



ModuleMD[®]

Providing solutions...not just software

Telemedicine User Guide: Registration & One Time Setup

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Purpose

Purpose

The purpose of this user guide is to explain:

- How to register for Telemedicine
- How to set up to use Telemedicine

* Keep in mind, setup only has to be done once.

Registration

Registration

Contact ModuleMD Client Services to register your practice for Telemedicine. You will be unable to use Telemedicine without registering your practice.

Client Services is available to help you through the setup process.

One Time Setup

Add Menu Privileges

The screenshot shows the ModuleMD web application interface. At the top, the user is logged in as 'Medical Clinic Inc LEAD CLINICIAN, Telemedicine' at 15:45:59. A navigation bar contains icons for Reception, Schedule, Patient Chart, Telemedicine, Documents, Allergy, VS Gen. Report, Manager, and Practice Setup. The 'Practice Setup' icon is highlighted with a red box. Below the navigation bar, a search bar and 'Search Options' are visible. The main content area has tabs for Dashboard and Practice Setup. Under Practice Setup, there are sub-tabs: General, Billing, EMR, Patient, Allergy, Meaningful Use, Privileges, Password Expiration, and Register IP. The 'Privileges' sub-tab is selected. Within the Privileges section, there are further sub-tabs: Providers, Location, Insurance, Insurance Format, User, and Facility. The 'User' sub-tab is highlighted with a red box. Below the sub-tabs, there is a search bar with 'cli' entered, highlighted with a red box. Below the search bar, there is a table of users. The first row is '126 Clifford, Daniel' with status 'InActive'. The second row is '631 Lead, Clinician' with status 'Active', highlighted with a red box. The checkbox next to '631 Lead, Clinician' is checked.

1. Select "Practice Setup"

2. Select "User"

3. Search for the name of the user for whom you would like to add telemedicine menu privileges.

4. Check the box next to the name of the user you would like to give telemedicine menu privileges to.

ID	User Name	Status
126	Clifford, Daniel	InActive
631	Lead, Clinician	Active

Add Menu Privileges (Continued)

Providers **Location** **Insurance** **Insurance Format** **User** **Facility**

Update User

Edit - Lead, Clinician **Menu Privileges** **Settings** **Report Privileges**

Menu Privileges for User Lead, Clinician

Save **Reset** **Copy From Role** **Copy From User**

7. Select "Save"

Clinical Management

Search

- ☒ Drafts
- ☒ Closed Messages
- ☒ Sent Messages
- ☒ Info Packages
- ☒ E-Fax
- ☒ Patient Chart
- ☒ DrFirst Reports
- ☒ DrFirst Messages
- ☒ Care Manager Notes
- ☐ **Telemedicine**

Revenue Management

Search

- ☒ Revenue Management
 - ☒ Charge
 - ☒ ICD
 - ☒ CPT
 - ☒ Visit Information
 - ☒ Claim Information
 - ☒ Undistributed Pmts
 - ☒ Manage Patient Payments
 - ☒ EOB
 - ☒ Overpayment/Refunds
 - ☒ Misc Receipt

Report Management

Search

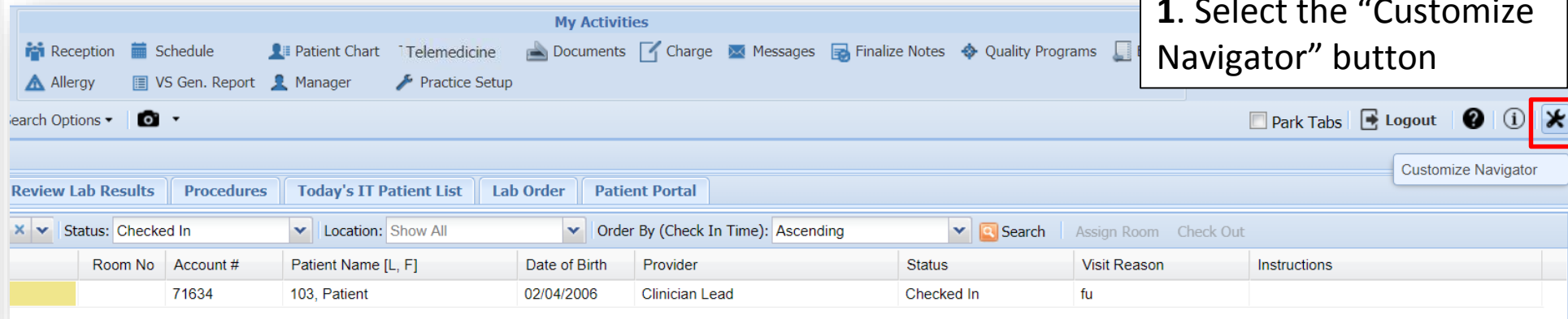
- ☒ Report Management
 - ☒ Schedule Reports
 - ☒ Appointments
 - ☒ Appointments By Date
 - ☒ No Show
 - ☒ Overbook
 - ☒ Cancelled Appointments
 - ☒ Referral Provider Informa
 - ☒ Patient Return Visit
 - ☒ Reminder Summary Repor
 - ☒ Appointments By Provide

5. Select "Menu Privileges"

6. Check the boxes next to "Telemedicine" under "Clinical Management"

Add Telemedicine to “My Activities”

1. Select the “Customize Navigator” button



The screenshot shows the 'My Activities' section of a software interface. At the top, there is a navigation bar with icons for Reception, Schedule, Patient Chart, Telemedicine, Documents, Charge, Messages, Finalize Notes, Quality Programs, Allergy, VS Gen. Report, Manager, and Practice Setup. Below this is a search bar with a dropdown arrow. To the right of the search bar are buttons for 'Park Tabs', 'Logout', and a 'Customize Navigator' button, which is highlighted with a red box. Below the search bar is a table with columns: Room No, Account #, Patient Name [L, F], Date of Birth, Provider, Status, Visit Reason, and Instructions. The first row of data shows Room No 71634, Patient Name 103, Patient, Date of Birth 02/04/2006, Provider Clinician Lead, Status Checked In, and Visit Reason fu.

☒ Show Only My Activities In Ribbon Menu

2. Optional: Make sure the box is checked next to “Show Only My Activities In Ribbon Menu”. This will allow you to customize your view and allow you to determine the order in which your most used shortcuts will show in your menu ribbon. My Activities gives your menu ribbon a cleaner more organized look. By including Telemedicine as a “My Activities” item, you can have quick and convenient access to the telemedicine platform.

My Activities - Drag and drop to reorganize menu items

Menu Name
Reception
Schedule
Patient Chart
TeleHealth
Documents
Charge
Messages
Finalize Notes
Quality Programs
E-Fax
Allergy
VS Gen. Report
Manager
Practice Setup

Add Telemedicine to “My Activities”

(continued)

4. Select “Save”

The screenshot shows the 'Customize Navigator' window in the ModuleMD software. At the top, there are tabs for 'Dashboard' and 'Customize Navigator X'. Below the tabs, there are 'Save' and 'Reset' buttons. The 'Save' button is highlighted with a red box. Below the buttons, there is a 'Select Group:' dropdown menu set to 'My Activities'. The main area is titled 'Select your favorite menu items' and contains two columns: 'Clinical Management' and 'Revenue Management'. Each column has a list of menu items with checkboxes. In the 'Clinical Management' column, the 'Telemedicine' item at the bottom is checked and highlighted with a red box. In the 'Revenue Management' column, the 'Charge' item is checked, while others are unchecked.

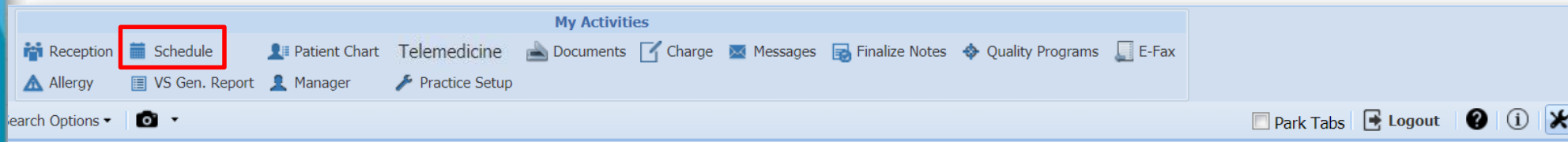
Clinical Management		Revenue Management	
	Menu Name		Menu Name
<input checked="" type="checkbox"/>	Finalize Notes	<input checked="" type="checkbox"/>	Charge
<input checked="" type="checkbox"/>	Documents	<input type="checkbox"/>	Undistributed Pmts
<input checked="" type="checkbox"/>	Schedule	<input type="checkbox"/>	Manage Patient Payments
<input checked="" type="checkbox"/>	Reception	<input type="checkbox"/>	EOB
<input type="checkbox"/>	Labs	<input type="checkbox"/>	Overpayment/Refunds
<input type="checkbox"/>	Timesheet	<input type="checkbox"/>	Misc Receipt
<input checked="" type="checkbox"/>	Messages	<input type="checkbox"/>	Patient A/R
<input type="checkbox"/>	Info Packages	<input type="checkbox"/>	Manage Claims
<input checked="" type="checkbox"/>	E-Fax	<input type="checkbox"/>	Manage Payments
<input checked="" type="checkbox"/>	Patient Chart	<input type="checkbox"/>	Empiric Upload
<input type="checkbox"/>	DrFirst Reports	<input type="checkbox"/>	Claim Status
<input type="checkbox"/>	DrFirst Messages	<input type="checkbox"/>	Manage Claim Status
<input type="checkbox"/>	Care Manager Notes		
<input checked="" type="checkbox"/>	Telemedicine		

3. Check the box next to
“Telemedicine”

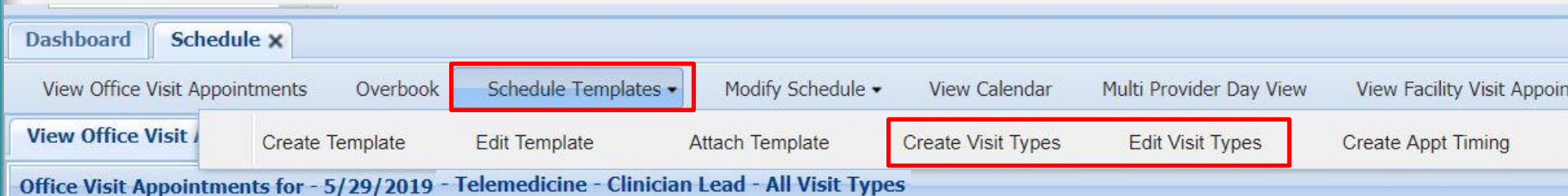
Telemedicine Visit Types

* Visit types must be setup as a “Telemedicine” service type for the ModuleMD schedule to connect to the Telemedicine schedule and to ensure your telemedicine notes will pull into the patient’s chart in ModuleMD.

1. Go to “Schedule”



2. Go to “Schedule Templates” then select either “Create Visit Types” or “Edit Visit Types” depending on if you want to create a visit type specific to Telemedicine or update an existing visit type.



Telemedicine Visit Types

(Continued)

* Follow the steps below to either create a new visit type or edit an existing visit type

The screenshot shows a web form titled "New Visit Types". The form contains the following fields and controls:

- Visit Type Name:** A text input field containing "Telemedicine".
- Visit Type Abbreviation:** A text input field containing "TLM" and a dropdown menu showing "NP, EMR, etc.".
- Color:** A dropdown menu showing "Antique White".
- Active:** A checkbox that is checked.
- Default:** A checkbox that is unchecked.
- Facility Visit:** A checkbox that is unchecked.
- Sort Order:** A text input field.
- Submit:** A button.
- Clear:** A button.

Five numbered callouts are overlaid on the form:

1. Enter the name and abbreviation of the visit type.
2. Choose which color you want the visit type to show up as.
3. Mark the check box next to "Active".
4. Mark the check box next to "Telemedicine".
5. Select "Submit".

Telemedicine Service Types

* Service types must be setup as a “Telemedicine” service type for the ModuleMD schedule to connect to the schedule in the Telemedicine platform and to ensure your telemedicine notes will pull into the patient chart in ModuleMD.

The screenshot shows the ModuleMD Practice Setup interface. The top navigation bar includes 'My Activities' and various icons. The 'Practice Setup' button is highlighted in the top right. The 'EMR' tab is selected in the left sidebar, and the 'EMR Service Type' sub-tab is active. The 'EMR Service Type Configuration - Practice' section shows a table of service types and a configuration area on the right.

1. Go to “Practice Setup”

2. Once you’re in Practice Setup, go to “EMR” and select “EMR Service Type”

3. Choose the service type(s) you want to use for Telemedicine visits or add a new one by selecting “New”.

Name	Active
DEMO	Yes
Telemedicine	Yes
PCMH Notes	Yes
Procedures	Yes
NewPatient	Yes
Established	Yes

5. Select “Save”

4. Check the box next to “Telemedicine” to use this service type for telemedicine visits.

EMR Type: ☒ Classic EMR ☐ Free Text EMR ☐ Transcription EMR

EMR Service Type Color: ☒ No Color

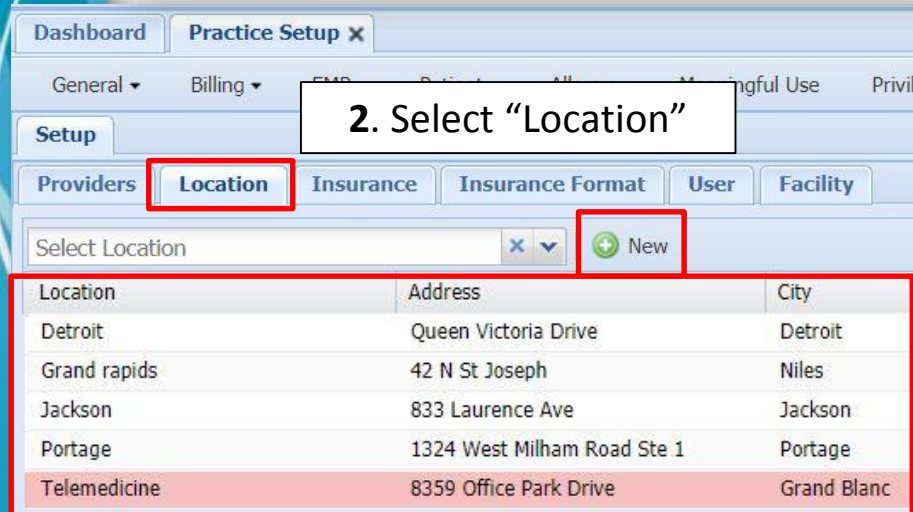
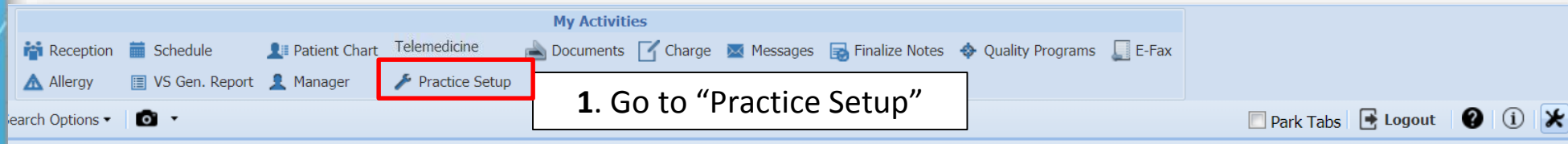
EMR Service Type: ☒ Telemedicine

Categories

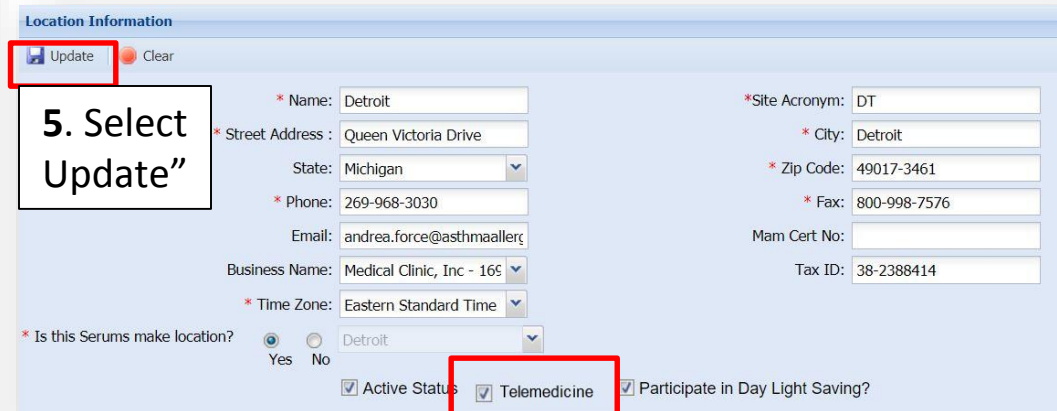
Name	Classic	Text Only	Gen
Chief Complaint	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Objective	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Telemedicine Locations

* Locations have to be setup as a “Telemedicine” location for the ModuleMD schedule to connect to the Telemedicine schedule and to ensure your telemedicine notes will pull into your ModuleMD notes.



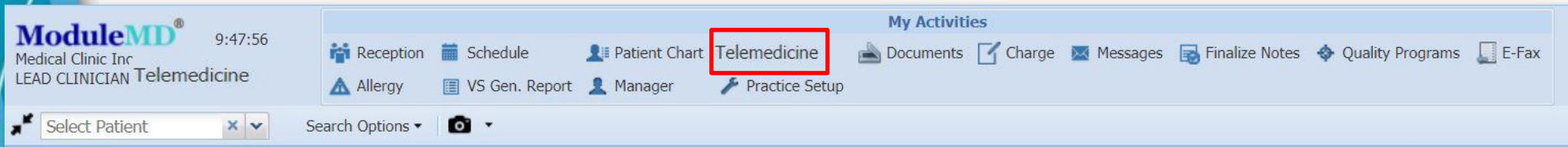
3. Select the location you would like to make a Telemedicine location. Otherwise, some practices may prefer to have a separate location for Telemedicine. If your practice wishes to do this, select “New” and fill out the information for the new Telemedicine location.



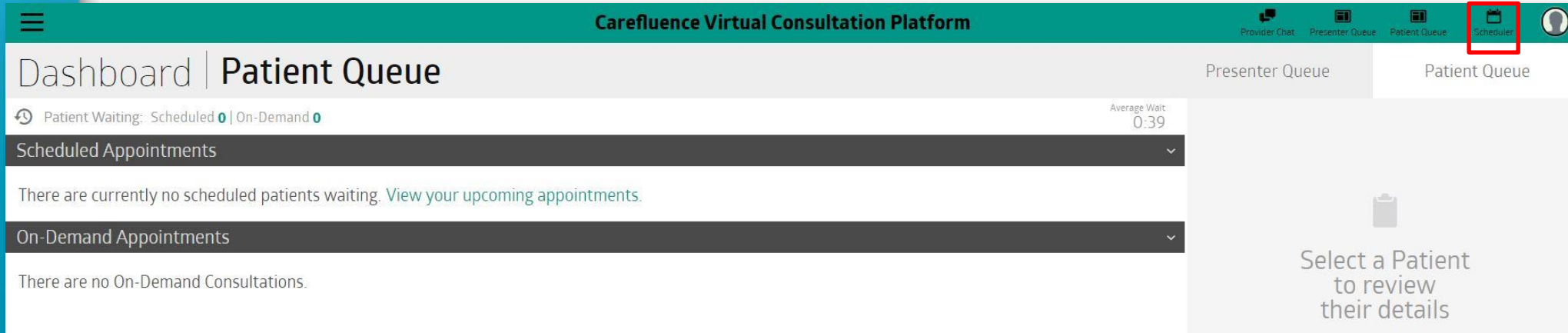
Set Availability for Clinicians

* Before seeing patients with telemedicine, each clinician's availability will need to be setup in the telemedicine platform. (You will need to be logged in as a registered clinician to be able to access schedule)

1. Go to "Telemedicine" from ModuleMD



2. The Telemedicine platform will launch in a new window and bring you to your dashboard. From here select "Scheduler".



Set Availability for Clinicians

(continued)

1. Select
"Availability"

Carefluence Virtual Consultation Platform

Scheduler

Provider Schedules Availability Appointments

May 2019 Today 05/26/2019 - 06/01/2019 Day Week Month Agenda

CURRENTLY VIEWING

Users

Clinician Lead

12:00 AM 1:00 AM 2:00 AM 3:00 AM 4:00 AM 5:00 AM 6:00 AM 7:00 AM 8:00 AM

Sun, 05/26 Mon, 05/27 Tue, 05/28 Wed, 05/29 Thu, 05/30 Fri, 05/31 Sat, 06/01

12:00 AM - 1:00 AM

New Block

Key

2. Select the clinician for whom you are updating availability. If you have multiple clinicians registered for telemedicine, make sure to update the availability of each clinician in the telemedicine platform.

3. Select "New Block" to create a block of availability.

Set Availability for Clinicians

(continued)


1. Create a block of time by using the calendars and clocks to adjust start and end time.

2. Select "All Day" if provider has availability all day.

4. Check the box next to "Make Private" if you want the availability calendar to be private to other telemedicine users in your practice.

Availability Block

Block Details

 **Clinician Lead**
Allergist

Starts

05/29/2019

12:00 PM

EST

Ends

05/29/2019

4:00 PM

EST

All Day ☐

Repeat ☐

Privileges

☐ Make Private

Close

Services Available

☐ On-Demand

☐ Patient Scheduled

☐ Admin Scheduled

☐ Provider Unavailable

5. Choose which services the clinician is available/ unavailable for.

3. Check the box next to "Repeat" if you want the block of time to repeat. Then use the box that pops up to select when you want the block to repeat.

All Day ☐

Repeat ☒

Repeats

Weekly

Every

1

Week

Days

S

M

T

W

Th

F

S

End Repeat

mm/dd/yyyy

6. Select "Create". Repeat as necessary to complete availability schedule.

Create



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Thank You

Questions?

Contact Support 248-434-0444, option 2