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Training Document for United States Coast Guard Enterprise Telehealth

October 27, 2020

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# Creating Accounts for Providers/Schedulers

**About:** We have already provisioned accounts for 220 providers/schedulers. However, only providers/schedulers at the pilot sites have been sent activation emails. Should you need to create additional accounts, follow the steps below. Provider/Scheduler usernames should be their full @uscg.mil email address (e.g. John.A.Smith@uscg.mil)

## Admin Tools > Click “Manage Providers”

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## Click “Add Provider” Button

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## Fill out these 5 fields:

### First Name

### Last Name

### Username

### Email

### Send Activation Email

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## Click “Orgs” Tab

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## Select Org and Role

### “USCG” Org

### “Provider” as the role

### Then click “Create User” button

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# Set Up A Schedule

## Click “Manage Schedule” Calendar Icon at top of Dashboard

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1. Search and select one or more providers under “Managing Schedule For.”
2. Under “Set Up Schedule” tab, click “Enable Schedule” toggle.

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## Select/enter the Following Fields

### Days Available

### Time Zone

### Patient Reminder Toggle and Minutes Prior

### Provider Reminder Toggle and Minutes Prior

### Interval

### Start Time

### End Time

### Generate Arrow

### Save Schedule

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# Manage Availability

## Search/Select one or more providers under “Managing Schedule For.”

## Click “Manage Availability” tab.

## Select Filter under “Show Availability For.”

## Click “Apply”

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## Open/Block By:

### Timeslot

### Day

### Selected

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# Manage Appointments

## Search/Select one or more providers under “Managing Schedule For.”

## Click “Manage Appointments” tab.

## Select Filter under “Show My Appointments For.”

## Click “Apply”

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## Appointment Options

### Access Visit

### Reschedule Visit

### Cancel Visit

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# Review Requests For a Video Visit

## From the “Patient Care” List

## Filter for “Assigned Provider Activities,”

## Click on the “Activity” Icon

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## Follow the Instructions and Schedule the Video Visit

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# Schedule Video Visit

## Click on the “TEAM” Tab

## Click on the “Schedule Visit” Button

## Optionally update the Date Filter

## Select Available Time Slot

## Enter the Visit Reason

## Click the “Confirm Time Slot” Button

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# Join Video Visit

## From SMS

### Click link, log in, link will launch video visit

Graphical user interface, text, application, chat or text message

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## From Email

### Click link, log in, link will launch video visit

Graphical user interface, text, application

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## From USCG Care Anywhere Website

### Click “Manage Schedule” Calendar Icon at top of Dashboard

### Click “Manage Appointments” tab

### Click “Access Visit” link on the appointment

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