

Vitality does telehealth: a tutorial

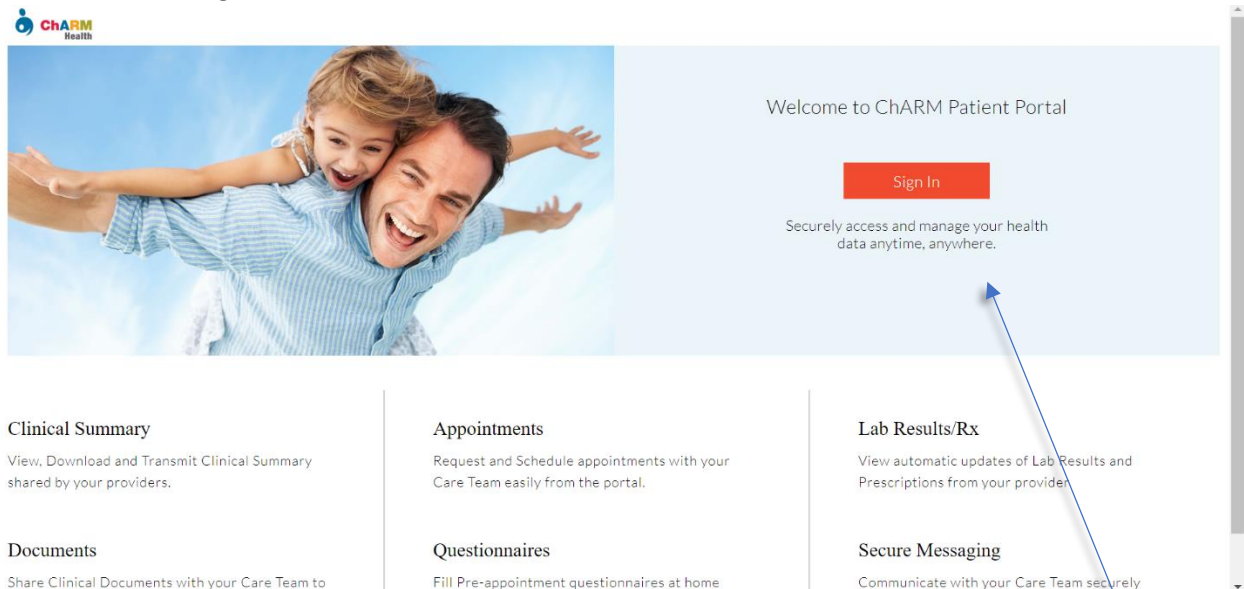
You are scheduled for a telehealth appointment- hurray! We are glad to be able to help you virtually. Telehealth appointments can be reached via a join url, or via the patient portal. Going through the patient portal is our preferred method, and our receptionist has sent a request to the email address you have provided as yourself (for people over 15) or as a patient representative (for folks who are accessing another person's record on their behalf, such as a parent for a child).

Patient Portal Method:

The patient portal invitation is automated from ChARM, and because it's from a computer program, sometimes gets sorted into junk mail or "other" folders. Make sure you check these looking for an invitation from Vitality Natural Medicine- the email address that it is sent from is noreply@charmtracker.com. The email contains the link to click on, and it also has a link to the ChARM patient portal guide if you're having trouble.

Click that link, confirm date of birth and time zone (if you're in the pacific northwest, that is GMT-8, or Pacific Standard Time) and you should be good to go!

Here's what the log in screen looks like:



This page can be reached at: <https://phr2.charmtracker.com/login.sas>

OR from vitalitynw.com- click on the patient portal button.

Magic button, click to sign in

Great! You clicked it! Now your screen should look like this:



One account. Access all services.

Sign In to access charmhr

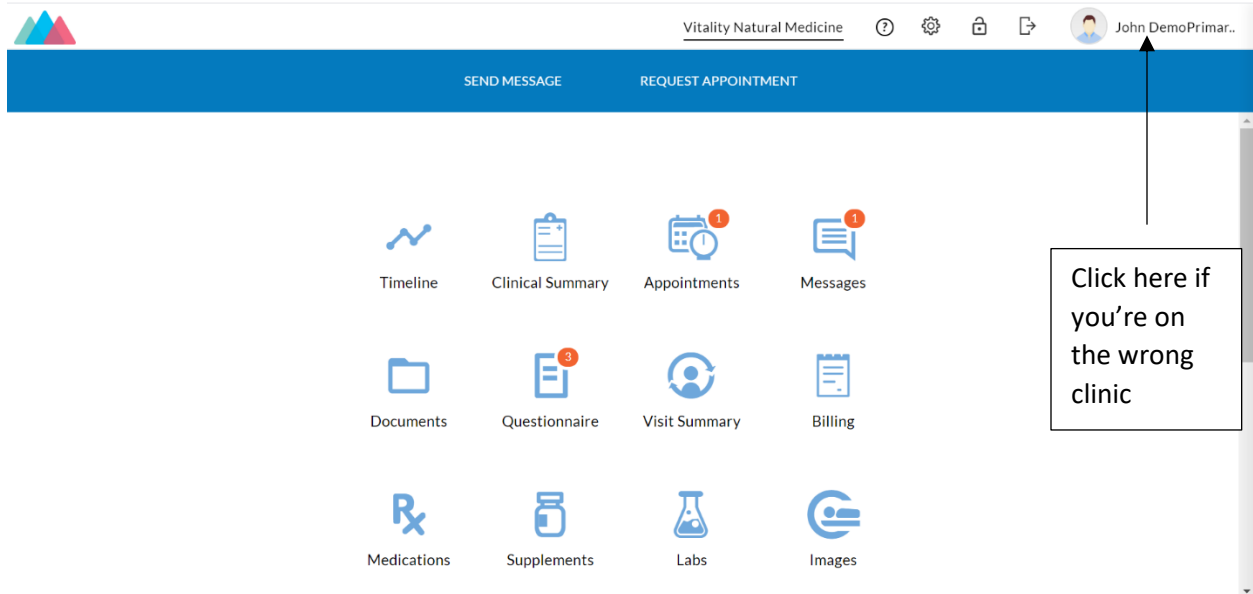
Email / Phone

Password

Keep me signed in [Forgot Password?](#)

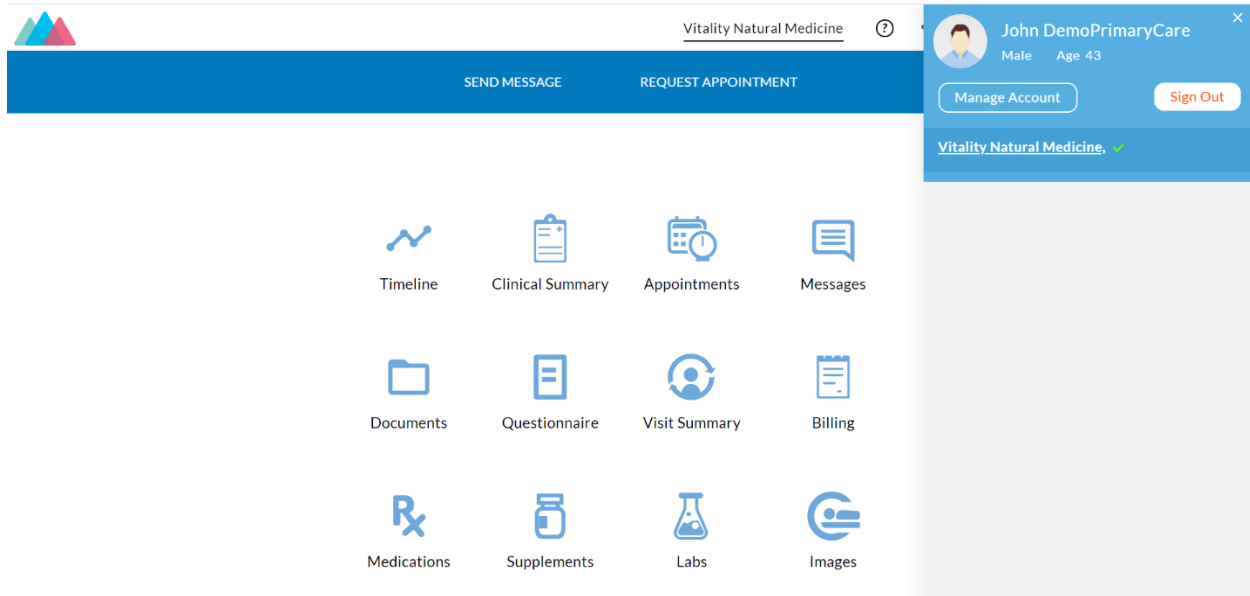
Sign In

(minor exception: If you are a provider who also uses charm, it will give you an error message. I'm pretty sure you need a different email than the one you use as a provider to have a functional patient portal.)



This is generally what it should look like.

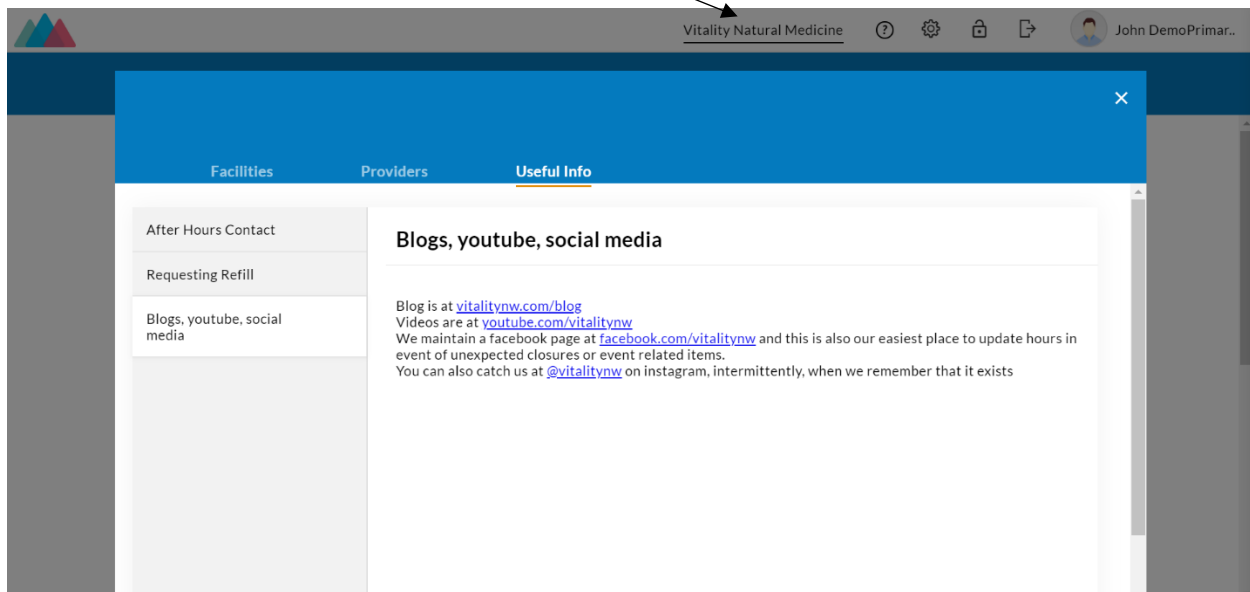
If you are a patient that has seen multiple providers who use the ChARM electronic medical record system, you may find that Vitality isn't the clinic that you are seeing. If that's the case for you, click on your picture/name in the upper right part of the screen.



That should open a dialogue box like the above. John DemoPrimaryCare isn't registered with any other clinics, because there's only so far you can stretch a screenshot tutorial. If he was, he could click on the clinic he wants to see, and that should correct it to the appropriate clinic.

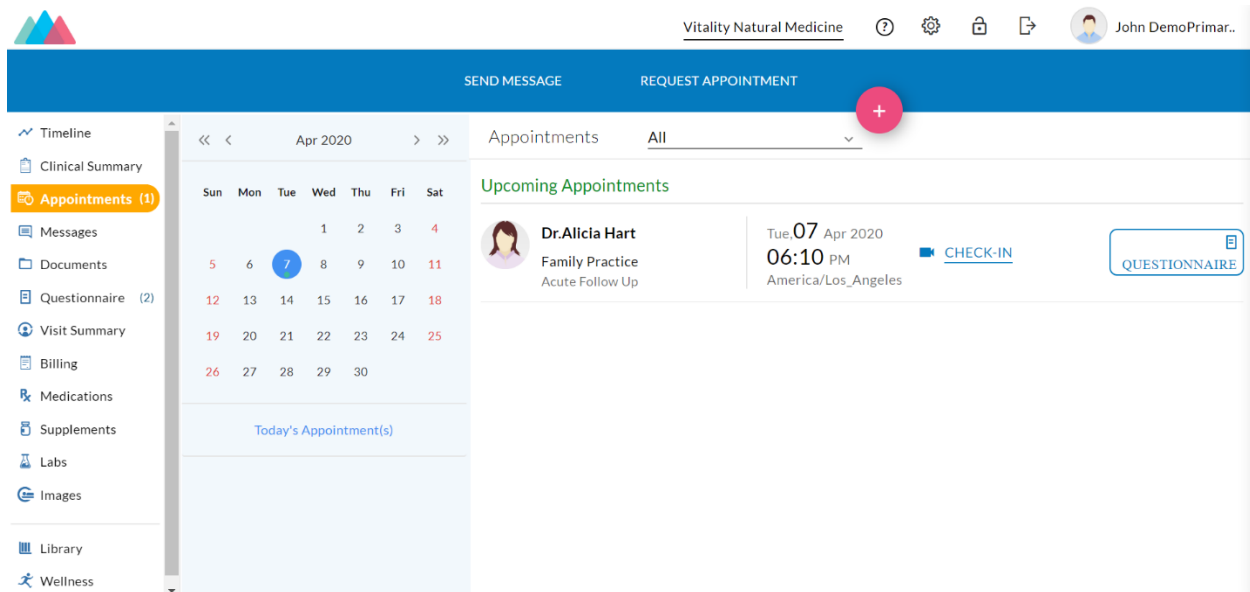
As a bonus, we do have just some helpful information that pops up if you click on the underlined Vitality Natural Medicine that is in the top middle.

Click here for reminders on how to get to on call line, request refill, or read our blog.



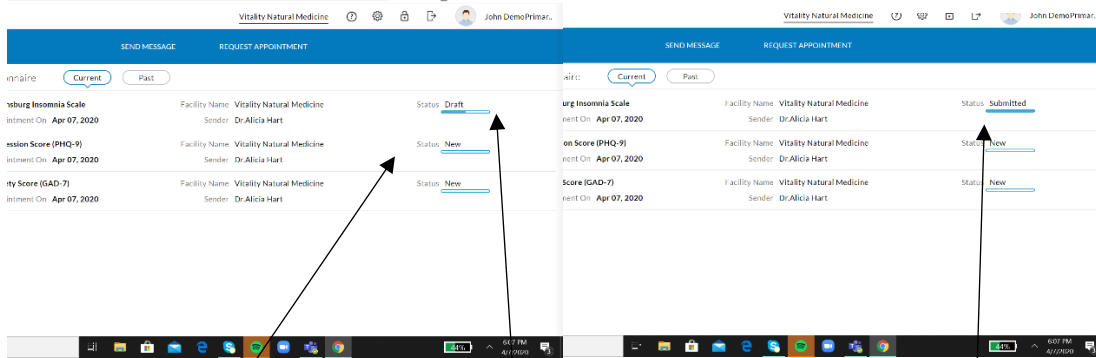
Just click outside of that popup, or click the X to get back to that main menu. Once you've done that, we're to the actual appointment piece!

Click on the appointment button and you should see something like this:



Make sure you're looking at upcoming appointments. You'll note that there is a button labeled "check in" and another button called "questionnaire". That questionnaire button should only be there if we sent questionnaires like the screeners we use in clinic. Not all of them are digitized, so sometimes this is still emailed!

If you have questionnaires, please fill them out before appointment. Note that if you click save, it will show on your screen as a draft. We can't see them unless you click submit.



Haven't done them yet

Clicked save, can't see it : (

Yay! We can see submitted questionnaires

OK, friends! Ready to skip all that pesky appointment prep? Click that "check in button" and this is the next screen that will show up:

Vitality Natural Medicine

Tuesday, April 07, 2020 06:10 PM (America/Los_Angeles)

Provider **Dr. Alicia Hart**

John DemoPrimaryCare

JOIN

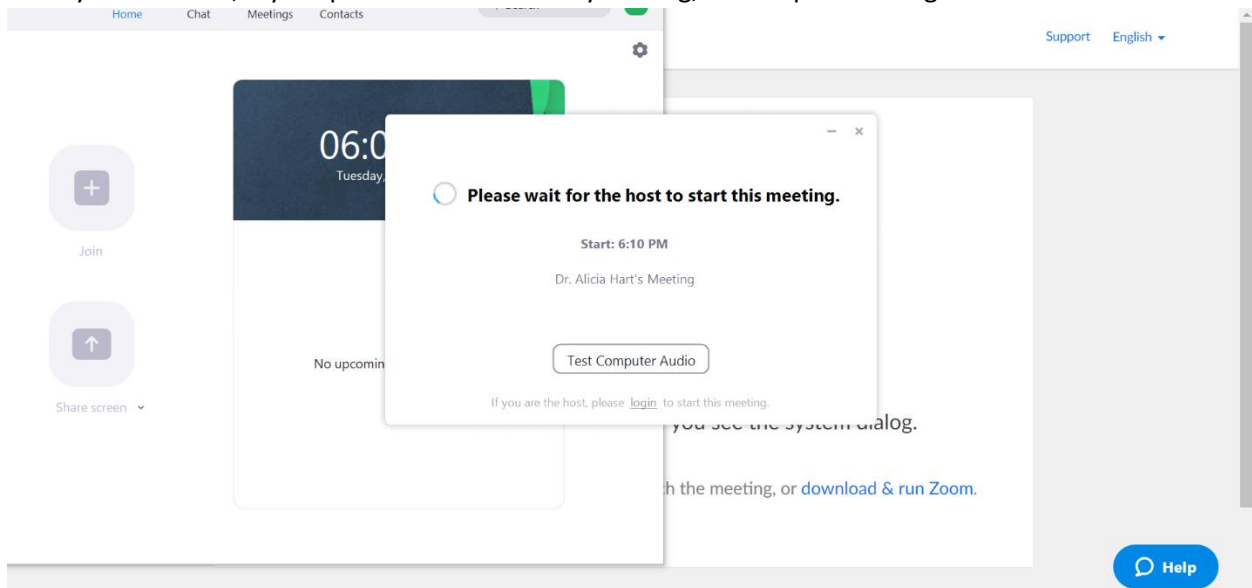
By joining this meeting, you are accepting the [ChARM TeleHealth Terms of Service](#)

This is it, the magic go button!

Zoom video platform is used for this TeleHealth session with your provider. You will be asked to install a Zoom plug-in, if it is not already installed in your machine.

Please note that ChARM uses a secure zoom meeting. If you've never used zoom, it will ask you to install this and it will take a couple of extra minutes to set up! Plan for this in your prep for appointment time. Go ahead and click "Join".

After you click that, if your provider is not already waiting, it will open a dialogue box like this one:



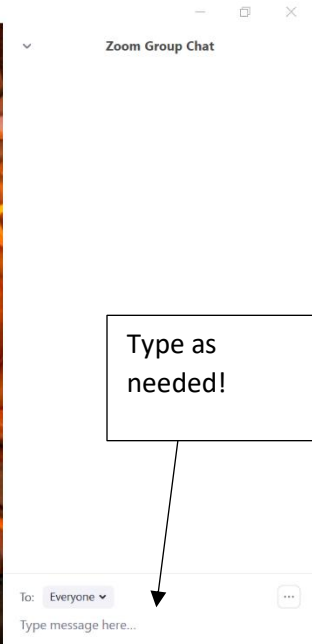
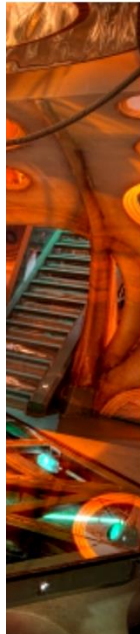
Go ahead and test your audio. Lots of people are having trouble connecting the audio, so make sure that whatever platform you're using can hear the zoom plug in. Trouble shoot: is your volume all the way down? Are your headphones unexpectedly plugged in? Do you have sound mirrored to a speaker somewhere else? If you're just set to mute, fix it by clicking on the microphone.



Mute/
unmute
button

Video/ no
video button

Having trouble? Pop open the chat and
type what's going on



The visit should be off to a smooth start!

Your providers may be using virtual backgrounds depending on where they are working from- if you have special requests let us know, we enjoy working with fun backgrounds. We also have virtual backgrounds that look like our exam rooms.

Virtual visits may have unexpected disruptions on either side. We understand that your cat might be on the wrong side of the door or that your child may visit. Our pets and children also may cause these disruptions, though we've made every effort to minimize impact to patient care. Occasionally videos are dropped due to internet issues- if your internet drops your connection, make sure you're within range (this seems to happen more frequently with backyard consults) and simply join the appointment the same way that you did the first time.

To get your after visit summary, click on the "clinical summary" button in your patient portal from the first step. Once your chart is complete, it will be visible there. If you joined from an emailed "join url", you will need to complete the patient portal steps to see the after visit summary.

Join Url Method:

If your patient portal is not set up and you have a telemedicine appointment scheduled, we will email you the join link for your appointment. Click on this, set up zoom as in the above steps, and we'll see you soon!

This method sometimes is delayed if providers are running late or involved in emergency care for another person. If you haven't gotten your join url prior to your appointment, make sure you check the email inbox and other/junk folder for the email that you provided us. If you've done that and still can't find it, please check in with the front desk at 503-344-1345 to trouble shoot this.

This method can also be used to pull in other family members or caregivers for the appointment if needed.