Instructor Outline: Getting Started with Telehealth

This document is designed to be used by the instructor alongside the accompanying PowerPoint presentation and/or live demonstration. It includes a course overview, talking points, and instructions for activities. Review this document before the workshop. It includes instructions the instructor needs to take before the workshop begins. Please note the PowerPoint slide numbers to help keep you on track.

Workshop Description:

This in-person or virtual workshop is for those who are new to telehealth and want to learn more about how to use telehealth services to receive medical care. At the end of the workshop, learners will be able to identify:

- What is telehealth.
- Options available for telehealth care.
- Types of care that can be managed with telehealth.
- How to use a patient portal to receive medical care.
- Technical requirements necessary to access telehealth.
- How to troubleshoot common technology issues experienced during a telehealth appointment.
- How to prepare for a telehealth appointment.
- What to expect during a telehealth appointment.

Curriculum Track:

Basics

Audience:

Adults from newly connected households and/or who are looking to build basic skills and confidence using technology.

Workshop Length:

60 minutes

Training Method:

Classroom or one-on-one instructor-led. Optional hands-on activities.

Purpose:

In this workshop, you will help users learn about telehealth and build the skills needed to be confident about receiving health care using telehealth.

Equipment Requirements:

In person: Projector, projection screen or smartboard and computer for the instructor are required. A device for learners and an internet connection is optional. Laser pointer (recommended).

Virtual: A web conferencing platform; computer for instructor and a device for participants with internet connections.

Software Requirements for Instructor:

- PowerPoint
- Web browser (Only Required for Virtual)
- Internet access (Only Required for Virtual)

Materials Required:

- Instructor PowerPoint: Before the workshop, review the slides and prepare or update the following information:
    - Slide 1:
        - Update instructor name, instructor affiliation (for example, library staff member, community volunteer, etc.), and location name.
        - Add your organizational logo.
        - Be prepared to give a brief introduction about yourself.
    - Slide 14 or 15:
        - If there are local organizations that provide telehealth care regardless of a patient's ability to pay, include a link.
    - Slide 93:
        - Include your organization's website URL.
        - Include future PLA DigitalLearn workshops that will be offered in the coming months, if applicable.
    - In addition to updating the slides, please preview the PowerPoint presentation display before the workshop on the instructor station to correct any minor formatting issues that may occur because of variations with devices, operating systems, and application versions.
- Instructor Guide (this document): Review the Instructor Guide and familiarize yourself with the workshop materials. The script, which starts on page 5 of this document, is also included in the Notes field of the PowerPoint presentation. The script includes the following information:
    - Slide # and Slide Title
    - On Slide Text. The text displayed on the slide.
    - Notes Section

- Talking Points. The information you share with the learners. Some slides also include instructions on actions the instructor needs to take to display or highlight information on the slide at the appropriate time.
- Instructor Note. Includes notes the instructor can use to help facilitate group conversations, actions you should take, etc.
- Additional Details: Identifies text on the slide that may need to be updated before the workshop begins. A note is included when the instructor can use the PowerPoint slides or live demonstration to illustrate the learning objective.

- Learner Handout
  - If there are local organizations that provide telehealth care regardless of a patient's ability to pay, include a link in the Learner Handout in the section Finding Telehealth Options.
  - Under the *What is a Patient Portal* section, you may want to include links to local patient portals in your community such as major medical centers or hospitals.
  - **For in-person workshops:** Print handouts for each learner and provide them before the workshop begins.
  - **For virtual workshops:** Provide a link to the Learner Handout, before the workshop as part of their registration confirmation and/or share a link to the Learner Handout through the online platform's chat feature.
- Notepaper, pens, or pencils. (Optional)
- Certificate of Completion: For the in-person workshop, type the name of the learner and print a certificate before the workshop to hand out to each learner once the workshop is completed. For virtual learners, send them an electronic copy by email. (Optional but highly recommended)
- Learner Name Tags: If you want to easily identify learners, make sure to bring name tag stickers or table tents. (Optional but highly recommended)

Learning Objectives

At the end of the session, learners will be able to:

- Identify the different types of telehealth care.
- Create an account and log in to their preferred patient portal.
- Message their provider using the portal.
- Identify a device to use to connect to a telehealth appointment.
- Identify how to fix common technical issues.
- Prepare for and attend a telehealth appointment.

Before the Workshop Begins

- In person:
  - Provide each attendee a Learner Handout and any other materials you will provide, like paper, pen, and relevant library handouts.
  - If using name tags, make sure they are easily accessible to learners and that you provide a marker or pen for learners to write their name.
  - Keep a registration list so you can identify who attended. (Optional)

- o Test and troubleshoot the instructor's computer well before the course to ensure it meets the technical requirements of the workshop.
  - o Identify a "parking lot," which is a place to track questions to be answered later in the workshop. Some suggested places for a parking lot are a whiteboard, flip chart, or notepad. Encourage learners to note the slide number and section as they "park" questions.
  - o Make sure all computers are turned on and ready for learners to use. (Optional)
- Virtual:
  - o A few days before the workshop, send instructions to participants about how to connect to the workshop. If possible, you may want to create a short video or document with step-by-step instructions (with images) to provide a basic overview of how to use the web conferencing tool to share with your participants.
  - o Send participants a link, before the workshop, to the Learner Handout. During the workshop, resend the link through the web conferencing chat tool.
  - o Keep a registration list so you can identify who attended.
  - o Identify a virtual "parking lot," which is a place for participants to ask questions and a way for you to easily track the questions to be answered later in the workshop. For your virtual parking lot, you may want to use the chat feature or the question feature of the web conferencing tool. Encourage learners to note the slide number and section as they "park" questions.

Instruction Methods

- When possible, encourage learners to practice what they are learning. There are a few different ways to structure your workshop to include practice.
  - o If each learner has a computer, tablet or smartphone, the facilitator can encourage learners to perform activities as they learn them.
  - o In the sections *Technical Requirements* and *Tips for Troubleshooting Technical Problems*, there are opportunities for the learners to perform specific steps on either a computer (Windows or Mac OS) or smartphone and tablet (Apple or Android OS).
  - o The option you choose will depend on the equipment available, comfort level, the number of learners attending, and whether you have assistants in the course.
  - o If the instructor is going to conduct live demonstrations of any of the material, they should test to make sure all technology works on the instructor station before the class.
  - o Check both the instructor station and the learner computers to make sure all tasks outlined in the course can be completed on the computers. To ensure the security and reliability of the computers, the computer administrator may need to install specific software applications or restrict access to some of the tools available within the computer operating system. If there is software missing or a task you are unable to perform, try working with the computer administrator to see if changes can be made to the computers before the class. If not, use the PowerPoint slides to walk the learners through the steps.
  - o If learners are performing the same steps as the facilitator, think about how you will assist learners who are experiencing issues. Will you stop the workshop and assist the learner or wait until the end of each section?

- o The section times are based on learners listening to the facilitator and then practicing their skills after all skills have been presented. If the facilitator invites learners to follow along using their computers, then the time to complete each section will increase.
- o If learners do not have access to computers or smartphones during or after the workshop, ask questions and encourage learners to call out the answers. There are question prompts in the script below.

Assessment Technique(s)

Successful completion of activities

- Participation in group conversations on Slides 4, 10, 18, 20, 22, and 38.
- Check for verbal and non-verbal cues to ensure the learner's understanding before beginning a new section. Check-ins occur on Slides 16, 39, 45, 84 and 92.
- It is recommended, but optional, to conduct a brief survey at the end of the workshop. You can use a preexisting template provided by your organization or use ProjectOutcome.org, which is a free survey tool for libraries.

Instructor Presentation

The following section will take you step by step through the PowerPoint presentation slides and notes section. While reviewing this part of the guide we suggest you open the PowerPoint presentation so you can become more familiar with the slides.

There are multiple slides of the presentation you will need to edit. Some of those will be changes to the projected slides and others to the notes section that only the presenter can see. Additionally, you can remove or edit slides to customize the workshop to your specific goals and audience.

Depending on what type of device you are using, you can demonstrate some of the steps outlined below using your computer instead of using the PowerPoint slides. The sections have been marked in the Additional Details section. You will also see this instruction: *USE POWERPOINT OR LIVE DEMONSTRATION* **in the PowerPoint Notes section of the applicable slides**.

Slide Number & Title Slide 1: Getting Started With Telehealth Workshop.

> **On Slide Text:**
>
> - Getting Started with Telehealth
> - Instructor Name
> - Instructor Title
> - Library Name
> - Library's logo

Notes Section

Talking Points: Example Script to begin the workshop: My name is *<your name here>* and I am *<brief description of yourself>*." Today's workshop is provided by the Public Library Association with support from Heartland Forward."

Before we get started, here are a few housekeeping items: *[Mention the items that are relevant to your workshop.]*

- Where are the restrooms?
- Where are the emergency exits?
- When/how to ask questions. Point to the page number located on each slide for participants to write down along with their questions.
- If you have a cell phone with you, please make sure to either turn it off or set it to silent.
- Will there be a break?

Instructor Note: *Include a thank-you to the community collaborator if applicable.*

Additional Details: Before the workshop, update this slide with the appropriate information:

- Instructor name
- Instructor affiliation (for example, library staff, community volunteer, and so on)
- Location name
- Organizational logo

Workshop Introduction

Slide Number & Title. Slide 2: Workshop Content Outline—Agenda (3 mins.)

On Slide Text: Today's agenda.
- What is Telehealth
- Using the Patient Portal
  - o What you can do
  - o Creating your account
  - o Using the Messaging feature
  - o Helpful Settings
- Technical Requirements
  - o Which device is best for you
  - o Tips for troubleshooting common technical problems
- Attending the Appointment
  - o What to prepare
  - o What to expect the day of the appointment
  - o After the appointment

Notes Section

Talking Points: In this workshop, you will learn about telehealth. We'll work on answering your telehealth questions and building skills so you feel more confident about receiving health care using telehealth. This will include:
- What is Telehealth
- Using the Patient Portal
  - o What you can do
  - o Creating your account
  - o Using the Messaging feature
  - o Helpful Settings
- Technical Requirements
  - o Which device is best for you
  - o Tips for troubleshooting common technical problems
- Attending the Appointment
  - o What to prepare
  - o What to expect the day of the appointment

      o   After the appointment

Let's get started!

Instructor Note: none

Additional Details: none

Talking Points, Topics, and Activities (45 mins.)

Introduction—What Is Telehealth

Slide Number & Title. Slide 3: What is Telehealth?

On Slide Text: It is a way to see your health care provider using a computer, tablet, or phone, without visiting their office.

Notes Section

Talking Points: What is telehealth? Telehealth is a way to see your health care provider using a computer, tablet, or phone without visiting their office. Think of it like a phone call or a video call with your doctor. Telehealth services may also include managing different aspects of your health care online.

A health care provider is the person or organization that provides medical care or treatment.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 4: Introduction.

On Slide Text:

- How many of you attended a telehealth appointment?
- What are you hoping to learn in today's session?

Notes Section

Talking Points: Ask the learners to raise their hands if they have attended a telehealth appointment.

Lead a brief discussion on why they're attending the workshop. Possibilities include they want to learn

- what type of care they can receive via telehealth.

- what to expect during a telehealth visit.

- how to use the technology needed to attend a telehealth visit.

Instructor Note: *Ask learners the questions on the slide and help facilitate a conversation to engage learners with the questions.*

Additional Details: none

Slide Number & Title. Slide 5: Types of Health Care Providers.

On Slide Text: Types of Health Care Providers: Doctors, nurses, pharmacists, mental health care professionals, physical and occupational therapists, medical offices, clinics, hospitals, and home health agencies.

Notes Section

Talking Points: Some examples of people who provide telehealth services include doctors, nurses, pharmacists, mental health care professionals, and physical and occupational therapists.

Organizations also support telehealth. Examples include medical offices, clinics, hospitals, and home health agencies.

In this course, we will use the word provider when talking about health care providers.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 6: Types of Telehealth Care.

On Slide Text: Types of Telehealth Care.

• Schedule appointments.

• Check-in on medical issues.

• Discuss lab tests or X-ray results.

• Follow up on prescription medications.

• Receive post-surgical follow-up.

• Receive preventive care like nutrition counseling.

• Receive referrals to specialists.

• Mental health treatment.

Notes Section

Talking Points: You can get many types of care through telehealth. You can schedule appointments, check in on medical issues, discuss lab tests or x-ray results, follow up on prescription medications, receive post-surgical follow-up, or preventive care like nutrition counseling, referrals to specialists, and mental health treatment, including therapy and counseling.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 7: Telehealth is Convenient.

On Slide Text: Telehealth is Convenient.

Notes Section

Talking Points: There are a lot of reasons why you might decide to get your health care through telehealth.

It's convenient. Telehealth allows you to receive care where you are, like work, home, or your car; you do not need to travel to and from your appointment, and it's easier to see providers who may be far away.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 8: When to Meet in Person.

On Slide Text: When to Meet in Person.

1. Provider may want a face-to-face visit.

2. Provider may need to conduct a physical examination.

3. Provider may need to use specialty equipment.

4. Insurance may not cover your telehealth appointment but may cover an in-person visit.

Notes Section

Talking Points: While there are benefits to telehealth, here are some reasons why you may need to meet with your provider in person.

1. If this is your first visit or you just started seeing a new doctor, they may want a face-to-face visit so you can get to know each other better.

2. Your provider may need to conduct a physical examination.

3. Your provider may need to use specialty equipment that is available at a health care facility during the appointment, like an X-ray machine, ultrasound, or ECG machine.

4. Insurance may not cover your telehealth appointment but may cover an in-person visit. Insurance coverage for telehealth visits varies based on the type of health insurance you have and where you live. Contact your insurance company or your doctor's office before your telehealth visit to find out if the care you need is covered and how much you'll have to pay out of pocket.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 9: Types of Telehealth Care.

On Slide Text: Types of Telehealth Care.

- Video visits

- Audio-only visits

- Secure messaging

- Remote monitoring

Notes Section

Talking Points: There are different types of telehealth care, including video visits, audio-only visits, secure messaging, and remote monitoring. Let's learn more about each option.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 10: Live Video Visits.

On Slide Text: Live Video Visits.

Notes Section

Instructor Note: *Before providing the definition, ask the learners if any of them have ever used video a conferencing tool to communicate with their friends, families, for work, school, church, etc. If they don't know, ask if they have used tools like FaceTime, Google Meet, Zoom, Teams, etc. If you ask this question, add this transition: Live video visits are a lot like the video calls you have had with friends, family, or co-workers. Include additional examples mentioned by the learners.*

Talking Points: Have you ever used video as a conferencing tool to communicate with your friends, families, for work, school, or church?

Live video visits. This is a live video conferencing appointment between you and a provider like your doctor or nurse practitioner.

Instructor Note: No additional notes for this slide.

Additional Details: none

Slide Number & Title. Slide 11: Audio Only Visits**.**

On Slide Text: Audio Only Visits

Notes Section

Talking Points: Audio Visits. The appointment with your health care provider is a phone call.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 12: Secure Messaging.

On Slide Text: Secure Messaging

Notes Section

Talking Points: Secure messaging. It's a way for a patient and provider to send messages back and forth online, privately and securely, about the patient's medical care. It's like sending an email, but using the portal makes sure that only you and your health care providers have access to this communication. For instance, a provider may want to share the results of a medical test like an X-ray, and they can do this by sending a message. Or they may ask you a question. Other times, you may have a question you want to ask your provider. For example, you have a new prescription, and you don't understand the instructions on the label.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 13: Remote Monitoring.

On Slide Text: Remote Monitoring

Notes Section

Talking Points: Remote monitoring. A provider may want to monitor certain health conditions over time. In these cases, you might use a medical device with an internet connection to share information with your doctor, like your blood pressure, glucose levels, and more.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 14: Finding Telehealth Options.

On Slide Text:

- Ask your current provider what telehealth options they offer.

- Contact your health insurance company, Medicare or Medicaid, to see if they have a list of providers who offer telehealth services.

Notes Section

Talking Points: How can you find a health care provider who supports telehealth?

[*INSTRUCTOR NOTE: Click ENTER to display the first bullet point.*] Ask your current provider what telehealth options they offer.

[*INSTRUCTOR NOTE: Click ENTER to display the second bullet point.*] Contact your health insurance company, Medicare or Medicaid, to see if they have a list of providers who offer telehealth services.

Instructor Note: none

Additional Details: If there are local options for receiving telehealth care regardless of a patient's ability to pay, you should list the resources here or on slide 15. Also, add the resources to the Learner Handout and inform the learners that the resources are listed on the handout for later reference.

Slide Number & Title. Slide 15: Finding Telehealth Options.

On Slide Text: Finding Telehealth Options. If you don't have health insurance, see if a health care center in your area provides telehealth services.

Notes Section

Talking Points: If you don't have health insurance, health care centers in your area may provide telehealth services regardless of a patient's ability to pay. The Health Resources & Services Administration has locations across the US that provide free or low-cost health care. They have a tool to find health centers in your area. The link is available in the Learner Handout we provided to you earlier.

Instructor Note: The link to the HRSA tool is clickable if you would like to do a live demonstration.

Additional Details: none

Slide Number & Title. Slide 16: Questions.

    On Slide Text: Questions. Do you have any questions before we move to the next section?

    Notes Section

    Talking Points: Do you have any questions before we move to the next section?

    Instructor Note: *Review and address items in the "parking lot".*

    Additional Details: For information about what the parking lot is, see the "Before the Workshop Begins" section of the Instructor Guide.

Using a Patient Portal

For the "Using a Patient Portal" you can use PowerPoint or a live demonstration for slides 21-23. Use PowerPoint for the remaining slides in this section, slides 17-20 and 24-39.

Slide Number & Title. Slide 17: What is a Patient Portal?

    On Slide Text: What is a Patient Portal? It is a secure website provided by a health care provider, a hospital, or clinic, to manage your medical care.

Notes Section

    Talking Points: A patient portal is a secure website provided by a health care provider, a hospital, or clinic, to manage your medical care. You can access your patient portal using an internet browser or app on your smartphone or tablet.

Even if your health care provider has a patient portal, you can still call you provider on the phone just like you do now.

Please note, if you receive medical care from different health care systems, you may need to create an account for each portal.

    Instructor Note: none

    Additional Details: none

Slide Number & Title. Slide 18: Introduction.

    On Slide Text: Introduction.
- Does your health care provider have a portal?
- How many of you have used your provider's patient portal?
- What can you do on the health care providers portal?

Notes Section

Talking Points: Does your health care provider have a portal? Raise your hands if you know if your health care provider has a portal.

[INSTRUCTOR NOTE: Click ENTER to display the second question.] How many of you have used your provider's patient portal? Raise your hands if you have used your health care provider's portal.

[INSTRUCTOR NOTE: Click ENTER to display the third question.] What can you do on the health care provider's portal?

Instructor Note: *Lead a brief discussion about what they can do on the health care provider's portal? Actions that were already covered include:*

- *Contact their health care provider to ask questions about a problem or to renew a prescription.*
- *Schedule appointments.*
- *See a list of upcoming and past appointments.*
- *Access lab results.*
- *See your health care provider's notes from a past appointment.*

Additional Details: none

Slide Number & Title. Slide 19: Things You Can Do with a Patient Portal.

On Slide Text: Things You Can Do with a Patient Portal.

- Read your provider's notes about your medical visits.
- View a list of your medications and request refills.
- See a history of your medical care.
- Track which appointments you need to schedule and which ones you have already scheduled.
- Schedule your appointments.
- Pay and view your bills.
- And access lab and imaging results.

Notes Section

Talking Points: The patient portal allows you to:

[INSTRUCTOR NOTE: Click ENTER to display Bullet 1.]. Read your provider's notes about your medical visits.

[INSTRUCTOR NOTE: Click ENTER to display Bullet 2.]. View a list of your medications and request refills.

[INSTRUCTOR NOTE: Click ENTER to display Bullet 3.]. See a history of your medical care.

[*INSTRUCTOR NOTE: Click ENTER to display Bullet 4.*]. Track which appointments you need to schedule and which ones you have already scheduled.

[*INSTRUCTOR NOTE: Click ENTER to display Bullet 5.*] Sometimes, you will be able to schedule your appointments, but sometimes, you will still need to call your provider on the phone.

[*INSTRUCTOR NOTE: Click ENTER to display Bullet 6.*]. Pay and view your bills.

[*INSTRUCTOR NOTE: Click ENTER to display Bullet 7.*] And access lab and imaging results.

Before you can use all of these features you will need to create an account to use the patient portal.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 20: Before You Begin.

On Slide Text: Before You Begin.

Notes Section

Talking Points: To create a patient portal account, you will need a computer, laptop, tablet, or smartphone, internet access and a web browser.

Instructor Note: *To engage the learners, ask the participants which device or devices they will use to access the patient portal.*

Additional Details: none

Slide Number & Title. Slide 21: Find Your Provider's Portal Online.

On Slide Text: Find Your Provider's Portal Online

Notes Section

Talking Points: To create an account, you must first go to your health care provider's patient portal. To do this, open your web browser.

If you have the URL of the portal, you can enter it into your web browser. If you don't, you can search for it online. To search, type in the name of the health care system and the words patient portal into the search box and click enter on the keyboard or tap Go on your smartphone or tablet.

Instructor Note: *You could do a live demonstration and search for one of health care systems in your community.*

Additional Details: User PowerPoint or a Live Demonstration

Slide Number & Title. Slide 22: Find Your Provider's Portal Online.

On Slide Text: Find Your Provider's Portal Online.
- Google Chrome
- Microsoft Edge
- Apple Safari
- Mozilla Firefox

Notes Section

Talking Points: Here are a few web browsers you can use.

- Google Chrome
- Microsoft Edge
- Apple Safari
- Mozilla Firefox

Instructor Note: *To engage the learners, you may want to ask the participants what web browser they use. You may also want to inform them which browser you have on the library's public computers.*

Additional Details: User PowerPoint or a Live Demonstration

Slide Number & Title. Slide 23: Search Results.

On Slide Text: Search Results.

Notes Section

Talking Points: The search results appear. Since we are searching for "Heartland Health Skills Patient Portal"

[*INSTRUCTOR NOTE: Click ENTER to highlight the patient portal link for Heartland Health Skills.*] you would click on that link to go to that portal's web page.

Instructor Note: *Heartland Heath Skills Patient Portal is only an example and does not have a website. If doing a live demonstration, click on the link for the local health care systems you searched.*

Additional Details: User PowerPoint or a Live Demonstration

Slide Number & Title. Slide 24: Getting Started with the Patient Portal.

On Slide Text: Getting Started with the Patient Portal.

Notes Section

Talking Points: The Heartland Health Skills patient portal web page displays. Your patient portal may look different, but you should be able to apply what you learned today when you use your health care provider's patient portal.

[*INSTRUCTOR NOTE*: *Click ENTER to highlight the Sign up now button.]* To create your account, you will click on the button that says Sign up now or Create account.

If you receive medical care from different health care systems, you may need to create an account for each portal.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 25: Getting Started with the Patient Portal - Activation Code.

On Slide Text: Getting Started with the Patient Portal.

Notes Section

Talking Points: You may need to enter an activation code and your date of birth to create your portal account. If you are required to enter an activation code your provider should send you the code in advance, either by email or in the mail. Each portal is different so follow the instructions that display on the web page.

[*INSTRUCTOR NOTE: Click ENTER to highlight the Enter Activation Code box.]*. This system requires an activation code so you would enter that code into the text box,

[*INSTRUCTOR NOTE: Click ENTER to highlight the Date of Birth box.]*. and then enter your birthday.

[*INSTRUCTOR NOTE: Click ENTER to highlight the Next button.]*. Then click the Next button.

Contact your provider if you need them to resend the code or if you need help.

You will only need the activation code to set up your account.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 26: Getting Started with the Patient Portal – Create Account.

On Slide Text: Getting Started with the Patient Portal

Notes Section

Talking Points: You will then be asked to create a username and password. You will use it each time you log into the portal website so it is important to pick a username and password that you will remember.

[*INSTRUCTOR NOTE: Click ENTER to highlight the Create Username box.].* Enter the username you selected in the Create Username text box.

[*INSTRUCTOR NOTE: Click ENTER to highlight the Create Password box.].* Then enter your password.

[*INSTRUCTOR NOTE: Click ENTER to highlight the Re-enter Password box.].* Re-enter your password. It must match the password you entered above.

[*INSTRUCTOR NOTE: Click ENTER to highlight the Okay box.].* To create the account, click OK.

[*INSTRUCTOR NOTE: Click ENTER to highlight the Link to Existing Account link.].* If you are a parent of a minor child or the authorized caregiver of an adult, for instance, your parent, you can link their account with your account so that you only need to use one username and password to access both accounts. Contact your provider if you need help.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 27: PLA DigitalLearn – Accounts & Passwords.

On Slide Text: PLA DigitalLearn: Accounts & Passwords

Notes Section

Talking Points: To learn how to create online accounts that are safe and secure, watch the PLA DigitalLearn course *Accounts and Passwords*. See the Learner Handout that you received during the workshop for a link to PLA DigitalLearn.

Instructor Note: *The link to the PLA DigitalLearn tool is clickable if you would like to do a live demonstration and show the learner how to access this course from the PLA DigitalLearn site.*

Additional Details: User PowerPoint or a Live Demonstration

Slide Number & Title. Slide 28: Getting Started with the Patient Portal – Terms of Use.

On Slide Text: Getting Started with the Patient Portal

Notes Section

Talking Points: A web page with the Terms of Use displays. It explains how the health care system can use your information in the portal. You need to agree to the Terms to use the portal.

[*INSTRUCTOR NOTE: Click ENTER to highlight the I agree box.*]

After reading it, click I Agree.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 29: Getting Started with the Patient Portal – Logged In.

On Slide Text: Getting Started with the Patient Portal

Notes Section

Talking Points Congratulations! Your account is created and information about you will appear on the screen.

Remember that each patient portal is slightly different so follow the instructions that display on the screen as you create your account on your provider's patient portal. If you have questions or experience problems, check your health care provider's website for instructions or you can give them a call to ask for additional assistance.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 30: Getting Started with the Patient Portal - App.

On Slide Text: Getting Started with the Patient Portal

Notes Section

Talking Points: If you choose to use your tablet or smartphone to create an account or log into the patient portal, you can use that device's web browser. Some health care systems may also have an app. You will need to download and install the app on your phone or tablet. Ask your provider how to find their app.

[*INSTRUCTOR NOTE: Click ENTER to highlight the Patient Portal app.*]. To open the app, tap the portal icon, then the portal app will open.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 31: PLA DigitalLearn: Using a Mobile Device.

On Slide Text: PLA DigitalLearn: Using a Mobile Device.

Notes Section

Talking Points: To learn more about how to find, download and install an app on your smartphone, watch PLA DigitalLearn's course *Using a Mobile Device* Lesson 5 for help. See the Learner Handout that you received during the workshop for a link to PLA DigitalLearn.

Instructor Note: *The link to the PLA DigitalLearn tool is clickable if you would like to do a live demonstration and show the learner how to access this course from the PLA DigitalLearn site.*

Additional Details: User PowerPoint or a Live Demonstration

Slide Number & Title. Slide 32: Communicating with Your Provider Using the Patient Portal.

On Slide Text: Communicating with Your Provider Using the Patient Portal

Notes Section

Talking Points: While you can still call your health care provider on the phone, you can also send messages using the patient portal. When you send information to your provider, it is recommended that you use your patient portal instead of using your personal email or sending a text message.

When you send a message to your medical team using the patient portal only you and your medical team can see information in your medical record.

Messages sent outside of the portal may not protect your information because the communication is not secure.

[*INSTRUCTOR NOTE*: *Click ENTER to highlight the Message icon.].* To send a message to your provider, click on the Message icon in the portal. Remember, you must be logged into the patient portal to message your provider!

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 33: Communicating with Your Provider Using the Patient Portal – What Would You Like to Do?

On Slide Text: Communicating with Your Provider Using the Patient Portal

Notes Section

Talking Points: A menu will usually appear asking, "What would you like to do?" Remember, each patient portal may have slightly different menu choices. This portal has three choices:

- Schedule an appointment.
- Refill a medication.

- Ask a care team a medical question.

You will select the choice that matches your request.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 34: Communicating with Your Provider Using the Patient Portal – Contact.

On Slide Text: Communicating with Your Provider Using the Patient Portal

Notes Section

Talking Points: If you have more than one provider, you will need to select which health care provider you would like to send the message to.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 35: Communicating with Your Provider Using the Patient Portal – Message.

On Slide Text: Communicating with Your Provider Using the Patient Portal

Notes Section

Talking Points: You will then enter a Subject and Message into the message box.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 36: Communicating with Your Provider Using the Patient Portal – Message Response.

On Slide Text: Communicating with Your Provider Using the Patient Portal

Notes Section

Talking Points: A health care provider will respond. Sometimes, they will send you a message using the portal, or they might give you a phone call. In this example, a nurse responds using the portal's messaging system and asks for additional information. You can use the portal to respond to the questions.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 37: Communicating with Your Provider Using the Patient Portal – App.

On Slide Text: Communicating with Your Provider Using the Patient Portal

Notes Section

Talking Points: Don't forget that the patient portal can be accessed using any computing device that has a web browser and internet access. You can send a message using your computer or laptop, but you can respond to a message using your tablet or phone or vice versa.

When using a tablet or smartphone, you can either connect with the patient portal using

[*INSTRUCTOR NOTE: Click ENTER to highlight the Web Browser app.*] the web browser or

[*INSTRUCTOR NOTE: Click ENTER to highlight the Patient Portal app.*] the app once you have downloaded and installed it on your device.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 38: Question.

On Slide Text: Questions. What questions might you ask your health care provider using the patient portal messaging feature?

Talking Note: What questions might you ask your health care provider using the patient portal messaging feature?

Instructor Note: *Lead a brief discussion about how they can use the Message feature of the patient portal. Possibilities include*

- *To ask a question about a current prescription.*
- *Request a referral to see a specialist.*
- *Ask if you need to schedule an appointment for an issue. For instance, you have a rash, and it is not going away. Should you go to urgent care, schedule an appointment to see the doctor, or see if a telehealth visit may work to diagnose the problem?*

Consider an example (either your own, a story from a friend, or a scenario you could expect to happen) that illustrates a way the learners can use telehealth in case no one volunteers.

Before moving to the next slide, remind the learners that communicating through the portal is not for emergency situations. Dial 911 if you need immediate care.

Additional Details: none

Slide Number & Title. Slide 39: Let's Review.

    On Slide Text: Let's review.

- What is a patient portal?
- What are some of the things you can do with a patient portal?

    Notes Section

    Talking Points: Before we move to the next section let's review. What is a patient portal?

    Instructor Note: *Lead a brief discussion about what is a patient portal.*

It is a secure website that allows you to access your medical information and communicate with your health care providers online using an internet browser or app on a computer, laptop, tablet, or smartphone.

    Talking Points: What are some of the things you can do with a patient portal?

    Instructor Note: *Lead a brief discussion about how they can use the patient portal. Possibilities include*

- *Schedule appointments*
- *Check-in on medical issues*
- *Discuss lab tests or X-ray results*
- *Follow up on prescription medications*
- *Receive post-surgical follow-up*
- *Receive preventative care like nutrition counseling*
- *Receive referrals to specialist*
- *Receive mental health treatment, including therapy and counseling*

Before we move to the next section do you have any questions?

    Instructor Note: *Review and address items in the "parking lot".*

    Additional Details: For information about what the parking lot is, see the "Before the Workshop Begins" section of the Instructor Guide.

Technical Requirements of a Video Telehealth Visit

Depending on what type of device you are using, you can demonstrate some of the steps outlined below using your computer instead of using the PowerPoint slides. The sections have been marked in the Additional Details section. You will also see this instruction: *USE POWERPOINT OR LIVE DEMONSTRATION* in the PowerPoint Notes section of the applicable slides.

Slide Number & Title. Slide 40: Technical Requirements of a Video Telehealth Visit.

On Slide Text: Technical Requirements of a Video Telehealth Visit

Notes Section

Talking Points: Let's explore what technology you need to participate in a video telehealth visit.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 41: Technical Requirements: What You Need.

On Slide Text: Technical Requirements: What You Need. A computing device with a
- Camera
- Microphone
- Speaker

Notes Section

Talking Points To connect to a video telehealth visit, you need to pick a device with a camera, microphone, and speaker.

Let's explore what device you should pick by learning about the pros and cons of using a smartphone, tablet, computer, and laptop for a telehealth visit.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 42: Smartphone or Tablet.

On Slide Text: Smartphone or Tablet.
Advantages

- Built-in microphone, speaker and camera
- Easy to maneuver
- It's portable

Disadvantages

- May need to download an app
- Smartphone screens are small
- Place the device on a stand

Notes Section

Talking Points Some of the benefits of using a smartphone or tablet include it has a built-in microphone, speaker, and camera.

They are easy to move so that you can easily show the provider something like a rash on your arm.

And it's portable, so you can easily move the device to the place you want to have the meeting.

[*INSTRUCTOR NOTE: Click ENTER to display the Disadvantages.*] While there are many benefits to using a smartphone or tablet, there are some disadvantages as well. For instance, you may need to download an app to connect to the appointment.

Also, smartphone screens are small, so it may be hard to see the person on the screen or any documents shared with you.

You may also want to place your device on a stand, so you don't have to hold it during the appointment. This will allow you to take notes and make sure your image on the screen does not move.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 43: Computer or Laptop - Advantages.

On Slide Text: Computer or Laptop. Advantages.
- Screen is large making it easy to see the provider and anything they share
- Most devices include built-in microphone, speaker, and camera
- Laptops are portable

Notes Section

Talking Points: Some of the reasons you might choose to use a desktop or laptop computer include they have a large screen, so it is easy to see the health care provider and any documents they share.

Most laptops and desktop computers include a built-in microphone, speaker, and camera. If you use a laptop, it is portable, so you can meet where it's convenient for you.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 44: Computer or Laptop - Disadvantages.

On Slide Text: Computer or Laptop: Disadvantages.

- Desktop computers are not portable.
- Some devices may not include built-in microphone, speaker and camera.

Notes Section

Talking Points: There are some disadvantages to think about as well. For instance, desktop or computers are not portable.

If the computer is in a shared area, you may not have the privacy you need.

Older desktop and laptop computers may not have a built-in camera, microphone, or speakers. However, you can attach an external camera and headphones with a built-in microphone to your device.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 45: Questions.

On Slide Text: Questions. Which device or devices will you use to participate in your video conferencing telehealth appointment? Why?

Notes Section

Talking Points: Which device or devices will you use to participate in your video conferencing telehealth appointment? Why are you choosing that device?

Before we move to the next section, do you have any questions?

Instructor Note: *Lead a brief discussion about which device or devices the learners will use to participate in their video conferencing telehealth appointment.*

Review and address items in the "parking lot".

Additional Details: For information about what the parking lot is, see the "Before the Workshop Begins" section of the Instructor Guide.

Slide Number & Title. Slide 46: Check Your Internet Connection.

On Slide Text: Check Your Internet Connection

Notes Section

Talking Points: Now that you have selected which device you will use for your video telehealth appointment, you will need to check your internet connection to make sure it is strong enough for your appointment. It is best to check your device well before your visit so you can troubleshoot any issues.

Test your computer where you will attend the telehealth visit so that you are sure the connection in that location can support your video appointment. So, if you are going to use your computing device at your kitchen table, check the internet speed from that location. You should also choose a location that is quiet and private.

> **Instructor Note:** none

> **Additional Details:** none

Slide Number & Title. Slide 47: Check Your Internet Connection – Speedtest.com.

> **On Slide Text:** Check Your Internet Connection.

> **Notes Section**

> **Talking Points:** To test your internet connection use a website like Speedtest. This website works on computers, laptops, tablets and smartphones.

> **Instructor Note:** *The link to the Speedtest tool is clickable if you would like to do a live demonstration and show the learner how to run the test on the website. You can demonstrate this on your computer and/or have learners try this search on their smartphone (if they have one).*

> **Additional Details:** User PowerPoint or a Live Demonstration

Slide Number & Title. Slide 48: Check Your Internet Connection – Browsers.

> **On Slide Text:** Check Your Internet Connection
> * Google Chrome
> * Microsoft Edge
> * Apple Safari
> * Mozilla Firefox

> **Notes Section**

> **Talking Points:** To run the test, open a web browser from the device you are going to use. Here are a few web browsers:

> * Google Chrome
> * Microsoft Edge
> * Apple Safari
> * Mozilla Firefox

> **Instructor Note:** none

> **Additional Details:** User PowerPoint or a Live Demonstration

Slide Number & Title. Slide 49: Check Your Internet Connection – Instructions.

On Slide Text: Check Your Internet Connection

Notes Section

Talking Points: Open the web browser

[*INSTRUCTOR NOTE: Click ENTER to display the URL.*] and type speedtest.net in the search bar. Once you type the URL, click enter on the keyboard or tap Go on your smartphone or tablet.

Instructor Note: none

Additional Details: User PowerPoint or a Live Demonstration

Slide Number & Title. Slide 50: Check Your Internet Connection – Run the Test.

On Slide Text: Check Your Internet Connection

Notes Section

Talking Points: The test will appear. Click the Go button to run the test.

Instructor Note: none

Additional Details: User PowerPoint or a Live Demonstration

Slide Number & Title. Slide 51: Check Your Internet Connection – Test Results.

On Slide Text: Check Your Internet Connection

Notes Section

Talking Points: To attend a video telehealth appointment, you should have a minimum download speed of 1.5 Mbps and a minimum upload speed of 12 Mbps.

If there is more than one device in your location using the internet service at the same time as your appointment, you may need a higher upload and download speed to ensure that all the devices connecting to the internet during your appointment have adequate internet access.

When you run this test on a smartphone, only the download speed will display.

Instructor Note: none

Additional Details: User PowerPoint or a Live Demonstration

Slide Number & Title. Slide 52: Do You Have the Required Software?

On Slide Text: Do You Have the Required Software?

Notes Section

Talking Points: Sometimes all you will need to connect to your appointment is a web browser. Make sure you have the recommended browser installed on your computer and that it is up to date. Sometimes you will need to download and install an application on your device. Your provider should send you instructions. Install and test the software before your appointment so you have time to fix problems before your appointment begins.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 53: Do You Have a Camera?

On Slide Text: Do You Have a Camera?

Notes Section

Talking Points: For a video appointment, you will need to use a device that has a camera. While most devices include a built-in camera, some do not. One way to check if your device has a camera is to look for a small camera lens. On computers and laptops, the camera is usually located at the top edge of the monitor, in the center.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 54: Do You Have a Camera – Windows Computer.

On Slide Text: Do You Have a Camera?

Notes Section

Talking Points: If you can't find the camera lens, check to see if your computer or laptop includes software to run a camera.

If you are using a Windows operating system, try searching for the software on your computer.

[*INSTRUCTOR NOTE: Click ENTER to highlight the Search box.*]. Some Windows computers include a search box in the taskbar,

[*INSTRUCTOR NOTE: Click ENTER to highlight the Start Menu.*]. or you may need to click on the Start Menu to find the search box.

[INSTRUCTOR NOTE: Click ENTER to highlight the word Camera in the Search in the Start Menu.]. Type camera in the search box and click enter on the keyboard.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 55: Do You Have a Camera – Dialog Box.

On Slide Text: Do You Have a Camera?

Notes Section

Talking Points: If the Windows Camera icon appears in the search result, click Open.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 56: Do You Have a Camera.

On Slide Text: Do You Have a Camera?

Notes Section

Talking Points: If you have a camera installed on your device, it should turn on when you click the link.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 57: Do You Have a Camera - Smartphone.

On Slide Text: Do You Have a Camera?

Notes Section

Talking Points: If you are using a smartphone or tablet check for a small camera lens which is usually located at the top edge of the screen or the back side of the device. In this example there are two cameras.

If you can't find the camera lens, check to see if your smartphone or tablet includes software to use a camera.

[INSTRUCTOR NOTE: Click ENTER TWICE to remove the highlight from the camera and to highlight the camera app.]. If you are using a device running the Android operating system, look for an icon of a camera or a menu with the heading titled photo. Tap the camera icon or menu item.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 58: Do You Have a Camera – Smartphone – Apple.

On Slide Text: Do You Have a Camera?

Notes Section

Talking Points: Apple smartphones and tablets include a camera. Most Mac computers also include a camera. A simple way to check to see if your device's camera works is to tap on the FaceTime or Camera icon.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 59: Do You Have a Camera – Smartphone – Apple (continued).

On Slide Text: Do You Have a Camera?

Notes Section

Talking Points: The camera should automatically turn on when these applications open.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 60: Do You Have a Camera – Other Options.

On Slide Text: Do You Have a Camera?

Notes Section

Talking Points: If your computer or laptop does not have a camera, you can attach an external camera or ask your health care provider if an audio-only appointment is possible.

If these steps do not work, you should check the manufacturer's website for more information on how to troubleshoot your device's issues.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 61: Do You Have a Camera - Stability.

On Slide Text: Do You Have a Camera?

Notes Section

Talking Points: When possible, make sure your device is on a stable surface so your camera remains in the same position during your appointment.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 62: Do You Have a Microphone and Speakers?

On Slide Text: Do You Have a Microphone and Speakers?

Notes Section

Talking Points: You will also need a microphone and speaker to talk to your provider and hear their response. Many devices have a built-in microphone and speaker.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 63: Do You Have a Microphone and Speakers – Windows Computer.

On Slide Text: Do You Have a Microphone and Speakers?

Notes Section

Talking Points: If you are using a computer or laptop running the Windows operating system and you can't hear any sound, click on the volume button to increase the sound. The button may be on your keyboard or on your screen.

Instructor Note: *If you are using a Windows computer for the training you may want to do a live demonstration of this section.*

Additional Details: User PowerPoint or a Live Demonstration

Slide Number & Title. Slide 64: Do You Have a Microphone and Speakers – Windows Computer (continued).

On Slide Text: Do You Have a Microphone and Speakers?

Notes Section

Talking Points: If that does not fix the problem, right-click the speaker icon on the taskbar. The icon is on the lower right-hand side of the screen.

Instructor Note: none

Additional Details: User PowerPoint or a Live Demonstration

Slide Number & Title. Slide 65: Do You Have a Microphone and Speakers – Windows Computer Audio Menu.

On Slide Text: Do You Have a Microphone and Speakers?

Notes Section

Talking Points: The Sound menu appears. Click on Open Sound settings.

Instructor Note: none

Additional Details: User PowerPoint or a Live Demonstration

Slide Number & Title. Slide 66: Do You Have a Microphone and Speakers – Windows Computer Audio Menu (continued).

On Slide Text: Do You Have a Microphone and Speakers?

Notes Section

Talking Points: If your Windows desktop or laptop has a speaker and microphone, it will show up on this screen.

Instructor Note: none

Additional Details: User PowerPoint or a Live Demonstration

Slide Number & Title. Slide 67: Do You Have a Microphone and Speakers – Smartphone.

On Slide Text: Do You Have a Microphone and Speakers?

Notes Section

Talking Points: The microphone and speaker may be a series of little holes or may look like a vent. Make sure you do not cover the speaker and microphone when using your device.

If you can't hear sound through the speakers, make sure the volume is turned up. There are usually one or two buttons on the side of the device that is used to control the volume.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 68: Do You Have a Microphone and Speakers – Additional Options.

On Slide Text: Do You Have a Microphone and Speakers?

Notes Section

Talking Points: You can attach external headphones with a built-in microphone to your device if it does not include a microphone or speaker. You may want to use external headphones so that others around you cannot hear what the provider is saying. Headphones may also provide a clearer audio connection.

If these steps do not work, check the device manufacturer's website for more information.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 69: Technical Requirements.

On Slide Text: Technical Requirements. A computing device with a
- Camera
- Microphone
- Speaker

Notes Section

Talking Points: If you have a computing device with a camera, microphone, and speaker along with strong internet access, you will be able to attend a video telehealth appointment.

Instructor Note: none

Additional Details: none

Tips for Troubleshooting Technical Problems

Depending on what type of device you are using, you can demonstrate some of the steps outlined below using your computer instead of using the PowerPoint slides. The sections have been marked with in the Additional Details section. You will also see this instruction: *USE POWERPOINT OR LIVE DEMONSTRATION* in the PowerPoint Notes section of the applicable slides.

Slide Number & Title. Slide 70: Tips for Troubleshooting Technical Problems.

On Slide Text: Tips for Troubleshooting Technical Problems

Notes Section

Talking Points: Now, let's explore how to fix some of the most common technical problems you may have with your device when you try to connect to your telehealth appointment.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 71: Make sure your camera and microphone are turned on!

On Slide Text: Tips for Troubleshooting Technical Problems. Make sure your camera and microphone are turned on!

Notes Section

Talking Points: Make sure your camera and microphone are turned on! If icons of a camera and microphone have a slash through them, it means they are turned off, and your provider can't hear or see you.

[INSTRUCTOR NOTE: Click ENTER to display the Video and Microphone ON icons and image on-screen displays.]. To turn them on, click on the icon. The slash across the camera or microphone will disappear.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 72: Restart Your Device.

On Slide Text: Tips for Troubleshooting Technical Problems. Restart your device.

Notes Section

Talking Points: If you experience problems, try restarting your computer or laptop. If you are using a computer running the Windows operating system, click on the Start menu on the lower left-hand side of the screen.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 73: Restart Your Device – Windows Computer.

On Slide Text: Tips for Troubleshooting Technical Problems. Restart your device.

Notes Section

Talking Points: then Power,

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 74: Restart Your Device – Windows Computer (continued).

On Slide Text: Tips for Troubleshooting Technical Problems. Restart your device.

Notes Section

Talking Points: A menu displays. Click Restart to restart your computer.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 75: Restart Your Device – Smartphone.

On Slide Text: Tips for Troubleshooting Technical Problems. Restart your device.

Notes Section

Talking Points: If you are using a smartphone or tablet, the steps vary depending on the manufacturer and model of your device. If needed, check the manufacturer's website for information on how to restart your particular device.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 76: Make Sure Your Device Is Fully Charged or Plugged In.

On Slide Text: Tips for Troubleshooting Technical Problems. Make sure your device is fully charged or plugged in.

Notes Section

Talking Points: Make sure your device is fully charged or plugged in.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 77: Close Other Applications -- Computer.

On Slide Text: Tips for Troubleshooting Technical Problems. Close other applications.

Notes Section

Talking Points: If you are having problems with your internet connection, try closing applications you are not using. Closing applications can increase the amount of internet available to run the portal.

[*INSTRUCTOR NOTE*: *Click ENTER to highlight the X on the top right side of the browser window.].* If you are using a laptop or computer running a Windows operating system, click on the X at the top right side of the window to close it.

Instructor Note: *You may want to do a live demonstration using the instructor's computer. Make sure to have a Window open that you can easily close.*

Additional Details: User PowerPoint or a Live Demonstration

Slide Number & Title. Slide 78: Close Other Applications – Android Smartphone.

On Slide Text: Tips for Troubleshooting Technical Problems. Close other applications. Step 1. Step 2.

Notes Section

Talking Points: To close an app on an Android device, tap the Overview button, which is usually located at the lower middle of the screen.

[*INSTRUCTOR NOTE: Click ENTER to display STEP 2.].* When you tap on this icon, it will display all the apps that are currently open. To close an app, tap the app and swipe up. You may notice differences between your device and what is shown. If that is the case, check with your device's manufacturer's website for more information.

Instructor Note: none

Additional Details: User PowerPoint or a Live Demonstration

Slide Number & Title. Slide 79: Close Other Applications – Apple Smartphone.

On Slide Text: Tips for Troubleshooting Technical Problems. Close other applications.

Notes Section

Talking Points: If you are using an Apple tablet or smartphone, swipe up from the bottom of the screen to see all of the apps that are open. To close an app, tap the app and swipe up.

Instructor Note: none

Additional Details: User PowerPoint or a Live Demonstration

Slide Number & Title. Slide 80: Turn Off Your Camera.

On Slide Text: Tips for Troubleshooting Technical Problems**.** Try turning off your camera.

Notes Section

Talking Points Keep in mind that when the camera is on, it uses more bandwidth, so if the connection starts to break up, you may need to turn off the camera when it is not needed.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 81: Make Sure Your Application Is Up to Date.

On Slide Text: Tips for Troubleshooting Technical Problems**.** Make sure your application is up to date.

Notes Section

Talking Points: Make sure the software you need for the appointment is up to date. Some telehealth appointments only need a web browser. Others may need additional software to connect to the appointment. Check with your provider to make sure you have the software you will need to attend the appointment.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 82: Try Using Another Device.

On Slide Text: Tips for Troubleshooting Technical Problems**.** Try using another device.

Notes Section

Talking Points: If you can't connect to your visit on your device, try using another device if you have one.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 83: Contact Your Provider for Help.

On Slide Text: Tips for Troubleshooting Technical Problems. Contact your provider for help.

Notes Section

Talking Points: If none of the previous tips work for you, contact your health care provider for help. The number to call for assistance may be found in your confirmation email or on the health care provider's website.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 84: Tips for Troubleshooting Technical Problems - Questions.

On Slide Text: Tips for Troubleshooting Technical Problems: Questions.
- Are there tips you would like to share?
- Is there a problem you have encountered that we did not cover?

Notes Section

Talking Points: Are there any tips you have used to troubleshoot technical problems that you would like to share?

Is there a problem you have encountered that we did not cover?

Before we move to the next section, do you have any questions?

Instructor Note: *Lead a brief discussion. Ask the participants if they have any tips they would like to share or if there are any problems they have encountered that were not covered.*

Review and address items in the "parking lot".

Additional Details: For information about what the parking lot is, see the "Before the Workshop Begins" section of the Instructor Guide.

Attending the Telehealth Appointment

Slide Number & Title. Slide 85: Attending the Telehealth Appointment.

On Slide Text: Attending the Telehealth Appointment

Notes Section

Talking Points: Now that we know we have the technology we need for a telehealth appointment, let's explore what you need to do to schedule and attend a telehealth appointment.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 86: Scheduling the Appointment.

On Slide Text: Scheduling the Appointment

- Ask the scheduler if the appointment can be a telehealth visit.
- Verify that your insurance will cover the telehealth appointment.
- Let them know if you need accommodations.

Notes Section

Talking Points: [*INSTRUCTOR NOTE: Click ENTER to display BULLET 1.*]. If you would like to see if your next appointment can be a telehealth appointment, just ask!

[*INSTRUCTOR NOTE: Click ENTER to display BULLET 2.*] Verify that your insurance will cover the telehealth appointment. Whether you have Medicare, Medicaid, private insurance, or a marketplace insurance plan, it's important to check if telehealth appointments are covered.

[*INSTRUCTOR NOTE: Click ENTER to display BULLET 3.*] Let them know if you need accommodations. Accommodations include needing an interpreter, real-time captioning, telecommunications relay service, video relay service, or remote interpreting.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 87: Information to Prepare Before the Appointment.

On Slide Text: Information to Prepare Before the Appointment

- Your allergies
- Your current prescriptions
- Medical devices you use
- Your preexisting conditions
- Your doctors and recent medical appointments or hospitalizations
- Address of you're your preferred pharmacy
- Make a list of questions

Notes Section

Talking Points A couple of days before the appointment, you will want to gather the information you may need for your appointment. That includes a list of your allergies, an up-to-date list of your prescriptions, a list of the medical devices you use, a list of preexisting conditions, a list of your doctors and information about recent medical appointments or hospitalizations, and the phone number and address of your preferred pharmacy.

You may also want to make a list of your health concerns and questions you want to discuss with your doctor during the appointment.

A medical professional may contact you shortly before the appointment to gather and ask you for information like your vitals, a summary of why you scheduled an appointment, and more.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 88: Log Into the Patient Portal.

On Slide Text: Log Into the Patient Portal

- Make sure you remember your username and password.
- Check that your information is up to date.
- Check if health care provider has requested any information for the appointment.

Notes Section

Talking Points Before the appointment, log into the patient portal to make sure you remember your username and password. Once you log in, check that your information is up to date, and to see if the provider has asked you to provide any information before the appointment.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 89: Day of the Appointment.

On Slide Text: The Day of the Appointment

- Verify you **received a link** to attend the telehealth visit.
- Review the **instructions about how to access** the telehealth appointment.
- Wear clothing that **easily shows areas of your body** your provider may need to see.
- Make sure you **have your provider's telephone number** in case you experience problems connecting to the appointment.
- **Fill out any paperwork** that is required as part of the check-in process.
- **Log in 15 minutes** early to resolve technical issues.
- Be patient. You may be put in a **virtual waiting room** until the provider is ready to see you.

- A pop-up message may appear asking for **access to your microphone and camera**. Click "Yes" or "Allow".
- If you bring another person to your appointment, you may need to fill out a **consent form**.

Notes Section

Talking Points: On the day of the appointment, there are several things to do to prepare. Don't worry you do not need to write this down. All of this information can be found in the Learner's Handout.

[INSTRUCTOR NOTE: Click ENTER to display BULLET 1.]. First, verify that you have received a link to attend the telehealth visit. It may be sent via text message, email, or in the patient portal.

[INSTRUCTOR NOTE: Click ENTER to display BULLET 2.]. Review the instructions about how to access the telehealth appointment.

[INSTRUCTOR NOTE: Click ENTER to display BULLET 3.]. Wear clothing that makes it easy to show areas of your body your provider may need to see.

[INSTRUCTOR NOTE: Click ENTER to display BULLET 4.]. Make sure you have your provider's telephone number in case you experience problems connecting to the appointment.

[INSTRUCTOR NOTE: Click ENTER to display BULLET 5.]. Fill out any paperwork that is required as part of the check-in process. Your provider will send you instructions on how to complete the paperwork before your appointment.

[INSTRUCTOR NOTE: Click ENTER to display BULLET 6.]. Approach your telehealth appointment the way you approach your in-person appointments. You should log in 15 minutes early to resolve technical issues.

[INSTRUCTOR NOTE: Click ENTER to display BULLET 7.]. Be patient. You may be put in a virtual waiting room until the provider is ready to see you.

[INSTRUCTOR NOTE: Click ENTER to display BULLET 8.]. A pop-up message may appear asking for access to your microphone and camera. Click yes or allow.

[INSTRUCTOR NOTE: Click ENTER to display BULLET 9.]. If you bring another person to your appointment, you may need to fill out a consent form.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 90: During the Appointment.

On Slide Text: During the Appointment

- Make sure your health care provider can see and hear you.
- Let your health care provider know if you have problems seeing or hearing them.
- Review your list of questions. Ask questions if you need help understanding something.
- Take notes.

Notes Section

Talking Points: During the appointment,

[*INSTRUCTOR NOTE: Click ENTER to display BULLET 1.*]. Make sure your health care provider can see and hear you.

[*INSTRUCTOR NOTE: Click ENTER to display BULLET 2.*]. Let your health care provider know if you have problems seeing or hearing them.

[*INSTRUCTOR NOTE: Click ENTER to display BULLET 3.*]. Review your list of questions. Ask questions if you need help understanding something.

[*INSTRUCTOR NOTE: Click ENTER to display BULLET 4.*]. Take notes that you can review after the appointment is over.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 91: Summary of Your Telehealth Appointment.

On Slide Text: Summary of Your Telehealth Appointment

Notes Section

Talking Points: At the end of the appointment, the health care provider should outline the next steps and add a summary of your appointment to your medical record. You should be able to access this summary in your patient portal.

If you have questions after the appointment, you can call your provider or submit a question using the patient portal. Depending on the question, the provider may answer the question in the portal or give you a call. This care is usually considered part of your telehealth appointment. More difficult questions, questions not related to your appointment, or questions you have months after the appointment may require payment.

Instructor Note: none

Additional Details: none

Slide Number & Title. Slide 92: Congratulations, Learners!

On Slide Text: Today you have:

- Learned about the benefits of telehealth.
- Built skills to:
    - Create an account with the patient portal and log in.
    - Message your provider using the portal.
    - Identify a device to use to connect to a telehealth appointment.
    - Identify how to fix common technical issues.
    - Prepare for and attend your telehealth appointment.

Notes Section

Talking Points: Congratulations, learners! Today you have learned:

- Learned about the benefits of telehealth
- Built skills to:
    - Create an account with the patient portal and log in
    - Message your provider using the portal
    - Identify a device to use to connect to a telehealth appointment
    - Identify how to fix common technical issues
    - Prepare and attend your telehealth appointment

Are there any other questions before today's workshop ends?

Instructor Note: *Review and address items in the "parking lot".*
Provide each learner with a Certificate of Completion.

Additional Details: For information about what the parking lot is, see the "Before the Workshop Begins" section of the Instructor Guide

Slide Number & Title. Slide 93: Additional Training Online.

On Slide Text: Today's training is provided the Public Library Association with support from Heartland Forward.

Visit <insert libraries URL here> and https://www.digitallearn.org for more courses and to build confidence using technology.

(If applicable): Mention future PLA digital learning workshops planned for the location and/or community.

Instructor Note: *Point the learners to additional courses that are available. Draw learners' attention to the website address in the slide.*

Additional Details: Before the workshop begins, insert your library's URL on the PowerPoint slide. Identify future workshops learners may want to attend and mention those classes as you wrap up the workshop.

Slide Number & Title. Slide 94: Thank You!

On Slide Text: Thank you for coming!

Notes Section

Talking Points: We appreciate all our participants for coming and we encourage you to keep learning!

(If applicable): Please fill out the survey before you leave today.

Instructor Note: none

Additional Details: none