

Virtual Visits

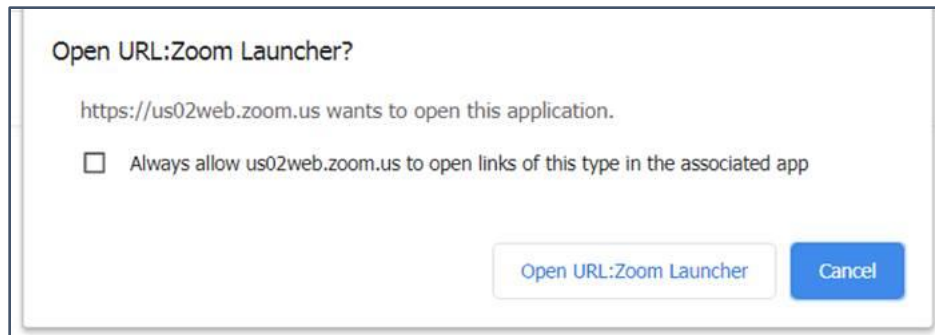
Virtual visits **are** performed within Epic. Any workflow outside of Epic must be approved by IS and Operational Leaders.

Start a Virtual Visit from your Computer

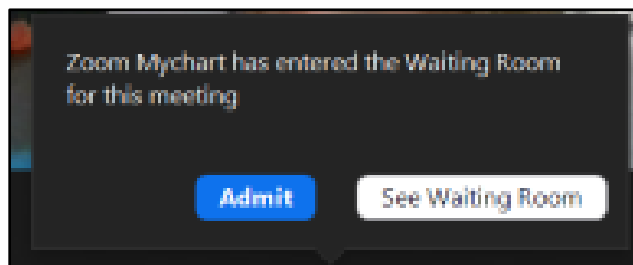
1. To find virtual visits on your Schedule, review the **Visit Type** column. Prior to a patient connecting for their virtual visit, the patient's status displays as **Scheduled**. Once the patient arrives for their virtual visit, the patient's status displays as **Arrived**. If you are waiting for the patient to arrive,  **Refresh the Schedule in the top right.**
2. Once you are ready to connect with the patient on video, **double-click** the patient's appointment row on the Schedule to open the encounter.
3. Once the encounter is open, locate the **Connect** section of the navigator and click  **Connect to Zoom Video**. There could be a 30-60 second delay while the application launches. The name of the person connected should display. For a child, this will be the proxy.



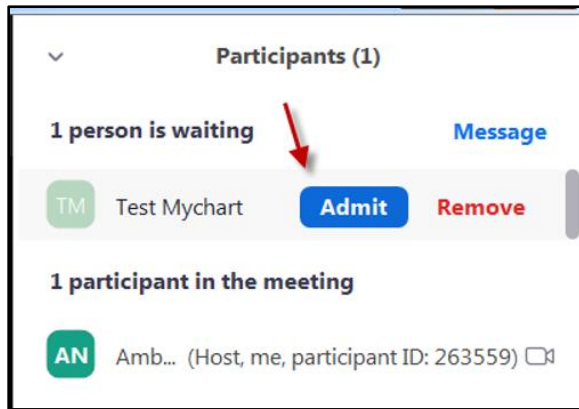
4. You may be prompted to **Open URL Zoom Launcher**. Do **NOT** select cancel.



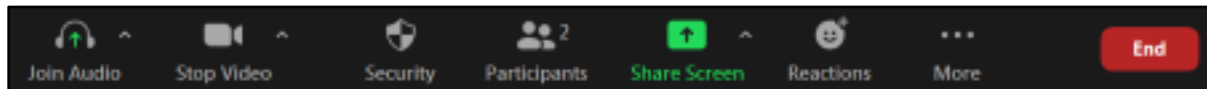
5. When the patient enters the "waiting room," the provider will be prompted to **Admit** the patient to the visit.



6. You can also click on **participants** at the bottom to view the waiting room.



7. After connecting, the video window opens so you can see the patient. Along the bottom of this video, you will see a thumbnail display of your camera, which is what the patient will see on their device. You will also see options for audio, video, participants, and the ability to share your screen for patient education materials.



8. When you connect with the patient, an **OurPractice Advisory (OPA)** fires allowing you to capture the patient's **location** and acknowledge that you are **licensed** in the state where the patient is located. The OPA must be completed in compliance with regulatory and payor requirements.
- Click the **Flowsheets** hyperlink.
 - Use the available **speed buttons** and **fields** to document required information for Telemedicine encounters.

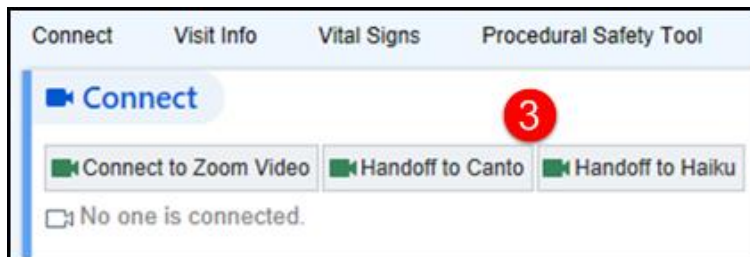
A screenshot of a web form titled 'Quality and Compliance (1)'. At the top, there is a warning banner: 'Patient location documentation is required for Telemedicine encounters.' Below this is a tabbed interface with 'Document' selected. The form contains several sections with dropdown menus and checkboxes. The first section is 'Telemedicine Encounter' with a 'Consent obtained?' dropdown set to 'Yes'. The second section asks 'Where is the provider currently located during the visit?' with dropdowns for 'Office', 'Hospital', and 'Home'. The third section asks 'What state is the provider currently located during the visit?' with a state selection dropdown. The fourth section is 'Visit Type?' with two options: 'Video Visit using audio-visual technology' (selected) and 'Audio-Only Virtual Visit'. The fifth section asks 'Where is patient currently located during the visit?' with a dropdown menu showing 'Home', 'Hospital', 'Prison', 'School/Telehealth Clinic', 'College', 'SNF/Nursing home/Domiciliary', 'Vehicle (Parked)', 'Work', and 'Other'. The sixth section asks 'What state is patient currently located in?' with a state selection dropdown. At the bottom, there is a question: 'Is patient located in a state where provider is licensed? If not, inform patient the visit will need to be immediately rescheduled. Provider will enter no charge and sign the visit.' with 'Yes' and 'No' dropdown options. A 'Accept (1)' button is at the very bottom.

- If the patient is located in a state where you are not licensed, inform the patient that the appointment will need to be rescheduled immediately and click **Acknowledge**.
9. If you are the only provider on the visit, click **End Meeting for All** to exit Zoom.

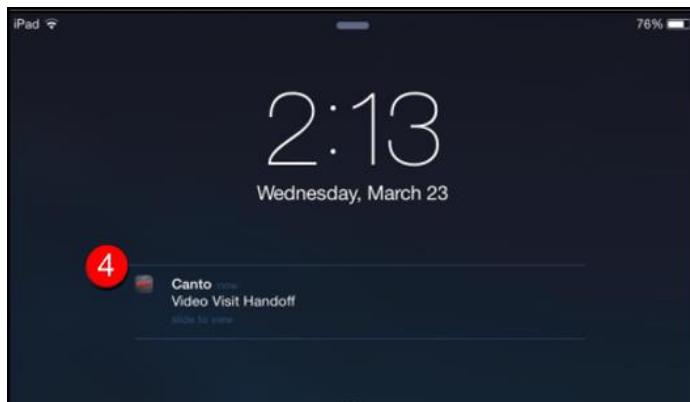
Start a Virtual Visit from/Handoff a Virtual Visit to Haiku or Canto

You can open the virtual visit as described in the **Start a virtual visit from your computer** section of this Tip Sheet, and then send the virtual visit to your mobile device. This can be helpful if you want to keep the patient's chart open on your computer and complete charting while using your mobile device for the video and audio. This workflow applies when there is not a webcam connected to your Norton-provided workstation.

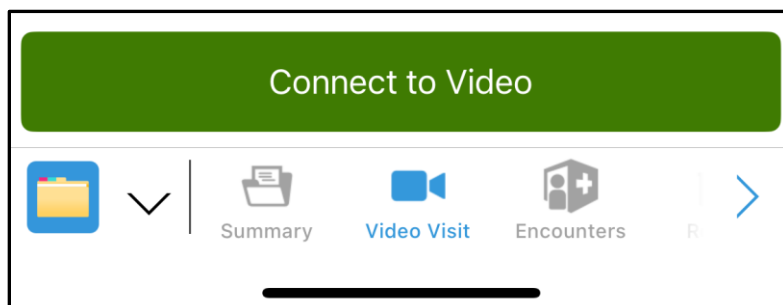
1. Find the patient's virtual visit on the Schedule and open the encounter.
2. Locate the **Connect** section of the navigator.
3. Click **Handoff to Haiku** or **Handoff to Canto** to send a push notification to your device.



4. Slide the notification on your mobile device to unlock the device and open the patient's chart in Haiku or Canto.



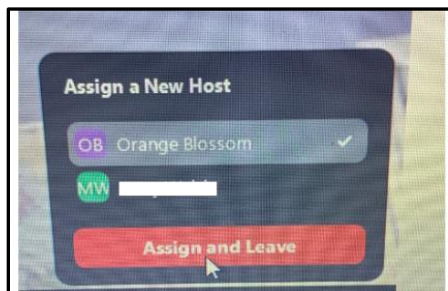
5. If you are the first one to join, tap **Start Video Call** to begin the virtual visit. If the patient has already joined, tap **Join Video Call**.
6. You can also log in to Haiku or Canto, select the patient appointment, and select Video Visit from the menu at the bottom of the screen.



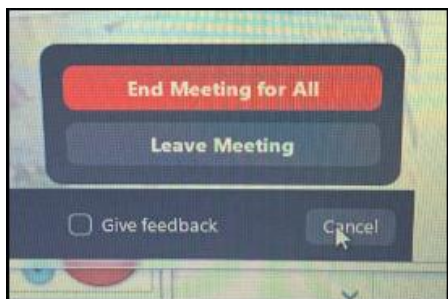
Multiple Provider Workflow

Multiple providers are able to connect to the same virtual visit with a patient at the same time. Each provider needs to log in to the department in which the patient has an appointment for a virtual visit and access the encounter.

1. Once the patient's Status is **Arrived**, follow the steps described in the **Start a virtual visit from your computer** section of this Tip Sheet.
2. Each **subsequent** provider follows the same process to access the virtual visit.
3. The **first** provider who connects with the patient becomes the **Zoom Host** for the virtual visit.
4. If the **Zoom Host** needs to leave the visit and there are other providers remaining on the visit, the **Zoom Host** will be prompted to **Assign a New Host**. Clicking **Assign and Leave** allows the **Zoom Host** to pass responsibility to another provider who then becomes the **Zoom Host**. If the **Zoom Host** leaves the meeting and does not pass responsibility to another provider, the Zoom session will end.



5. Once the visit is complete, the **Zoom Host** needs to **End Meeting for All** to end the video visit. If there are other providers on the visit who are not the **Zoom Host**, they may only see the **Leave Meeting** option.



Multidisciplinary Clinic (MDC) Provider Workflow

The **Multidisciplinary Clinic (MDC)** workflow requires a designated “host provider” (or nurse) to ensure that all documentation is complete before the visit is signed and the encounter is closed. In the steps below, the MDC Host is not to be confused with the Zoom Host.

Similar to the **Multiple Provider Workflow** described in the previous section, **multiple Multidisciplinary Clinic (MDC)** providers are able to connect to the same virtual visit with a patient at the same time.

1. Log in to your **home** department and access the patient appointment from the Schedule.
2. Once the patient’s Status is **Arrived**, follow the steps described in the **Start a virtual visit from your computer** section of this Tip Sheet.
3. Each **subsequent** provider follows the same process to access the virtual visit.
4. Once you have completed **your** virtual visit with the patient and are ready to disconnect from **Zoom**:
 - If you were the first provider who connected with the patient thereby becoming the **Zoom Host**, pass responsibility to another provider who then becomes the **Zoom Host**.
 - If you are not the **Zoom Host**, simply click **Leave Meeting**.

MDC Workflow

1. After you have completed **your** documentation for the patient during the MDC visit, it is imperative that you exit the patient’s chart. Otherwise, it’s possible that another provider will be prohibited from accessing the same section in the patient’s chart to complete their documentation.
2. If you are the **MDC Host** provider and are unable to sign the visit because it is locked or currently being accessed by another provider, it may be because the **Zoom Host** did not properly end the visit.

Finish documentation for the Visit

1. Complete any remaining charting.
2. Enter an appropriate **Level of Service (LOS)** code.
 - A “No Charge” LOS code of 99999 is available if you, as the provider, determine a visit is not billable.
3. Sign the visit.



If the LOS codes you need are not available as speed buttons in the Level of Service window, add them. In the Level of Service window, click the wrench at the top right. To add a new button, click **+ Add** in an empty rectangle. Add a caption and a code in the window that opens. When you have completed your updates, click **Accept**.