



Super User JeffConnect™ Guide

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What is JeffConnect?

JeffConnect® is a Jefferson telehealth platform.

Patients can have scheduled appointments with their provider over video, rather than going into the office in person.

Patients can also use JeffConnect’s On-Demand service which allows patients to see a Jefferson healthcare Provider physician whenever, wherever you want, either online or by mobile app. JeffConnect On Demand is available 24 hours a day, 7 days a week, 365 days a year.

What is JeffConnect Super User?

A JeffConnect Super User will assist in outreach of patients, educate individuals on the JeffConnect app, help navigate any telehealth issues that may occur in departments and with patients, and act as a liaison between their entity and the telehealth department.

JeffConnect Access for Super Users

Access for Super Users in the JeffConnect platform will include scheduler and call center roles.

Individuals who are defined as Super Users will receive scheduler access for all departments in their entity (i.e. an Abington Super User can see all Abington scheduled visits across the platform). This will allow them to complete needed outreach and ensure all patient information has been entered correctly, including name, coupon code, etc.

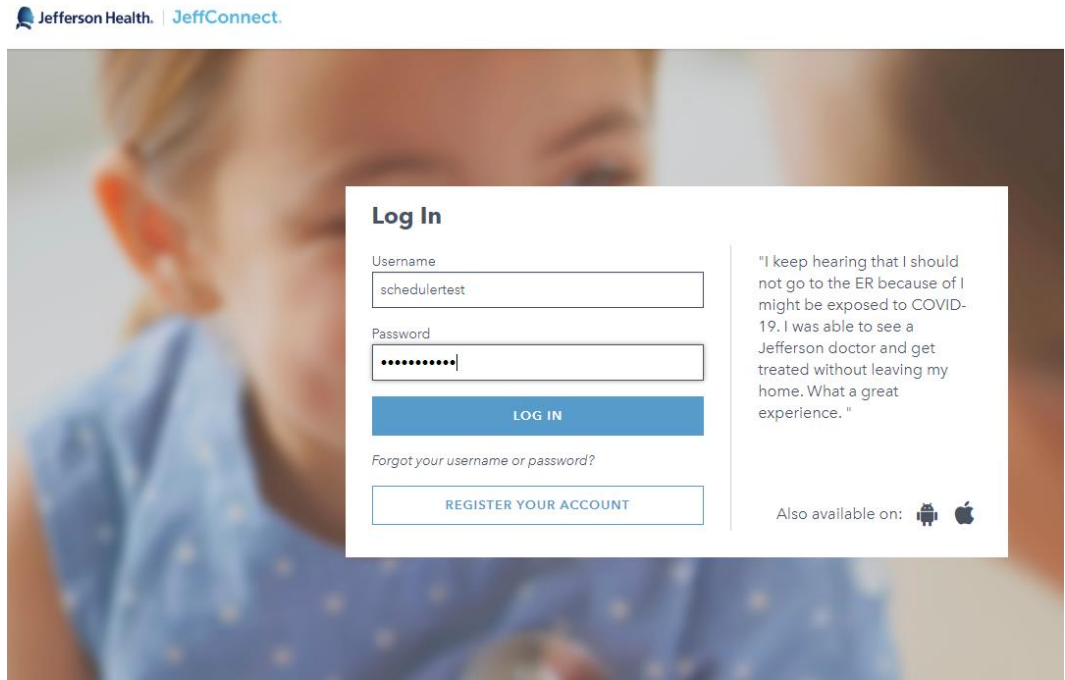
These individuals will also receive call center access. This will allow the Super Users to assist patients in password resets.

The Super User role will result in the creation of **two** JeffConnect accounts, one for scheduler, and another for call center.

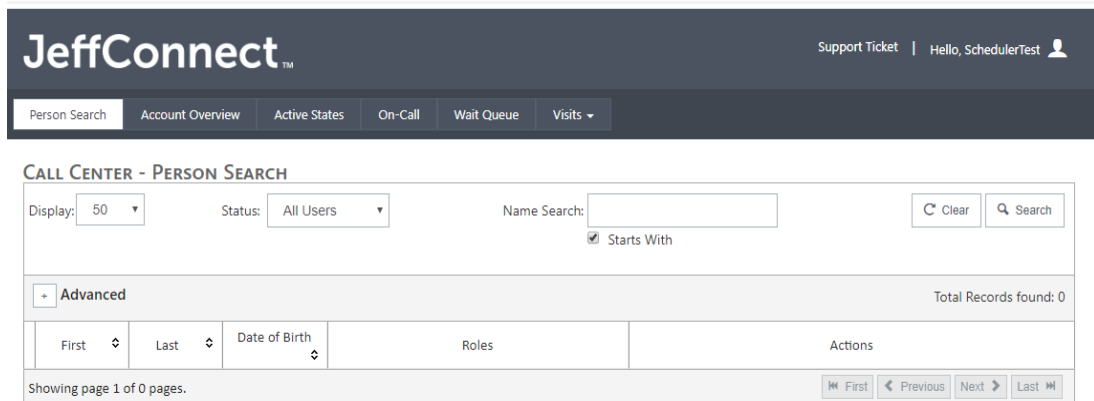
Please note: functionality of call center is limited. If there is a need to create a provider or scheduler account, please email JeffConnect@jefferson.edu to inform telehealth department of the need to create accounts.

User Guide for Call Center/ Scheduler Access

Log into JeffConnect with your credentials



You will see a new screen when you log on. This screen will allow you to patient search to reset passwords/ determine if patients have accounts already.



When you patient search, type the name in patient search and press enter/search. Patient information should appear. Please note if patients are registered or not registered (this says primary because I am a registered patient. **Patients that are not registered will say not registered**)

CALL CENTER - PERSON SEARCH

Display: 50 Status: All Users Name Search: elizabeth lewallen Starts With

Advanced Total

	First	Last	Date of Birth	Roles	Actions
<input type="checkbox"/>	Elizabeth	Lewallen	5/18/1992	Site Admin (Registered), Provider (Registered), Patient (Primary), Call Center (Registered), Scheduler (Registered)	<input type="button" value="Schedule Visit"/> <input type="button" value="Reset Password"/> <input type="button" value="Edit"/>

Showing page 1 of 1 pages.

To reset a password, go to reset password

CALL CENTER - PERSON SEARCH

Display: 50 Status: All Users Name Search: elizabeth lewallen Starts With

Advanced Total Records found: 1

	First	Last	Date of Birth	Roles	Actions
<input type="checkbox"/>	Elizabeth	Lewallen	5/18/1992	Site Admin (Registered), Provider (Registered), Patient (Primary), Call Center (Registered), Scheduler (Registered)	<input type="button" value="Schedule Visit"/> <input type="button" value="Reset Password"/> <input type="button" value="Edit"/>

Please enter the new password for this user.

If you leave the default password value, the user will be prompted to change their password the next time they log in.

New Password

Showing page 1 of 1 pages.

The default password is password123

Please tell the patient this is their new password and you reset it to the email on file

Scheduler (Registered)

Please enter the new password for this user.

If you leave the default password value, the user will be prompted to change their password the next time they log in.

New Password

Showing page 1 of 1 pages.

You can find the email on file by going to the edit button next to their name and updating the email

VIEWING [EXL045](#)

Person

Person

Username Email

First Name Last Name

Middle Name

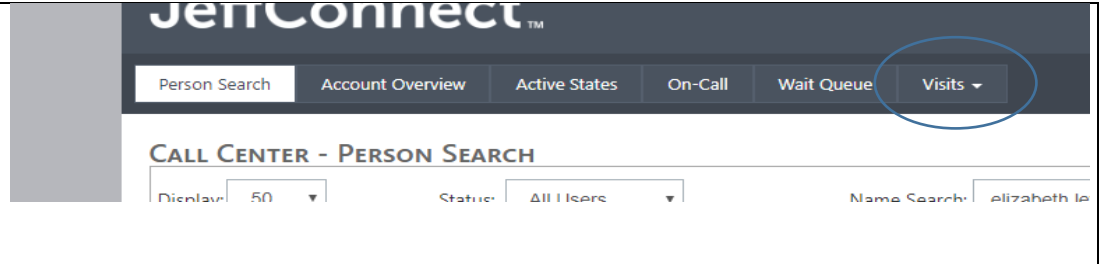
Date of Birth Gender Male Female Other

Mobile Phone Home Phone

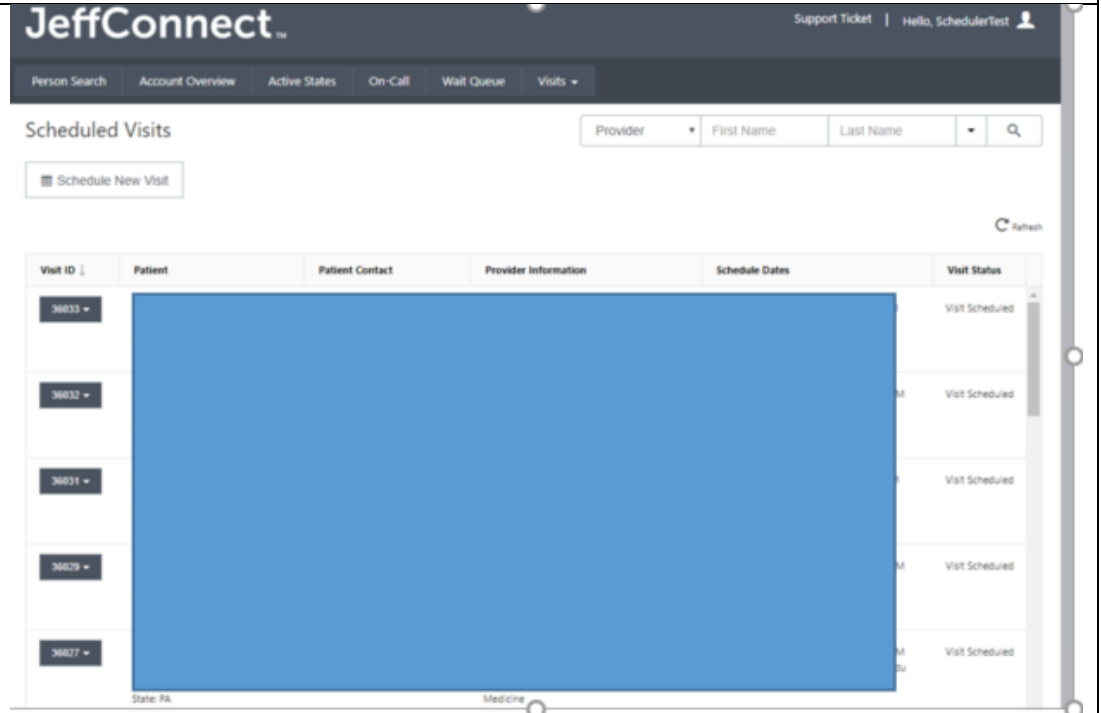
On Call Backup

Roles

To toggle between patient search and visit, go to visits and select the drop down "Scheduled visit"



From there, you will be able to see the scheduled visits for your entity.



Scheduler Guide

Scheduled Visits

Users with the scheduler role may schedule a new visit, view past and/or current scheduled visits, add coupons and search for visits.

The screenshot shows the TELADOC interface with a user profile 'Hello, ashleysch' in the top right. Below the navigation bar, there is a 'Visits' dropdown menu. The main content area is titled 'Scheduled Visits' and includes a search bar with fields for 'Provider', 'First Name', and 'Last Name'. A red box highlights the 'Schedule New Visit' button. Below this is a table of scheduled visits with columns for Visit ID, Patient, Patient Contact, Provider Information, Schedule Dates, Visit Status, Visit Reason, and Coupon Applied.

Visit ID	Patient	Patient Contact	Provider Information	Schedule Dates	Visit Status	Visit Reason	Coupon Applied
1120	Marc Goldberg DOB: 1950-05-10 Age: 67 Gender: Male State: MD	Mobile: (301)467-8530 Home: (301)983-6640	Don Goldberg (301)467-8530	Schedule Start Date: 05/22/2018 9:30 AM Scheduled by: Don Goldberg (Provider) Date Scheduled: 04/20/2018 6:33 AM	Visit Scheduled	meds	
1114	Alan Costner DOB: 1963-09-23 Age: 54 Gender: Male State: IL	Mobile: (513)907-3940	Dr. Roger Bannister (513)907-3940	Schedule Start Date: 04/19/2018 12:15 AM Scheduled by: Roger Bannister (Provider) Date Scheduled: 04/18/2018 1:34 PM	Visit Scheduled	sore throat	
1093	Adam Scott DOB: 1981-01-01 Age: 37 Gender: Male State: AZ	Mobile: (480)555-1111	Mr. test doc (555)555-5555	Schedule Start Date: 04/04/2018 9:45 AM Scheduled by: test doc (Provider) Date Scheduled: 04/04/2018 9:35 AM	Visit Scheduled	test visit	
1085	Matt Glassman DOB: 1979-06-10 Age: 38 Gender: Male State: AZ	Mobile: (480)111-1122 Home: (480)111-1111	Dr. Alex Smith (555)555-5555	Schedule Start Date: 03/30/2018 10:00 AM Scheduled by: Alex Smith (Provider) Date Scheduled: 03/28/2018 1:57 PM	Visit Confirmed	Follow up	Coupon Name: Free Visit Coupon Code: freevisit Discount: 100% Visit Fee: \$0.00

Completing a Test Visit

If you are interested in completing a test visit, please follow this workflow and use the coupon code EMTEST instead of billed.

Schedule New Visit

Clicking on the "Schedule New Visit" button will open the dialog box (shown below).

The dialog box titled 'Schedule New Visit' contains several input fields and buttons. It includes fields for 'Patient', 'Provider', and 'Reason', each with a 'Search' button. There is a 'Time' section with a dropdown menu labeled 'Please enter a provider' and a 'Select' button. Below that is a 'Coupon Code (optional)' field with an 'Apply' button. There are also 'Invited Family Member (optional)' and 'Invited Provider (optional)' fields, each with an 'Invite' button. At the bottom of the dialog are 'Schedule' and 'Cancel' buttons. The background shows a blurred view of the main interface with a patient's name 'Test Doc MD' and a schedule start date '04/04/2017 4:15 PM'.

The scheduler must enter a patient, provider, reason, and time to schedule the visit. They can also enter a coupon code and/or invite a participant (both are optional).

Selecting a Patient

Here the scheduler can search for an existing patient or register a new one.

The screenshot shows a web form titled "Schedule New Visit - Select Patient". It features a search section with four input fields: "First Name", "Last Name", "Date of Birth" (with a "MM/DD/YYYY" placeholder), and "Email". A blue "Search" button is to the right of the "Email" field. Below the search fields, it says "No patient matches". At the bottom right of the form are two buttons: "Register New Patient" (blue) and "Cancel" (grey). The footer of the form contains the following text: "Dr. Test Doctor10 MD (450)123-3276", "Schedule Start Date: 04/13/2017 3:30 PM", "Scheduled by: Test Doctor10 (Provider)", "Visit Scheduled", and "test".

When registering a new patient, the scheduler must enter the new patient's:

- First and Last Name
- Date of Birth
- Gender
- Email Address
- Home/Mobile Phone Number

The screenshot shows a web form titled "Schedule New Visit - Register Patient". It contains several required fields: "First Name (required)", "Last Name (required)", "Date of Birth (required)" (with dropdowns for MM, DD, and YYYY), "Gender" (with a "Select gender..." dropdown), "Email Address (required)", "Address Line 1" (with a "Street address" placeholder), "Address Line 2" (with an "Apartment, suite, unit, building, floor, etc." placeholder), "City", "State" (with a "Select state..." dropdown), and "Zip Code". There are also two phone number fields: "Home Phone (at least one)" and "Mobile Phone (at least one)". Below these are "Insurance Information" and "Eligibility Class" (with a "Select class for patient..." dropdown). At the bottom right, there are two buttons: "Continue" (blue) and "Return to Search" (grey).

Selecting a Provider

Here the scheduler can search for a provider to conduct the visit. Only existing providers can be selected; a new provider cannot be registered.

The screenshot shows a dialog box titled "Schedule New Visit - Select Provider". It contains a search form with two input fields: "First Name" and "Last Name". A blue "Search" button is positioned to the right of the "Last Name" field. Below the input fields, the text "No provider matches" is displayed. A grey "Cancel" button is located at the bottom right of the dialog box.

Selecting a Time

Here the scheduler selects a date, time, and duration for the visit. When selecting a different day, you will select the day you are looking for and then click on the "Find" button. If you don't select the find button, the day you have selected will not show up.

The screenshot shows a dialog box titled "Schedule New Visit - Select Time". It displays the following information:

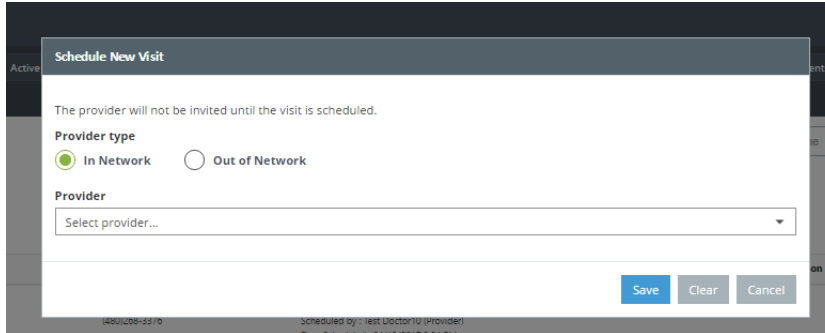
- Patient:** Smith, John
- Provider:** Hudson, Dr John
- From Date:** 04/20/2017
- Duration:** 15 (with a dropdown arrow)
- Find:** A blue button.
- Timeslots are in Local Time:** A label with "Select" and "Cancel" buttons.

Below this information, the timeslots are organized by day:

- Thursday - 04/20/2017:** A grid of 18 timeslot buttons ranging from 12:15 PM to 11:45 PM.
- Friday - 04/21/2017:** A grid of 8 timeslot buttons ranging from 12:00 AM to 03:45 AM.

Inviting a Participant

When inviting another provider, first select "In Network" or "Out of Network."




For In-Network: Select the provider from the drop-down list.

For Out of Network: Enter the provider's name and email address.

Viewing Visits

When viewing past/active scheduled visits, the scheduler has several actions they can perform. To see the list of actions, click on the Visit ID drop-down next to the patient's name.

Scheduled Visits

 Schedule New Visit

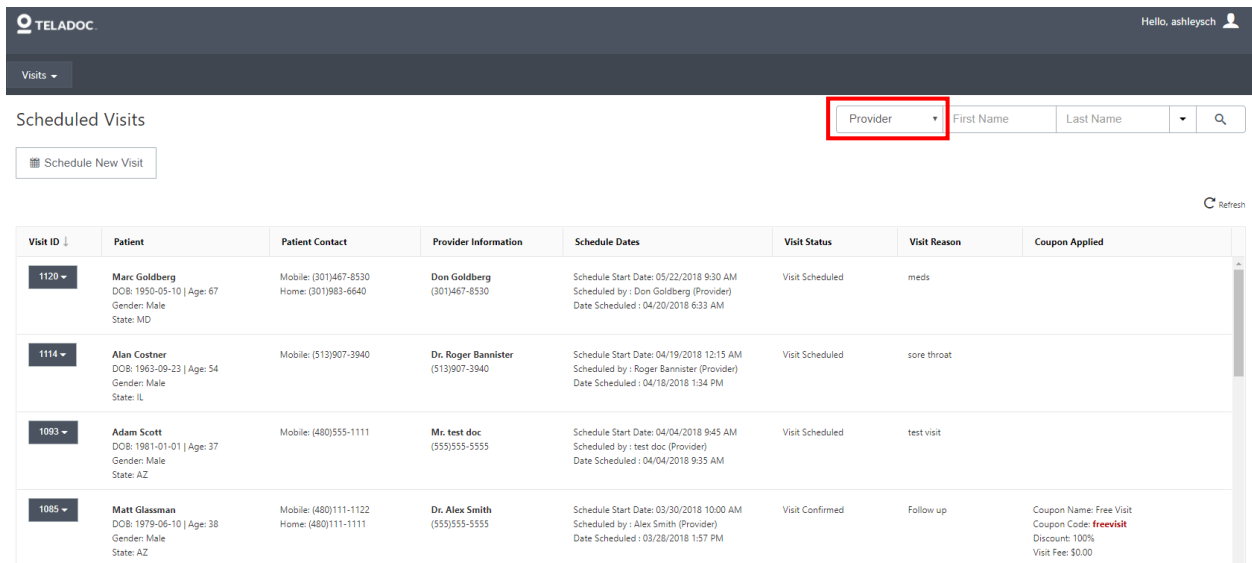
Visit ID ↓	Patient	Patient Contact	Provider Information	Schedule Dates
1120 ▼	Marc Goldberg DOB: 1950-05-10 Age: 67	Mobile: (301)467-8530 Home: (301)983-6640	Don Goldberg (301)467-8530	Schedule Start Date: 05/22/2018 9:30 AM Scheduled by : Don Goldberg (Provider) Date Scheduled : 04/20/2018 6:33 AM
		Mobile: (513)907-3940	Dr. Roger Bannister (513)907-3940	Schedule Start Date: 04/19/2018 12:15 AM Scheduled by : Roger Bannister (Provider) Date Scheduled : 04/18/2018 1:34 PM
1083 ▼	Adam Scott DOB: 1981-01-01 Age: 37 Gender: Male State: AZ	Mobile: (480)555-1111	Mr. test doc (555)555-5555	Schedule Start Date: 04/04/2018 9:45 AM Scheduled by : test doc (Provider) Date Scheduled : 04/04/2018 9:35 AM

Actions:

- Confirm – Confirms the date and time of a scheduled visit.
- Send Reminder – Sends the patient a reminder about their upcoming visit.
- Apply a Coupon – Apply a coupon code to the visit (BILLED)
- Change Provider – Allows the scheduler to select a different provider to conduct the visit.
- Reschedule – Change the date and the time of the visit.
- Cancel – Cancels the visit.

Searching for a Visit

To search for a specific patient and/or provider, using the dropdown, select the user's role then enter their first and last name and click search.



TELADOC Hello, ashleysch

Visits

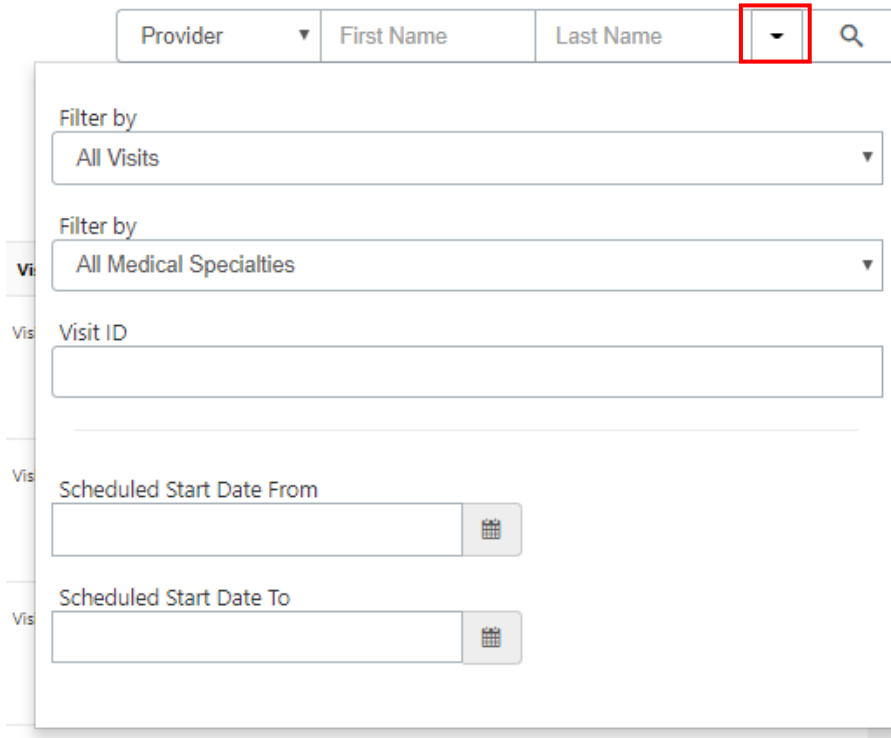
Scheduled Visits

Provider First Name Last Name

Schedule New Visit

Visit ID	Patient	Patient Contact	Provider Information	Schedule Dates	Visit Status	Visit Reason	Coupon Applied
1120	Marc Goldberg DOB: 1950-05-10 Age: 67 Gender: Male State: MD	Mobile: (301)467-8530 Home: (301)983-6640	Don Goldberg (301)467-8530	Schedule Start Date: 05/22/2018 9:30 AM Scheduled by: Don Goldberg (Provider) Date Scheduled: 04/20/2018 6:33 AM	Visit Scheduled	meds	
1114	Alan Costner DOB: 1963-09-23 Age: 54 Gender: Male State: IL	Mobile: (513)907-3940	Dr. Roger Bannister (513)907-3940	Schedule Start Date: 04/19/2018 12:15 AM Scheduled by: Roger Bannister (Provider) Date Scheduled: 04/18/2018 1:34 PM	Visit Scheduled	sore throat	
1093	Adam Scott DOB: 1981-01-01 Age: 37 Gender: Male State: AZ	Mobile: (480)555-1111	Mr. test doc (555)555-5555	Schedule Start Date: 04/04/2018 9:45 AM Scheduled by: test doc (Provider) Date Scheduled: 04/04/2018 9:35 AM	Visit Scheduled	test visit	
1085	Matt Glassman DOB: 1979-06-10 Age: 38 Gender: Male State: AZ	Mobile: (480)111-1122 Home: (480)111-1111	Dr. Alex Smith (555)555-5555	Schedule Start Date: 03/30/2018 10:00 AM Scheduled by: Alex Smith (Provider) Date Scheduled: 03/28/2018 1:57 PM	Visit Confirmed	Follow up	Coupon Name: Free Visit Coupon Code: freevisit Discount: 100% Visit Fee: \$0.00

Click on the down arrow and a drop-down menu will appear. Visits may be searched using various filters.



Provider First Name Last Name

Filter by
All Visits

Filter by
All Medical Specialties

Visit ID

Scheduled Start Date From

Scheduled Start Date To

Outreaching a Patient

Reached Patient Script

Hi this is _____(my name) and I'm calling from Jefferson's _____ Department for _____.

Is that you?

IF REACHED PATIENT

I'm calling to see if I can help you get set-up for your appointment on ____ (date) at ____ (time). We sent some automatic directions to your ____ email address, when we scheduled the appointment. I wanted to know if you saw these directions or needed any help getting set up.

DID SEE EMAIL:

Do you have any questions on how to connect?

What device were you planning on using?

- If an Apple smartphone/tablet, did you have a chance to download the JeffConnect app?
- If a computer, does it have a webcam/camera?

Did you have a chance to register your account yet?

Do you need me to send you another copy of the instructions?

Call us if you have any questions or need assistance.

DID NOT SEE EMAIL:

The easiest way to connect to the appointment is with an Apple tablet or smartphone, or a computer with a camera. Do you have one of those devices available?

On smartphone/tablet:

1. Download the JeffConnect app (blue profile of Thomas Jefferson).
2. Register your account.
3. Log in, click "My Visits", and go through the screens to join the video 5-10 minutes before your appointment. You will hear a song/jingle once you have entered the virtual waiting room. Wait for your provider to join; they normally join within 15 minutes of the appointment time.

On computer:

1. Go to jeffconnect.org
2. Register your account.
4. Log in, click the appointment under "My Visits", and go through the screens to join the video 5-10 minutes before your appointment. You will hear a song/jingle once you have entered the virtual waiting room. Wait for your provider to join; they normally join within 15 minutes of the appointment time.

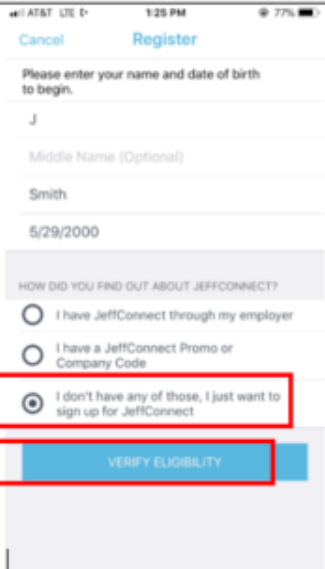
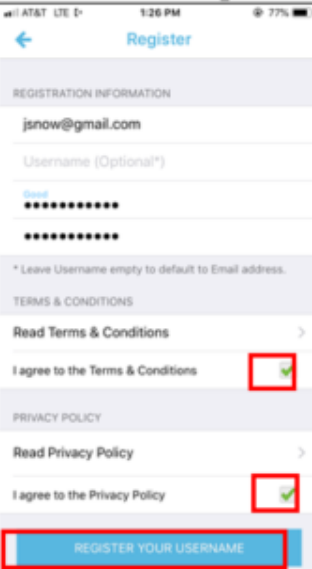
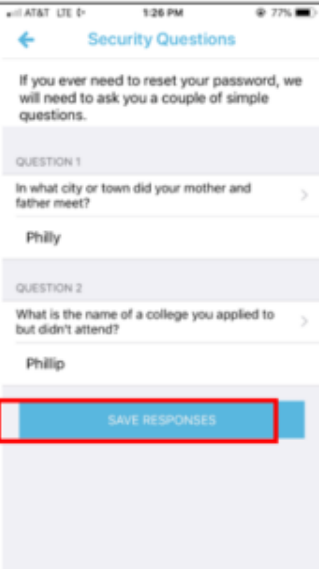
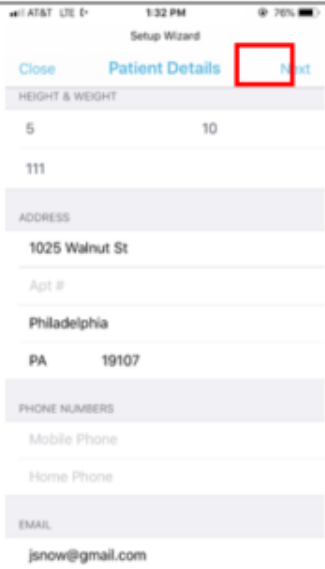
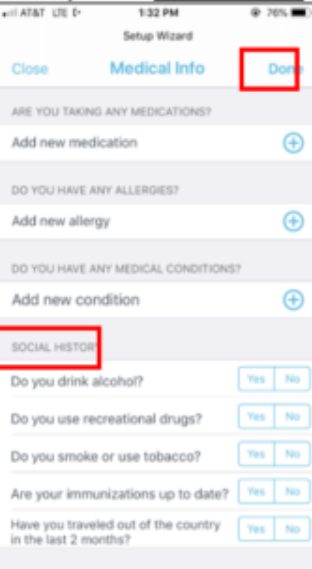
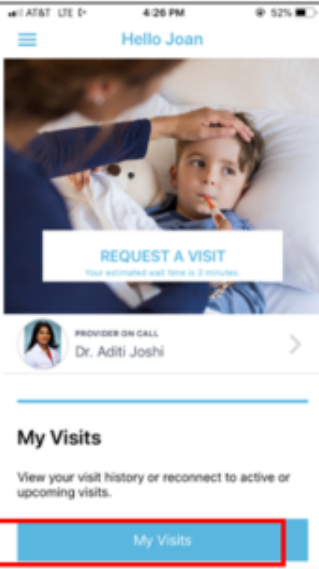
Voicemail Script

Hi this is Jefferson's Telehealth Department calling for _____ (patient first name). I'm calling to see if you received our email with directions on using the JeffConnect app, sent when the appointment was scheduled. This app can be used for things like video visits. Please call us if you have any questions, if any issues arise, or if you'd like to do a test call at _____ (phone number).

Email Script

Please see the email below. This is currently sent at the time of scheduling automatically through JeffConnect. If a patient requires another email, please send this email along with the [JeffConnect Mobile Registration sheet](#).

JeffConnect Mobile Registration

 <ol style="list-style-type: none"> 1. Enter your name and date of birth 2. If you are not a Jefferson employee select option "I don't have any of these" 3. Click verify eligibility to continue. 	 <ol style="list-style-type: none"> 4. Enter the email address JeffConnect used to contact you. Create a password. 5. Read and agree to the terms and condition and privacy policy. 6. Click "Register Your Username" 7. If you get a prompt saying your email is already in use: Click continue. 	 <ol style="list-style-type: none"> 8. Select and answer 2 security questions.
 <ol style="list-style-type: none"> 9. Enter your patient details, then click "Next" to continue. 	 <ol style="list-style-type: none"> 10. You are only required to answer the social history questions. 11. Click "Done" one these have been answered. 	 <ol style="list-style-type: none"> 12. Your scheduled visit should be listed under "My Visits" 13. Call your office if you do not see the appointment listed.

Hello,

This is the Telemedicine Department at Jefferson Health contacting you about your upcoming video appointment.

Since this is a video appointment, you will not be going into the office. If you need to cancel, or reschedule, then please contact your provider's office.

TO PREPARE FOR YOUR VISIT

Download the JeffConnect app to a smartphone or tablet. You will find the JeffConnect app in the Google Play and Apple App Store

The app icon is a blue silhouette of Thomas Jefferson

NOTE: You **MUST** download the app if you are using a mobile phone or tablet. Internet browsers on smartphone and tablets do not support video visits.

Once the JeffConnect app is downloaded:

1. Open the JeffConnect app, log on and accept the terms and conditions
2. **If you do not have a Username or Password** - follow the steps below:
 1. Choose REGISTER YOUR ACCOUNT to create a Username and Password
 2. Enter the email address the doctor's office used to create your scheduled visit
NOTE: JeffConnect will inform you your email address is already in use, this is you! Choose Continue to continue with your registration
 3. **Complete required information** after entering your email
 1. **Required:** Height and weight and Yes/No answers to social questions
 2. **Optional:** All other information

ON THE DAY OF YOUR VISIT

Allow yourself 15 minutes before your appointment time to follow these steps:

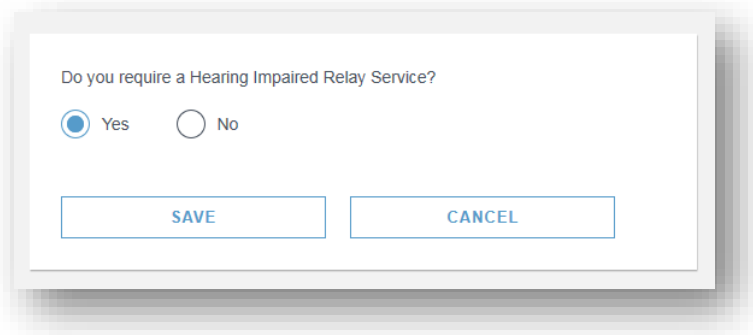
1. Open the JeffConnect app and log in
2. JeffConnect will ask you if you would like to join your already scheduled appointment, say Yes.
3. Confirm: the patient and location, type of visit, contact number in case of problems, provider you will be seeing, and if you would like to invite a family member.
4. Confirm: the reason for the visit.
5. You will be required to find and select a pharmacy.
6. Confirm: the fee (copay) for the visit.
7. Scroll to review the information you have entered, review and certify the terms and conditions, and press **Start Visit**.
8. Once the Start Visit button is pressed you will hear a jingle about JeffConnect. You will be in the virtual waiting room and must wait until the provider connects to you.
NOTE: If your wait is significantly longer than expected, please call your provider's office.

If you do not see your visit listed when you login or if you need assistance you can call 215-955-7975 and select Option 4 for Telehealth.

Hearing Impaired - Patient Cannot Hear (or has difficulty hearing)

To enable Hearing Impaired from the website jeffconnect.org:

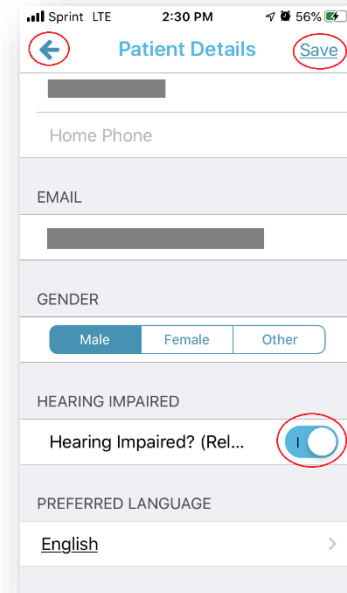
1. Click **Profile** button in JeffConnect
2. Click **Change** for HEARING IMPAIRED on your General tab (the default tab.)
3. Click **Yes** to the question Do you require a Hearing Impaired Relay Service?
4. Click **Save**.



5. Click **Close** in lower left corner to return to the main screen.
You may have to scroll to see the Close button.

To enable Hearing Impaired from the mobile app the steps are:

1. In JeffConnect, tap **My Account** at bottom of screen. *You may have to scroll to the very bottom of the app.*
2. Tap **DETAILS** associated with the Patient.
3. Scroll to bottom and enable the slider for Hearing Impaired
4. Tap **Save** in upper right corner
5. Tap **back arrow** in upper right corner to return to main screen



Patient:

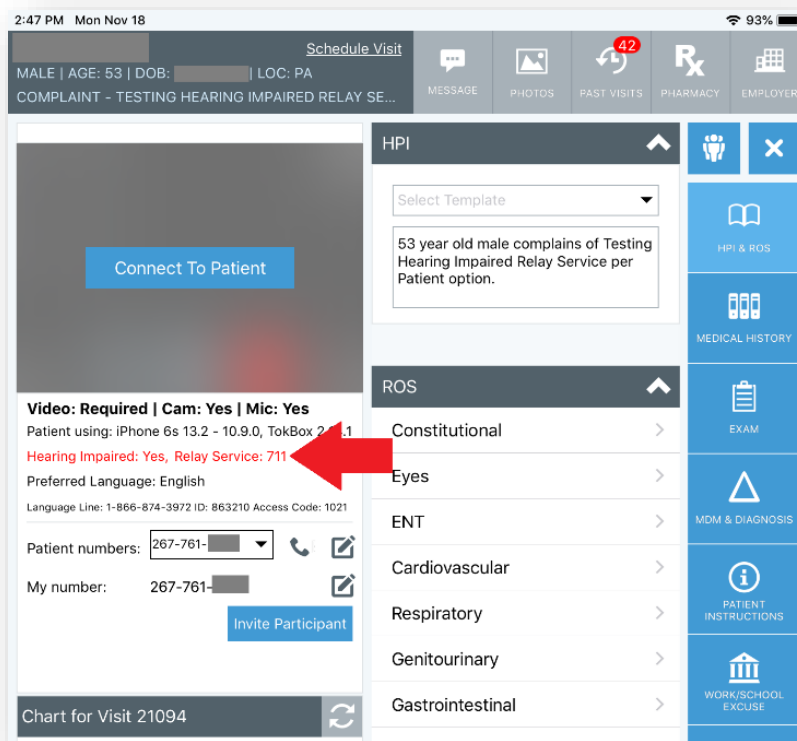
When a Patient starts their JeffConnect experience (On-Demand Visit or Scheduled Visit) with Hearing Impaired enabled, they see nothing different in JeffConnect.

But the Patient most likely has a TTY device or TTY app which transmits their typed words to a verbal translator who read from the TTY device to the Provider / hearing participant. The hearing participant then speaks to the translator who enters the information back into their TTY device for the Patient to read.

Provider:

When a Provider opens the Patients JeffConnect chart they see:

Hearing Impaired: Yes, Relay Service: 711



Call 711 from a non-Jefferson phone (you may use a cell phone.) Provide all requested information to the Agent on the other side.

711 is an FCC requirement

https://www.fcc.gov/sites/default/files/711_for_telecommunications_relay_service.pdf

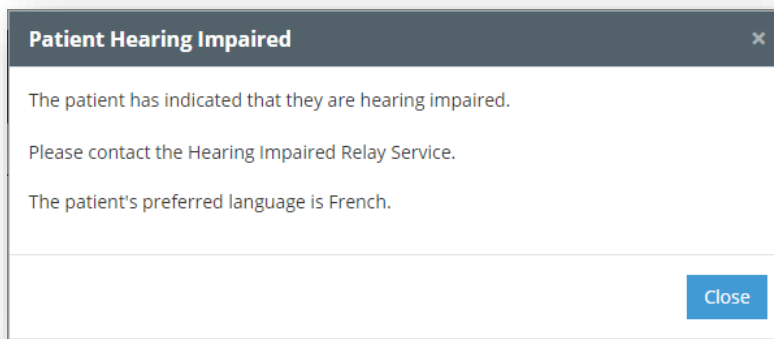
Hearing Impaired and Preferred Language

Patient:

When a Patient starts their JeffConnect experience (On-Demand Visit or Scheduled Visit) with Hearing Impaired enabled, they see nothing different in JeffConnect.

Provider:

When a Provider opens the Patients JeffConnect chart they see a popup box informing them the patient has indicated that they are hearing impaired and if the patients preferred language is not English then the provider is also alerted the preferred language is x.



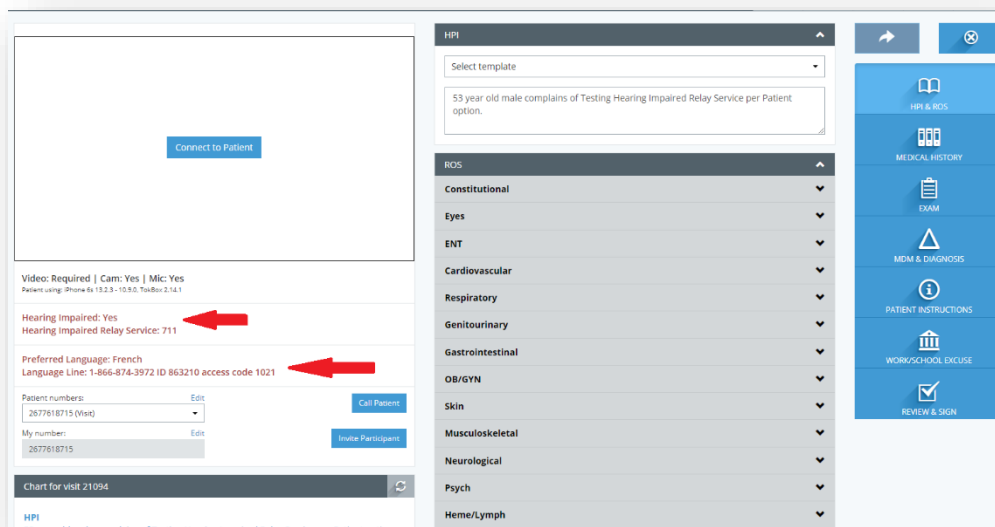
The Provider also sees hearing impaired and language information within the chart

Hearing Impaired: Yes

Hearing Impaired Relay Service: 711

Preferred Language: French

Language Line" 1-866-874-3972 ID 063210 access code 1021



Dialing Out Information

Dialing 711 for TTY Operator when Patient has selected Hearing Impaired

When a patient has enabled the Hearing Impaired option in JeffConnect you will see a notification to dial **711**. **711** is the required three digit dialing number, similar to **911**, the FCC has mandated to be available by any phone. **711** will put you in touch with a **711** agent who acts as a middle man between you and a hearing impaired person.

The **711** service acting as a middle man, an agent, verbally relays to you what the hearing impaired person has typed into a TTY device. And when you speak the **711** service agent then types into a TTY device your words which are then relayed visually to the hearing impaired persons TTY device.

Dialing 1-866-874-3972 ID 063210 access code 1021 for Language Translator

When a patient activates their JeffConnect account they enter their Preferred Language. And when a patient selects a language other than English you will see under the Connect to Patient box:

Preferred Language: Language
Language Line" 1-866-874-3972 ID 063210 access code 1021

When you call **1-866-874-3972** the computerized attendant will ask you for the ID, access code, and what language needs to be interpreted. The system will then locate a human being who can translate the patient's language to and from you.

The language translator will not be in the video. They will be listening just as you are but they are remote on their phone.


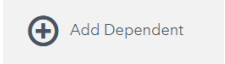
Registration (Patient under 18 years old)

Dependents who are minors cannot have an account or initiate video visits by themselves. To assist, you must add them to your account. Minors can also be assisted by any Spouse/Significant Other whose is linked as a dependent on your account. All dependents who are connected to your account can also share any Jefferson-affiliated medical plan coverage you have for the On-Demand Service.

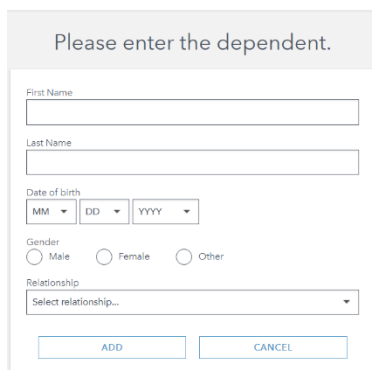
To add dependents:

- From the app:
 - Go to the bottom of the first screen and tap **“My Account”**.
 - Tap the **+** symbol in the upper right corner.
 - If you do not see any dependents, then choose **“Add New Dependent”**.
 - Follow any screens to set up your dependent and/or Spouse accounts.
- From the website: Choose **+ Manage Dependents** and follow instructions to add dependents.

How to Register a Minor

1. Patients younger than 18 need to be listed as dependents on a parent/guardian JeffConnect account.
2. From JeffConnect.org click the **“Register Your Account”** button. Complete the steps of registration using the parent or guardian information. 
3. Once the parent/guardian account is registered stay logged in on the patient account. Click the button in the top right corner **“Add Dependent”** 

4. Enter the information for the dependent patient and then click **“add”**.



Please enter the dependent.

First Name

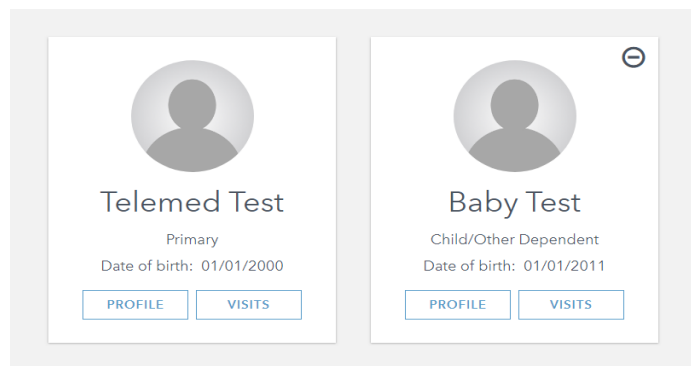
Last Name

Date of birth
MM DD YYYY

Gender
 Male Female Other

Relationship
Select relationship...

5. Once added you will see 2 patient profiles when logged in to JeffConnect. Click the button that says Profile under the patient/dependent account. Enter the address, height, weight and phone number.



Two patient profiles are shown side-by-side. The first profile is for 'Telemed Test', labeled as 'Primary' with a date of birth of 01/01/2000. The second profile is for 'Baby Test', labeled as 'Child/Other Dependent' with a date of birth of 01/01/2011. Both profiles have 'PROFILE' and 'VISITS' buttons at the bottom.

6. Log out of the patient account. Log in to scheduler account. Select the schedule a visit button. Search for the patient name. After selecting the patient, use the drop down to select the parent or guardian. Once selected hit the blue continue button.

Schedule New Visit - Review Patient

First Name (required)
Baby

Last Name (required)
Test

Date of Birth (required)
01 / 01 / 2011

Gender
Select gender...

[Information for Parent or Guardian](#)

Select Parent or Guardian
Select parent or guardian...

Continue Return to Search

7. Follow the usual steps to finish scheduling the visit. See the Scheduler 1 page guide for assistance if needed.
8. When connecting to the scheduled visit, log in to JeffConnect using the parent or guardian login information.

Completing a Test Call

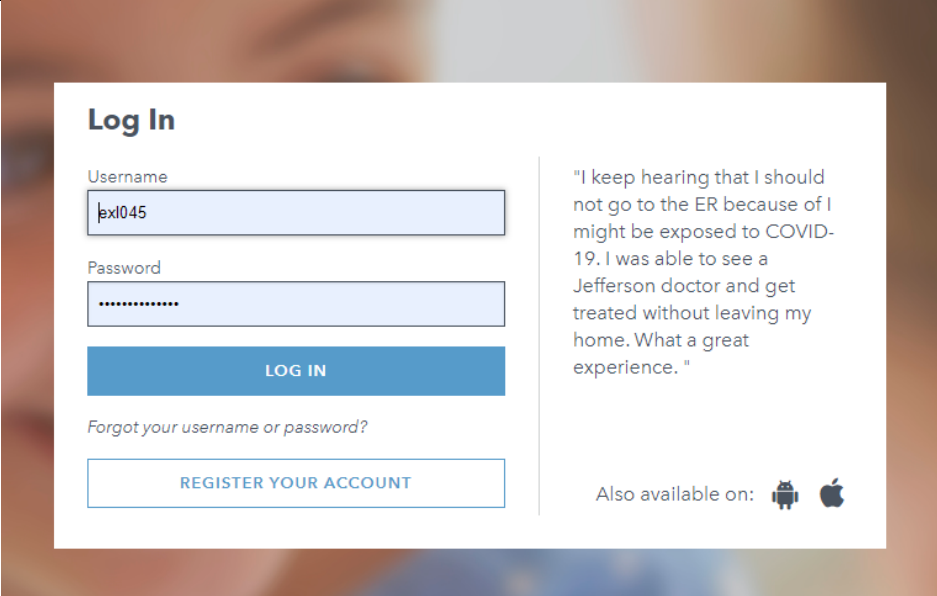
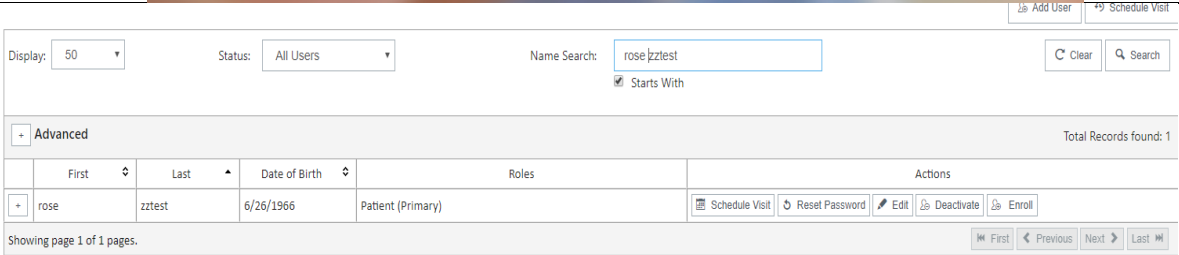
Super Users will be given provider access with their accounts. This access will be associated with the practices of that entity.

Currently, the CORE group of Super Users will have access to all practices. As we move into a model where each practice supports itself, schedulers will have provider access for their practice.

In order to schedule a test call, the following two things need to occur:

1. Receive provider access from Telehealth Team during orientation and training
2. Complete Super User Training by reviewing guide and working with telehealth department/identified entity Super Users.

From there, you will be able to assist a patient in scheduling a test visit to ensure they are set up for telehealth.

<p>Log into JeffConnect with person account log in</p>	
<p>Under Person Search, identify name of patient</p>	

Choose Schedule Visit, and ensure with patient all demographics are correct. If correct, press continue

Schedule New Visit - Review Patient

First Name (required) **Last Name (required)**

Date of Birth (required) **Gender**

Email Address (required)

Address Line 1

Address Line 2

City **State** **Zip Code**

Home Phone (at least one) **Mobile Phone (at least one)**

To select provider, search for your own name (can search by last name). Press select once identified.

Schedule New Visit - Select Provider

Search by

First Name **Last Name**

1 provider

Lewallen, Elizabeth
 lewallen@dukes.jmu.edu Mobile: (215)499-6376 SMS: 2154996376

6/26/1966 Patient (Primary)

Select the department in which their appointment is scheduled.

Enter Reason: Test
 Time: Next available
 Coupon Code: EMTEST (apply)

Press Schedule

Schedule New Visit

Patient
 ✕ Search

Service

Provider
 ✕ Search

Department

Reason
 ✕

Time
 Select

Coupon Code (optional)
 Apply

Invited Family Member (optional)
 Invite

Invited Provider (optional)
 Invite

Schedule Cancel

Once scheduled, go back to the home screen of JeffConnect and go to "Change Portal" and choose Provider Portal

JeffConnect Manage Tickets | Support Ticket | Hello, Elizabeth Lewallen

Person Search | Account Overview | Active States | Coupons | Message Templates | On-Call | State Edit | Visit History | Wait Queue | Medical Specialties | Advertisements | Settings | File Uploads

Provider Shifts | Visits | Change Portal | Payers

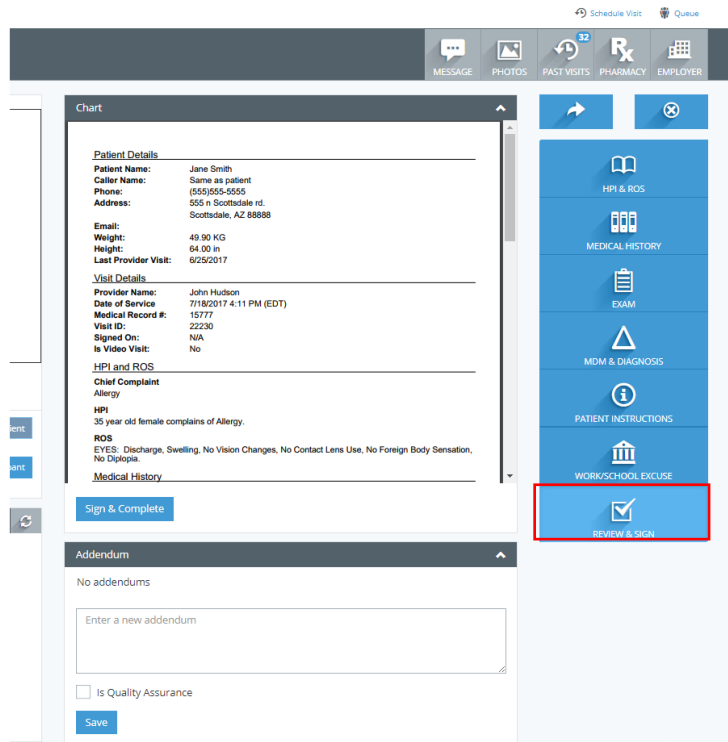
In the Provider Portal, see the patients name

Last update: 04/05/2020 6:19 PM SEARCH

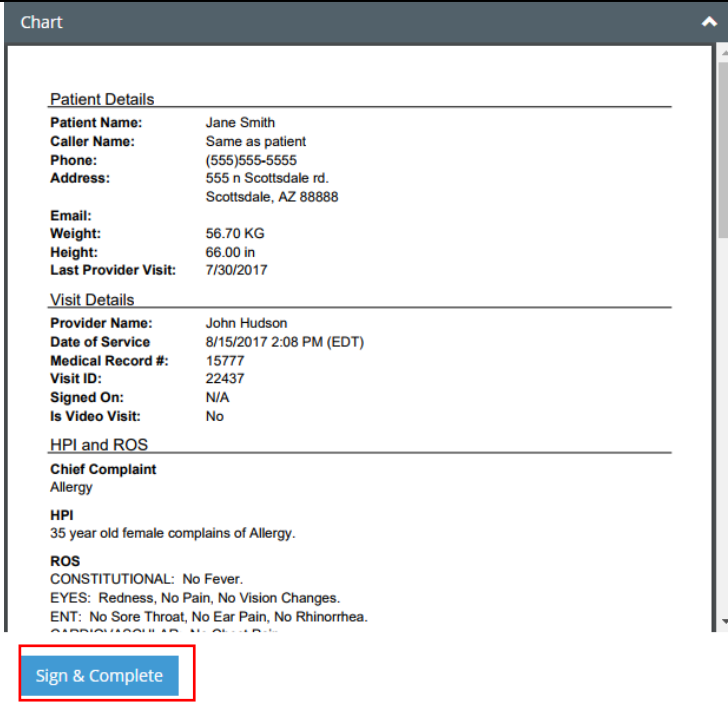
SCHEDULED VISITS							REFRESH
Rose Zztest Sex: Female Age: 53 DOB: 06/26/1966	PA	General Medicine test	Visit ID 47109	Scheduled 04/05/2020 6:30 PM	Provider E.Lewallen	Status Scheduled	VIEW 📄

Complete the appointment with the patient and confirm all technology is working (audio and visual connections).

When the test is complete, chose review and sign on the right hand side of the screen



Finally, click "Sign and Complete" to close out the chart. This completes the test visit.



Troubleshooting:

What to do when a patient has multiple JeffConnect accounts and the appointment is in the wrong account?

Patients with Jefferson Medical Plans have the insurance benefit of video visit copays being no larger than their copay for an in-person visit. This affects the process.

	General Patient	Patient with a Jefferson Medical Plan
Scheduled Visit	Quick: Cancel old appointment (be aware to remember or first screenshot the copay code, time date and MD name) and reschedule in the account they activated.	Quick: you must keep the appointment in the account that has eligibility. If this is not registered, register it and move the appointment.

Resetting Passwords

1. You need the patient on phone to reset password. Have patient confirm DOB and one other identifier (address/email). Click "Reset Password" and continue to reset the password.

Display: 50 Status: All Users Name Search: elizabeth lewallen Starts With

+ Advanced Total Records for

	First	Last	Date of Birth	Roles	Actions
+	Elizabeth	Lewallen	5/18/1992	Site Admin (Registered), Provider (Registered), Patient (Primary), Call Center (Registered), Scheduler (Registered)	<input type="button" value="Schedule Visit"/> <input type="button" value="Reset Password"/> <input type="button" value="Edit"/> <input type="button" value="Enroll"/>

2. If you leave the default reset password (password123) the patient will be prompted to reset their password when logging in.
 - o You can also directly change the password to what they want, if they would prefer

	First	Last	Date of Birth	Roles	Actions
+	Elizabeth	Lewallen	5/18/1992	Site Admin (Registered), Provider (Registered), Patient (Primary), Call Center (Registered), Scheduler (Registered)	<input type="button" value="Schedule Visit"/> <input type="button" value="Reset Password"/>

Please enter the new password for this user.

If you leave the default password value, the user will be prompted to change their password the next time they log in.

New Password

Showing page 1 of 1 pages.

A patient or provider name is not coming up when I am scheduling an appointment.

Search by the person's last name and make sure the "First Name" and "Last Name" boxes are correct. Spelling counts, so ask if they registered the account with hyphenated last names.

If the patient name does not come up, the patient might not have activated their account. Click "Register New Patient" and fill out the required information. Make sure the email address is correct to the outreach email is sent to the correct place.

If the provider name does not come up, contact the Telehealth Department and include the name of the scheduler, provider, and patient and state the patient resides.

What do we do when a provider or scheduler requests a JeffConnect account?

Contact the telehealth department using the JeffConnect inbox and/or call 215-503-5515 with the provider/scheduler name, contact information, and practice, and the available technology they have (computer, iPad, iPhone).

How can we best help patients prepare for a visit?

In the Call Center view, make sure:

- Patients registered their JeffConnect account and can have the scheduled visit under that account.
- Patients have the JeffConnect app downloaded to a smartphone or tablet, OR know to go to jeffconnect.org on a computer with a webcam.
- Patients received the emailed instructions when their visit was scheduled. If not, confirm the email in their account is correct.

In the scheduler view, make sure:

- The correct coupon code is applied to all visits ("Billed" for most visits, "emtest" for test visits).

During a visit:

How can a patient turn the song/jingle's sound off when waiting for the doctor?

Press pause on the video or click the mute button on the video's sound. You may have to tap the video to see these sound options. When the Provider joins the video, make sure the sound is no longer muted.

What to do if the sound isn't working?

Have the patient and provider mute and un-mute the audio, and turn up the volume on their devices. Any phone calls or Zoom visits that are already open should be closed before you join the video, or else they will prevent the audio from working over the video. Generally, the patient and provider should both leave and re-join the visit. Make sure they are both connected to the internet. Smartphone users can also try joining with cellular data.

What to do if the video isn't working?

Have the patient and provider turn the video off and on. Generally, the patient and provider should both leave and re-join the visit.

Make sure they are both connected to the internet. Smartphone users can also try joining with cellular data.

Lessons Learned and Workflows to Mitigate and Escalate Issues

Top 5 JeffConnect New Patient Data Entry Oops'es:

1. First and Last name entered backwards (Jonas Salk and not Salk Jonas).
2. Patients with spaces in their last name (create searching issues and duplicate patients.)
 - Example: John De Luca -
Searching for first name **John** & last name **De Luca** returns nothing.
Searching for first name **John** & last name **De** returns *John De Luca*.
 - *And Daniel and Dan are not the same either. Patients using shorten names will not match what Schedulers enter.*
3. Patient already existed in JeffConnect with a DOB a day off, or was entered with a DOB by a day off
 - Example: 5 instead of 6 if you see a date of birth off by a day, or a year off by a year, but everything else looks correct then call the patient and ask "Do you already have a JeffConnect account but the DOB is wrong?"
 - If they say yes then schedule the patient and submit a ticket to have the patient's info updated.
4. Type-o's in the e-mail address. You can enter superman@gmale.com. The application does not know this is not valid because it may be valid. E-mail addresses must be correct.
5. Names entered in all caps or all small letters (BARBARA JEAN IS SCHEDULED. matt doyle will be the doctor). No patient names should be entered in all caps or all small case.

Super User Tips:

Patient Searches

1. When searching for patients, take advantage of the advanced search options. (Click the plus sign to bring up other searching options)
2. This is especially helpful for patients who you cannot find in JeffConnect. You can search with minimal information (you can enter only a few letters in a field to search, you do not need the full name, you can also search by patient email or username)

CALL CENTER - PERSON SEARCH

Display: 50 Status: All Users Name Search: Starts With

Advanced

First Name	Last Name	Date of Birth	Relation	Role
<input type="text"/>	<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="All"/>	<input type="text" value="All"/>
<input checked="" type="checkbox"/> Starts With	<input checked="" type="checkbox"/> Starts With			
UserName	Account/Company	Class	Email	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Total Records found: 3

3. You can edit a variety of patient information from the call center view (name, DOB, email or username)

- a. Email addresses cannot be changed from the edit button when the patient account is not registered and requires a ticket to the service desk (which includes the patient name, DOB, and correct email address)
4. If a patient has multiple accounts, submit a ticket to the helpdesk to merge the accounts or deactivate any unused accounts.

Scheduler Cannot Find Provider

1. A scheduler and a provider must be in the same department in JeffConnect in order for the scheduler to find them.
2. Search the provider in JeffConnect, click edit to check what department and specialty their account has.
3. Search the scheduler in JeffConnect, click edit to grant them access to the same department/specialty as the provider.
4. NOTE: do not check the general medicine check box under service lines

Patient Error Message "Update Profile"

1. This error occurs when a patient tries to start a JeffConnect visit but they did not enter the 5 social history questions when creating their JeffConnect account (do you drink, do you smoke..)
2. The patient will be prompted to enter this information when starting their visit (second screen on computer, third screen on mobile)
3. If the patient is on the homepage of their account, they can also add this information by
 - a. Mobile app
 - i. My Account
 - ii. Click Name
 - iii. Click Medical Info
 - iv. Answer Social History
 - b. Computer
 - i. Click profile
 - ii. Click medical history tab at top
 - iii. Answer social history in bottom right

Eligibility Issues

Follow the steps below for each prompt to mitigate issues for patient and providers as they relate to eligibility issues:

Can't schedule a patient, ineligible for service:

When scheduling a patient, you may receive an error stating that the patient is ineligible for services and cannot schedule the appointment. If you receive this error, please follow the following steps:

Step 1: Determine if the patient has a second email address.

- If they do, instruct them to register for a retail account with the new email address. Schedule the appointment under this account.
 - If patient still gets error have them change name slightly (example: if Donald Trump is giving error have them register Donald J Trump
 - Schedule under account patient just made

- Then, place a Service Now Ticket to merge accounts with patient name and DOB

If they do not have a second email address:

Step 2: place a Service Now Ticket with the patient name and DOB in order to create a ticket with the vendor.

Step 3: If the appointment is within 24 hours, reschedule appointment 2 business days out for vendor to fix.

Patient has duplicate accounts:

If a patient has a duplicate account, ensure with patient that appointment is visible under the correct account.

If the appointment is visible for the patient:

Step 1: Create a Service Now ticket for a merge account with patient name and DOB

If the appointment is not visible for the patient:

Step 1: Cancel the current appointment for the patient

Step 2: Reschedule the appointment under the correct account the patient has access to

Step 3: Create a Service Now ticket for a merge account with patient name and DOB

Patient is a dependent and has issues with account creation:

This is a unique issue that should not happen if patients are checking their account prior to their appointment. However, we have noticed individuals using their parents account and providers documenting under the dependent in the EMR.

If this happens, please place a Service Now Ticket with primary name and DOB and dependent name and DOB, provider name, and date and time of appointment for the vendor to switch information in JeffConnect.

General Issues

Patient Does Not See Scheduled Visit in Their JeffConnect Account

The only way this could be happening is the patient did not create an account, or the patient did create an account and it did not match what the scheduler created. The steps below describe how to escalate the issue:

Step 1: Make sure the patient registered their account. Ask them for the exact name and spelling on their account (displays on homepage on website and under My Account on Mobile App)

Step 2. Provider alerts schedulers they cannot see patient for date and time

Step 3: Scheduler must find out if the patient created their account, and if they did then see if it is different than what the Scheduler entered

Step 4: Schedulers can and should cancel the previously scheduled visit and make the visit on the account the patient created and move on. Tell patients to ignore any cancellation emails.

Step 5: Schedulers may submit a Service Now ticket for the patients accounts to be modified or merged if more than 1 exists.

Audio and Visual Issues

Follow the steps below for each prompt to mitigate issues for patient and providers as they relate to audio and visual issues:

A patient can see and/or hear the provider, but cannot hear and/or see the provider:

Step 1a (cannot hear provider): Check that the microphone does not have a line through it on the provider's screen to determine if microphone is on for provider

- Determine device provider is using
 - If on desktop: go to controls and check volume
 - If on smartphone or tablet:
 - Turn volume up on phone and/or
 - Go into settings and adjust volume. In settings, look for JeffConnect app. Ensure microphone is enabled.
 - Try having the provider use headphones

Step 1b (cannot see provider): Check to determine if camera is on for provider

- If on desktop: go to controls and check camera
- If on smartphone or tablet:
 - Check that nothing is covering the camera
 - Check that camera is enabled

Step 2a (cannot hear provider): Check to determine if volume is up for patient

- Determine device patient is using
 - If on desktop: go to controls and check volume
 - If on smartphone or tablet: turn volume up on phone, go into settings and adjust volume.
 - Try having the patient use headphones

Step 2b (cannot see provider): Check to see if all permissions were allowed by patient

Step 3: If on and not working, instruct both parties to log off, close browsers, and log back into appointment.

Step 4: If problem did not resolve, both volumes have been adjusted, and all permissions were allowed, either

- Call the patient on the phone and use phone audio with JeffConnect video
- Reschedule appointment when second device is identified
- Complete a telephone encounter

Step 5:

- If identified by Super User: Enter a Service Now Ticket or email JeffConnect@jefferson.edu with the name and DOB of patient
If identified by other: escalate to Super User, then follow them follow same process

A provider can see and/or hear the patient, but cannot hear and/or see the patient:

Step 1a (cannot hear patient): Check to determine if microphone is on for patient

- Determine device provider is using
 - If on desktop: go to controls and check volume
 - If on smartphone or tablet:
 - Turn volume up on phone and/or
 - Go into settings and adjust volume. In settings, look for JeffConnect app. Ensure microphone is enabled.

Step 1b (cannot see patient): Check to determine if camera is on for patient

- Determine device provider is using
 - If on desktop: go to controls and check camera
 - If on smartphone or tablet:
 - Check that nothing is covering the camera
 - Check that camera is enabled

Step 2a (cannot hear patient): Check to determine if volume is up for provider

- Determine device patient is using
 - If on desktop: go to controls and check volume
 - If on smartphone or tablet: turn volume up on phone, go into settings and adjust volume.

Step 2b (cannot see patient): Check to see if all permissions were allowed by provider

Step 3: If on and not working, instruct both parties to log off, close browsers, and log back into appointment.

Step 4: If problem did not resolve, both volumes have been adjusted, and all permissions were allowed, either

- Reschedule appointment when second device is identified
- Complete a telephone encounter

Step 5:

- If identified by Super User: Enter a Service Now Ticket or email JeffConnect@jefferson.edu with the name and DOB of patient
- If identified by other: escalate to Super User, then follow them follow same process

Registration:

Follow the steps below for each prompt to mitigate issues for patient and providers as they relate to registration issues:

Choosing from the three registration options:

Currently, there are three choices for registration:

Let's get started.

Tell us about yourself.

First name

Middle name

Last name

Date of birth
MM DD YYYY

How did you find out about JeffConnect?

I have JeffConnect through my employer

I have a JeffConnect Promo or Company Code

I don't have any of those, I just want to sign up for JeffConnect

1. Only use this option if patients are employees of Jefferson, Silvi, Ambulanz, Wills Eye and/or are members of IBX
2. This is the least used option and may have received a code from the telehealth department
3. Most common and retail account. If they are not part of the groups in Option 1, choose this

If patients end up with duplicate accounts, ensure the appointment is scheduled under the correct account and place a Service Now Ticket with the patient name and DOB for merge.

Patient puts in different name than what practice puts in:

Patients should be instructed to sign up for JeffConnect with their legal name (name on license or birth certificate), but sometimes, patients create different accounts with names that vary from the EMR. When this happens, duplicate accounts are created.

In order to resolve this issue, ensure the appointment is scheduled under the account the patient has access to and create a Service Now ticket with patient name, altered name, and DOB for a merge account.

Patient enters incorrect date of birth:

DOB can be fixed by Super Users with Call Center access. If a patient has an incorrect DOB, work with office staff to fix the issue. The place a Service Now Ticket with patient name, incorrect DOB, and correct DOB for it to be permanently fixed by vendor.

Patient does not know what email to register account with:

When outreaching patients, it is important to look for them in patient search to identify if they have an email address already in an unregistered account. This may occur if their information was uploaded through an eligibility file with email included. Not checking this may create duplicate accounts or ineligibility issues. If this occurs, reset their password and inform them of email address.

Service Now Request

Call 215-955-7975 and Choose Option 4 to verbally report issues

Procedure

- 1.) Find the icon on your desktop that allows access to the Solution Center Portal or go to

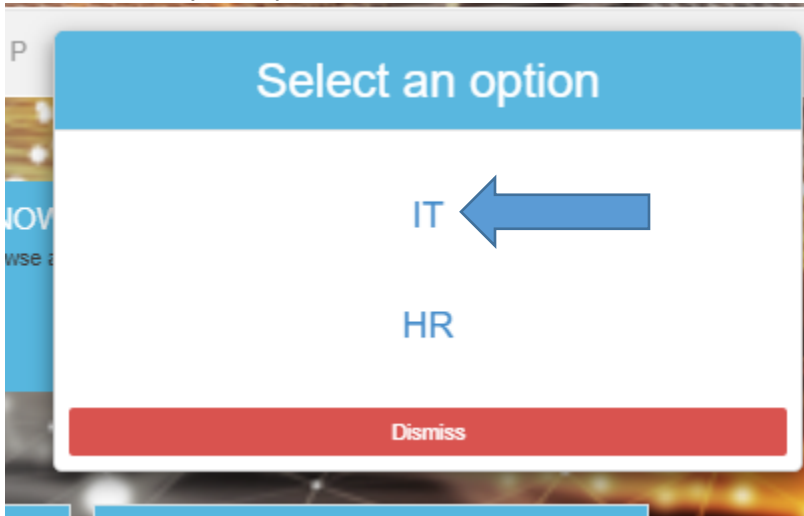
https://jefferson.service-now.com/sc_portal



- 2.) Choose the Icon Marked **REPORT AN ISSUE**, which is the 3rd tile from the left on the screen



- 3.) Choose IT as your option



- 4.) Then fill out the request form with as much information as possible and choose **Submit**, you should choose the option "**This is being reported for another person**" and their contact information is applicable.

Name
Michael Fox

Options

- This being reported for another person
- Might be affecting multiple systems/users

*Contact Number
215-605-1783

*Organization
Center City/Methodist

*Department
Chief Digital Officer

*Building
833 Chestnut St.

*Floor
06

*Room
600

*Category
-- None --

*Short Description

*Detailed Description

Submit Add attachments

Required information **Category** **Short Description** **Detailed Description**

**In the description fields try to add MRN, date and time of appointment and provider being seen, and CSN if you are to find the CNS number of the appointment, if in this issue occurred in EPIC. If this is a hardware issue, please try to grt as much information about devices...software version number, PDA# if it's a hospital owned iPad, or PCS number if it's a hospital owned PC. Include the words telehealth in ticket to ensure it reaches the department faster

Contacts:

IT Help:

Service Now Solution Center or 215-955-7975

Telehealth Department:

telehealthfeedback@jefferson.edu

Contacts:

Liz Lewallen, Project Manager

Elizabeth.lewallen@jefferson.edu

484-393-2896

Frank Sites, Vice President

Frank.sites@jefferson.edu

484-268-7501