



Training Materials

MGH Epic Integrated Virtual Visit

Admin User Guide

7/29/2021

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Epic Integrated Admin Virtual Visit User Guide

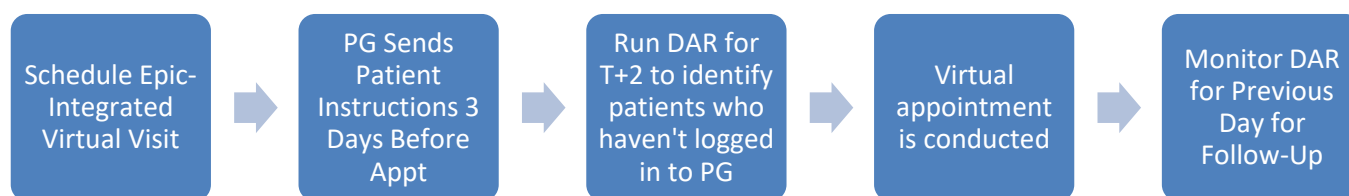
This Epic Integrated Admin User Virtual Visit User Guide should be used by front desk staff who will be supporting providers who will be seeing patients via the Epic Integrated Video Virtual Visits Zoom platform.

Overview

What Is an Epic Integrated Virtual Visit?

Epic Integrated Virtual Visits are the preferred MGB platform, as it allows patients to receive care via video and is the most secure platform we currently offer. By conducting via Patient Gateway (PG), it allows our hospital and practices to send communications and updates to the patient in a secure and HIPAA compliant manner and comes with many other conveniences such as eCheck In.

Workflow Overview



What does the patient need to participate?

1. A reliable Internet connection and one of the following devices:
 - PC/Mac with a webcam and microphone (must have pop-up blockers disabled)
 - iPhone/iPad
 - Android device
 - Turn off pop-up blockers
2. Active PG account

Doximity Dialer Setup if Working from Home

Doximity is an application that allows you to set your “caller ID” to the number for your clinic so that patients will not see your personal phone number. When you call patients from your personal phone, please use the Doximity Dialer. Please see the [Using Doximity to Call Patients Tip Sheet](#) for more detailed information.

Scheduling New Epic Integrated Virtual Visits

When scheduling a new Epic Integrated virtual visit, a scheduling questionnaire will fire in Cadence once an Epic Integrated visit type is selected. The questionnaire guides schedulers to ensure patients will be in an approved state for the virtual visit, will have the technology to complete a virtual visit, and verbally consents to a virtual visit. **Note:** If a patient has had a completed Epic-Integrated virtual visit in the last year, Cadence will suppress the questionnaire for the patient.

1. From the patient’s appointment desk, click **Make Appt.**
2. Enter the appropriate **Appt notes.**
3. Select the appropriate Epic Integrated Virtual **Visit type.**

Visit Type	Default Duration	Description
Virtual Annual Wellness Visit [555068]	30 min	Annual Well Visit
Virtual Established [555035]	30 min	Established patient to the provider/practice. Does not need to have had a prior virtual visit.
Virtual Established Complex [555072]	60 min	Established patient that may require additional medical review relating to complex medical issues.
Virtual International [555036]*	30 min	International patients.
Virtual New [555034]	60 min	A brand new patient to the provider/practice.
Virtual Nurse [555070]	15 min	Nurse visit
Virtual Patient In Clinic [555071]	30 min	Patient in clinic and provider will be in another physical location (remote or onsite)
Virtual Physical [555069]	45 min	Physical
Virtual Urgent [555206]	30 min	Urgent
Virtual Post Op [555208]	30 min	Post-operation

- The decision tree will automatically open. Ask the patient the required questions and enter their responses appropriately.
- Review the decision tree instructions carefully and take appropriate action:

*If the patient does not have the required technology to participate in a virtual visit but verbally consents to virtual care, update the visit type to a Telemedicine visit type. Note that *new, out-of-state* patients cannot have their first visit be telemedicine.

*If a patient will be out-of-state for their virtual visit, you will need to confirm they will be in an approved state (CT, ME, NH, RI, VT, or FL) and check provider licensure. See step 6 for details.

*If a patient will not be in an approved state, you will be prompted to deny scheduling a virtual visit and offer an in-person visit instead.

*If the patient verbally consents to participation in a virtual visit, continue scheduling. The decision tree will evaluate if the patient has an active Patient Gateway account, and if not, will advise to switch to a Standalone Virtual Visit. Always encourage patients to enroll in Patient Gateway and let them know an activation link will be automatically sent after scheduling. The link is valid for 30 days.

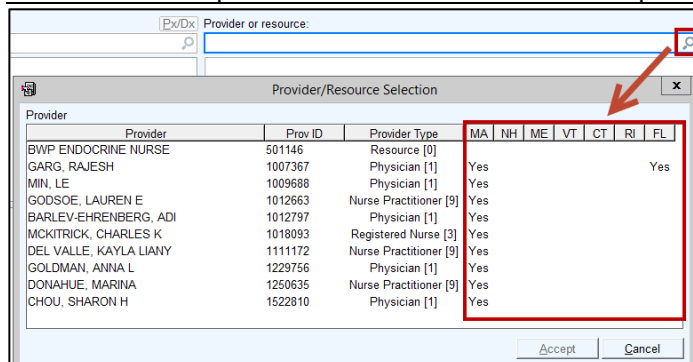
*If the patient declines consent to participate in a virtual visit, offer the patient an in-person visit instead.

*If the patient has given verbal consent within the last year or has signed the annual virtual consent document, the decision tree will suppress the consent question.

*If a patient had previously declined to sign the Consent – Virtual Care document, but now consents to virtual care, you will be able to continue scheduling. Note that the Consent-Virtual Care document will automatically expire on the Documents Table.

6. Select the appropriate **provider** in the Provider or resource field.
 - **Important Note:** If the patient will be in an approved state outside of Massachusetts, only schedule with an Authorized Clinician (Attending Physician, NP, PA, or Clinical Psychologist) who is licensed in the patient’s state. Use the magnifying glass in the Provider or resource field to view providers’ state licensures. You can sort by state by clicking on the column header. Do NOT schedule an appointment with a provider who is not licensed in the patient’s state. Doing so risks

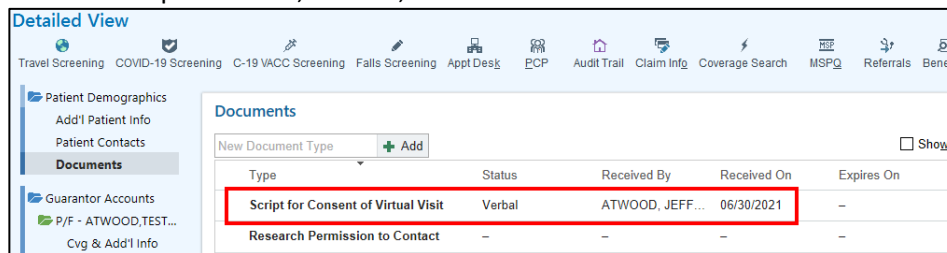
adverse action to a clinician’s home state license and leaves the clinician and institution vulnerable to malpractice claims and civil or criminal penalties.



7. Select the **date** on the calendar.
8. Click **Search**.
9. Double-click a time slot that works for the patient, then click **Schedule**.
10. Click **Schedule** at the Appointment Review Window.
11. Complete Registration steps.
 - **Note:** If you chose a provider not licensed in the patient’s state, you will receive a Confirmation Message when completing Registration. You will need to change the provider to one who is licensed in the patient’s state or cancel the appointment.



- **Note:** If patient verbally consents to participating in a virtual visit, the **Script for Consent of Virtual Visit** will automatically be updated on the Documents Table. The patient will be prompted to sign the full Virtual Care Consent document during eCheck-in. If the patient does not have Patient Gateway, they will be prompted to sign the Virtual Care Consent document at check-in for their next in-person visit, ED visit, or Admission.



12. Click **Finish**.

Converting Appointments to Epic Integrated Virtual Visits

Existing in-person visits that need to be changed to an Epic-Integrated Virtual Visit need to be cancelled and rescheduled to ensure that the decision tree fires so patient consent for virtual care can be collected. The decision tree will not fire when using the Change Appointment activity.

1. From the Appt Desk, right-click on the existing appointment and select **Cancel/Reschedule**.

2. Enter the appropriate **Cancel reason**, then click **Reschedule**.
3. In the Make Appointment activity, the Decision Tree for the original visit type will automatically open. Click **Discard Tree**.
4. [Continue from Step 3 of “Scheduling New Epic Integrated Virtual Visits.”](#)

Interpreter Scheduling for Epic Integrated Virtual Visits


It is important that front desk staff continue to schedule interpreters for Epic Integrated Virtual visits during scheduling or when adding an interpreter to an already scheduled appointment.

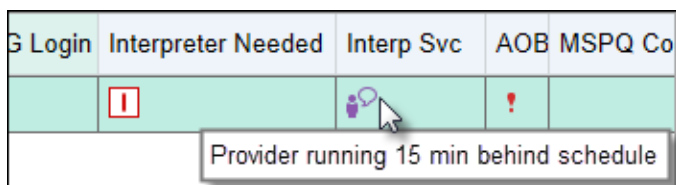
In-house interpreters can join the Epic-integrated virtual visit directly from their schedule. If using CyraCom or Language Line, providers can use the [Adding an Interpreter to an Epic-Integrated Virtual Visit](#) tip sheet for steps on adding the interpreter to the visit. If a provider starts a visit with a patient and realizes they need an interpreter, see the *Unscheduled Interpreter for MGH Main Campus and MGH Chelsea* section for steps on how to invite the interpreter to the visit.

If you need to contact Interpreter Services, be sure to contact them for your site:

Main Campus	mghinterpreters@partners.org or 617-726-6966
Revere	Please refer to Revere Interpreter Services Phone list or CyraCom
Chelsea	mghchelseainterpreterservices@partners.org or 617-887-3534
Charlestown	Janice Del Castillo 617-724-8154 or Rachel Levison 617-724-8143
Everett	Telephone Interpreters only
Waltham	CyraCom
Danvers	CyraCom

To improve communication between practices/providers and interpreters, a new actionable Storyboard feature is available to message information to interpreters. For instance, in the event a provider is running behind schedule, practices can enter a comment for the interpreter to view (e.g., “Provider is running “x” minutes behind schedule). Any comments entered can be viewed via the DAR by adding the **MGB AMB INTERPRETER SERVICES COLUMN [2107891]**. This column will display an icon if a comment has been entered.

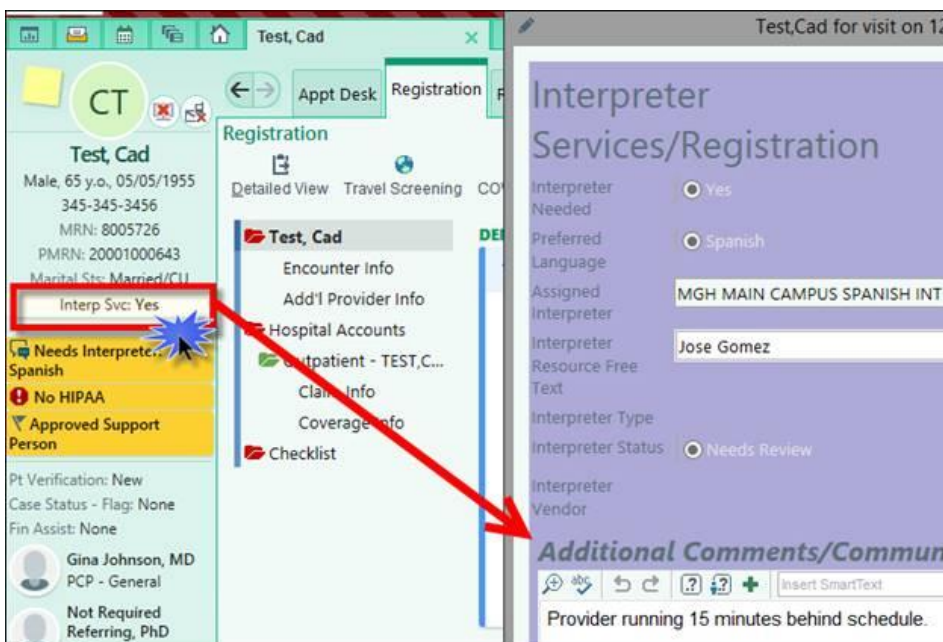
- The **Needs Interpreter?** Flag needs to be set to **Yes**, for the message icon  will appear on the DAR. The Hover bubble will display any comments.



To enter/edit a comment for an interpreter:

1. Access the patient’s Registration activity for the encounter either by clicking **Reg** on the DAR toolbar or from the Appt Desk by selecting the visit and clicking **Reg Appointment Contact** on the bottom toolbar.
2. Click the **Interp Svc: Yes** icon in Storyboard.

- In the **Additional Comments/Communication** field, type an appropriate message for interpreters to view (e.g., provider running 'x' minutes behind, etc.).



NOTES:

- These comments are encounter specific and do not carry forward to other encounters.
- The **Interp Svc: Yes** icon is actionable only when in Registration for a specific encounter or from within a clinical encounter.
- Providers can view and add comments from the Multi-Provider Schedule (MPS) or Storyboard within the Encounter. Interpreters can also view this from the Interpreter Work List.

Appointment Reminders

For departments using Televox, patients will receive text or voice reminders with scripts specific to virtual visits.

SMS Script: *You have a virtual appt (Short Date/Time). This is NOT an in-person appt. To opt out txt STOP. To confirm txt YES. To decline txt NO.*

Verbal Script: *“Hello, this is (department name), calling to confirm a virtual visit for (Patient first name) on (date) at (time). Please note this is not an in person visit. Please sign on a few minutes before your appointment.”*

Patients who are already active on Patient Gateway will receive a PG message at the top of the hour after the Epic-integrated virtual visit is scheduled with instructions for joining the visit. They will receive another reminder about their upcoming virtual visit **3 days prior** to the appointment. The reminder contains instructions about downloading Zoom, completing eCheck-in, and starting the virtual visit. It also contains resources for technical support and a link to the [Patient Gateway Virtual Visit Guide](#).

See below for a sample virtual visit reminder. Note the sections are highlighted in yellow are new as of 2/21/21.

Greetings,

[Patient Name] has an appointment for a Virtual Visit. **As a reminder, virtual visits are done by video or telephone only. This is not an in-person visit.**

Date: 3/06/21
Time: 2:00 PM

Please log into Patient Gateway at <https://patientgateway.massgeneralbrigham.org> for more details. If you have more than one appointment on the same day, you will only get one reminder.

If this is your first Virtual Visit, please follow these important steps now:
1. Download Zoom from the Apple Store, Google Play, or directly from Zoom: <https://zoom.us/client/latest/Zoom.pkg>.
2. Click to test your Zoom connection: <https://zoom.us/test>.
3. Click to follow instructions on adjusting your pop-up settings: https://patientgateway.massgeneralbrigham.org/MyChart-PRD/PPGDocs/Partners/Disabling_a_Popup_Blocker.pdf

Please complete eCheck-In on Patient Gateway before your visit to review your information, fill out questionnaires related to your visit, and take care of any co-pays ahead of time: <https://patientgateway.massgeneralbrigham.org/MyChart-PRD/Visits/visitslist>

To start your visit:
1. Log in to Patient Gateway at least 10 minutes before the appointment.
2. Find "Begin visit" in Health Feed and click on it (available 30 minutes before the appointment).
3. You will see a prompt from Zoom to click "Open" or "Run."
If you have not downloaded Zoom, click Run. See above for details.
4. You will see "Waiting for the host to start this meeting" and then a "Welcome" screen. Please wait here.
5. When your screen changes, click "Allow access to video." You will wait in your provider's "Personal Waiting Room" until your visit starts.
6. When the visit starts, select audio.
Choose "Using Internet Audio" from a smartphone or tablet, or a computer with microphone/speaker.
Choose "Call me" if you don't have a microphone/speaker or a strong internet connection.

If you need technical help preparing for your Virtual Visit, please call the Patient Gateway Support line at 1-800-745-9683 or see the resources below.

Please call the clinic directly with any scheduling or health-related questions.

We look forward to your visit.

Please note that Mass General Brigham is updating Patient Gateway. Beginning February 21, 2021, you will find an improved layout and new features to help you find what you need. You'll see a one-time tutorial the first time you log in after the update. Click here for a preview: <https://patientgateway.massgeneralbrigham.org/mychart-prd/PPGDocs/en-US/PGUpgrade2021.pdf>

Thank you,
Your Care Team

Virtual Visit Resources:
Virtual Visit Guide: https://mychart.partners.org/MyChart-PRD/PPGDocs/Partners/PPG_Virtual_Visit_Guide.pdf
Frequently-Asked Questions: https://mychart.partners.org/MyChart-PRD/PPGDocs/Partners/Zoom_PPG_Patient%20FAQs.pdf

PLEASE DO NOT REPLY TO THIS MESSAGE.

-----ABOUT THIS MESSAGE----- This is an automated message. Patient Gateway is for non-urgent messages with your doctor's office. For health questions that need a response sooner than 2 business days, please call the clinic.

To update your Patient Gateway communication preferences: Go to 'Your Menu', scroll down or search for 'Communication Preferences'. You can also search for "Email" in 'Your Menu'. Open 'Communication Preferences' to make changes, including opting in to receive text messages

For Patient Gateway technical support, please visit: <https://ppgapp.partners.org/public/support/faq/portal?lang=en-US>.

Manually Sending a Reminder for an Urgent Virtual Visit

Epic integrated virtual visit appointment instructions are sent to patients via Patient Gateway at the top of the hour following scheduling. This message includes instructions for patients to download/install the Zoom application on their device and how to start their visit when it's time (see above for a sample). The only time a patient won't receive this message on time is if an urgent appointment is scheduled and occurs before the top of the hour. In this instance, front desk staff can proactively send patients this message on demand by using a SmartPhrase in Epic.

1. From your In Basket in Epic, click the **Patient Msg** button.
2. Select the appropriate patient.
3. Add a subject for the email (i.e: Virtual Visit Reminder)
4. In the body of the message type: **.enterprisesamedayvirtualvisit** this will pull in the reminder for the patient.

Pre-Appointment Monitoring of Patient Gateway Login

In order to join an Epic-integrated virtual visit, patients must be able to log into their Patient Gateway account. To mitigate delays and frustration for patient and provider, Front Desk staff should monitor the patient's last Patient Gateway login date, which has recently been added to the Department Appointment Report (DAR).

Add New Column to Private DAR

1. Select your **Private DAR**.
2. Click the **Display** tab.
3. From the **Available Columns** section, select the **CAD PHS MYCHART PG LAST LOGIN [117406390]** and click the right facing triangle to add to the **Selected Columns** section.
4. Click **Save**.

1. Run **DAR for T+2**.

- Sort the **VISIT TYPE** column to identify patients with an Epic-integrated virtual visit (prefix of VIRTUAL). Then check the **LAST PG LOGIN** column to identify patients who have not logged into Patient Gateway in the last 30 days (if this field is blank, it indicates patient has not completed activation of PG account).
- Using preferred phone #, **callout to patients who have not logged into Patient Gateway in last 30 days or who have not completed activation of their PG account.**
- Ask them to **log in to ensure they know their password and download Zoom** in preparation for their virtual appointment.

Appointment Monitoring of Department Appointments Report (DAR)

Front Desk staff **do not** need to Arrive Epic Integrated virtual visits, as these visit types will auto-arrive once the patient clicks “Begin Visit” from Patient Gateway. However, front desk staff now need to monitor their Department Appointment Report (DAR) the day after the appointment (T-1).

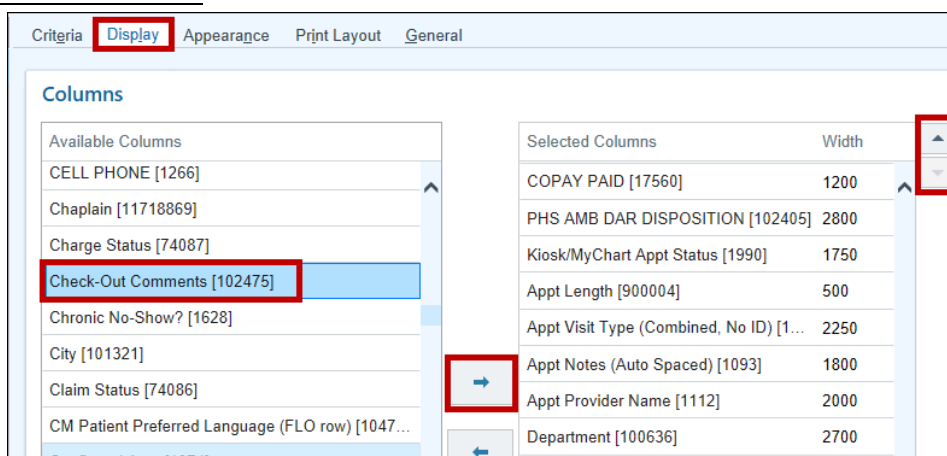
- Monitor the statuses of the Epic- Integrated virtual visit appointments
- Review the Check-Out Comments and Follow-Up columns for notes from providers to ensure next appointment is scheduled if necessary.

- Ensure you have 2 key columns on your DAR –

Using a Private DAR

If you’re using a **Private DAR** you may need to add the Check-Out and Follow-Up columns:

- Select your saved private DAR.
- Click the **Display** tab.
- Select the **Check-Out Comments [102475]** click the right facing triangle to add to the Selected Columns section.
- Select the **PHS AMB DAR disposition [102405]** column and click the right facing triangle to add to the Selected Columns section.



- Use the **Up/Down arrows** on the right side to reorder the columns to the desired location.
- Click **Save**.

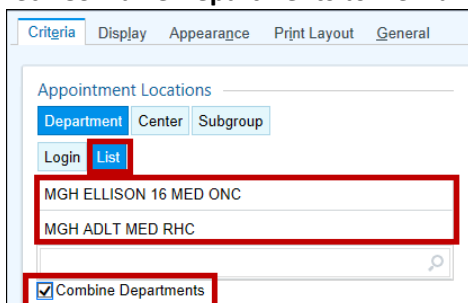
Using a Standard PHS DAR

If you’re using a **PHS Standard DAR**, it defaults both columns:

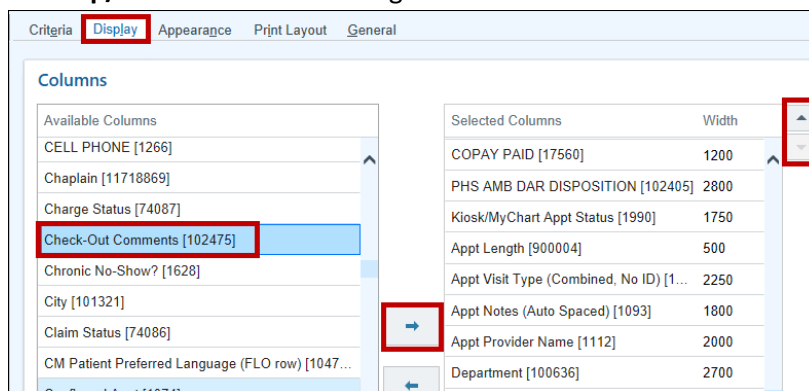
- PHS Check In & Check Out DAR [154812]**
- PHS Check Out DAR [154811]**

The standard DAR is set to look at your log-in department. Your area may check in for multiple departments or need to see fewer types of appointments in the DAR.

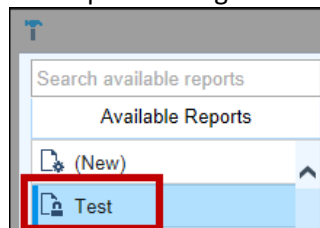
1. From the DAR, click **Settings** on the activity toolbar.
2. To look at other/multiple departments besides your login department:
 - a. Select the **List** button.
 - b. Enter each department you want to be displayed on the DAR.
 - c. Check **Combine Departments** to view all departments on the same report.



- d. The same is true of for the Provider, Visit Type, and Appointment Status criteria. If you want to limit what you see on the DAR, select the **List** button and enter the specific Dept., Provider, Visit Type, or Appt. Status you would like to keep.
3. To look at past or future dates or a range of dates:
 - a. Change the date criteria.
 - b. If you want to see the whole range in one list, be sure to click 'Combine dates'.
4. To add/remove a column on the report:
 - a. Click the **Display** tab.
 - b. Select a column from the Available Columns section and click the right facing triangle to add to the Selected Columns section.
 - c. Use the **Up/Down arrows** on the right side to move columns to the desired location.



5. Click **Save As**.
6. At the Report Settings prompt, you can rename your report or just click **Accept**.
 - Once saved, the renamed DAR will appear in the Available Reports section on the left side of the Report Settings window. You'll see a lock icon, indicating the DAR is only visible to you.



2. Run your DAR for T-1.

- Sort the DAR by the **Visit Type** column (in descending order) to view all Epic-integrated virtual visits (visit types beginning with VIRTUAL).
- Monitor appointment status for any follow-up:

DAR Appt Status	Definition	Action
Comp	These visit types will auto-complete when the provider begins documenting a note or places an order in the encounter.	No action.
Left	This means the patient connected to the visit but exited before the provider was able to connect. (DAR status may indicate Arrived – check for red font and double-click appt to view EOD status.)	Needs follow up. Follow up with provider/patient to find out if patient connected by phone instead; if not reach out to patient to see if appointment needs to be rescheduled.
Sch or eCheck-in comp	Indicates that the patient never connected to the virtual visit. These visits will change to “No Show” during end of day processing.	Needs follow up. Reach out to provider to see if visit completed by phone; if not reach out to patient to see if appointment needs to be rescheduled.

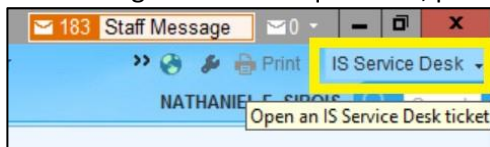
- Review **Check-Out Comments** and **Follow-Up** columns for comments from providers after virtual visits so you can follow up with each patient after the virtual visit to ensure the next appointment is scheduled.
 - If a patient requires a follow-up appointment, please see instructions for [Order-Based Ticket Scheduling](#).

Appendix

Support Resources

Provider/Practice Support:

- For urgent technical questions and support please call the MGPO 24-hour hotline at 1-866-266-3240.
- For non-urgent technical questions, please open a ticket in Epic:



- For general questions, please email the Center for Telehealth at MGHTeleHealth@partners.org.

Patient Support

- For Patient support, please contact Patient Gateway at 1-800-745-9683.

Frequently Asked Questions

Question	Answer
Out-of-State Patients	
Can <u>new</u> or <u>existing</u> patients be scheduled for an Epic-Integrated Virtual Visit if they live out of state?	After July 1, 2021, virtual visits should be conducted only for patients in New England and Florida, and only with Attending Physicians, NPs, PAs, and Clinical Psychologists licensed in those states. See Clinician FAQs for more details.

Changes to Provider Licensure



<p>What if a provider becomes licensed in one of the approved states? How do I update the Provider Lookup table?</p>	<p>If a provider has obtained a license to practice in an approved state, please notify the Centralized Credentialing Office (CCO) at PHSCentralCredentialingOfficeExpirables@partners.org.</p> <p>It is important to maintain up-to-date licensure information for scheduling and billing purposes.</p>
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Interpreter Scheduling for Out-of-state patients



<p>Do interpreters need to be licensed in different states to provide services for out-of-state patients?</p>	<p>No. Since interpreters are not providing clinical care, they do not need to be licensed in the patient’s state.</p>
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Patients without Virtual Visit Technology (SmartPhone, Computer, Internet)

<p>If a patient doesn’t have the technology (SmartPhone, computer, internet, etc.), can they still be scheduled for a virtual visit?</p>	<p>Yes. Schedule the patient for a Telemedicine Phone Established or Telemedicine Phone New* visit type. See the Standalone Virtual Visit User Guide for details.</p> <p>*New patients who live out of state should not be scheduled for new telemedicine visits.</p>
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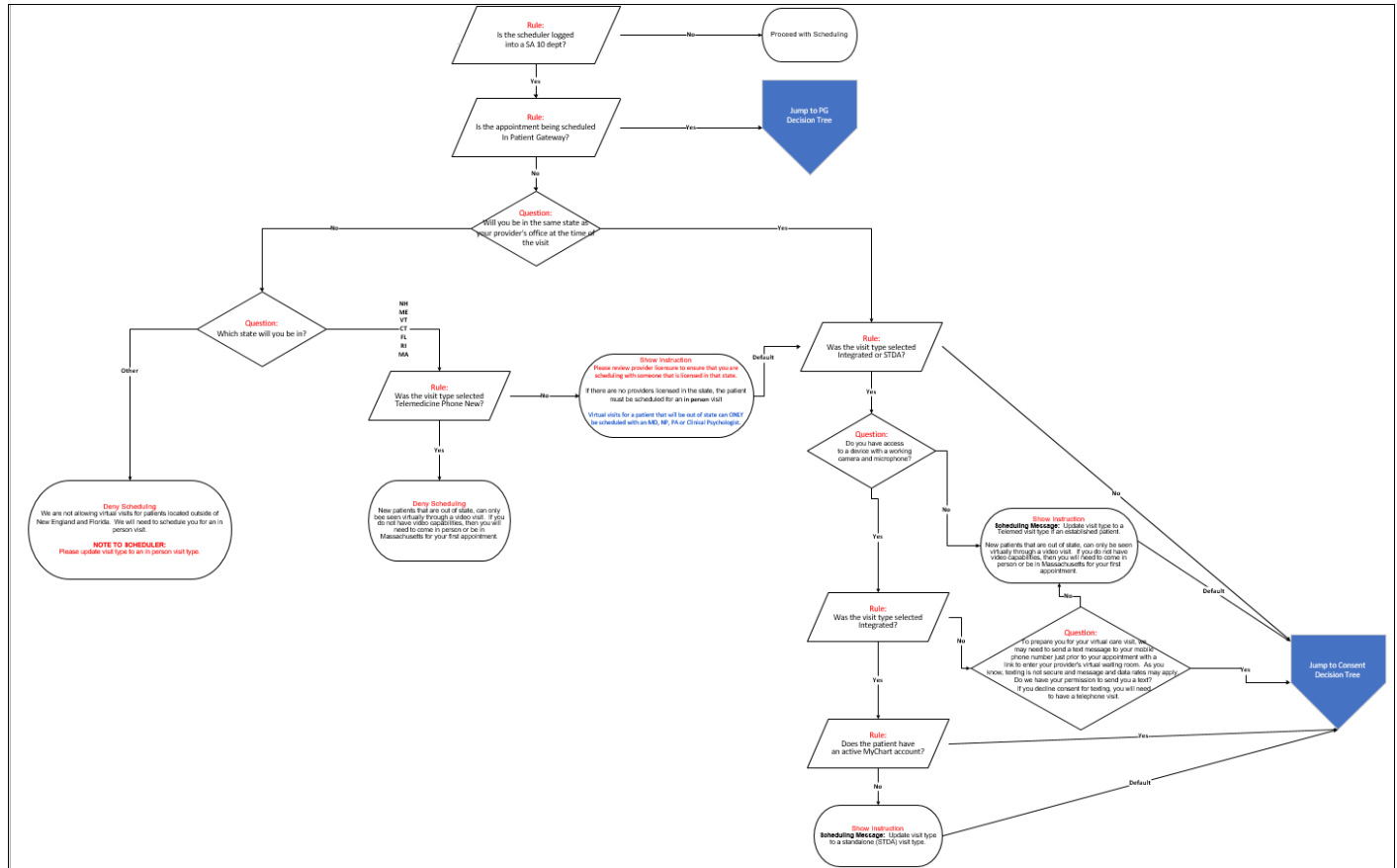
Patients with Disabilities (Special Needs in Epic)

<p>What if patient has Visual Impairment in Epic?</p>	<p>Guidance from Zary Amirhosseini, MGH Disabilities Program Manager, and MGH Disabilities Task force: It depends on the level of vision loss.</p> <ul style="list-style-type: none"> • If patient has access to screen reader software such as JAWS and can navigate to the link, they may be able to use virtual video. • If not, a ‘Telemedicine Phone’ visit would be best
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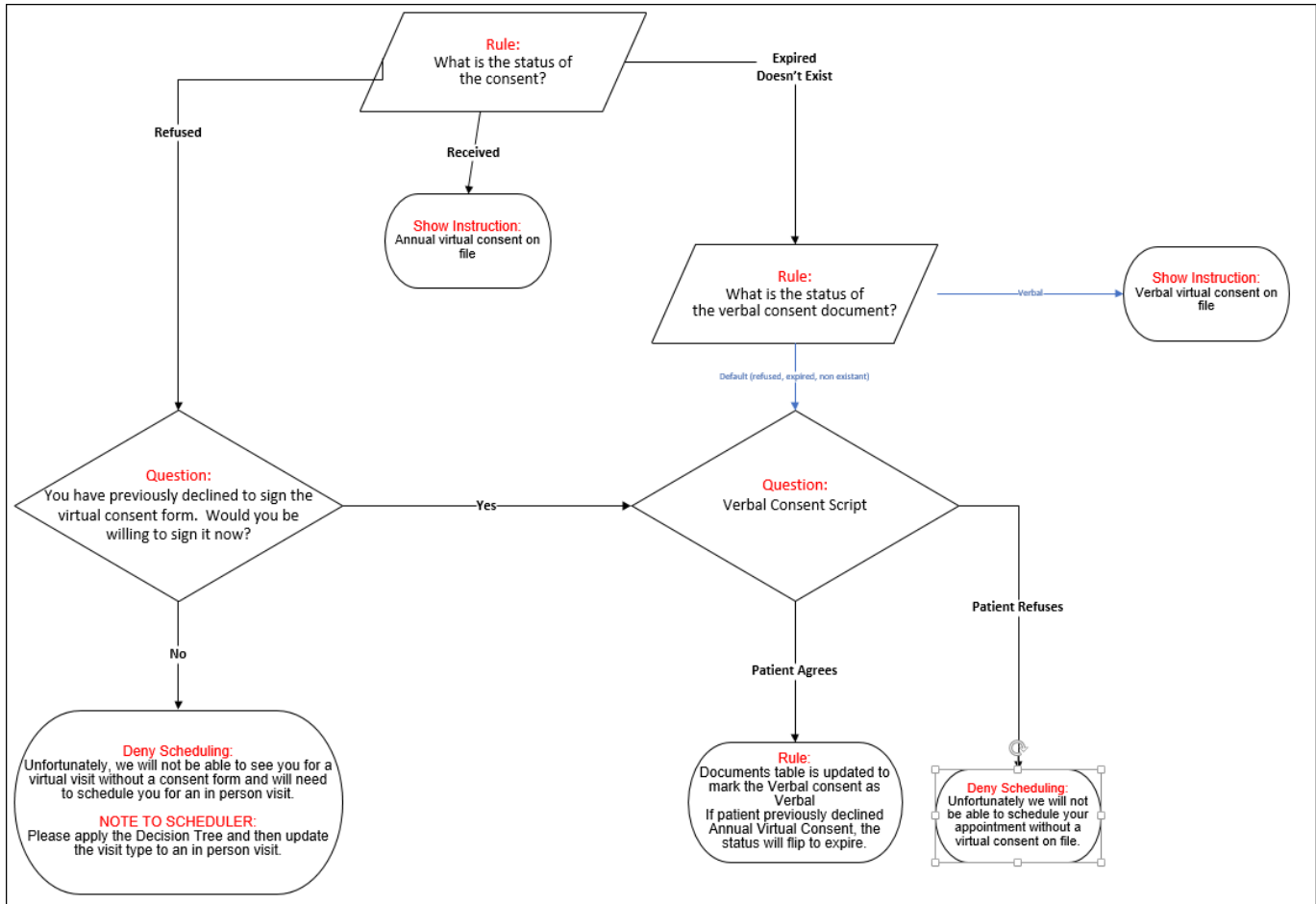
<p>What if patient has Hearing Impairment in Epic?</p>	<p>Guidance from Zary Amirhosseini, MGH Disabilities Program Manager, and MGH Disabilities Task force for scheduling virtual visits for deaf and late-deafened patients –</p> <ol style="list-style-type: none"> 1) <u>Deaf Patients (ASL Interpreter)</u> <ul style="list-style-type: none"> • Schedule virtual video visit • Request a virtual visit with a Deaf patient by emailing the following information in advance to Susan Muller-Hershon and cc Melissa Calverley, include - <ul style="list-style-type: none"> ○ Patient Name ○ MRN ○ Appointment date/time ○ Department contact name/phone ○ Virtual platform being used <p>NOTE: If the request is for the same day, please call the Interpreter Services Department at 617 726-6966</p> 2) <u>Late-Deafened/Non-Sign Language Patients (CART remote transcription service)</u> <ul style="list-style-type: none"> • Schedule virtual video visit • Email same information above in addition to <ul style="list-style-type: none"> ○ Provider email address ○ Patient email address
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Virtual Visit Decision Tree

Please zoom in for best viewing experience:



Virtual Care Consent Decision Tree



Patient Gateway Self-Scheduling Decision Tree

