![NextStep Solutions - Moving Behavioral Health Forward]

Insig Telehealth QRG

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Insig Telehealth - Virtual Client Care

Insig Telehealth is an integrated feature in NextStep Solutions that allows you to seamlessly schedule from the web Scheduler for Telehealth visits. You can access it directly from the Main Menu in NSS, and it automatically creates the connection between the scheduled appointment and the link to the actual virtual visit. The client receives the link via email or phone, allowing for quick and easy access.

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Schedule a Telehealth Appointment

Schedule a Telehealth Appointment

1. Navigate to the web Scheduler: **Navigation Menu** > **Scheduler.**
2. From the **Select a Resource…** drop-down menu, select a Provider.
3. Select a Telehealth **Appointment Template**. These templates will be set up during implementation or managed by your Admin and are noted with **Tele-** or **TH**.

4. Click the **Client** Icon and drag to the desired time slot.
   Note: For Group Therapy Telehealth appointments, create the appointment and drag and drop all clients to the appointment.
5. Double-click the appointment to open and review its details. The link to the appointment is available in the Notes section and a link is also sent to the client.
   Note: The client is notified by text and/or email. A text message will be sent to the cell phone if listed, and an email to the email address if it is provided in the client's Face Sheet.
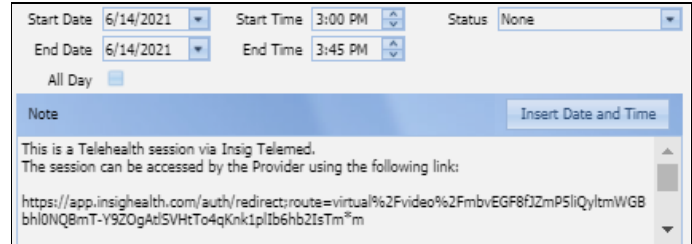
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Start and Conduct a Telehealth Appointment

It is **important** to **not** mark the Telehealth appointment as "Seen" in the Scheduler prior to completing it, otherwise you are locked out of the appointment.

Accessing a Telehealth appointment can be done by either the link included in the appointment, an email sent to the treating Provider, or through the Telehealth Dashboard located in the Main Menu of NextStep.

Via the Web Scheduler

1. Navigate to the web Scheduler: **Navigation Menu** > **Scheduler > Double-click Appointment.**

2. Copy the appointment link from the Notes section**.**

3. Open a new browser window, paste the link in the address bar, and press **Enter**.

4. If you are greeted with a login page, enter your **Email** and **Password.** Your User ID and Password are typically the same as your credentials for NSS Clinical and are provided to you by your Admin.

5. Proceed to Conduct a Telehealth Appointment.

From the Telehealth Dashboard in NextStep Clinical:

1. Navigate to Insig Telehealth: **Treatment Planning > Insig Telehealth Dashboard**.

2. If you are greeted with a login page, enter your **Email** and **Password.** Your User ID and Password are typically the same as your credentials for NSS Clinical and provided to you by your Admin.

3. Click **GO!** for the appointment you want to open under Today's Appointments.

4. Proceed to Conduct a Telehealth Appointment.

From an email sent to the Provider:

1. Navigate to your Provider email.

2. Click the appointment link to open the appointment.
   Note: The Provider must be set up/registered for Telehealth and must have logged into the Telehealth Dashboard from the Main Menu once to establish the connection. After you've logged in once, you do not have to log in again.

3. Proceed to Conduct a Telehealth Appointment.

Conduct a Telehealth Appointment

1. While conducting the virtual visit, you can open your Notes within NextStep and resize your browser to document (split-screen) or once completed, return to NSS Clinical to document Notes and Plans per your Agency's practices.

2. Exit out of the appointment by clicking the **X** on the browser or the **Complete Appointment** button.

3. Navigate to the Scheduler: **NextStep Navigation Menu > Scheduler**.

4. Mark the appointment as Seen by right-clicking the appointment, clicking **Status**, and selecting **Seen**. This pushes billing information to the Billing Engine.

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Run Telehealth Appointment Reports

Making the decision to leverage Telehealth is important, but so is understanding how (and how much) it is being used by your Agency. Insig Telehealth allows you to download or review appointment reports for Telehealth, enabling you to view how many appointments have occurred and what type they are.

Run a Telehealth Appointment Report

1. Navigate to the Telehealth Dashboard: **Main Menu > Treatment Planning > Insig Telehealth Dashboard.**
2. Click the **Appointment Report** button at the top of the Virtual Care window.
3. Data is downloaded to a CSV file. Print or save the file.

Review Data from the Telehealth Dashboard

1. Navigate to the Telehealth Dashboard: **Treatment Planning > Insig Telehealth Dashboard.**
2. From the Dashboard, you have several options to select from the Admin tab:
   - **Dashboard** tab: provides a high-level overview of Appointment Bookings, Net Revenue, and other details (under **Monthly Totals**).
   - **Providers** tab: shows appointments by Provider.
   - **Theme** tab**:** allows you to customize the color scheme.

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