# ECHOVANTAGE RELEASE NOTES

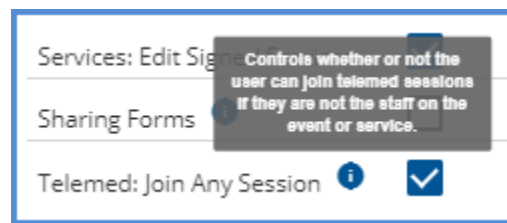VERSION 3.10 SERVICE PACK 1

NEW FEATURES

Join Telemed Session from an Event

A provider can now join a Telemed session from the Event without needing to create a Service from that Event. The *Join Telemedicine Session* button will be available from an Event (or Service) screen for 30 minutes prior to and 30 minutes after the scheduled Start Time.

Telemed — **JOIN TELEMEDICINE SESSION**
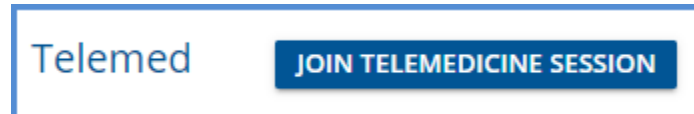
Join Any Telemed Session Permission

A new feature permission, *Telemed: Join Any Session,* is available. When selected for a User Group, members of that group are able to join any Telemed session even if they are not the scheduled staff on the Service or Event.

Services: Edit Sig... Controls whether or not the user can join telemed sessions if they are not the staff on the event or service.

Sharing Forms

Telemed: Join Any Session ☑

Telemed Contacts

A Telemed Contact can now be created for underage or adult clients when another party should be designated to receive all messages and emails regarding the Telemed session. An underage client is **required** to have a designated Telemed Contact to be successfully scheduled into a Telemed session. This contact must be over the minimum age defined in the portal and have a valid email of the type configured in the Mend Third Party Integration page. To create this contact:

- Navigate to the Client **Contact Info** tab
- Select the Contact to be designated as the Telemed Contact
- Select the TELEMED button to open the Telemed Contact modal.
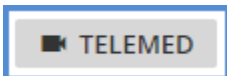
■ **TELEMED**

-
- Check the Use as Telemed Contact box, enter the **Birth date**, and Save.
- A designated contact is identified by the icon plus Telemed Contact displayed beneath the contact's name

Young, Sharyn

📞 Emergency Contact   ■ Telemed Contact
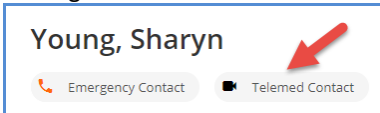
-
- There can only be ONE Telemed Contact defined per client at a time

Please note that changing the Telemed Contact will not update the contact used for any already scheduled Telemed sessions. There are two options if the contact needs to be updated:

- **Delete and recreate the Event or Service**
- **Changed the Attendance code to a Telemed cancellation code, save, update the contact as needed, then change the attendance code back**

Underage Clients

Underage clients must have a designated Telemed Contact AND a gender in addition to a Date of Birth and email address of the correct type before they can be scheduled into a Telemed session. The agency defines the minimum client age for the portal during the setup process. It is important for any user creating Telemed appointments to be familiar with this minimum age. Once the underage client has the required setup information, they may be scheduled for an individual Telemed Session. Underage clients with a Telemed Contact may not be added to an Event Template (Group session) as that is not supported in Mend.

KNOWN ISSUES

- **Underage clients without a Telemed Contact can be added to an Event Template BUT they will not be added to the Telemed session AND will not receive any notification.**

Group Telemed Session

Group Telemed sessions are now supported within EchoVantage. The validation that the clients are configured correctly for Telemed sessions takes place when they are added to an Event Template with a Location code that would activate a Telemed session. Because of the timing of the validations it is recommended that new Event Templates be created for each group but is not required.

Quick access to a client's Contact Info tab is now available from the Event Template. This can be used to update the client or client contact of existing template clients before a group session is scheduled.

A copy function is availabe to expedite adding a client to an existing Event Template. Selecting this opens the *Add a Participant* entry screen with the same PLAAR component values as the client on that row.

KNOWN ISSUES

- If a single client in a group session cancels and the attendance code for that client is updated in the Telemed session to a defined cancellation code, the entire session becomes Telemed ineligible. It is recommended that client cancellations be updated after the group session has completed until this issue is resolved in a future release.
- If existing templates are used and any of the clients are NOT properly configured, Telemed sessions can still be successfully created but the clients not properly configured will not receive notifications. In addition, there is no indication within EchoVantage that those clients were not added to the group session. User notification that a client was not successfully added to the group Telemed session is planned for a future release.

IMPORTANT

Prior to Creating Appointments

A Mend portal is created for each agency with the specific validations elected during the setup process. Each agency also configures the Mend Third Party Integration page in the Configuration menu within EchoVantage. It is especially important for any user creating Telemed appointments to be familiar with the following:

- The minimum client age defined for the portal for their agency
- The Staff and Client Email Types required
- The Location code or codes that indicate the scheduled appointment is for a Telemed session
- The Attendance code or codes that indicate a scheduled Telemed session will not occur, eg cancellations

All clients and staff are required to have an email address of the correct type to be scheduled for and join Telemed sessions. These email addresses are the unique identifiers within Mend. There should be no shared addresses between staff, clients, or an underage client and their Telemed contact. To successfully create a Telemed session, the Service or Event Client and Staff must have the following configured:

- Date of Birth
- Email Address of the correct type

An underage contact must also have configured:

- Gender
- Telemed Contact

Staff and Client phone numbers are not required for Telemed eligibility validations. Phone numbers of the defined type are needed however if the agency has elected to turn on services that require a phone number such as text reminders.

Updating Scheduled Individual Telemed Sessions

Once a Telemed session for an individual is successfully created for a Service or Event, the Client and Staff become locked. There are two options available to update these:

- Delete and recreate the Service or Event
- Change the Attendance code to a Telemed cancellation code, save, update the Client/Staff, and then change the attendance code back

Changes to a group Telemed session are handled through the Event Template. No changes to the Service or Event is required.