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APPOINTMENT CHECKLIST AND TASKS

*Welcome! We are so happy to serve your health needs using the convenient and secure telehealth option of a virtual appointment. Your participation with the simple steps listed below will help us prepare your patient chart and assist in the registration and check-in processes.*

**\*\* Important Note:** Completing these tasks on a desktop or laptop is recommended—otherwise, tabs may not be viewable on mobile devices **\*\***

WHAT STEPS DO I NEED TO COMPLETE BEFORE THE VIRTUAL VISIT WITH MY HEALTH PROVIDER?

**Step 1:** **Sign up** as a New Patient **or Log in** as an Established Patient on the **Patient Portal** at our SPEKTRUM Health web page \*hint: access the patient portal at the bottom right hand corner of the web page

*\*\* Important to distinguish between new or established patient—you will only need to* sign up *as a new patient once, and then* log in *as an established thereafter \*\**

**Step 2: Find tabs** listed to the left and at the top of the screen. Ensure **Personal Info** has correct and up-to-date details.

**Step 3**: Use the **Patient Forms** tab to access **Check-In Notes** as a *New Patient* **or** *Existing Patient*. In your own words, tell our health provider about your reasons for the appointment, your medical history, present medications, any symptoms you have recently experienced, or any relevant remarks to help in caring for your health needs. Close tab at bottom to submit.

**Step 4**: Use the **Patient Forms** tab to **sign and submit the legal documents** of acknowledgement and consent (**Legal Section**forms). Close tab at bottom to submit.

**Step 5:** Check your email for an invoice. We kindly ask that payment for services be made before your virtual visit time. This will also ensure that no fees will be incurred for late arrival to your virtual appointment and to optimize your time with the provider.

WHAT ARE THE 3 DOCUMENTS THAT NEED TO BE SIGNED AND SUBMITTED PRIOR TO MY APPOINTMENT?

1. Notice of Info: Practices and Privacy Statement
2. Consent to Treat
3. Virtual Appointment Agreement and Consent

\*\* **Note***: These documents will only need to be signed and submitted once unless an update is required at a later date*\*\*

WHAT HEALTH-RELATED FORMS NEED TO BE SUBMITTED PRIOR TO MY VIRTUAL VISIT?

This information is submitted under **Check-In Notes**. In this area you will provide information related to your reasons for an appointment, any symptoms you may be experiencing, and how the provider is better able to serve your health needs.

DO I NEED TO PAY BEFORE MY VIRTUAL VISIT WITH THE PROVIDER?

Yes, please review the invoice and provide necessary payment prior to your appointment date and time.

WHEN SHOULD I COMPLETE THE PRE-APPOINTMENT TASKS AND WHY IS THIS IMPORTANT?

Like a face-to-face visit, it is necessary before a virtual visit to obtain signatures on appropriate forms, acquire an intake of past medical history that includes allergies, chronic conditions, medications, and to learn about a patient’s current health status. Taking care of accounting matters *before* your appointment date and time also ensures that no fees will be incurred for late arrival to your virtual appointment. Having up-to-date information uploaded to your chart also optimizes your time with the provider.

I’M AN ESTABLISHED PATIENT. ARE MY CHECK-IN TASKS DIFFERENT?

If this is your first telehealth encounter and virtual visit, please sign and submit the *Virtual Appointment Agreement and Consent* form under the **Legal Section** of the **Patient Forms** tab. Otherwise, just proceed to **Check-In Notes** (follow-up) as an *Existing Patient* to detail your reason for visit, current health status including pertinent symptoms, and update any necessary information. Also, please check your email for an invoice and provide payment before your appointment time.

IT’S THE DAY OF MY VIRTUAL APPOINTMENT & THE ABOVE REGISTRATION AND CHECK-IN TASKS ARE COMPLETED. WHAT DO I DO NEXT?

**Step 1:** A few minutes before your appointment start time, find a comfortable, private, and quiet area.

**Step 2:** Download our customized SPEKTRUM Health app for your Android or Apple device. Follow the directions to snap or upload a photo of yourself and quickly register. Then choose **Join Video Consult**.

If you’re on a laptop or desktop: Navigate to the SPEKTRUM Health web page, click on the **Virtual Appointment Link (Zoom)** tab at the top, or use <https://zoom.us/> . Choose **Join A Meeting** using the code we provided to you when confirming your appointment request.

**Step3:** You will be connected to the health care provider within a few short moments. Relax, and know that we prioritize your comfort, health, and privacy. Feel free to take notes of your discussion with the provider and be sure to have any concerns or questions addressed.

HOW DO I UPDATE MY INSURANCE INFORMATION VIA THE PATIENT PORTAL?

Simply scan and upload your new insurance card under the **Upload Documents/Records** tab, and SPEKTRUM Health will update this information for you. This tab also applies to any previous medical records or other forms that need to be included in your chart.

I STILL HAVE QUESTIONS OR NEED CLARIFICATION. WHAT DO I DO?

We are here for you! Please don’t hesitate to reach out to us. We can help answer your questions, navigate the patient portal, and provide guidance in your telehealth experience. Thank you for allowing us to assist you in being healthy and feeling well.