

The Commonwealth of Kentucky
**Kentucky Level of
Care System**



**Provider Telehealth Quick
Reference Guide (QRG)**

Introduction

This Quick Reference Guide is intended to instruct Providers on basic system navigation related to Telehealth functionality in KLOCS.

References	
Last Updated	January 25, 2022
Audience	Providers

Table of Contents

Telehealth	3
1.1 Telehealth Overview	3
1.1.1 Preparing for an Appointment	3
1.2 Dashboard Screen – Telehealth Functions	4
1.2.1 Appointment Status Descriptions.....	6
1.3 Calendar Screen	7
1.3.1 Calendar View.....	9
1.3.2 Calendar Details.....	10
1.4 Provider is Unavailable for an Appointment	14
1.5 Search for Appointments	18
1.6 Join an Appointment	20
1.6.1 Additional Staff Need to Join a Meeting	26
1.6.2 Microsoft Teams - Meeting Control Bar.....	27
1.6.3 Microsoft Teams – Chat.....	27
1.7 Additional Scenarios	30

Telehealth

1.1 Telehealth Overview

The Department for Medicaid Services (DMS) is implementing KLOCS Telehealth to allow Community Mental Health Centers (CMHCs) and the Peer Review Organization (PRO) to conduct their respective assessments virtually for Medicaid Members and those pending Medicaid Eligibility in long-term care nursing facilities.

A pilot program was conducted in November 2021. Telehealth is being rolled out to facilities in a phased approach in 2022.

What are the benefits of Telehealth?



Conduct **contactless and real-time** virtual assessments.



Increase accessibility of Telehealth through **Microsoft Teams** which may be **accessed on desktop, tablet, and mobile devices**.



Limit health risks in long-term care nursing facilities.

Please Note: If accessing Telehealth functionality through a mobile device, then the MS Teams App must be downloaded.

Please Note: Providers do NOT receive email notifications when appointments are scheduled. It is recommended that Providers log into KLOCS daily to view appointments scheduled for the current day and view upcoming appointments.

1.1.1 Preparing for an Appointment

The following section outlines suggested documentation (if available) to assist with the appointment process:

- The Provider/facility representative should be able to speak to the Member's condition/current status as the Reviewer (i.e., PRO or CMHC) will be guiding the assessment through a verbal screening/audit. There may be time in which screen sharing is required/needed.
- Items that may assist the Provider through the assessment include:

- Diagnosis list
- Access to items such as – MAR, TAR, ADLS, therapy notes, MD orders
- Medical chart – clinical documentation to support the need for ongoing nursing facility placement
- Ability to speak to the PASRR – overall understanding of the PASRR Process – including Level I, Level II, Significant Change Process, etc.
- Ability to enter discharges within KLOCS

1.2 Dashboard Screen – Telehealth Functions

The **Dashboard** screen is the default homepage for KLOCS Users and is the first screen Users see upon logging in to KLOCS. This screen serves as the starting point for all Telehealth work Providers may perform in KLOCS. On the **Dashboard** screen, Providers may view and join appointments scheduled for the current day in the *Today's Appointments* section.

If a Provider would like to view all appointments scheduled, review appointment details, search for appointments, or indicate they are unavailable for a specific appointment, they must navigate to the **Calendar** screen. To navigate to the [Calendar screen](#), click **View Appointments** in the *Quick Links* section.

The screenshot shows the KLOCS Dashboard interface. The 'View Appointments' link in the Quick Links sidebar is highlighted with a red box. The 'Today's Appointments' table at the bottom is also highlighted with a red box. The table lists appointments with columns for Start Time, End Time, App #, Appointment Category, Appointment Group, Status, and Action.

Start Time	End Time	App #	Appointment Category	Appointment Group	Status	Action
05:00 PM	05:30 PM	400152372	PRO Field Review	PRO	Scheduled	Join
12:00 PM	12:30 PM	400152374	PRO Field Review	PRO	Scheduled	Join
04:40 AM	05:10 AM	400151321	ID-RC/Dual LOC Recommendation		Cancelled	Join
04:15 AM	04:45 AM	400151321	ID-RC/Dual LOC Recommendation		Complete	Join
04:00 AM	04:30 AM	N/A	SMI LOC Determination		Complete	Join
03:35 AM	04:05 AM	400152376	PRO Field Review	PRO	Cancelled	Join

Today's Appointments section - Functionality Guide

The following table outlines the functionalities available in the *Today's Appointments* section of the **Dashboard** screen.

Element	Description
Filter By	Allows the User to filter based on selection in <i>Filter By</i> field.
Start Time	Displays the start time for the appointment in EST.
End Time	Displays the end time for the appointment in EST.
App #	Displays the application number for the appointment. If the appointment is scheduled on a Provider (i.e., facility) level, then N/A displays.
Appointment Category	Displays the appointment category: <ul style="list-style-type: none">• PRO – Field Review, Annual Reassessment• CMHC – SMI LOC Determination, ID-RC/Dual LOC Recommendation, Request Level II – SMI LOC Determination, Request Level II – ID-RC/Dual LOC Recommendation
Appointment Group	Lists the Reviewer conducting the appointment. <ul style="list-style-type: none">• PRO or CMHC
Status	Displays the current status of the appointment. <ul style="list-style-type: none">• No Show, Show, Scheduled, Rescheduled, Complete, Cancelled, and Batch Closed
Action	The link to join the appointment is enabled 15 minutes before the start time and remains active until 11:59PM EST of the current day. Every effort should be taken to join at the scheduled appointment time.

Please Note: The *Today's Appointments* section only displays appointments when there is at least one appointment for the current day. Otherwise, it will display the message "**No Appointments Available.**"

1.2.1 Appointment Status Descriptions

The following table outlines the available Appointment Statuses.

Appointment Status	Description
Scheduled	<ul style="list-style-type: none"> • Is the default value when an appointment is initially scheduled. • If an LOC Determination is made prior the appointment, the Reviewer must manually close these appointments since they have not been initiated. • Appointments in Scheduled status may not be updated to Show status.
Rescheduled	<ul style="list-style-type: none"> • This appointment was rescheduled to the currently listed date and time. • If an LOC Determination is made prior the appointment, the Reviewer must manually close these appointments since they have not been initiated.
Cancelled	<ul style="list-style-type: none"> • If a Member is discharged, then all associated appointments are marked as Cancelled. • A Reviewer may manually update the status to Cancelled if no one joins the appointment. • Appointments in Cancelled status may not be updated to any other status.
No Show	<ul style="list-style-type: none"> • The Reviewer (i.e., PRO or CMHC) joined the meeting but no one from the facility joined the appointment. • Once an appointment is marked as No Show it cannot be edited or updated to any other Appointment Status.
Show	<ul style="list-style-type: none"> • The appointment has started.
Complete	<ul style="list-style-type: none"> • The appointment was finished/marked Complete by the Reviewer. • Additional follow-up appointments or tasks may be requested by the Reviewer.
Batch Closed	<ul style="list-style-type: none"> • Appointments still in the Scheduled, Rescheduled, or Show status by the end of the current day (11:59PM EST) are automatically updated to the Batch Closed status. • A new appointment must be created by the Reviewer (if needed).

1.3 Calendar Screen

The **Calendar** screen is accessible from the **Dashboard** screen when Providers click the **View Appointments** link under the *Quick Links* section.

Providers are able to perform the following activities from the **Calendar** screen:

- There are two main sections of the **Calendar** screen: *Calendar View* and *Calendar Details*.
- The *Calendar View* section enables Providers to filter appointments by Group (i.e., PRO, CMHC) and by Appointment Category (i.e., PRO Field Review, SMI LOC Determination). If a Group is selected, then the Appointment Category drop-down only displays values corresponding to the Group (i.e., if PRO is selected only corresponding PRO appointment categories are displayed).
- The *Calendar Details* section enables Providers to view appointments through a Day View or Week View. The **Calendar** screen defaults to the Day View which displays appointments scheduled for the current day.
- Providers may view appointment details in the *Calendar Details* section by selecting the desired appointment.
- If a Provider is unable to make a scheduled appointment, they may select the appointment and click **Mark Appointment as Unavailable** in the *Calendar Details* section to indicate to the Reviewer that the appointment needs to be rescheduled or cancelled.
- Providers may also use the **Calendar** screen to join appointments.
- Providers may click **Search for Appointments** to navigate to the **Appointment History** screen.

Please Note: The link to join the appointment is enabled 15 minutes before the scheduled start time and will remain active 11:59PM EST of the current day.

Please Note: All times displayed are in Eastern Standard Time (EST).

KLCS Home Start Application LOC Management Message Center 562 Quick Search Welcome Mana Prot Sign Out Help Agency: NF Provider 1

Calendar *Required field

Provider Name: Mana, Prot Provider Number: 7100576180

Calendar View

Group Appointments: --Select--

Appointment Category: --Select--

[View](#)

[Search for Appointments](#)

Calendar Details

Day Week

Oct 2021

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Appointment Details

Provider:
Interviewer:
Time:
Appointment Category:
Appointment Status:

[View Appointment](#)

[Join Appointment](#)

[Mark Appointment as Unavailable](#)

Tuesday 12

6:00 AM	
7:00 AM	
8:00 AM	
9:00 AM	
10:00 AM	PRO Annual Reassessment Isabel Ezra
11:00 AM	PRO Annual Reassessment Isabel Ezra
12:00 PM	ID-IC/Dual LOC Recommendation Birk Wynn
1:00 PM	

[Return to Dashboard](#)

Please Note: Providers are only able to view appointments associated with their facility.

1.3.1 Calendar View

This section outlines the search functionality in the *Calendar View* section of the **Calendar** screen.

Element	Action
Provider Name	Displays the name of the logged-in User.
Provider Number	Displays the Provider Number for the logged-in User.
Group Appointments	Displays two options: PRO or CMHC.
Appointment Category	<p>Displays appointment categories specific to the Reviewer:</p> <ul style="list-style-type: none">• PRO – Field Review, Annual Reassessment• CMHC - SMI LOC Determination, ID-RC/Dual LOC Recommendation, Request Level II – SMI LOC Determination, Request Level II – ID-RC/Dual LOC Recommendation <p>If a value for Group Appointments is also selected, then this drop-down only displays categories for the respective Group.</p>
Search for Appointments	Navigates to the Search for Appointments screen.


1.3.2 Calendar Details

Using the *Calendar Details* section on the right panel, Providers may switch between the Day and Week view.

Day View

The screenshot displays the KLCS system interface. At the top, there is a navigation bar with links for Home, Start Application, LOC Management, Message Center (with a '540' badge), and Quick Search. The user is logged in as 'Welcome Mana Prot' and the agency is 'NF Provider 1'. The main content area is titled 'Calendar' and shows the provider's name 'Mana, Prot' and number '7100576180'. There are dropdown menus for 'Group Appointments' and 'Appointment Category', both currently set to '--Select--'. A 'View' button is present below these menus. The calendar view is for 'October 08, 2021' and is in 'Day' view. The day is labeled 'Friday 8'. The calendar shows a grid of appointments from 12:00 AM to 8:00 AM. Appointments include 'ID-RC/Dual LOC Recommendation' by Mana Prot, 'SMI LOC Determination' by Brielle Isalah and Phoebe Lachlan, and 'PRO Field Review' by Mike Buton and Isabel Ezra. On the right side, the 'Calendar Details' panel is visible, with 'Day' and 'Week' view options highlighted in a red box. Below this is a calendar grid for October 2021, with the 8th highlighted. The 'Appointment Details' section shows the provider, interviewer, time, appointment category, and status, along with buttons for 'View Appointment', 'Join Appointment', and 'Mark Appointment as Unavailable'.

Week View


[Home](#)
[Start Application](#)
[LOC Management](#)
[Message Center559](#)
[Quick Search](#)

[Welcome Mana Prot](#) | [Sign Out](#) | [Help](#)

Agency: NF Provider 1

Calendar * = Required field

Provider Name: Mana, Prot Provider Number: 7100576180

Calendar View

Group Appointments: --Select--

Appointment Category: --Select--


[View](#)

Search for Appointments


< October 10 - October 16, 2021 >

	Sun 10	Mon 11	Tue 12	Wed 13	Thu 14	Fri 15	Sat 16
12:00 AM		Significant Change Birk Wynn					
1:00 AM		SMI LOC					
2:00 AM							
3:00 AM		PRO Field Review Ania George					
4:00 AM		Request Level II - SMI LOC					
5:00 AM		Request Level II - SMI LOC					
6:00 AM		Request Level II - ID-RC/Dual LOC					
7:00 AM		Significant Change					
8:00 AM							

Calendar Details



Day



Week

Oct
2021

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Appointment Details

Provider:
Interviewer:
Time:
Appointment Category:
Appointment Status:

View Appointment

Join Appointment

Mark Appointment as Unavailable

[Return to Dashboard](#)

On selecting a scheduled appointment, the right panel displays a high-level overview of the appointment details for *Provider*, *Interviewer*, *Time*, *Appointment Category*, and *Appointment Status*. When a scheduled appointment is selected, the **View Appointment**, **Join Appointment**, and **Mark Appointment as Unavailable** buttons are enabled.

The screenshot displays the KLOCs web application interface. At the top, there is a navigation bar with links for Home, Start Application, LOC Management, Message Center 559, and Quick Search. The user is logged in as Mana Prot, and the agency is identified as NF Provider 1. The main content area is titled "Calendar" and shows the provider name "Mana, Prot" and provider number "7100576180".

The "Calendar View" section includes dropdown menus for "Group Appointments" and "Appointment Category", both currently set to "--Select--". A "View" button is located below these menus. To the right of the calendar view is a "Search for Appointments" button.

The calendar itself shows the date "October 11, 2021" and a "Monday 11" header. The time slots range from 12:00 AM to 11:00 PM. Two appointments are visible: one from 12:00 AM to 1:00 AM titled "Significant Change Brk Wynm" and another from 10:00 PM to 11:00 PM titled "SMI LOC Determination Brk Wynm".

On the right side, the "Calendar Details" section shows a "Day" view selected and a calendar for October 2021. Below this, the "Appointment Details" section is highlighted with a red box and contains the following information:

- Provider: NF Provider 1
- Interviewer: Mana Prot
- Time: 11:00 AM-12:33 PM EST
- Appointment Category: PRO Field
- Review
- Appointment Status: Scheduled

Below the details are three buttons: "View Appointment", "Join Appointment", and "Mark Appointment as Unavailable". At the bottom left of the page, there is a "Return to Dashboard" button.

Calendar Details - Reference Values

This section describes the information and functionality available in the *Calendar Details* section.

Element	Description
Calendar Details	Displays a calendar view where the User may toggle between Day View and Week View.
Day	Displays the daily calendar view.
Week	Displays the weekly calendar view.
Appointment Details	Displays a quick view of the selected appointment.
Provider	Displays the Provider Name for the selected appointment.
Interviewer	Displays the Interviewer's First and Last Name for the selected appointment.
Time	Displays the time for the selected appointment in EST.
Appointment Category	Displays the Appointment Category for the selected appointment.
Appointment Status	Displays the current Appointment Status.
View Appointment	<ul style="list-style-type: none">• This button is enabled once an appointment is selected.• Navigates to the Schedule Appointment screen, where appointment information for the selected appointment is prepopulated.
Join Appointment	<ul style="list-style-type: none">• This button is enabled once an appointment is selected.• A pop-up screen displays with a link to join the appointment.
Mark Appointment as Unavailable	<ul style="list-style-type: none">• This button is enabled once an appointment is selected.• A pop-displays for the Provider to confirm that they are unavailable for the appointment.• This is only enabled when an appointment has an appointment status of Scheduled or Rescheduled.• This button will be disabled 1 hour prior to the scheduled appointment time.

Please Note: PRO appointments will display as grey in the calendar. CMHC appointments will display as blue.

1.4 Provider is Unavailable for an Appointment

The Reviewer (i.e., PRO or CMHC) is responsible for scheduling all appointments. If a Reviewer schedules an appointment during a date or time the Provider is not available, it is the responsibility of the Provider to select the appointment and mark the appointment as unavailable. Marking an appointment as unavailable triggers a red exclamation mark next to the selected appointment that is visible to both the Reviewer and Provider. The red exclamation mark informs the Reviewer that this appointment must be rescheduled or cancelled. The red exclamation mark is removed once the Reviewer updates the appointment.

Please Note: The **Mark Appointment as Unavailable** button will be disabled 1 hour prior to the scheduled appointment time.

To Request an Appointment be Rescheduled, complete the following steps:

1. On the **Dashboard** screen, under the *Quick Links* section, click **View Appointments**.

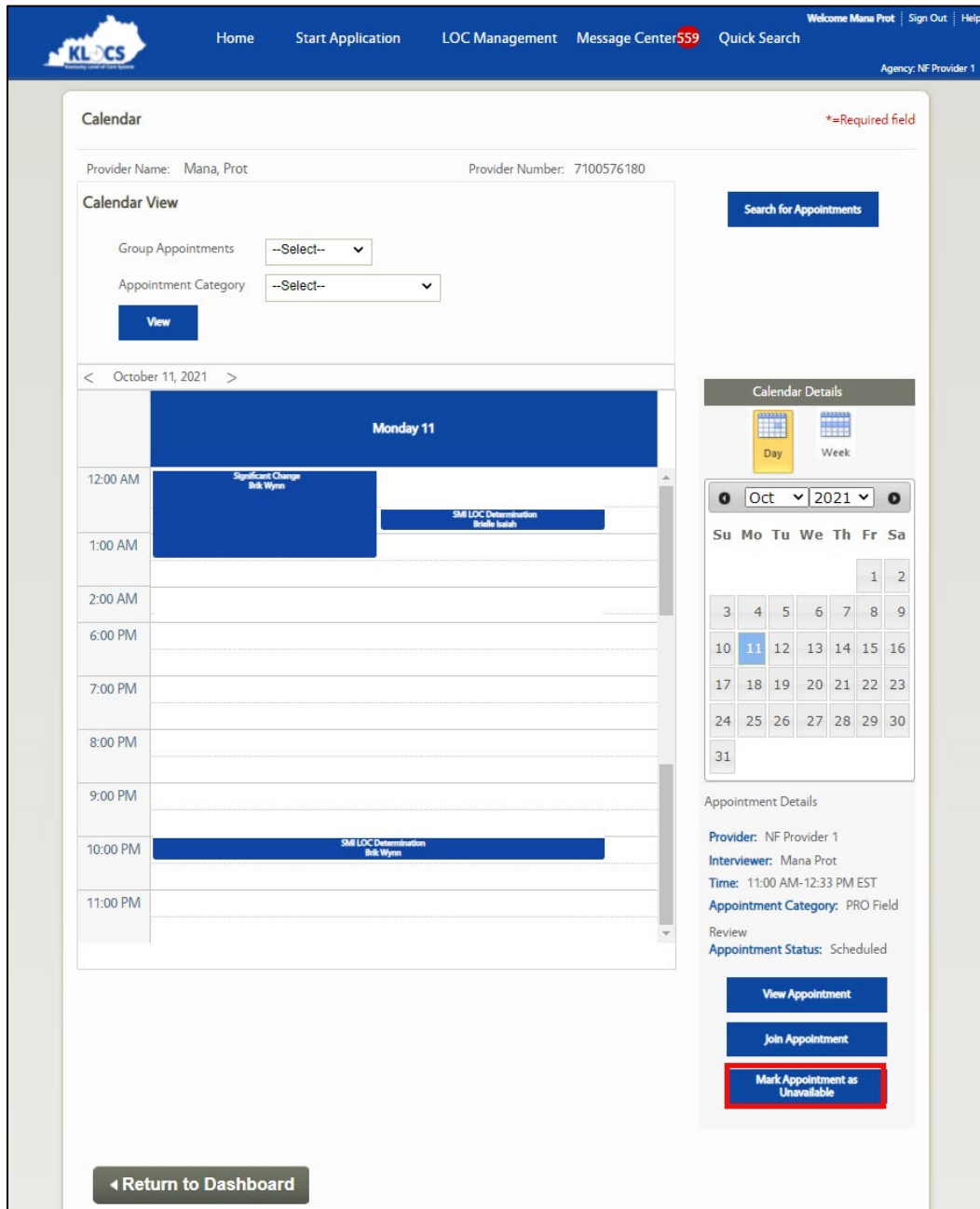
The screenshot shows the KLOCs Dashboard interface. At the top, there is a navigation bar with links for Home, Start Application, LOC Management, Message Center (with a red notification badge '528'), and Quick Search. The user is identified as Thomas Lika, and the agency is NF Provider 1. The main dashboard area is titled 'Dashboard' and shows the current time travel date as 10/07/2021. On the left side, there is a 'Quick Links' menu with several options. The 'View Appointments' link is highlighted with a red box and has a red notification badge with the number '26'. Other links include 'Start New Application', 'Message Center (528)', 'View Announcements (26)', 'View Appointments', 'Quick Search', 'LOC Management', 'Manage Discharge', 'Other Links', 'Member View', 'FAQ', 'MAP Forms', 'Policy Documents', 'CHFS Website', 'Page Help', and 'Change Facility'. Below the Quick Links, there is a 'Tasks' section with a table showing 'My Tasks' and 'Group Tasks' for 'Tasks Assigned' and 'Due'. The 'Tasks' table shows 0 assigned and 0 due tasks for 'My Tasks', and 2 assigned and 0 due tasks for 'Group Tasks'. There is also a 'Task Type' table showing 0 existing LOC overlap for 'My Tasks' and 2 for 'Group Tasks'. Below the 'Tasks' section, there is an 'Applications' section with a table showing one application initiated on 11/09/2020 with app # 400149625, individual name EOIJ_OEJOI, and application status 'Saved'. The 'Today's Appointments' section shows a table with columns for Start Time, End Time, App #, Appointment Category, Appointment Group, Status, and Action. The table lists several appointments, including PRO Field Reviews and ID-RC/Dual LOC Recommendations, with various statuses like Scheduled, Cancelled, and Complete.

2. The **Calendar** screen displays.

Please Note: The **Calendar** screen default display is the *Day View*. If the appointment that needs to be rescheduled is scheduled for another day, select the appropriate date using the calendar in *Calendar Details*.

3. Select the appointment that needs to be rescheduled. The **Mark Appointment as Unavailable** button, under the *Calendar Details* section, is now enabled.

4. Click **Mark Appointment as Unavailable**.



5. A pop-up displays asking for confirmation.

The screenshot shows a web-based calendar interface. At the top, there are two dropdown menus for 'Group Appointments' and 'Appointment Category', both set to '--Select--'. Below them is a blue 'View' button. The main calendar area shows the date 'October 11, 2021' and a large blue block for 'Monday 11' from 3:00 PM to 5:00 PM. To the right, there is a 'Calendar Details' section with 'Day' and 'Week' views, a date selector for 'Oct 2021', and a weekly calendar grid. Below the calendar, there is a 'Provider: NF Provider 1', 'Interviewer: Mana Prot', 'Time: 11:00 AM-12:33 PM EST', 'Appointment Category: PRO Field', and 'Appointment Status: Scheduled'. At the bottom, there are three buttons: 'View Appointment', 'Join Appointment', and 'Mark Appointment as Unavailable'. A 'Return to Dashboard' button is at the bottom left. A white pop-up dialog is centered over the calendar, titled 'Mark Appointment as Unavailable'. It contains the text: 'You are about to indicate that you are unavailable for this appointment. If you wish to proceed, click Confirm. If you want to exit, click Cancel.' Below the text is a text input field labeled '* Comments'. At the bottom of the dialog are two buttons: 'Cancel' (green) and 'Confirm' (green).

6. Enter the appropriate information in the *Comments* field.

Please Note: It is recommended the Provider lists blocks of times they are available in the Comments (e.g., Monday 1-3, Wednesday 8-12, etc.).

7. Click **Confirm**.

Mark Appointment as Unavailable

You are about to indicate that you are unavailable for this appointment. If you wish to proceed, click Confirm. If you want to exit, click Cancel.

* Comments

Cancel **Confirm**

8. The **Calendar** screen displays. The appointment is now highlighted with a red exclamation mark visible to both the Provider and the Reviewer.

October 12, 2021

Tuesday 12

9:00 AM

10:00 AM **!** PRO Annual Reassessment
Isabel Ezra

11:00 AM PRO Annual Reassessment
Isabel Ezra

12:00 PM ID-RC/Dual LOC Recommendation
Brik Wynn

1:00 PM

2:00 PM

Calendar Details

Day Week

Oct 2021

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Please Note: The appointment status stays as **Scheduled** or **Rescheduled**. The Reviewer is expected to update the appointment status as necessary by looking at the red exclamation mark. The red exclamation mark disappears once the Reviewer updates the appointment.

1.5 Search for Appointments

The **Appointment History** screen is accessible from the **Calendar** screen when Providers click **Search for Appointments** in the upper right corner of the screen. Providers may search for Appointments using multiple identifiers. The more identifiers used the narrower the search results. Search results will be displayed in a table at the bottom of the **Appointment History** screen. Only Appointments associated with the Provider's facility will display.

To Search for Appointments, complete the following steps:

1. On the **Dashboard** screen, under the *Quick Links* section, click **View Appointments**.
2. Click **Search for Appointments** in the upper right corner of the **Calendar** screen.

The screenshot displays the KLAS Appointment History interface. At the top, there is a navigation bar with links for Home, Start Application, LOC Management, Message Center 562, and Quick Search. The user is logged in as Mana Prot. The main content area is titled 'Calendar' and shows the provider's name (Mana Prot) and number (7100576180). Below this, there are filters for 'Group Appointments' and 'Appointment Category', both set to '--Select--'. A blue 'View' button is present. A red box highlights the 'Search for Appointments' button in the top right corner. The calendar view shows the date 'October 12, 2021' and a blue header for 'Tuesday 12'. The time slots range from 6:00 AM to 1:00 PM. There are two appointments: 'PRO Annual Reassessment Isabel Era' at 10:00 AM and 'ID-RC/Dual LOC Recommendation Bob Wynn' at 1:00 PM. The right sidebar contains 'Calendar Details' with a calendar icon and a date selector for 'Oct 2021'. Below that is a calendar grid showing the current date (12) highlighted. The 'Appointment Details' section includes fields for Provider, Interviewer, Time, Appointment Category, and Appointment Status, along with buttons for 'View Appointment', 'Join Appointment', and 'Mark Appointment as Unavailable'. A 'Return to Dashboard' button is located at the bottom left.

3. The system navigates to the **Appointment History** screen.

The screenshot shows the 'Appointment History' screen. The header includes the KLDOS logo and navigation links: Home, Start Application, LOC Management, Message Center 562, and Quick Search. User information includes 'Welcome Mana Prot', 'Sign Out', and 'Help'. The agency is identified as 'NF Provider 1'. The search form contains the following fields and values:

Field	Value
Identifier Type	--Select--
Identifier	
* Begin Date	
* End Date	
Provider Name	NF Provider 1
Provider #	7100576180
Appointment Type	--Select--
Appointment Category	0- Selected
Appointment Status	0- Selected
Filter Columns	12- Selected

Buttons: Reset, Search, Back.

4. On the **Appointment History** screen, only the *Begin Date* and *End Date* fields are mandatory. However, enter as much identifying information for the Individual as possible to narrow the search results.
 - a. (Optional) Use the drop-down in the *Identifier Type* field to select from the two options (**App #** or **Individual #**).
 - b. Select the **Begin Date** in the *Begin Date* field.
 - c. Select the **End Date** in the *End Date* field.
 - d. (Optional) Select the **Appointment Type** from the *Appointment Type* field.
 - e. (Optional) Select the **Appointment Category** from the *Appointment Category* field.
 - f. (Optional) Select the appropriate statuses in the *Appointment Status* field.
5. Click **Search**.
6. A table with the search results displays at the bottom of the **Appointment History** screen.
 - a. (Optional) Filter the search results by selecting the preferred criteria in the *Filter Columns* field.

Elements under some columns in the search results grid may be clickable links (i.e., *View Comments*).

Please Note: The search functionality only allows Providers to search for appointments associated with their facility.

1.6 Join an Appointment

This section covers how to join Microsoft Teams for Telehealth appointments with the Peer Review Organization (PRO) or the Community Mental Health Center (CMHC). If additional staff need to join a meeting, they follow this same process.

To Join an Appointment, complete the following steps:

1. On the **Dashboard** screen, under the *Today's Appointments* section, click **Join** under the *Action* column for the appointment.

The screenshot shows the KLC's dashboard interface. At the top, there is a navigation bar with links for Home, Start Application, LOC Management, Message Center 528, and Quick Search. The user is logged in as Thomas Like. The dashboard includes a 'Time Travel Date' of 10/07/2021 and a 'Change Time Travel Date' link. A 'Quick Links' sidebar on the left contains various navigation options, with 'Message Center 528' and 'View Announcements 26' highlighted. The main content area features a 'Unread Announcements' section with a table showing 'My Tasks' and 'Group Tasks' counts for 'Existing LOC Overlap'. Below this is a 'Tasks' section with a search filter and a table that currently displays 'No tasks available for this queue'. The 'Applications' section shows a table with one application entry. The 'Today's Appointments' section is highlighted with a red box and contains a table of appointments for the current day, with a 'Join' link in the 'Action' column for each row.

Task Type	My Tasks	Group Tasks
Existing LOC Overlap	0	2

Task Name	App #	Action	Provider #	Individual Name	Program
No tasks available for this queue					

Date Initiated	App #	Individual Name	Application Status	Action
11/09/2020	400149625	EOJJ_OFJOI	Saved	Continue / Withdraw

Start Time	End Time	App #	Appointment Category	Appointment Group	Status	Action
05:00 PM	05:30 PM	400152372	PRO Field Review	PRO	Scheduled	Join
12:00 PM	12:30 PM	400152374	PRO Field Review	PRO	Scheduled	Join
04:40 AM	05:10 AM	400151321	ID-RC/Dual LOC Recommendation		Cancelled	Join
04:15 AM	04:45 AM	400151321	ID-RC/Dual LOC Recommendation		Complete	Join
04:00 AM	04:30 AM	N/A	SMI LOC Determination		Complete	Join
03:35 AM	04:05 AM	400152376	PRO Field Review	PRO	Cancelled	Join

Please Note: The *Today's Appointments* section on the **Dashboard** screen only displays appointments when there is at least one appointment for the current day. Otherwise, it will display the message **"No Appointments Available."**

- (Optional) Alternatively, Providers may select the appointment and click **Join Appointment** from the **Calendar** screen.

KLDCS Home Start Application LOC Management Message Center 59 Quick Search Welcome Mana Prot | Sign Out | Help Agency: NF Provider 1

Calendar *Required field

Provider Name: Mana, Prot Provider Number: 7100576180

Calendar View

Group Appointments: --Select--
Appointment Category: --Select--
[View](#)

[Search for Appointments](#)

< October 11, 2021 >

Monday 11

12:00 AM	Significant Change Bik Wynn	SMI LOC Determination Bik Wynn
1:00 AM		
2:00 AM		
6:00 PM		
7:00 PM		
8:00 PM		
9:00 PM		
10:00 PM	SMI LOC Determination Bik Wynn	
11:00 PM		

Calendar Details

Day Week

Oct 2021

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Appointment Details

Provider: NF Provider 1
Interviewer: Mana Prot
Time: 11:00 AM-12:33 PM EST
Appointment Category: PRO Field

Review
Appointment Status: Scheduled

[View Appointment](#)
[Join Appointment](#)
[Mark Appointment as Unavailable](#)

[Return to Dashboard](#)

Please Note: The link to join the appointment is enabled 15 minutes before the scheduled start time and will remain active until 11:59PM EST of the current day.

Please Note: If the Provider doesn't see the **Join** link enabled within 15 minutes of the appointment start time, refresh the page.

3. If joining a meeting through the **Calendar** screen, an additional pop-up displays with the appointment details. If the meeting selected is the correct meeting, click **Join Meeting**.

Appointment Details

Care must be taken to ensure only authorized personnel are able to view Protected Health Information (PHI). Please remember it is your responsibility to safeguard patient data per the Health Insurance Portability and Accountability Act (HIPAA). In addition, compliance is required with all security procedures established by your organization.




Individual Name:	N/A	App #:	N/A
Provider Number:	7100576180	Provider Name:	NF Provider 1
Date:	10/12/2021	Appointment Category:	PRO Field Review
Time:	08:30 AM-09:00 AM EST		

[Cancel](#) [Join Meeting](#)

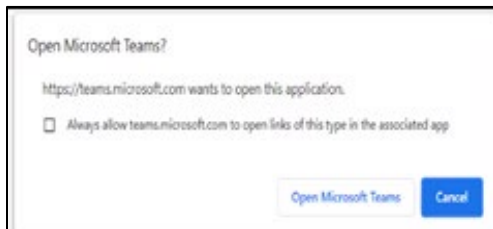
Please Note: Care must be taken to ensure only authorized personnel are able to view Protected Health Information (PHI). Please remember it is your responsibility to safeguard patient data per the Health Insurance Portability and Accountability Act (HIPAA). In addition, compliance is required with all security procedures established by your organization.

4. A new browser window pop-up displays asking to join the meeting with the Microsoft Teams application.

How do you want to join your Teams meeting?

-  **Download the Windows app**
Use the desktop app for the best experience.
-  **Continue on this browser**
No download or installation required.
-  **Open your Teams app**
Already have it? Go right to your meeting.

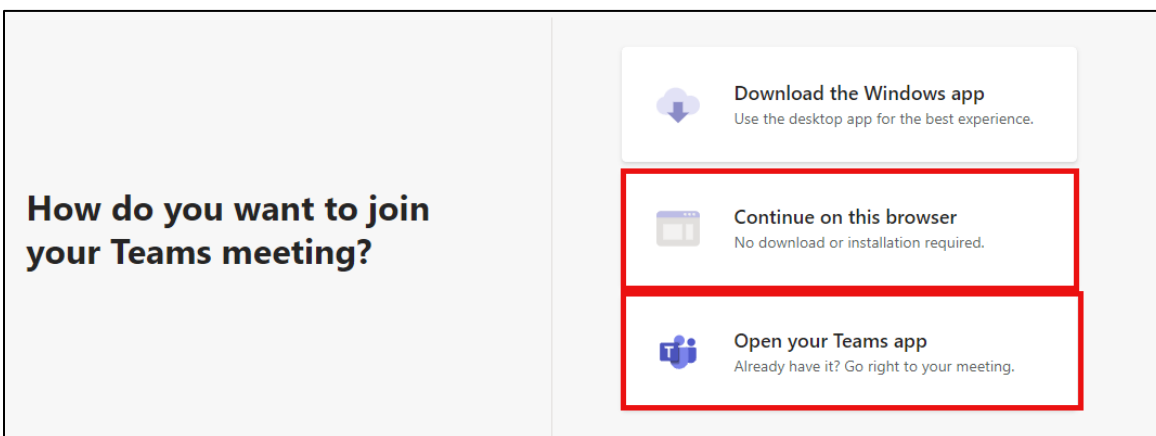
- An additional pop-up may display asking to open the appointment via the Microsoft Teams App.



- If the preference is to connect via the Microsoft Teams App, click **Open Microsoft Teams** (if installed). Alternatively, click **Open Teams App** in the browser.
- If the preference is to connect via the web browser, click **Cancel**. Then, in the web browser click **Continue on this browser**.

Please Note: For best results, use one of the following preferred web browsers: Google Chrome, Microsoft Edge, or Safari (version 11.6 and above). Internet Explorer is not supported.

If using a preferred web browser, it is not required to download the Microsoft Teams App. If using a non-preferred browser (i.e., Firefox), certain functionality may not work. It is recommended to use the Microsoft Teams App. Select the **Open Teams App** option or click **Open Microsoft Teams** in the initial pop-up to join the meeting.

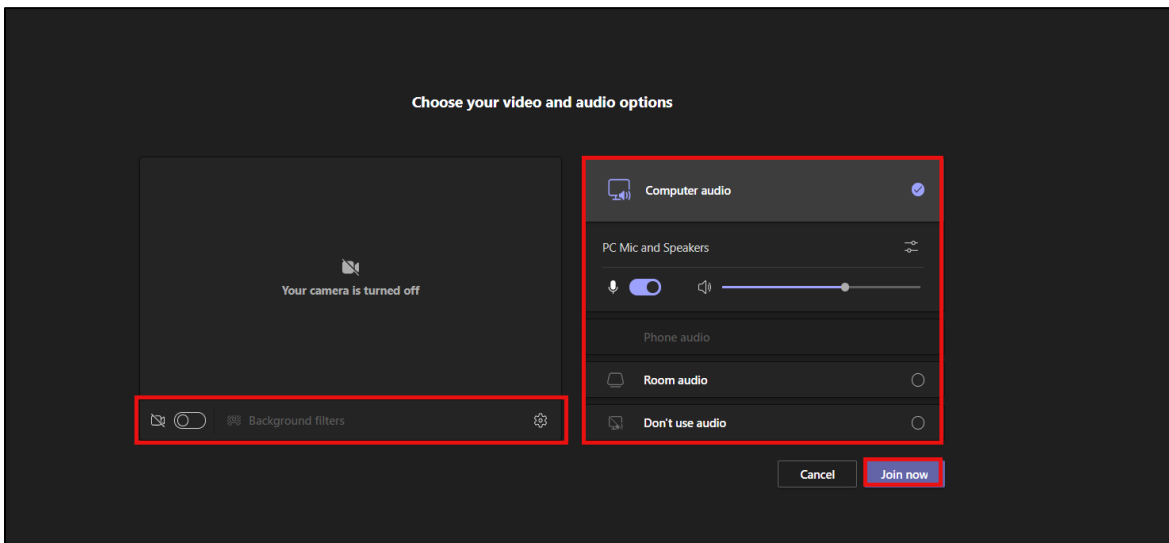


5. Enter your **Name** (First and Last) and check that the camera and microphone are toggled on.

Please Note: If using the Microsoft Teams App, the username automatically integrates with the App.

Please Note: Audio and video are turned off by default. The user may keep their audio/video on or off while waiting to join a meeting.

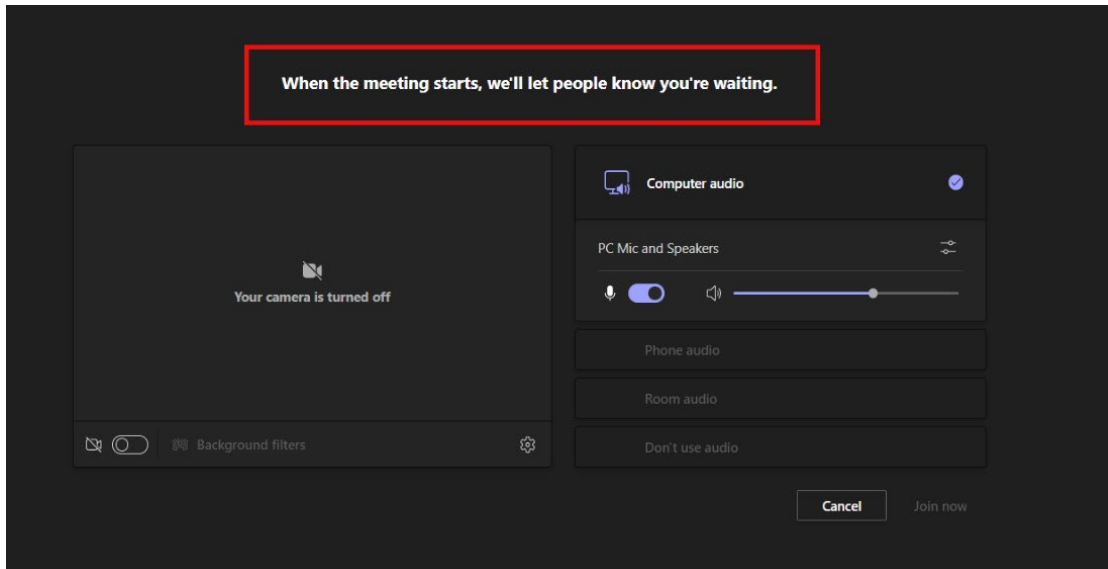
6. Click **Join Now**.



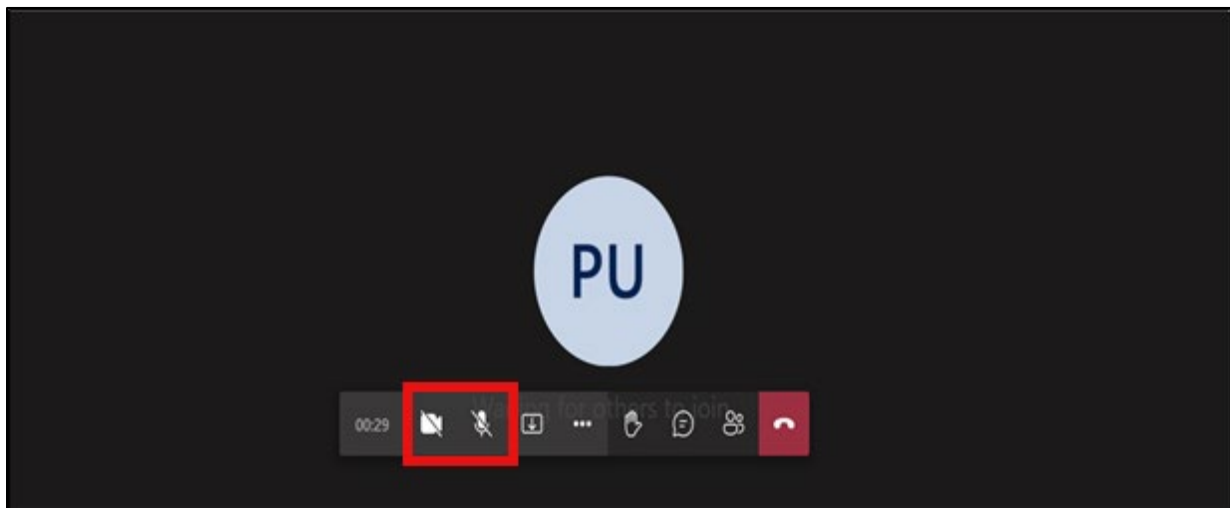
Please Note: The screen display may vary based on the device used (mobile, computer, or Microsoft Teams App).

Please Note: As MS Teams opens in a new browser, the Provider is still able to access information in KLOCS during the appointment.

7. If waiting for additional users to join the meeting, the message **“When the meeting starts, we’ll let people know you’re waiting”** or **“Waiting for others to join”** may display. Providers are able to join the meeting once the Reviewer admits them to the meeting.



8. When the Reviewer starts the meeting, use the menu option on the screen to turn on video and audio when ready. Once the appointment ends, no additional action is needed from the Provider unless requested by the Reviewer.



1.6.1 Additional Staff Need to Join a Meeting








Additional Providers and Reviewers may join a meeting as needed. If other staff need to join a meeting, they must log into KLOCS and follow the steps outlined in [Join an Appointment](#).

Please Note: Kentucky Online Gateway (KOG) credentials should **NOT** be shared.

Please Note: Microsoft Teams has an option to invite people to join meetings through copying the meeting link or sharing via email. It is **NOT RECOMMENDED** that Reviewers or Providers utilize this feature as it increases the risk of a potential HIPAA violation. Providers and Reviewers must always join Telehealth Appointments through KLOCS.

1.6.2 Microsoft Teams - Meeting Control Bar

The following table outlines basic functionality in the meeting control bar in Microsoft Teams.

Icon	Description
	Camera button - Turns the webcam on and off
	Microphone button - Turns the microphone on and off
	Arrow in box icon - Opens the Share Tray; Individuals may display their Desktop/Window (i.e., screenshare).
	3 dots button - List additional options (e.g., meeting details, enter full screen, gallery view, etc.)
	Talking bubble icon - Opens the chat bar
	People icon - Displays list of users in the meeting
	Red box with phone icon - Ends the meeting (don't click until the Reviewer confirms the meeting is over)


Please Note: Meeting Control Bar icons are subject to change pending Microsoft Updates to the Teams App.

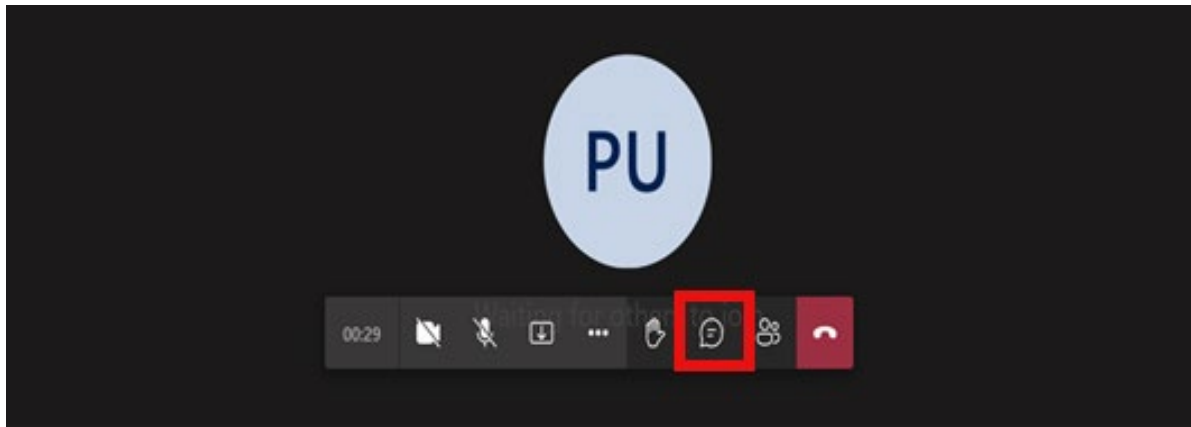
Please Note: Users have the option to display the media of their choice. Prior to screensharing, care must be taken to ensure only authorized personnel are able to view the information.

1.6.3 Microsoft Teams – Chat

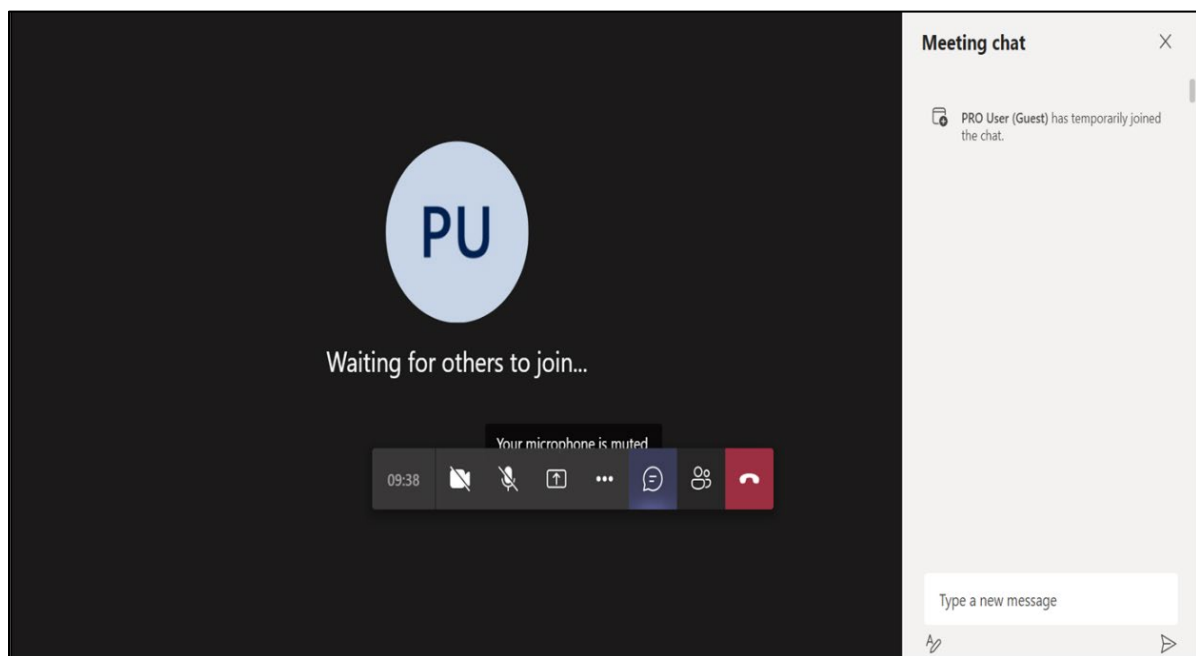
Teams provides a chat feature where Providers may share information without disrupting the flow of the meeting.


To use the Chat function, complete the following steps:

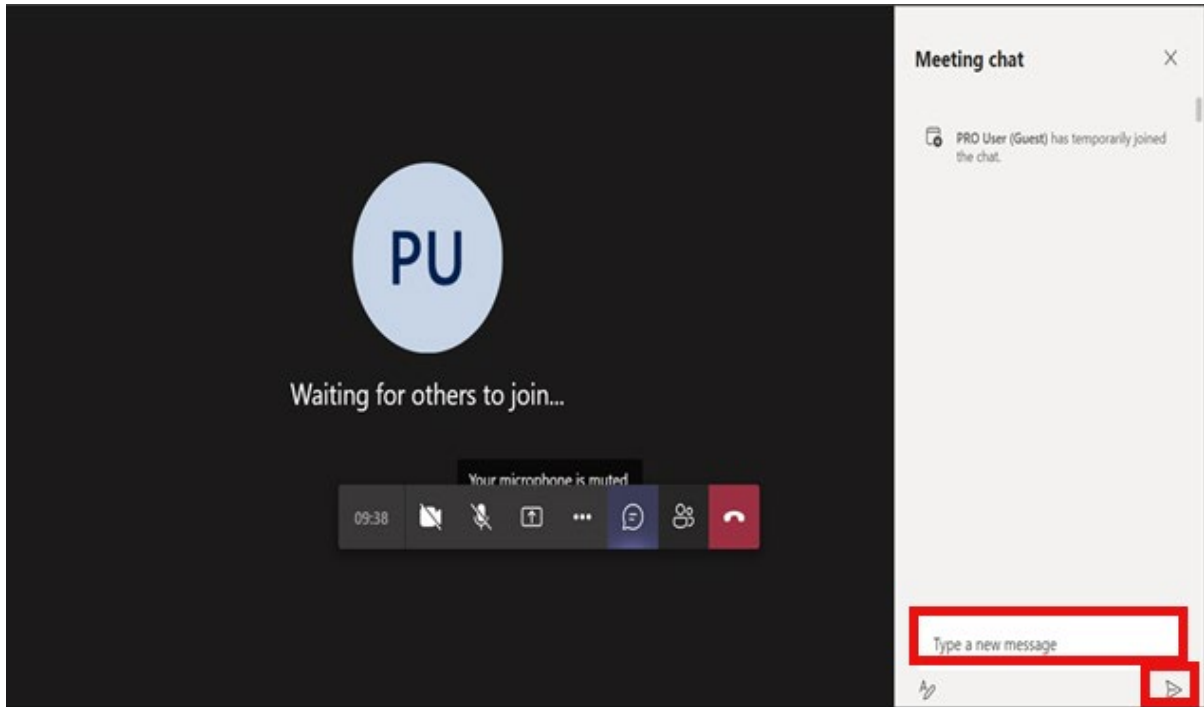
1. In the meeting control bar, click the  **Chat** icon.



2. The meeting chat window opens to the right of the main screen.



3. To send a message, type it in the text box and then click the  **Send** icon.



Please Note: DO NOT SHARE PII and PHI over MS Teams Chat. Please be sure to remove all PHI, PII, and CI from chat messages, images, and other entries in the chat function.

1.7 Additional Scenarios

The following table outlines common KLOCS scenarios and how they impact appointments.

Scenario	Description
Discharge	<ul style="list-style-type: none"> • If a Member is discharged, then all associated appointments with the status of Scheduled, Rescheduled, or Show are changed to Cancelled. • A cancellation notice is NOT sent to the Provider. • The appointment will still be listed in <i>Calendar View</i> with the updated status and searchable in <i>Appointment History</i>. • The system will generate the following comment in the appointment history: Member was discharged.
Systematic Discharge	<ul style="list-style-type: none"> • If a Member is systematically discharged (i.e., Nursing Facility to Institutionalized Hospice), then all associated appointments with the status of Scheduled, Rescheduled, or Show are changed to Cancelled. • A cancellation notice is NOT sent to the Provider. • The appointment will still be available in the <i>Calendar View</i> with the updated status and searchable in <i>Appointment History</i>. • The system will generate the following comment in the appointment history: Member was systematically discharged.
Application Withdrawn	<ul style="list-style-type: none"> • If an application is withdrawn by the Provider, then all associated appointments with the status of Scheduled, Rescheduled, or Show are changed to Cancelled. • A cancellation notice is NOT sent to the Provider. • The system will generate the following comment in the appointment history: Application was withdrawn.
Transfer	<ul style="list-style-type: none"> • If a Member is transferred, then associated Field Review appointments with a status of Scheduled, Rescheduled, or Show are marked as Cancelled. • Reassessment appointments are NOT cancelled. • If an appointment was cancelled due to a transfer, the system will generate the following comment in the appointment history: Member was transferred.