white text. The first box, labeled 'Step 1:', contains the text 'From the landing page, click on this icon to invite a patient to a consultation'. The second box, labeled 'Step 2:', contains the text 'Complete the relevant patient information required and once ready to send to your invite, click invite guest and you will receive an email and sms notification confirming the invite has been sent'. A blue arrow points from the plus sign icon to the first box, and another blue arrow points from the second box to the 'INVITE GUEST' button. At the bottom right, a green notification bar with a white checkmark icon contains the text 'Successfully sent out the scheduled invitation' and a close button (X).

Step 1:
From the landing page, click on this icon to invite a patient to a consultation

Step 2:
Complete the relevant patient information required and once ready to send to your invite, click invite guest and you will receive an email and sms notification confirming the invite has been sent

Successfully sent out the scheduled invitation

PATIENT APPOINTMENT SUPPORT STAFF/ DOCTORS SECRETARY SENDING AN INVITE

Select a TeleHealth Workflow

Invite Guest to a Scheduled Consultation

First Name Last Name
Sarah Smith

Email Address
sarah@smith.com

Phone Number
+27 ▼ (21) 809-6500

Waiting Room

Nelly James's Waiting Room x ▼

Nelly James's Waiting Room

Michaela Smith's Waiting Room

Bradlev Chetty's Waiting Room

THE DOCTORS SUPPORT STAFF
MUST SELECT THE SPECIFIC
DOCTOR THE PATIENT WILL SEE
WHEN MAKING THE
APPOINTMENT.
THERE WILL ONLY BE MULTIPLE
DOCTORS IF MORE THAN ONE
EXISTS IN THE PRACTICE

THE PATIENTS WORKFLOW

A short video is embedded in the invite sent to the patient.
Click on the link to watch it: <https://youtu.be/vFa1RQMm9fU>

PATIENT WORKFLOW

PRIOR TO THE CONSULTATION

- The patient will receive a SMS and an email containing the details of the consultation

Hi John,
You have been invited to a Pathways telehealth consultation at 26/08/2020 15:30 (SAST) with Dr Sarah Jones. Tap on the following link to begin your consultation:
<https://telehealth-demo.pathways.africa/inv/2c98a74b-2b31-437c-a557-7a4644acc7ac>

Hello **Frank**,

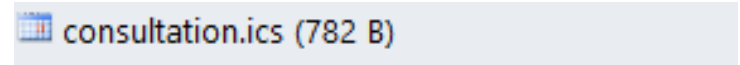
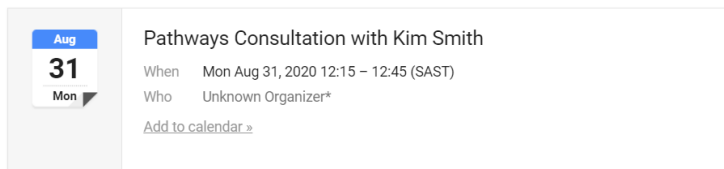
You have been invited to participate in a **Pathways** consultation with **Dr Sithole** on **08 Apr 2020** at **3:30 PM**.

For *iOS* devices (*iPhone / iPad*) we recommend joining the consultation via the **Apple Safari** web browser application. For *Android*, *Windows* and *MacOS* devices we recommend joining the consultation via the **Google Chrome** web browser application. Other browsers may also work but are not fully supported at this time. Your device will also need to be equipped with a video camera and microphone. Before joining the consultation you will have to **allow Pathways access** to your device's camera and microphone.

By joining the consultation you are agreeing to the [Pathways Terms of Use Policy](#) and confirming your identity.

JOIN CONSULTATION

- An ICS file in the email invite, if clicked upon by the patient, will allow the patient to automatically save the appointment in their calendar.



- There is a link present in the email with a video describing the patient steps to follow for the consultation.

Watch the short video here <https://youtu.be/vFa1RQMm9fU>

- It is important the patient also uses **GOOGLE CHROME** or **SAFARI** when joining an appointment.

PATIENT WORKFLOW

THE DAY OF THE APPOINTMENT

- The patient will click on join consultation in their email, sms or calendar invite.

Hi John,
You have been invited to a
Pathways telehealth
consultation at 26/08/2020
15:30 (SAST) with Dr Sarah
Jones. Tap on the following link
to begin your consultation:
[https://telehealth-
demo.pathways.africa/inv/
2c98a74b-2b31-437c-
a557-7a4644acc7ac](https://telehealth-demo.pathways.africa/inv/2c98a74b-2b31-437c-a557-7a4644acc7ac)



Hello **Frank**,

You have been invited to participate in a **Pathways** consultation with
Dr Sithole on 08 Apr 2020 at 3:30 PM.

For iOS devices (iPhone / iPad) we recommend joining the consultation via
the **Apple Safari** web browser application. For **Android**, **Windows** and
MacOS devices we recommend joining the consultation via the **Google**
Chrome web browser application. Other browsers may also work but are
not fully supported at this time. Your device will also need to be equipped
with a video camera and microphone. Before joining the consultation you
will have to **allow Pathways access** to your device's camera and
microphone.

By joining the consultation you are agreeing to the [Pathways Terms of Use](#)
[Policy](#) and confirming your identity.

[JOIN CONSULTATION](#)



- On clicking **JOIN CONSULTATION** the patient will be directed to a screen where they will need to accept terms and conditions. The link to the consultation will be active from 15 minutes prior to and 30 minutes after the booked consultation time. Once active they will be able to enter their appointment.

Welcome Steven!

You have been invited to participate in a Pathways
consultation with **Dr Sarah Jones**.

Your consultation is scheduled to start in 20m.

Your device needs to be equipped with a microphone and video camera. When prompted, access to the devices
should be allowed.

Legal Agreements

[Pathways Africa Terms of Use](#)

[Pathways Africa Privacy Policy](#)

☒ I accept the legal agreements above and confirm my identity.

You can join the consultation in 5m 15s.

Welcome Steven!

You have been invited to participate in a Pathways
consultation with **Dr Sarah Jones**.

Your consultation is scheduled to start in 12m.

Your device needs to be equipped with a microphone and video camera. When prompted, access to the devices
should be allowed.

Legal Agreements

[Pathways Africa Terms of Use](#)

[Pathways Africa Privacy Policy](#)

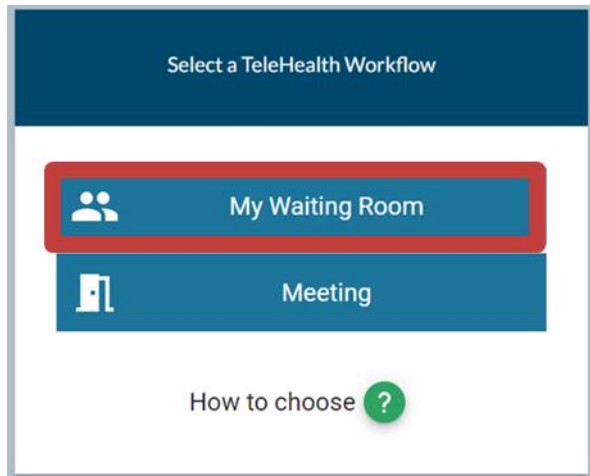
☒ I accept the legal agreements above and confirm my identity.

[JOIN CONSULTATION](#)



THE DOCTORS WORKFLOW

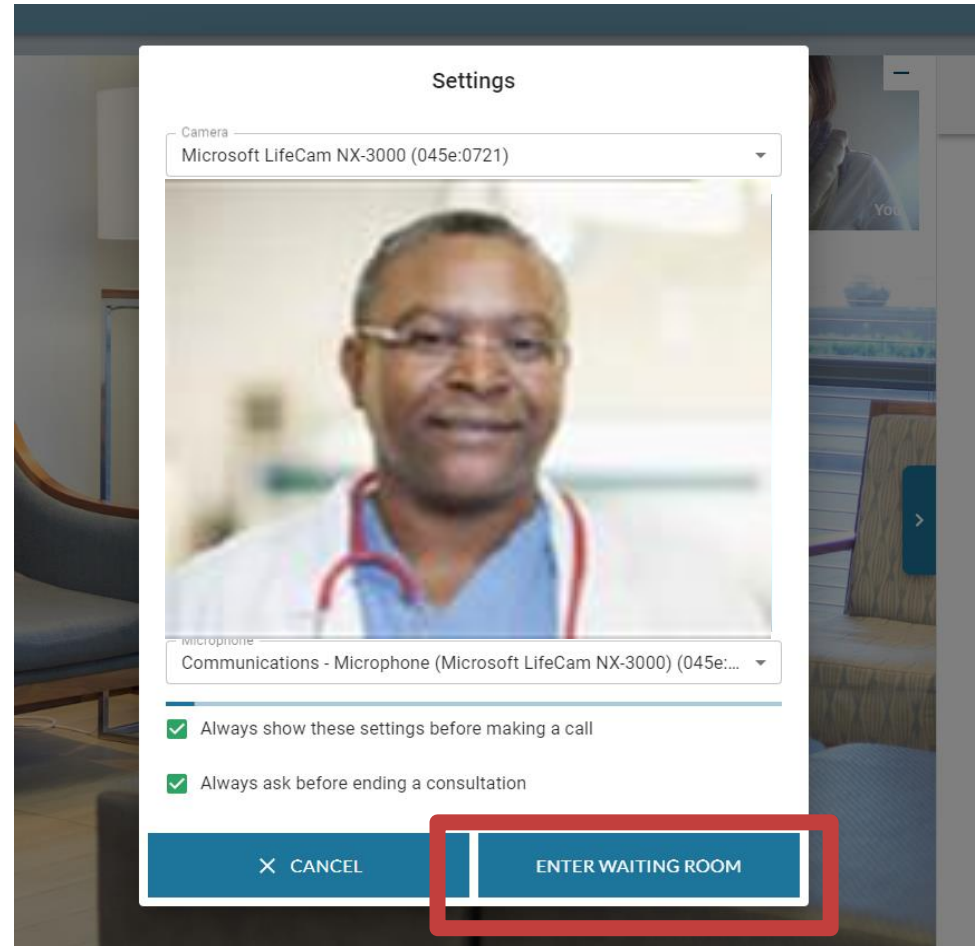
“MY WAITING ROOM”



DOCTOR WORKFLOW

ENTERING THE VIRTUAL WAITING ROOM AND SETTINGS

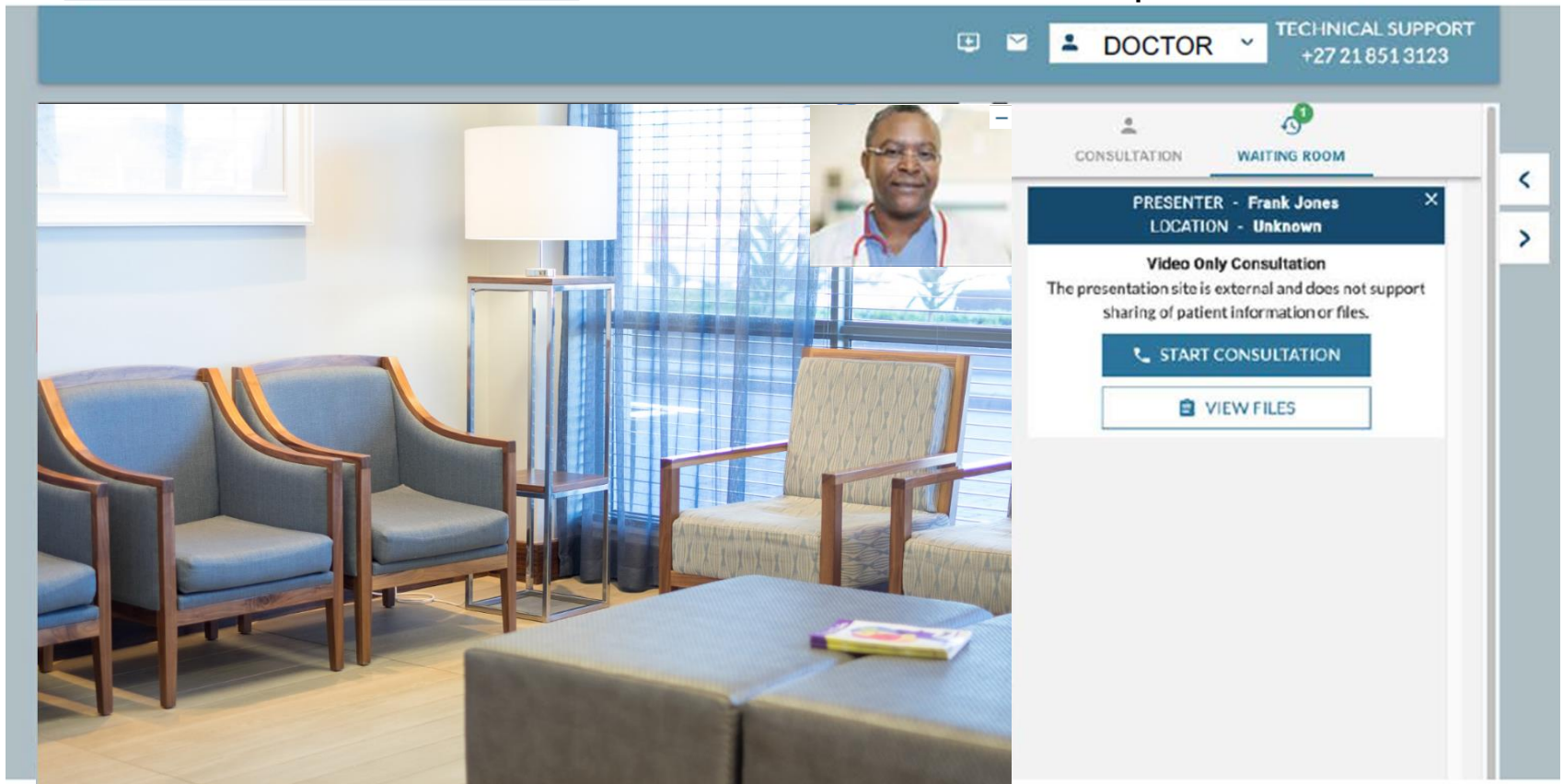
- 1) Once you have selected “*My Waiting room*” you will enter a settings screen.
- 2) Allow *Pathways.Africa* access to your camera and microphone and select enter waiting room.
- 3) You will be asked to select your camera and microphone input.
- 3) Once confirmed click on “ENTER WAITING ROOM”



ENTERING THE VIRTUAL WAITING ROOM

DOCTORS PRE-CONSULTATION VIEW

- Patients will appear in the virtual waiting room.
- The doctor will then enter their virtual waiting room and click on **START CONSULTATION** to start the consult with the patient.



DOCTORS VIEW DURING THE CONSULT

TECHNICAL SUPPORT
0861 429 434

JOE SMITH

CONSULTATION WAITING ROOM

26/08/2020 00:02:22

PROVIDER ATTACHMENTS

Consultation file space is 0% full

Drop files here or click to upload

Include in Consultation Summary Report PDF: ☒

screenshot_2020-08-26_

screenshot_2020-08-26_

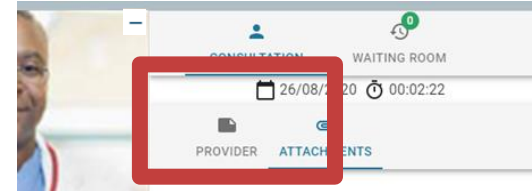
screenshot_2020-08-26_

00:11

Charles Maxwell

WRITING PROVIDER/ DOCTOR NOTES

1) Click on the “PROVIDER” block on the right hand side of the screen.

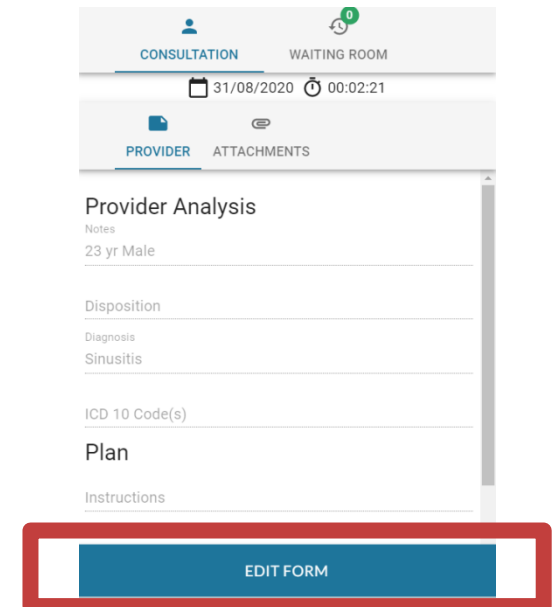
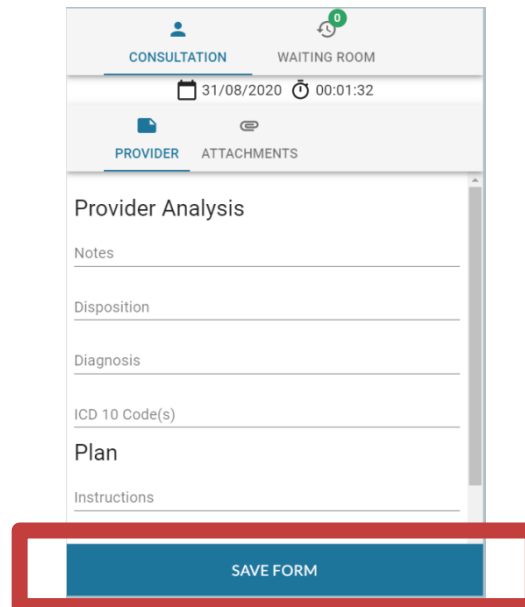
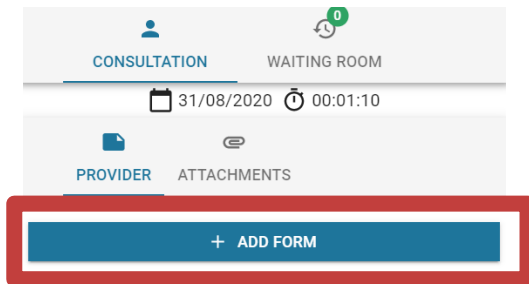


2) Select “ADD FORM” and capture notes within the template.

3) Click” SAVE FORM” once complete to save the record.











4) To edit your notes, click “EDIT FORM” and continue your note taking

* You can customise your own note taking templates. This is described in the “Edit Forms” setting.




MAKING SENSE OF THE IN-CONSULTATION CONTROLS

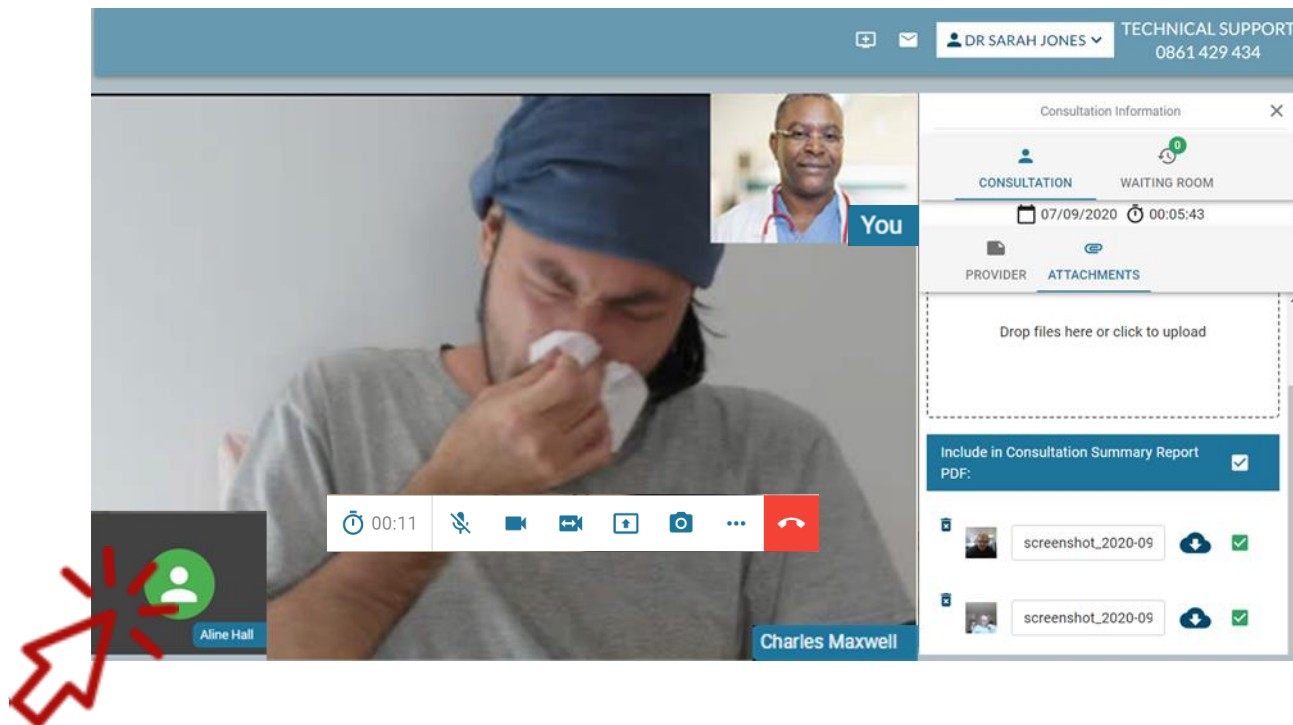


	MUTE OR UNMUTE MICROPHONE
	SWITCH ON & OFF THE VIDEO CAMERA
	SWITCH VIDEO INPUT (e.g. Front/Back facing camera)
	ACTIVATE SCREEN SHARING
	FAR END SCREEN CAPTURE (Captures a screenshot of the patient)
	 CALL QUALITY STATISTICS
	 ACTIVATE FULL SCREEN MODE
	 ADD A GUEST TO THE CONSULTATION
	END CONSULTATION

ADD A GUEST

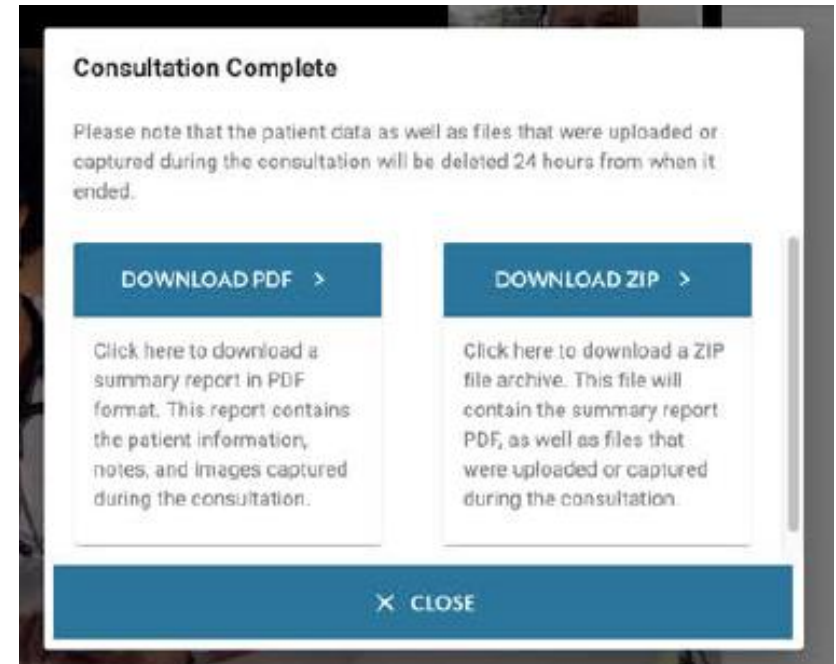


- To add a guest to the consultation click on the  icon in the controls
- Complete the requested detail and send the invite
- **When more than one person is in a consultation click on the video feed to swap your video input between the different guests on the call**
- We would advise not adding having more than 4 people on a call.



ENDING THE CONSULTATION AND CONSULTATION SUMMARY

- Once the consultation is complete a summary will be available for you to download.
- The zip file will contain individual jpeg images captured, any attachments and the pdf.
- The pdf will contain the notes and images captured during the consult
- It will be **available for 48 Hours** before the record is destroyed and will no longer be accessible. This information is not archived.



EXAMPLE OF THE CONSULTATION REPORT

- All information incorporated during the consultation will be included in the consultation record PDF
- The video of the consultation is currently not recorded.

Consultation ID	22
Start Date	2020-05-18 12:06 SAST
End Date	2020-05-18 12:09 SAST
Duration	Hours: 0, Minutes: 2, Seconds: 30
Created	2020-05-18 12:06 SAST

Participants

Presenter

Display Name Aline Hall

Provider

First & Last Names	Michaela Smith
Location	Dr Smith and Van soelen
Organization	Dr Smith and Van Soelen
NPI	0987654321

Form Data

Video Only Consultations do not have presenter and provider forms.

Attachments

screenshot_2020-05-18_12-08-10.jpeg



screenshot_2020-05-18_12-08-12.jpeg



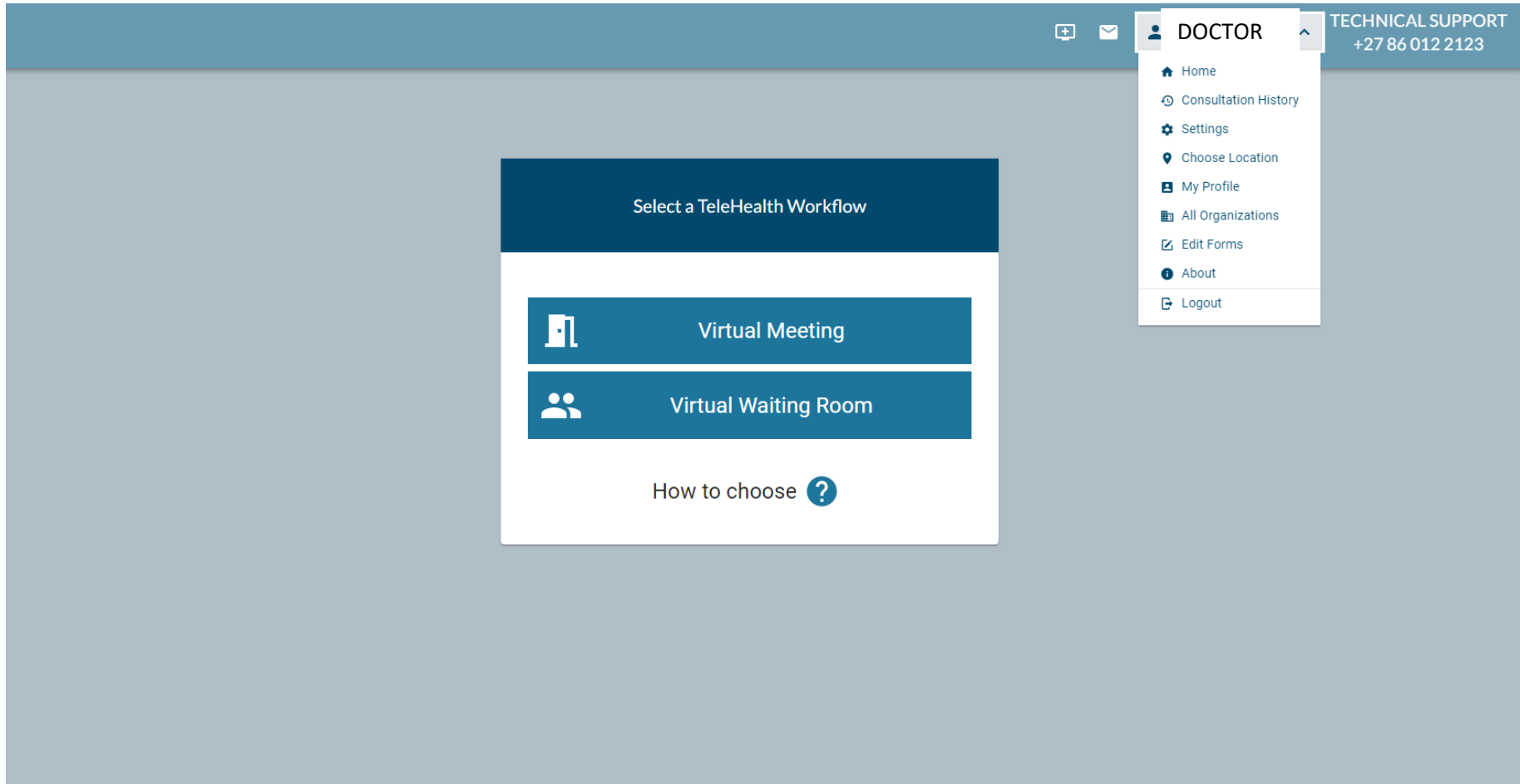
TELEHEALTH TRAINING

MODULE 3

- **Understanding the Settings**

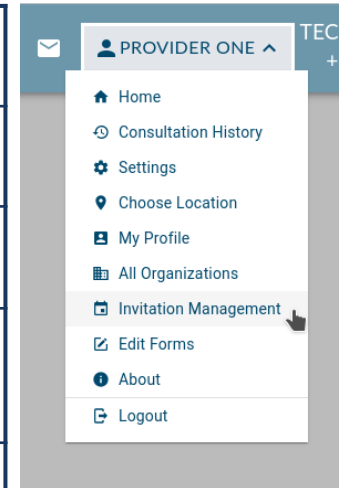
SETTINGS

- Click on your name in the top right hand corner to see the settings drop down menu.



SETTINGS OVERVIEW

Home	Takes the user to the home landing page
Consultation History	View of the doctors consultation history
Settings	Device settings
Choose Location	To review the microphone and camera connections
My Profile	Users own profile detail
All Organisations	View the organisation the user belongs to
Edit Forms	Create and edit custom form (These are used in nurse based virtual care that providers can create to facilitate the assessment)
Invitation Management	Schedule of patient appointments sent
About	Information about the Pathways Software
Logout	Logs the user out



SETTINGS

CONSULTATION HISTORY

- The patients name will appear in the presenter column with the treating doctor being the provider.
- The PDF or Zip file summary will be available for **48 hours** as previously noted

DULAIN STANDER

TECHNICAL SUPPORT

←

Consultation History

ID	Type	Created ↓	Started	Duration	Presenter	Provider	Actions
69	Video Only	04/08/2020 14:02	04/08/2020 14:04	00:10:01		Dulaine Stander	
68	General	04/08/2020 13:21	Not started		Dulaine Stander		
67	General	04/08/2020 10:44	04/08/2020 10:57	00:29:19	Dulaine Stander		
66	General	04/08/2020 10:11	Not started		Dulaine Stander		
64	General	04/07/2020 16:26	Not started		Dulaine Stander		
63	General	04/07/2020 14:58	Not started		Dulaine Stander		
62	General	04/07/2020 14:57	Not started		Dulaine Stander		
53	General	04/07/2020 09:55	Not started		Dulaine Stander		
52	General	04/07/2020 09:55	Not started		Dulaine Stander		
51	General	04/07/2020 09:39	Not started		Dulaine Stander		

Rows per page: 10

1-10 of 19

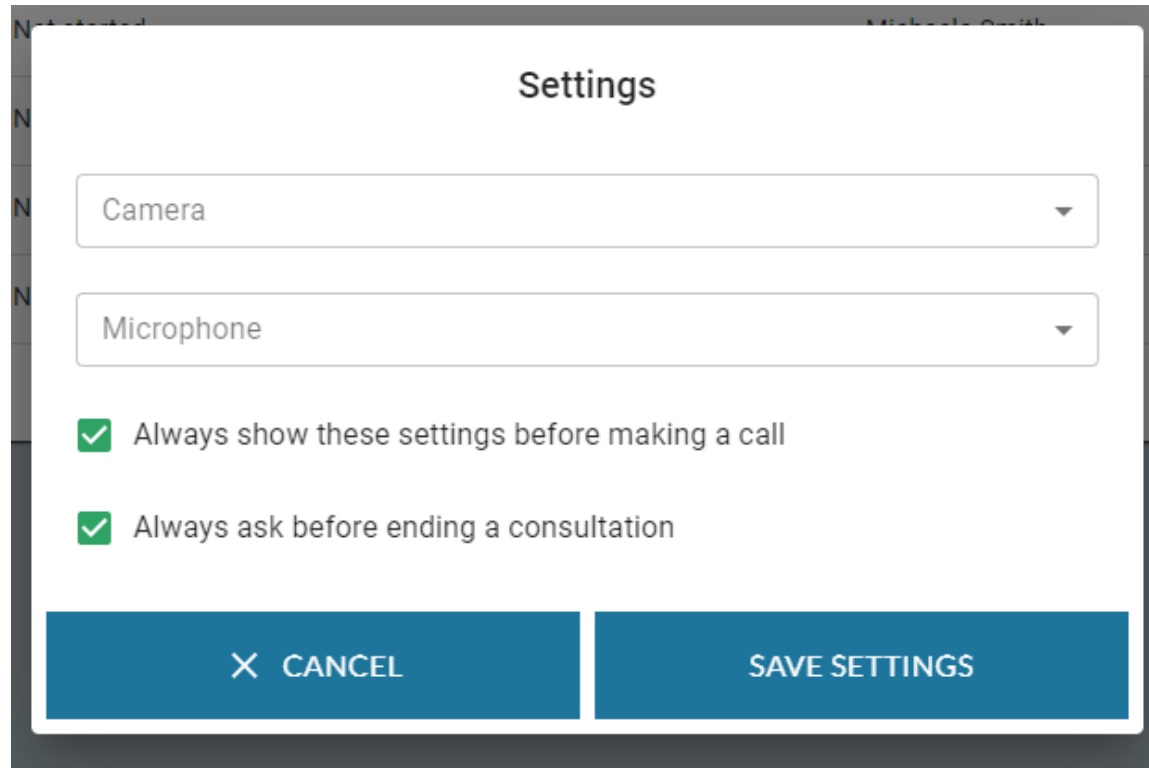
←

→

SETTINGS

SETTINGS

- Please check that your camera and microphone settings are working correctly

A screenshot of a 'Settings' dialog box. The dialog has a title bar with the word 'Settings' in the center. Below the title bar, there are two dropdown menus. The first dropdown is labeled 'Camera' and the second is labeled 'Microphone'. Below these dropdowns, there are two checked checkboxes. The first checkbox is labeled 'Always show these settings before making a call' and the second is labeled 'Always ask before ending a consultation'. At the bottom of the dialog, there are two buttons: 'CANCEL' on the left and 'SAVE SETTINGS' on the right. The 'CANCEL' button has a small 'X' icon to its left. The dialog box is set against a dark gray background.

Settings

Camera

Microphone

☒ Always show these settings before making a call

☒ Always ask before ending a consultation

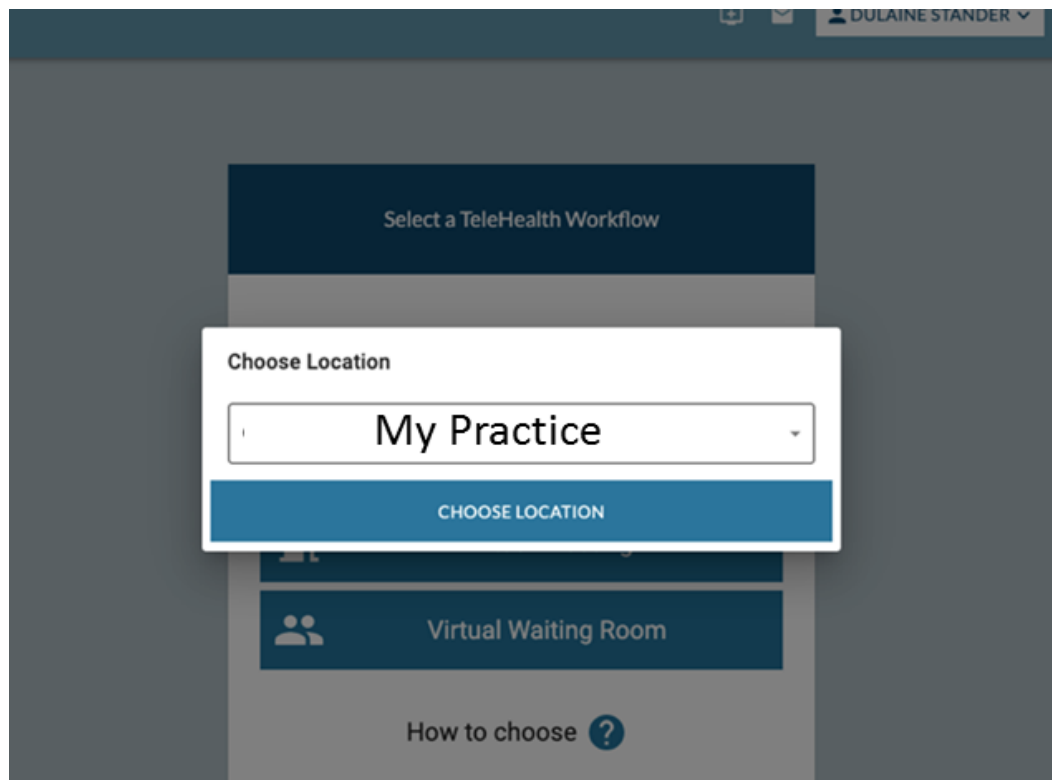
× CANCEL

SAVE SETTINGS

SETTINGS

CHOOSE LOCATION

- Locations have been added to the software for use when practices may consult at multiple sites. It doesn't impact the functionality of the software
- In this Mediclinic instance the default will be “MyPractice” or the name of a group practice.



SETTINGS

MY PROFILE

- MY PROFILE provides and overview of your detail.
- Those that are greyed out are the user permissions that are configured by Mediclinic when the account is created

My Profile

User Details

Username *

Doctor@gmail.com

First name

John

Last name

Smith

☒ Active

Organization

Dr Smith and Van Soelen

User Role

Role

Services

☐ Presenter

☒ Provider

NPI number

0987654321

Virtual Rooms

Name	Type	Private
------	------	---------

CANCEL

SAVE

SETTINGS

EDIT FORM

- The edit forms function allows for a note taking template to be generated for your specific practice.
- To start this process click on the plus sign next to Form Templates

← Form Templates +				
<input type="checkbox"/>	Name	Description	Owner	Type
<input type="checkbox"/>	Wound Assessment	Follow up care		Provider

- To generate a form template create a **Name** and **Description**
- **Owner Type:** Select “Organisation”
- **Owner:** Select yourself
- **Template Type:** Provider

Form Template Information

Name
General Assessment Form

Description

Owner Type ☒ Organization ☐ Provider

Owner



Template Type
Provider

SETTINGS

EDIT FORM CONTINUED

- Once the form has been created, click on the edit button



← Form Templates +				
<input type="checkbox"/>	Name	Description	Owner	Type
<input type="checkbox"/>	Wound Assessment	Follow up care		Provider
				 

- You will then be able to start working on your template and the adding the types of questions you wish to include.

← Edit Template 

Sections

ADD NEW SECTION +

CLOSE SECTIONS ^

Form Elements

TEXT

INTEGER

DECIMAL

CHECKBOX

DATE

SAVE

SETTINGS

EDIT FORM CONTINUED

STEP 1: Select **Add New Section** to create a heading.

“History” and “Examination Findings” are examples of sections in the image below.

STEP 2: Once a Section has been created different question types can be added these are all noted under “Form Elements”


STEP 3: To add more detail to the form element click on the Edit button of the specific element. “Date of Onset of presenting complaint” being an example below.

The screenshot displays a form editor interface. On the left, a sidebar contains a list of form elements: TEXT, INTEGER, DECIMAL, CHECKBOX, DATE, SELECT, and TEXT AREA. Above this list are two buttons: 'ADD NEW SECTION +' (highlighted with a red box and the number 1) and 'CLOSE SECTIONS ^' (highlighted with a red box and the number 2). The main area shows a list of sections: 'History' (highlighted with a blue header), 'History of presenting complaint', 'Symptoms', 'Examination Findings', and 'Text'. Each section has a set of icons to its left: a trash can, an edit pencil (highlighted with a red box and the number 3), a checkbox, and a star. The 'History' section is expanded, showing its content: 'Date of onset of presenting complaint' with a date input field 'dd/mm/yyyy' and a calendar icon, followed by 'History of presenting complaint', 'Symptoms', 'Examination Findings', and 'Text'. A 'SAVE' button is located at the bottom right of the interface.

SETTINGS

SCHEDULED INVITATIONS

- This view allows you to see all appointment invitations sent to your patients.
- Click on delete or resend should you need to amend the invite detail

Scheduled Invitations				
	↑ Date	First Name	Last Name	Waiting Room
^	2020-01-02 03:04	John	Doe	Intercare
<p>Email: jdoe@example.com</p> <p>Phone: 012 345 6789</p> <p>Message: This was the message that was sent to the guest.</p> <p>RESEND > DELETE </p>				
▼	2020-01-02 03:04	John	Doe	Dr Jones
▼	2020-01-02 03:04	John	Doe	Dr Jones
▼	2020-01-02 03:04	John	Doe	Dr Jones
Rows per page: 5 ▼ 1-5 of 13 < >				

FURTHER QUESTIONS OR IN NEED OF HELP?

- See the FAQs and support documentation for doctors and patients on the Mediclinic Telehealth Website
- If you need assistance with training and using the system, please email Telehealth@mediclinic.co.za and we can set up a session with yourself and your team.
- Contact Mediclinic Service Desk with any technical problems on servicedesk@mediclinic.co.za or call **0861 429 434**

