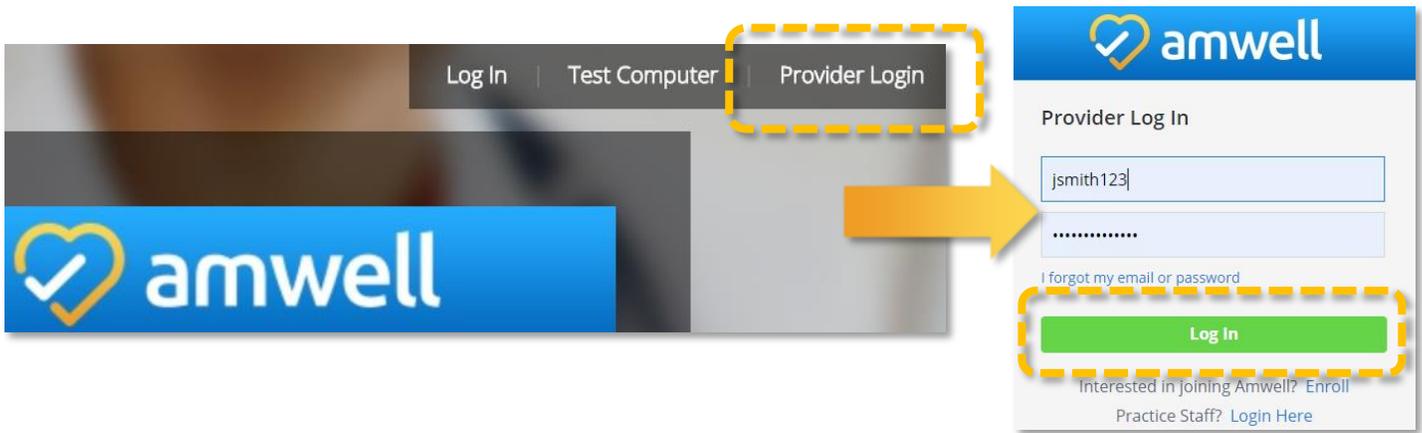


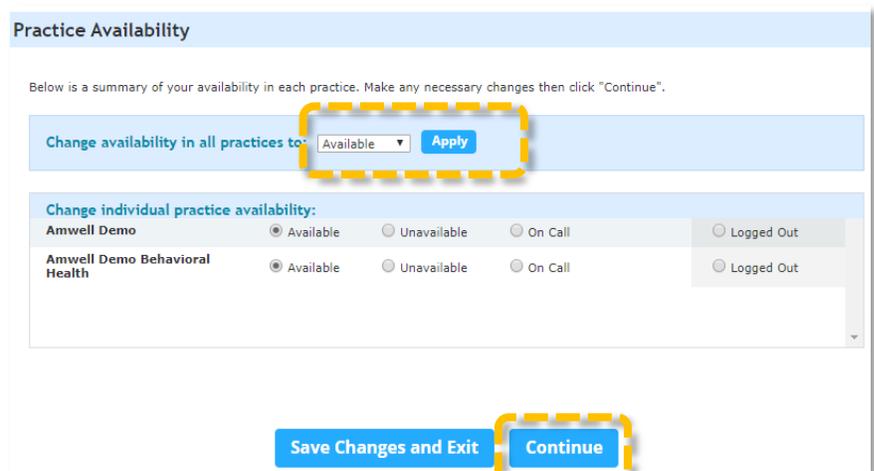
Scheduled Visit Workflow

Transition in office appointments to telehealth visits with the scheduled visit workflow. Simply set the date and time for your visit, invite patients to enroll, launch a video visit and export patient records to your EMR.

1. Click 'Log In' in the top right corner of the page, click 'Provider Login'.
2. Enter your username and password, click 'Log In'.



3. If your account is enrolled in more than one practice you will be directed to the 'Practice Availability' page. You can set your availability from the 'Change availability in all practices to' section or you can set availability for specific practices listed under 'Change individual practice availability' section. Click 'Continue'.



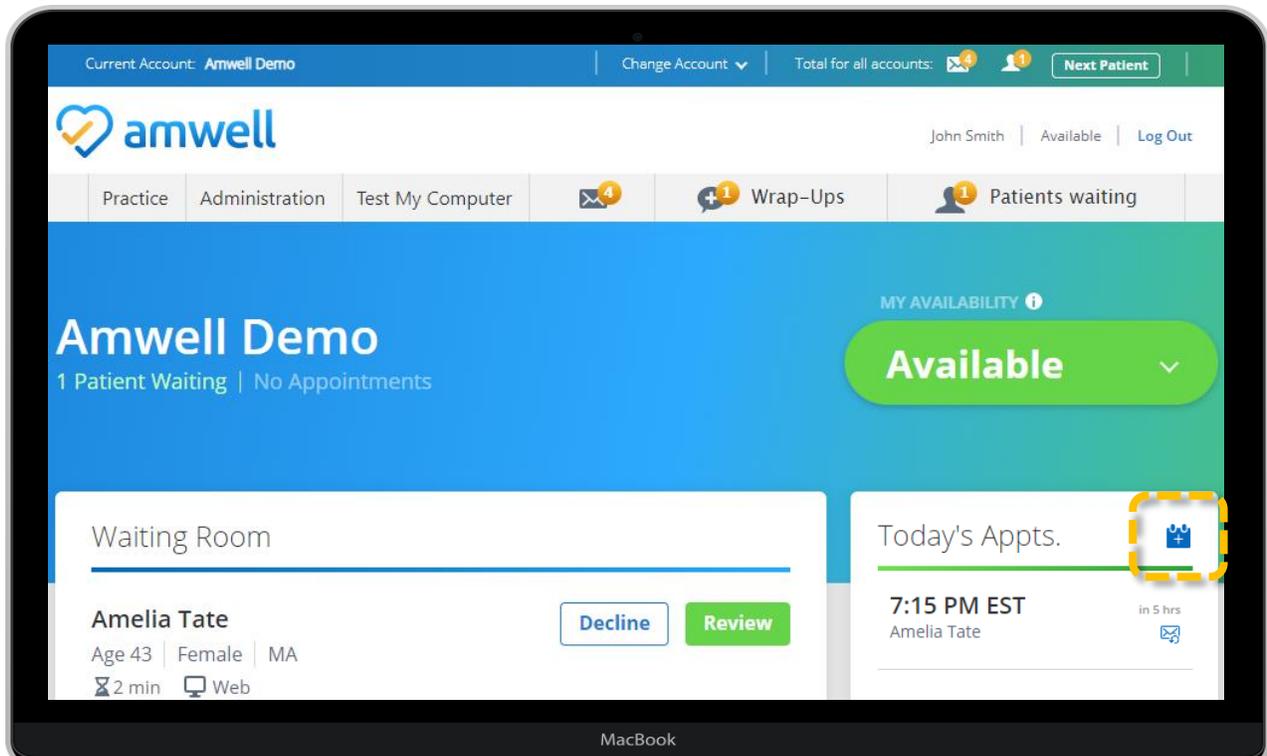
4. You will be directed to your practice home. From this page you will manage your waiting room, availability, incoming patients and calendar.

The screenshot displays the Amwell Demo practice home interface. At the top, the user is logged in as John Smith, who is available. The dashboard includes a navigation bar with options for Practice, Administration, Test My Computer, Wrap-Ups, and Patients waiting. The main content area features a large 'Available' button, a 'Waiting Room' section with a patient named Amelia Tate (Age 43, Female, MA, 2 min, Web) and a 'Today's Appts.' section showing 'No Appointments'. The 'Waiting Room' and 'Today's Appts.' sections are highlighted with dashed yellow boxes.

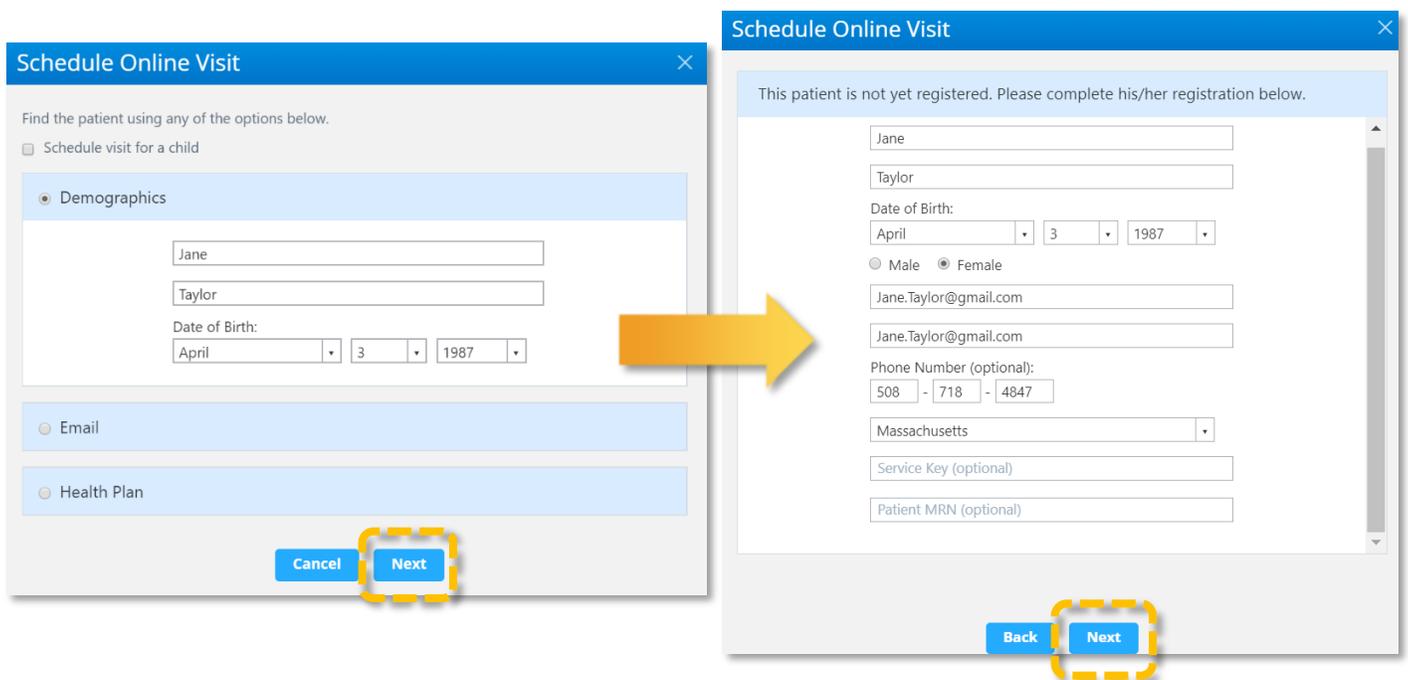
5. When you enter your account always run 'Test My Computer'. Click 'Start Test'. Follow the 'Test My Computer' prompts. Click 'Yes' to proceed to the next step. Test your camera, microphone, speaker and internet speed. When you have completed the required steps click 'Done'. Run 'Test My Computer' each time you sign on to ensure your video software is up to date. Close the 'Test My Computer' page and return to your waiting room.

The screenshot shows the navigation bar of the Amwell Demo practice home. The navigation bar includes options for Practice, Administration, and Test My Computer. The 'Test My Computer' button is highlighted with a dashed yellow box.

6. Click the blue icon next to 'Today's Appts.' to schedule an appointment from your waiting room.



7. Enter the patient's details. Click 'Next'. Complete the patient registration, click 'Next'.



8. Select who the visit is for, you can schedule for yourself, by date, other provider's names or the first available. Click 'Next'. Select the date and time. Edit visit length and reminders from the drop down. If you would like to schedule the visit for right now click, 'Schedule for right now'. Click 'Next'.

The first screenshot shows the 'Schedule Online Visit' window with the heading 'Who is seeing the patient?'. There are four radio button options: 'Me', 'Find providers by date', 'Another provider', and 'The first available'. The 'Next' button at the bottom is highlighted with a dashed orange box. An orange arrow points from this 'Next' button to the second screenshot.

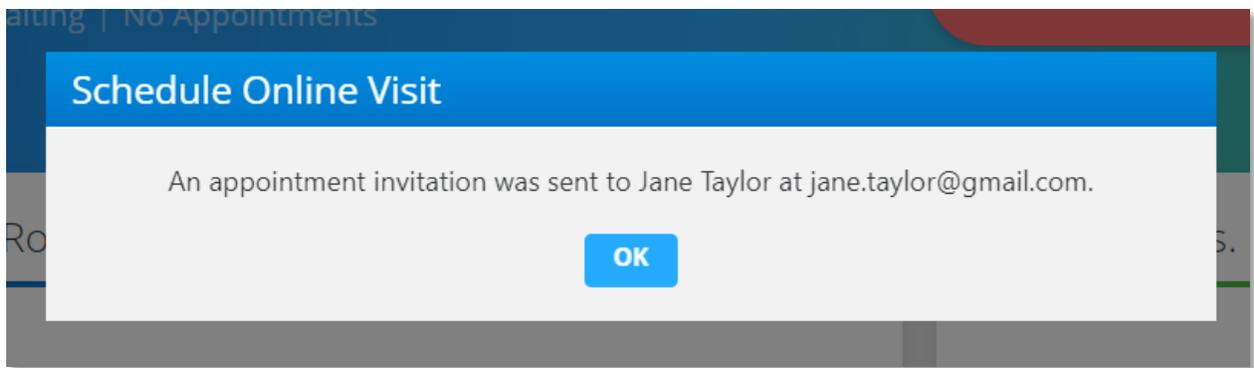
The second screenshot shows the 'Schedule Online Visit' window with the heading 'Select a date and time' and 'Schedule for right now'. A calendar for March 2020 is displayed, with the 24th highlighted. To the right, a list of times for Tuesday, March 24, 2020 is shown, with 11:45 AM selected. Below the calendar, there are fields for 'Visit length' (45 minutes), 'Email provider reminder' (15 minutes before visit), and 'Email provider appointment' (checked). The 'Next' button at the bottom is highlighted with a dashed orange box.

9. Entering the patient's health insurance information is optional. Add a note to the patient and click 'Complete Visit Setup'.

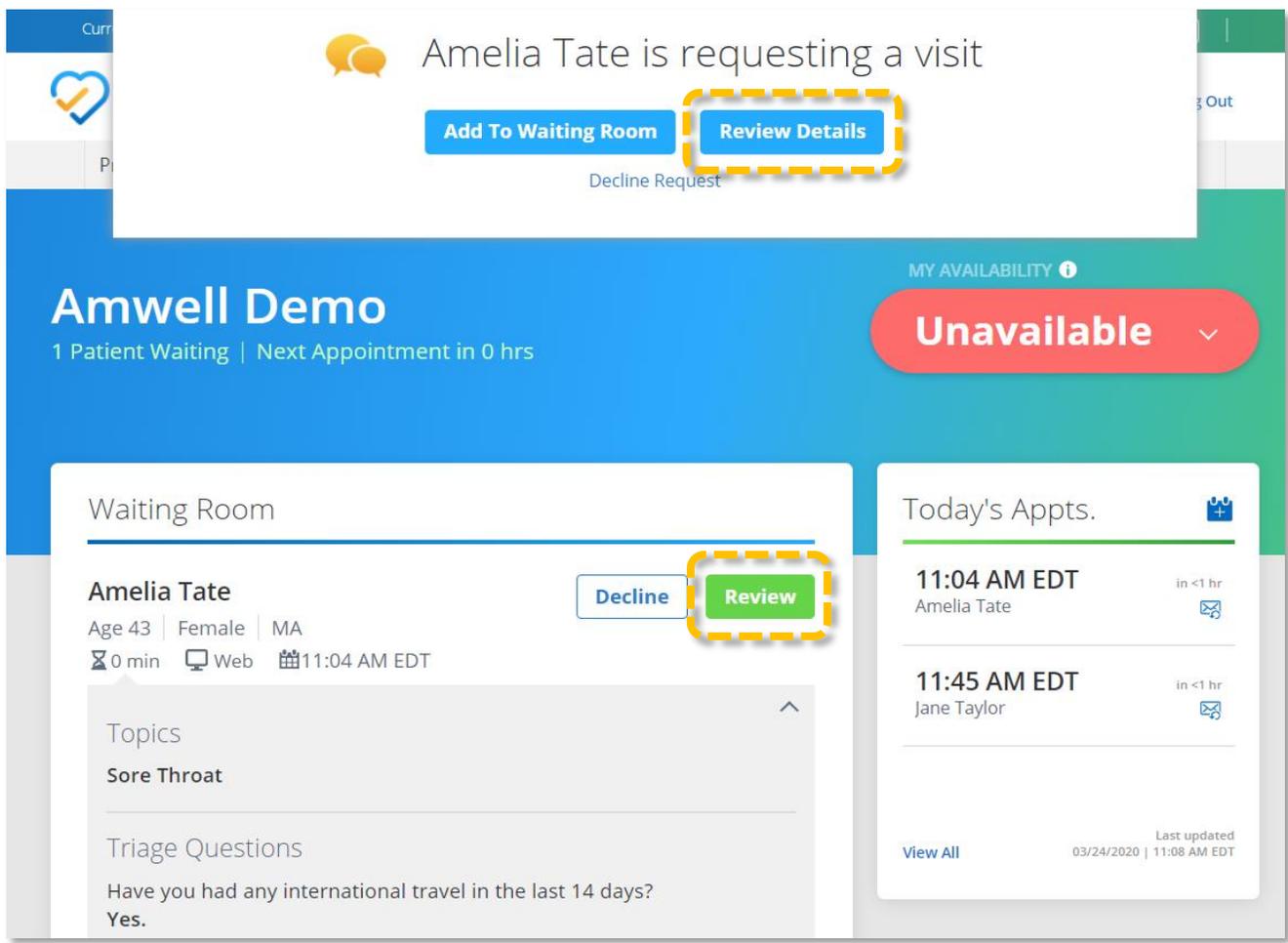
The first screenshot shows the 'Schedule Online Visit' window with the heading 'Enter the patient's insurance information (optional)'. There is a dropdown menu with the text '- Select Health Plan -'. Below it, a note says 'If the patient's Health Plan is not listed, you can skip this step.' The 'Next' button at the bottom is highlighted with a dashed orange box. An orange arrow points from this 'Next' button to the second screenshot.

The second screenshot shows the 'Schedule Online Visit' window with the heading 'Visit Details'. It displays the following information: Patient: Jane Taylor, Provider: John Smith, Psychiatrist, Visit Time: Tue, Mar 24, 2020 11:45 AM EDT, Visit Type: Video, and Patient Cost: \$69.00. Below this, there are logos for American Express, Mastercard, Visa, and Discover, with a note 'Collected from the patient at the time of visit.' and a link 'Add coupon'. The 'Invitation Options' section has a text area for 'Note to Patient (optional):' containing the text 'Please run "Test My Computer" before your visit to set up your video and audio inputs.' The 'Complete Visit Setup' button at the bottom is highlighted with a dashed orange box.

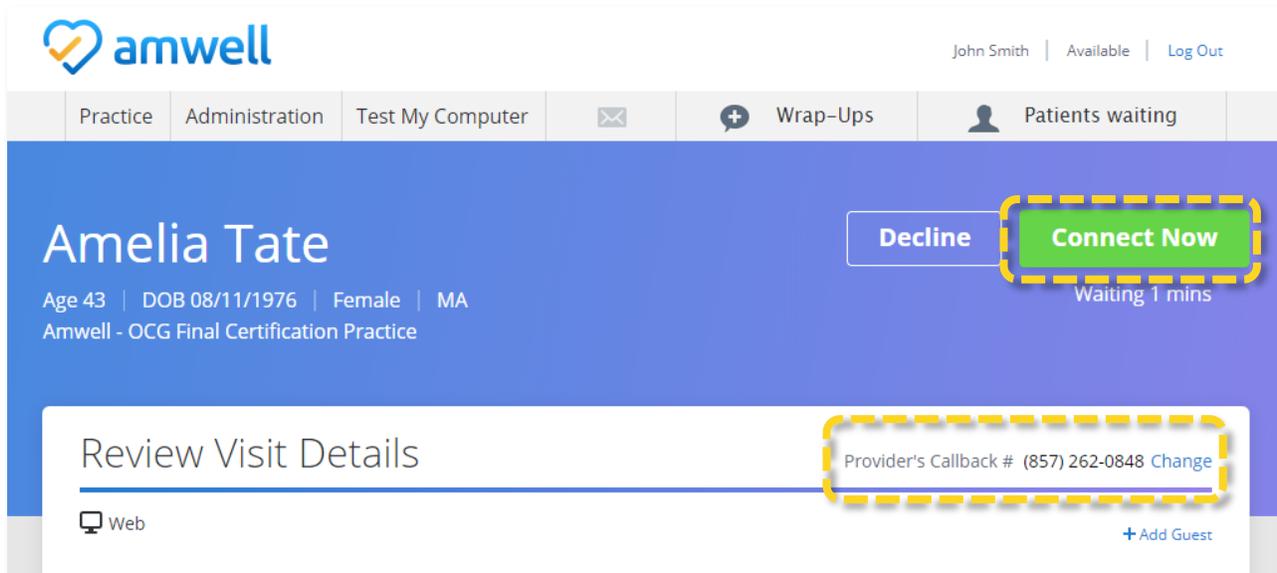
10. An email invitation will be sent to the patient. Click 'OK'.



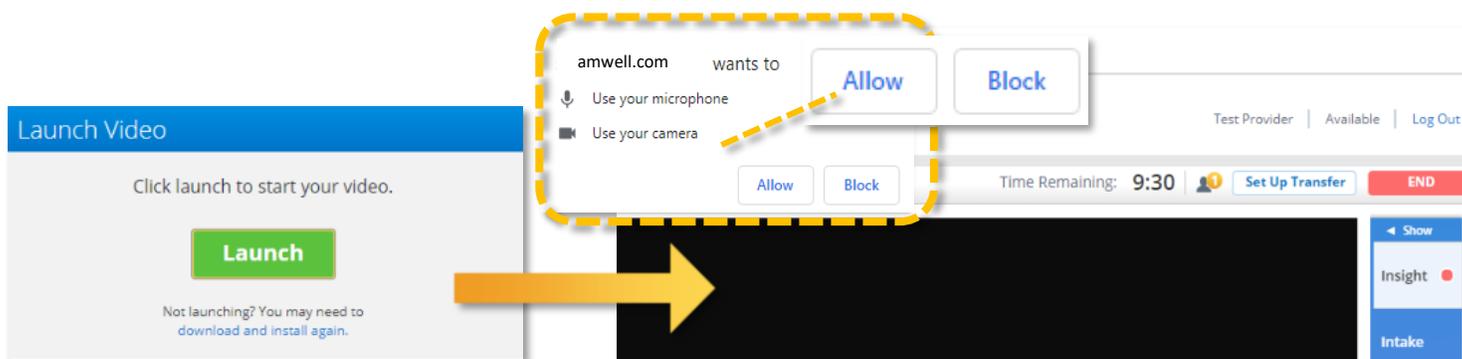
11. At the time of the visit the patient will enter your waiting room a drupe will appear and an alert will play. You will also be able to see your other upcoming appointments in the 'Today's Appts' section. Click 'Review Details' from the drupe or 'Review' from the Waiting Room.



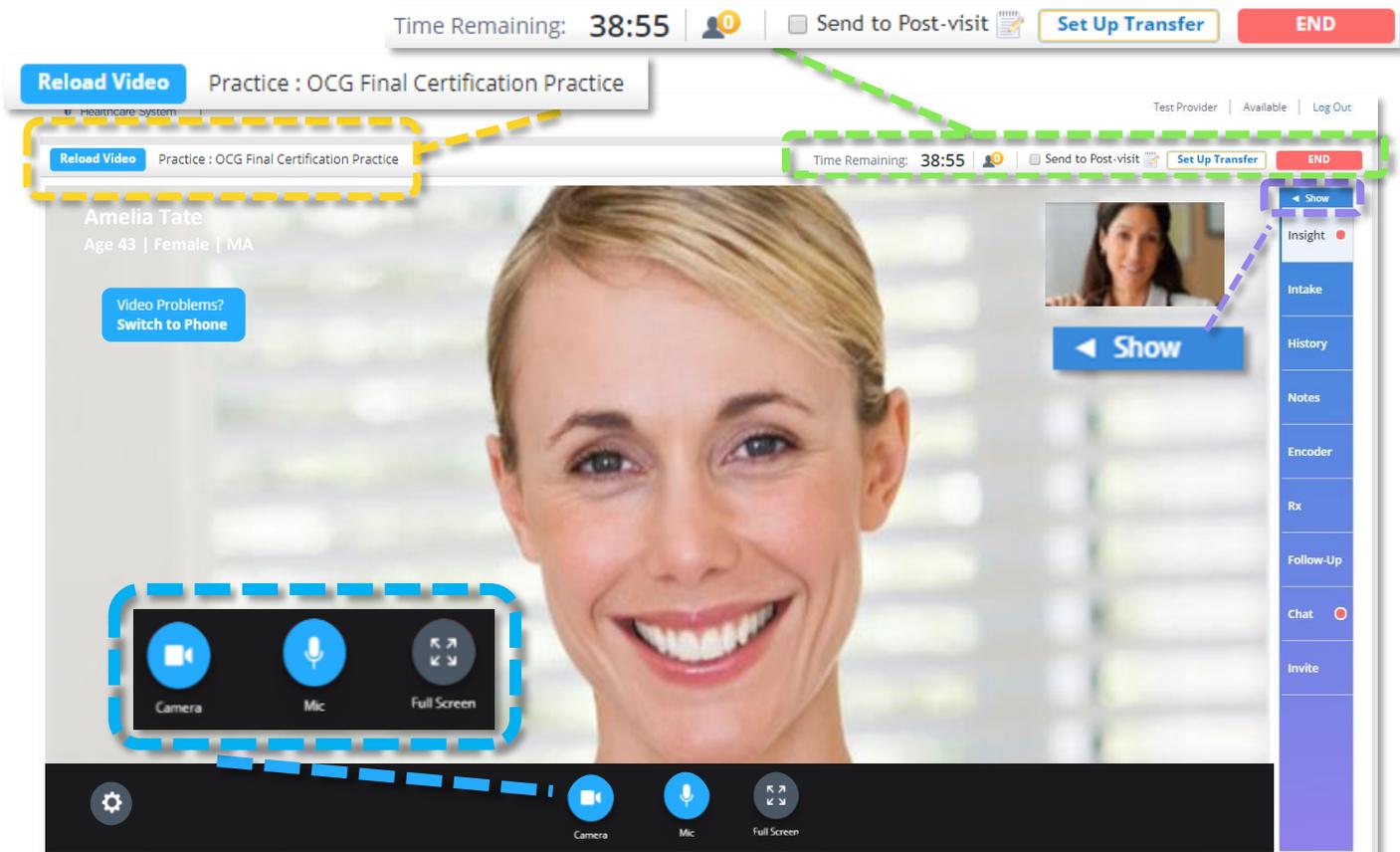
12. Review patient details. The length of time the patient has waited, patient's modality, current location and reason for visit are listed. Confirm you are available on the phone number listed next to 'Provider's Callback #'. Click 'Connect Now'.



13. Click 'Launch'. Click 'Allow' to provide access to your microphone and camera.

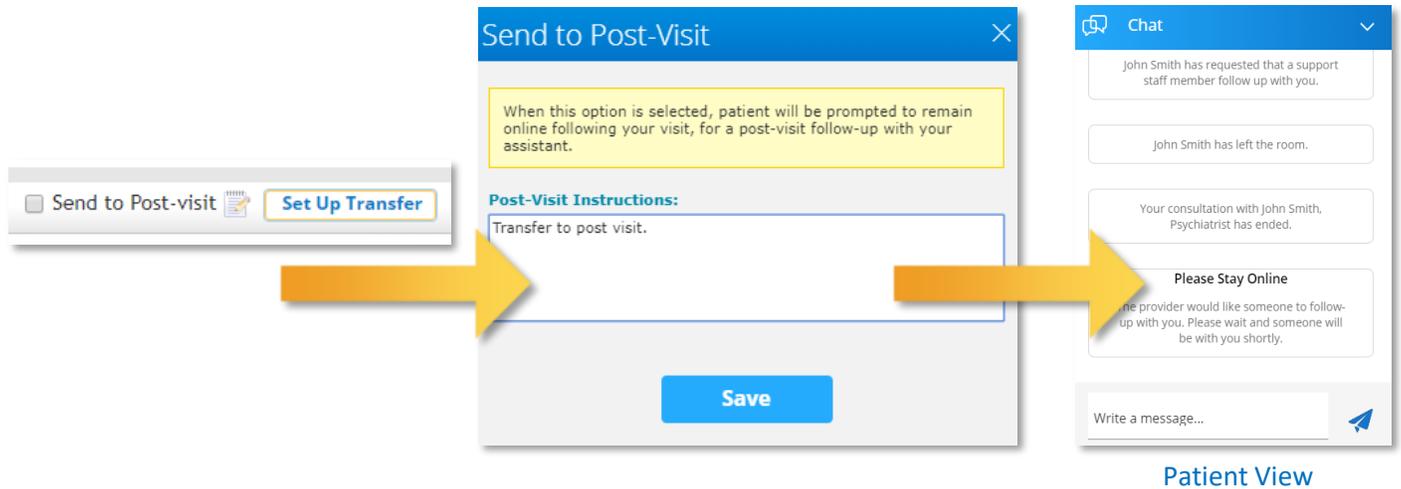


14. **Video Window:** In the top left of the video window is the 'Reload Video' button which momentarily interrupts the video and creates a stronger connection, to the right is the practice the patient has entered the visit through. The visit timer is set to a standard visit length automatically and is never visible to the patient, the timer will extend your visit length, you will never be cut off in the middle of a visit with a patient. The icon of a person alerts you if there are patients waiting to see you, 'Set Up Transfer' and 'Send to Post Visit' are discussed below. Click the red 'End' button to end the visit. Click the 'Show' button to expand the documentation panel.

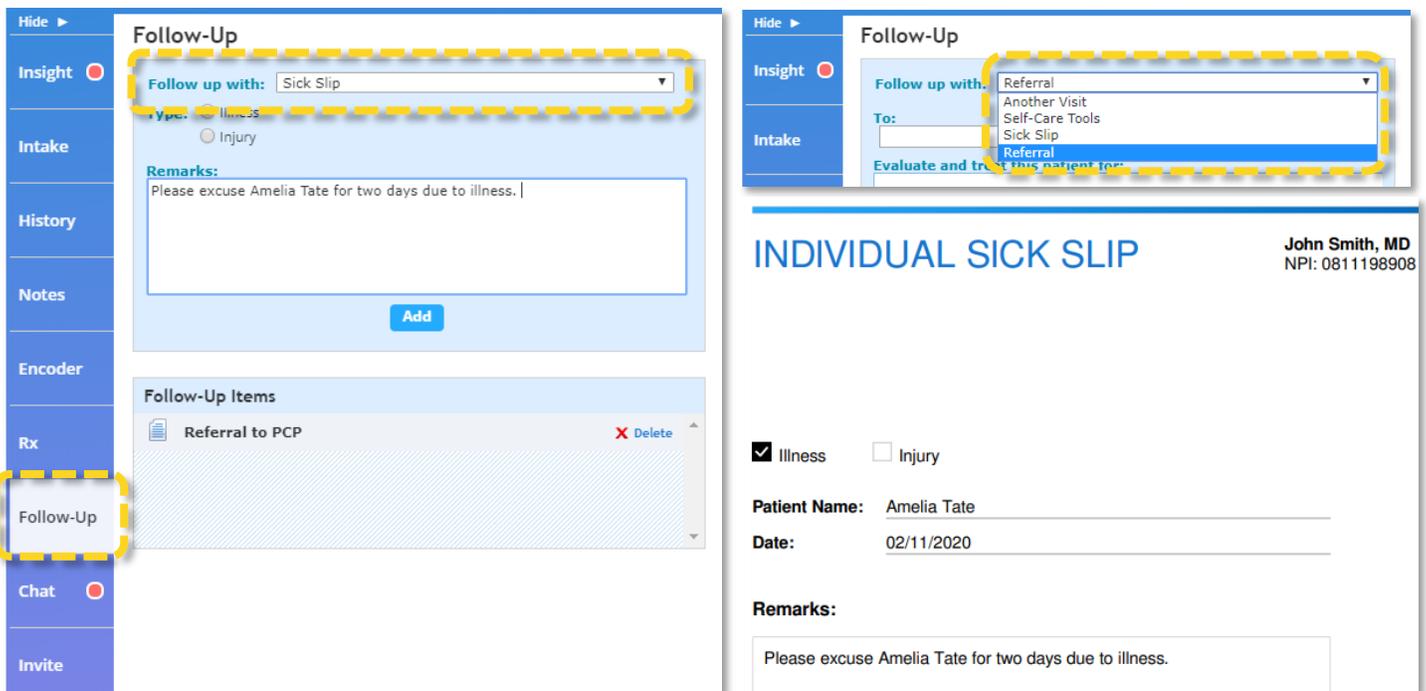


15. **Patient Details:** The patient's name, gender and state are always listed in the top left of the video. If the patient's video connection is not strong enough use the 'Switch to Phone' button, you will receive a call on to the number listed as 'Provider Callback #'. On the bottom of the window the gear icon will open the video settings. The camera icon adjusts your video view, the mic button mutes your microphone and the full screen icon expands the patient video.

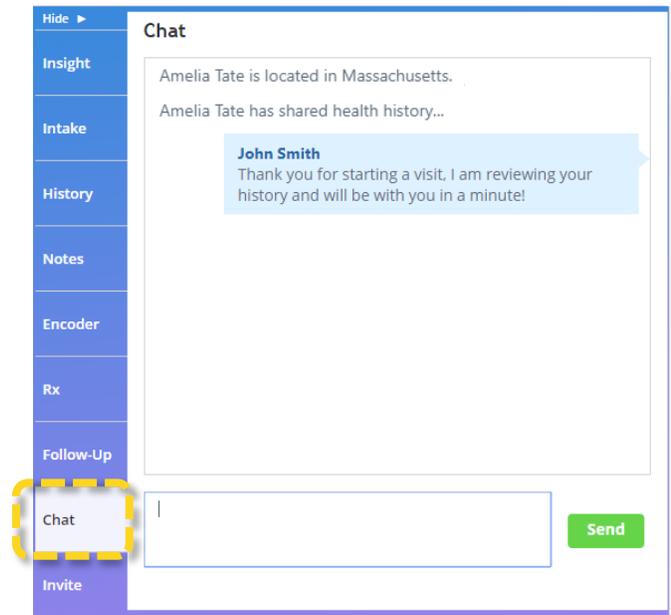
16. When the 'Send to Post Visit' button is clicked the visit will end and the patient will be directed to a follow up visit with practice staff. Practice staff can schedule follow up visits on your behalf, add in sick slips and chat with the patient. Check with your administrator to see if you will use this workflow. 'Set Up Transfer' allows you to send the patient to a follow up visit with another available provider.



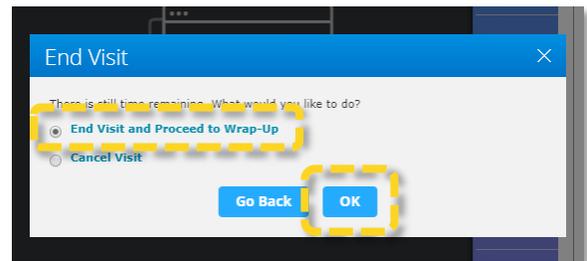
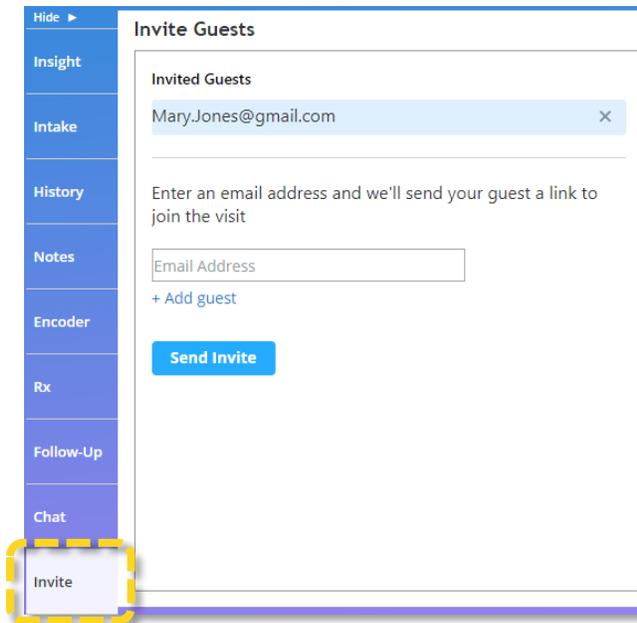
17. **Follow Up:** In the 'Follow Up' tab you can create a sick slip due to illness or injury. Enter a description in the remarks section and click 'Add'. Patients receive sick slips as a pdf via secure messages when the Wrap-Up is submitted. A basic referral can be created by selecting referral from the dropdown. You will not be able to select a specific provider but the patient will receive the referral as a pdf file and will be able to follow up on your suggestion.



18. Use 'Chat' to connect with the patient if for example they have a poor video connection and you are going to switch the visit to phone. If the chat is grayed out the patient has launched the visit through the app and chat is not available.



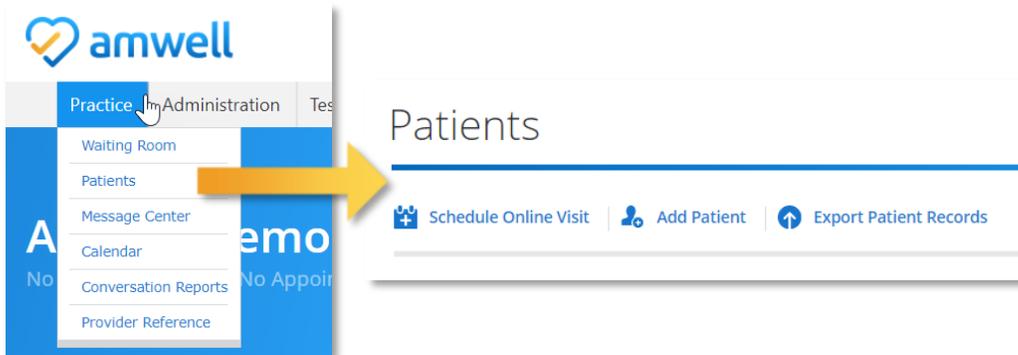
19. **Invite:** 'Invite' allows both patients and providers to invite a guest into the visit.
20. To end the visit prompt the patient to click the red 'End Visit' button. A pop up will appear, select 'End Visit and Proceed to Wrap-Up' and click 'OK'. Note: clicking 'Cancel Visit' will delete the record of the visit, this should only be used if there was a technical issue and no clinical care was provided.



Export Patient Records

If you have documented in the Amwell platform you can export the patient's record to update your EMR.

1. Hover over the 'Practice' tab, click 'Patients'. Click 'Export Patient Records'.



2. Select either 'Export Visit Summaries' or 'Export Health Summaries'. Select which visits you would like to export and the format you would like to receive the file in. A zip file will be sent to you by secure message. Open the zip file and use the visit information to create a new EMR encounter to submit a claim with the patient's health plan.

A screenshot of the 'Export Patient Records' form. The form is titled 'Export Patient Records' and has a blue header. Below the header, there is a section titled 'Select Summaries to Export'. This section contains two radio button options: 'Export Visit Summaries' (selected) and 'Export Health Summaries'. Under 'Export Visit Summaries', there are three sub-options: 'All Visit Summaries', 'Visit Summaries not yet exported', and 'Visit Summaries within a date range:'. The date range option has two input fields for dates, with examples '(e.g., 5/16/2001)'. There is also a checkbox for 'Include Health Summaries for these visits'. Below the 'Select Summaries to Export' section is a section titled 'Select Export Format' with three radio button options: 'PDF' (selected), 'CCD', and 'CCR'. At the bottom of the form, there are two buttons: 'Cancel' and 'Continue'. Both the 'Export Visit Summaries' radio button and the 'Continue' button are highlighted with a yellow dashed border.



Patient Experience Entering Scheduled Visit

When you invite a patient to join a scheduled telehealth visit they will be prompted to complete the following steps.

1. The patient will receive an email invitation prompting them to enroll in the platform and prepare their device.

amwell Your Upcoming Telehealth Appointment

Patient: Krista Smith
Cost: \$69.00
When: Tuesday, March 24, 2020 at 5:15 PM EDT

Provider Note: Thank you for rescheduling your appointment as a telehealth visit. Use click the 'Start Appointment' button when you are ready to begin the visit.

Your upcoming appointment
Click the button 10-15 minutes before your appointment.

Get Started

Cancel Appointment

For technical assistance, call 855-635-1393.

amwell

Welcome, Krista!
(If this is not you, [click here to enroll](#).)

Your appointment with John Smith is about to begin.

We need to collect some basic information so the provider can better assist you. Once you've completed these questions, the provider will be notified of your arrival.

If you've been here before, you may be asked to log in first.

Continue

Need technical assistance? Contact Customer Support at 855-635-1393.

2. The patient will set their account password and agree to terms of use.

amwell

Please choose a new password

Password

Confirm Password

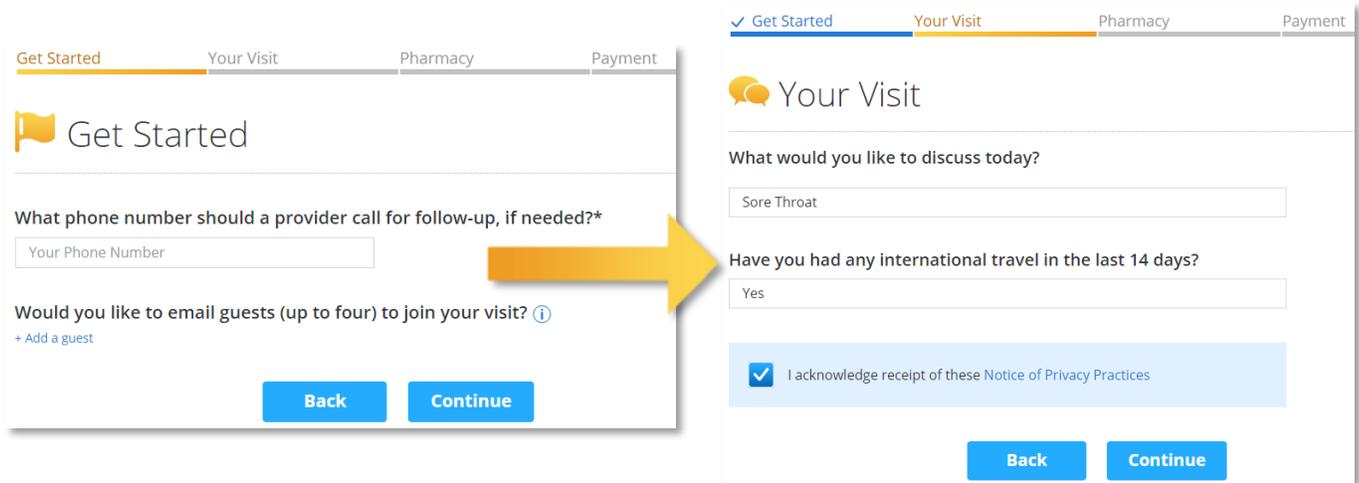
Change Password

Hi Krista, please complete your enrollment below.

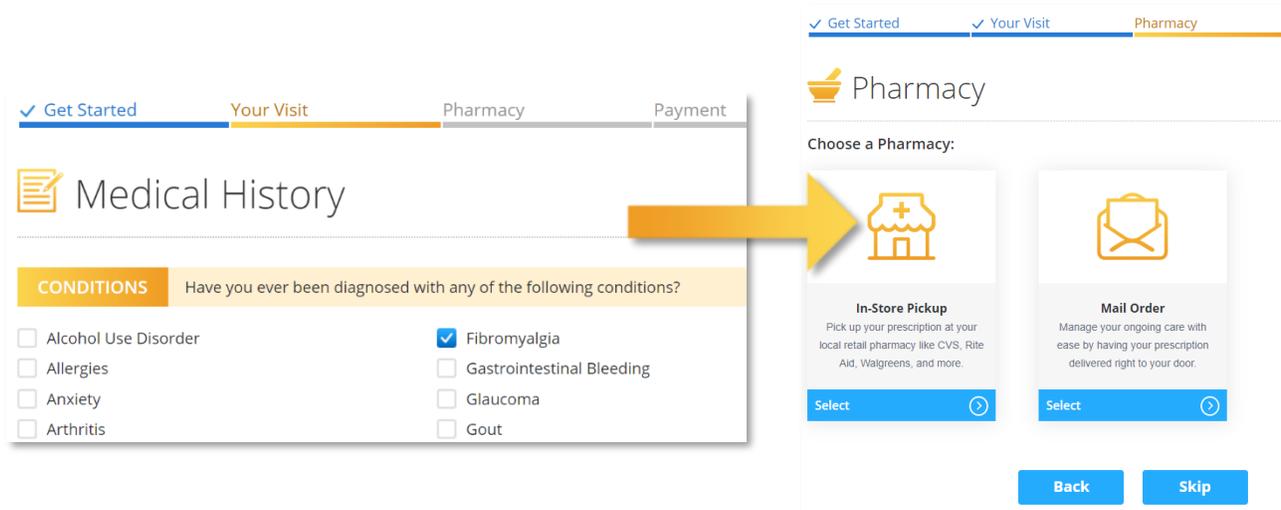
I agree to these Terms of Use.

Continue

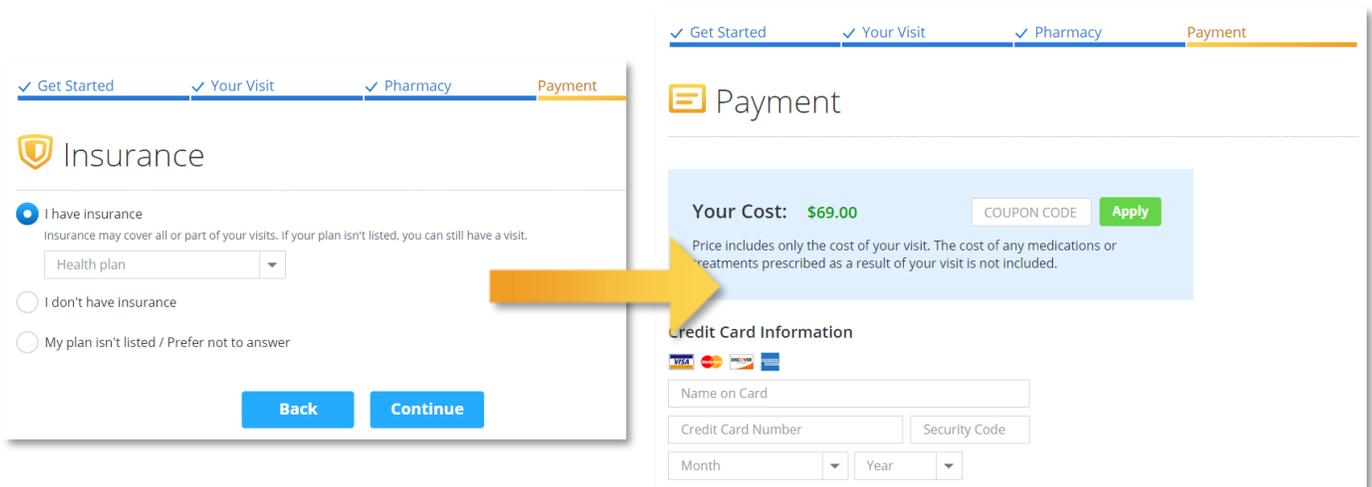
3. The patient will be prompted to add a phone number, complete triage questions and agree to privacy practices.



4. They will then add in medical history and select their pharmacy.



5. The patient will add their insurance and payment details.



- The patient will be prompted to complete a tech check and will enter your waiting room for the scheduled visit.

Set Up Your Audio and Video

Please **ALLOW ACCESS** to your camera and microphone (you may need to update your browser settings to allow access). Then, select your preferences for camera and microphone.

Select a Camera
Integrated Camera (5986:2113)



If you do not see yourself make sure your camera is on and not in use by another application.

Select a Microphone
Default - Microphone Array (Realtek High Definition At)



Test your audio input by speaking into your microphone. If you do not see the sound bars move, confirm the microphone is not muted.

[Continue](#)

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