



# *Training* Materials

## Standalone Virtual Visit

Front Desk User Guide

7/29/2021

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### Summary

**What is a Virtual Visit?** Virtual Visits allow patients to have face-face visits with their clinician via secure video conferencing from the comfort of their home or other private location. Patients need the following to participate:

<p><u>Video Visits:</u></p> <ul style="list-style-type: none"> <li>• A reliable Internet connection and one of the following devices:             <ol style="list-style-type: none"> <li>1. PC/Mac with a webcam and microphone</li> <li>2. iPhone/iPad</li> <li>3. Android device</li> </ol> </li> </ul>	<p><u>Phone Visits:</u></p> <ul style="list-style-type: none"> <li>• Landline</li> <li>• Mobile phone</li> </ul>
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# Standalone Admin User Virtual Visit User Guide

This Virtual Visit User Guide should be used by front desk staff who will be supporting providers that will be seeing patients for Virtual Visits (phone or video) who have not migrated to [Epic Integrated Virtual Visits](#) or for patients who do not have Patient Gateway accounts or technology needed for an Epic Integrated virtual visit.

## Doximity Setup to Mask Personal Phone # 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 if you are working from home. 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. Skip to next section if you are working from the office.

## Scheduling New Standalone Virtual Visits or Telemedicine Visits

When scheduling a new standalone virtual visit, a scheduling questionnaire (aka decision tree) will fire in Cadence once the standalone virtual visit type is selected. The decision tree guides schedulers on questions we need to ask patients to ensure they have the technology to complete a virtual visit and that patients will be in an approved state for their virtual visit.

- From the patient’s appointment desk, click **Make Appt.**
- Enter the appropriate **Appt notes.**
  - If scheduling a STDA virtual video visit, include the platform that will be used for the visit to assist with patient support if necessary (i.e. Doximity, Zoom, etc.)
  - If scheduling a Telemedicine – Phone visit, include the preferred phone number for the visit in the Appt notes.
- Select the appropriate **Standalone Virtual Visit Type.**

Standalone Visit Types	Default Duration	Description
Telemedicine Phone Established [555066]	60 min	Standalone telephone visit for existing patients, <i>only use if patient declines enrolling in PG and does not have technology required for a video visit.</i>
Telemedicine Phone New [555214]	60 min	Standalone telephone visit for new patients, <i>only use if patient declines enrolling in PG and does not have technology required for a video visit; patient must be in-state</i>
STDA VV NEW [555073]	30 min	Standalone virtual visit new patient
STDA VV Established [555074]	30 min	Standalone virtual visit established patient
STDA VV Group [555075]	30 min	Standalone virtual visit group therapy (i.e. behavioral health)
STDA VV Individual Psychotherapy [555076]	TBD min	Standalone virtual visit individual psychotherapy ( <i>Limited to certain DEPs</i> )
STDA Patient in Clinic [555077]	30 min	Standalone virtual visit patient in clinic and provider will be in another physical location (remote or onsite)
STDA VV Established Complex [555079]	60 min	Standalone virtual established patient that may require additional medical review relating to complex medical issues
STDA VV International [555080]	30 min	Standalone virtual international patient
STDA VV Annual Wellness Visit [555081]	30 min	Standalone virtual annual wellness visit
STDA VV Physical [555082]	45 min	Standalone virtual physical
STDA VV Nurse [555083]	15 min	Standalone virtual nurse visit

STDA VV Urgent [555207]	30 min	Standalone virtual urgent visit
STDA VV Post Op [555209]	30 min	Standalone virtual post-operation visit

- 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 technology to participate in a video but consents to virtual care, update the visit type to a Telemedicine visit type. Note that *new, out-of-state* patients should NOT be scheduled for telemedicine visits.

\*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 agrees to receive text messages, verbally consents to participation in a virtual visit, and will be in Massachusetts or another approved state, continue scheduling.

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

Decision Tree for STDA VV ESTABLISHED

Will you be in the same state as your provider's office at the time of the visit?  Yes  No  
Yes

Do you have access to a device with a working camera and microphone?  Yes  No  
Yes

To prepare you for your virtual care visit, we may need to send a text message to your mobile phone number just prior to your appointment with a link to enter your provider's virtual waiting room. As you know, texting is not secure and message and data rates may apply. Do we have your permission to send you a text? If you decline consent for texting, you will need to have a telephone visit.

To schedule your visit, you must agree to the following:  Patient Agrees  Patient Refuses  
Patient agrees

We will bill your insurance for this visit, and you may be responsible for all or part of the cost depending on your coverage. A summary... [see more](#)

**Results - Follow Instructions**

Instructions

**NOTE TO SCHEDULER:** Update visit type to a Telemed visit type if an **established patient**. Please confirm with patient that this is no longer going to be a video call, but will be telephone visit instead.

**New patients** that are out of state, can only be seen virtually through a video visit. If the patient does not have video capabilities, then they will need to come in person or be in Massachusetts for their first appointment.

\*If the patient declines to receive text messages, but consents to virtual care, update the visit type to a Telemedicine visit type. Note that new, out-of-state patients should NOT be scheduled for telemedicine.

Decision Tree for STDA VV ESTABLISHED

Will you be in the same state as your provider's office at the time of the visit?  Yes  No  
Yes

Do you have access to a device with a working camera and microphone?  Yes  No  
Yes

To prepare you for your virtual care visit, we may need to send a text message to your mobile phone number just prior to your appointment with a link to enter your provider's virtual waiting room. As you know, texting is not secure and message and data rates may apply. Do we have your permission to send you a text? If you decline consent for texting, you will need to have a telephone visit.

**Results - Follow Instructions**

Instructions

Please confirm patient's phone number with patient.

**Read to Patient:** Please make sure you have your phone available for your appointment.

Instructions

Annual virtual consent on file

\*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.

Decision Tree for STDA VV ESTABLISHED

Will you be in the same state as your provider's office at the time of the visit?  Yes  No  
Yes

Do you have access to a device with a working camera and microphone?  Yes  No  
Yes

You have previously declined to sign the virtual consent form. Would you be willing to sign it now?  Yes  No  
Yes

To schedule your visit, you must agree to the following:  Patient Agrees  Patient Refuses  
Patient agrees

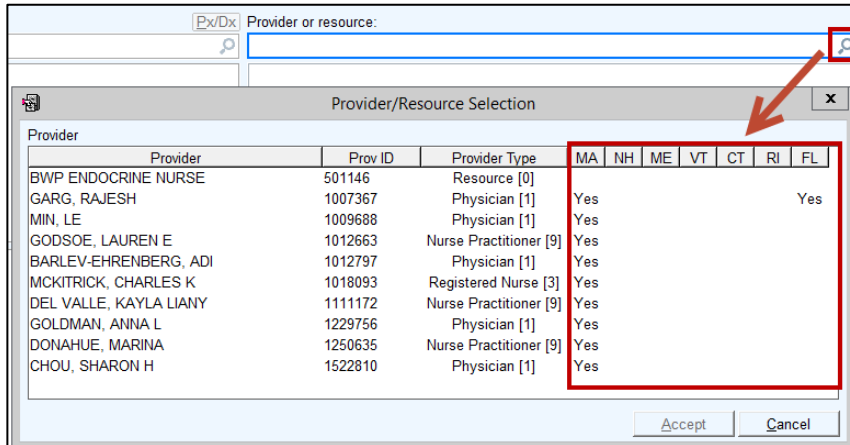
We will bill your insurance for this visit, and you may be responsible for all or part of the cost depending on your coverage. A summary... [see more](#)

**Results - Continue Scheduling**

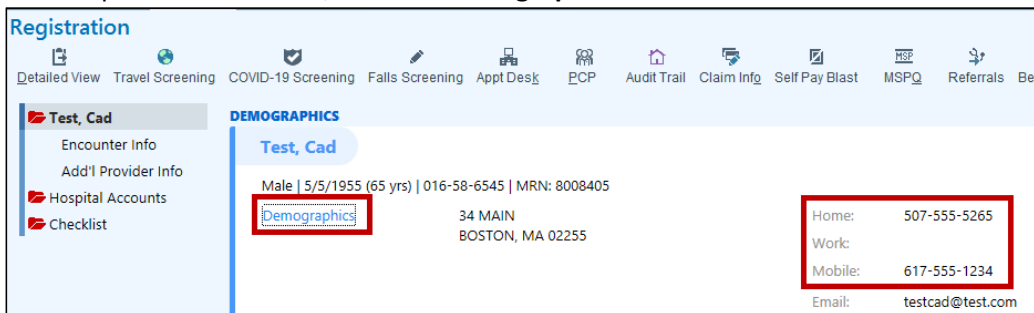
No results to apply.

\*If the patient had previously declined the Consent – Virtual Care form, 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.

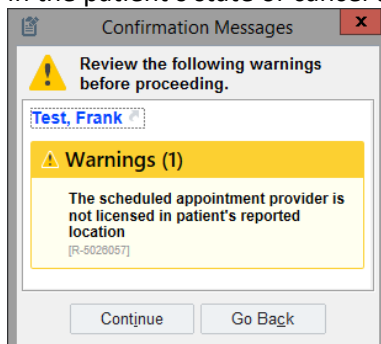
6. Select the appropriate **provider** in the Provider or resource field.
  - **Important Note:** If the patient will be in an approved state outside of Massachusetts, only schedule with an Authorized Clinician (Attending Physician, NP, PA, or Clinical Psychologist) who is licensed in the patient’s state. 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.



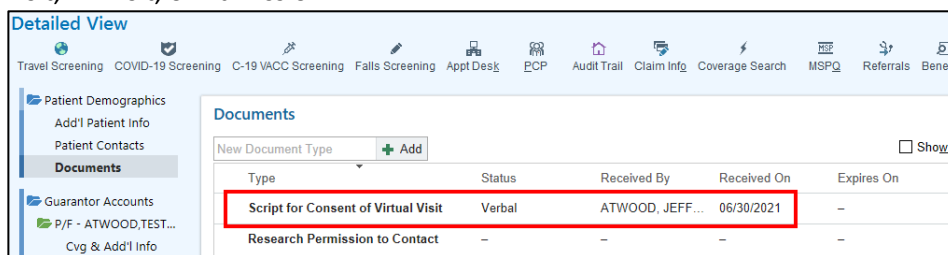
7. Select the **date** on the calendar.
8. Click **Search**.
9. Double-click a time slot that works for the patient, then click **Schedule**.
10. Click **Schedule** at the Appointment Review Window.
11. On the Interactive Face Sheet of Registration, confirm the patient’s phone numbers are correct.
  - If updates are needed, click the **Demographics** link.



12. Complete remaining Registration steps and click **Finish**.
  - **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.



## Converting Appointments to Standalone Virtual or Telemedicine Visits

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

- From the Appt Desk, right-click on the existing appointment and select **Cancel/Reschedule**.
- Enter the appropriate **Cancel reason**, then click **Reschedule**.
- In the Make Appointment activity, the Decision Tree for the original visit type will automatically open. Click **Discard Tree**.
- [Continue from step 2 of "Scheduling New Standalone Virtual Visits or Telemedicine Visits."](#)

## Standalone Virtual Visit Platforms

You may need to follow additional steps, depending on the platform your provider is using. **NOTE: Beginning 1/4/2021, Doximity will be the MGB enterprise-supported solution for Standalone Virtual Visits. Practices may elect to continue to use a Basic Zoom account or pay for a Licensed Zoom account (providers who conduct group visits will not incur a fee for a Licensed Zoom account). It's strongly recommended that a practice select a single video platform to streamline workflows for patients and staff.**

<b>Doximity</b> (recommended as of 1/4/2021)	<b>Zoom-Basic</b> (free)	<b>Zoom-Licensed</b> (for providers who opt in or conduct group visits)
When scheduling, ensure the correct mobile phone number is on file in Epic and collect consent for texting. Patient receives a text message with a link when the provider begins the visit. They just need to click to join – no advance downloads or sign-in required.	Front desk staff sends patient link using Virtual Visit Reminder Tool 3 days out (see below for details).  <b>Note:</b> There is a 40-minute call limit for meetings with 3 participants.	Front Desk staff sends patient link using Virtual Visit Reminder Tool 3 days out (see below for details). Because Doximity has a limitation of 4 participants per session, Zoom is the recommended solution for standalone group virtual visits.

*\*Your practice may choose to use a different video platform (i.e. doxy.me). Follow your departmental guidelines.*



## Interpreter Scheduling for Standalone Visits


It is important that front desk staff continue to schedule interpreters for Standalone Virtual Visits (phone or video) during scheduling or when adding an interpreter to an already scheduled appointment.

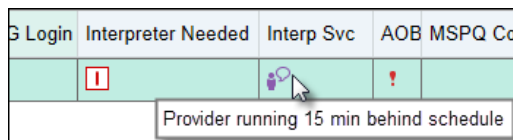
See below for additional steps on inviting the interpreter to the appointment for Standalone visits, depending on the virtual visit platform used:

	Best Practice:	Locations:
Doximity	<p>Provider can add the interpreter to the call. See the <a href="#">Completing STDA Virtual Visits Using Doximity Dialer User Guide</a>.</p> <p><b>Note:</b> The Doximity mobile app cannot dial a phone number that uses a decision tree (e.g., press 1 for translation services, press 2 for...) to connect with a translator. Only the Doximity Desktop app allows you to dial a number that uses a decision tree.</p>	<p><b>Main Campus:</b> <a href="mailto:mghinterpreters@partners.org">mghinterpreters@partners.org</a> or 617-726-6966</p> <p><b>Revere:</b> Please refer to Revere Interpreter Services Phone list or CyraCom</p> <p><b>Chelsea:</b> <a href="mailto:mghchelseainterpreterservices@partners.org">mghchelseainterpreterservices@partners.org</a> or 617-887-3534</p> <p><b>Charlestown:</b> <a href="#">Janice Del Castillo</a> 617-724-8154 or <a href="#">Rachel Levison</a> 617-724-8143</p> <p><b>Everett:</b> Telephone Interpreters only</p> <p><b>Waltham:</b> CyraCom</p> <p><b>Danvers:</b> CyraCom</p>
Zoom, Basic	<p>Front desk staff will need to use email tool to send Zoom link to interpreter services</p> <p><b>Note:</b> There is a 40-minute time limit for meetings with 3 participants.</p>	<p><b>Main Campus:</b> <a href="mailto:mghinterpreters@partners.org">mghinterpreters@partners.org</a></p> <p><b>Revere:</b> Please refer to Revere Interpreter Services Phone list or CyraCom</p> <p><b>Chelsea:</b> <a href="mailto:mghchelseainterpreterservices@partners.org">mghchelseainterpreterservices@partners.org</a> or 617-887-3534</p> <p><b>Charlestown:</b> <a href="#">Janice Del Castillo</a> 617-724-8154 or <a href="#">Rachel Levison</a> 617-724-8143</p> <p><b>Everett:</b> Telephone Interpreters only</p> <p><b>Waltham:</b> CyraCom</p> <p><b>Danvers:</b> CyraCom</p>
Zoom, Licensed	<p>Front desk staff will need to use email tool to send Zoom link to interpreter services</p>	<p><b>Main Campus:</b> <a href="mailto:mghinterpreters@partners.org">mghinterpreters@partners.org</a></p> <p><b>Revere:</b> Please refer to Revere Interpreter Services Phone list or CyraCom</p> <p><b>Chelsea:</b> <a href="mailto:mghchelseainterpreterservices@partners.org">mghchelseainterpreterservices@partners.org</a> or 617-887-3534</p> <p><b>Charlestown:</b> <a href="#">Janice Del Castillo</a> 617-724-8154 or <a href="#">Rachel Levison</a> 617-724-8143</p> <p><b>Everett:</b> Telephone Interpreters only</p> <p><b>Waltham:</b> CyraCom</p> <p><b>Danvers:</b> CyraCom</p>

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

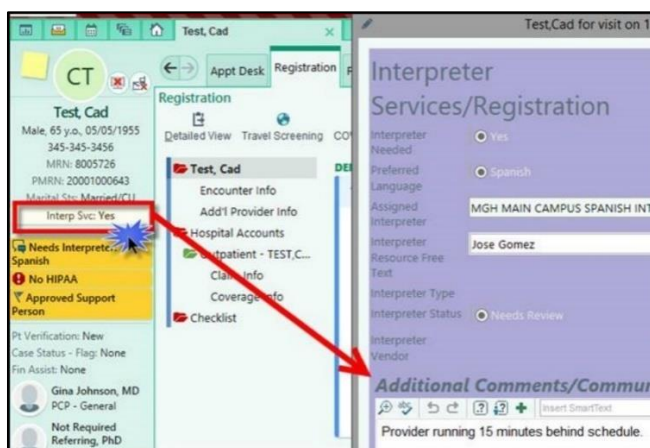
behind schedule). Any comments entered can be viewed via the DAR by adding the **MGB AMB INTERPRETER SERVICES COLUMN [2107891]**. This column will display an icon if a comment has been entered.

- The **Needs Interpreter?** Flag needs to be set to **Yes**, for the message icon  to 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.
3. 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.

**Send Reminder Email with Links for STDA Zoom Virtual Visits**

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

**Telemedicine Visit Script:**

**SMS Script:** *Pls expect a phone call from (department name) on (date) @ (time). To opt out txt STOP. To confirm txt YES. To decline txt NO.*

**Verbal Script:** *Hello, this is (department name), calling to confirm a phone call appointment for (patient first name) on (date) at (time). We will call you at the number we have on file. Please note this is not an in person visit.*

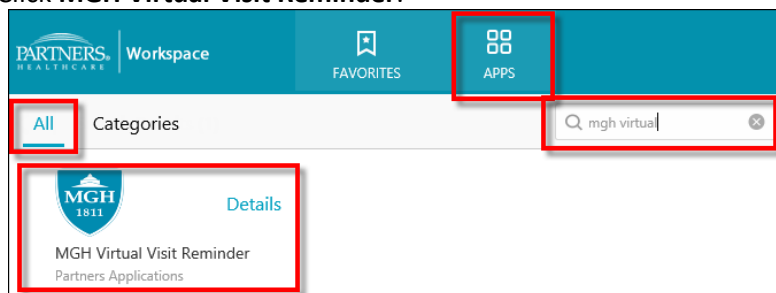
**STDA Virtual Visit Script:**

**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.*

Televox SMS reminders do **NOT** contain a link for the virtual visit. While STDA Doximity visits send a text to the patient with a link when the provider begins the visit, STDA Zoom visits do not. If your practice is using Zoom for standalone virtual visits, front desk staff can leverage the MGH “Virtual Visit Reminder Tool” to send secure email reminders that contain the hyperlink to join the visit. The email does not include any PHI; just virtual visit appointment date and time with zoom hyperlink to join for their upcoming appointment. **NOTE: It’s recommended to send these reminders 3 days prior to the appointment, not at the time of scheduling.**

1. Open the “Virtual Visit Reminder Tool” <http://MGHVirtualVisitReminder.partners.org> (TIP: bookmark for future use).
  - If not on site/VPN, the tool can be accessed via:
    - a. Go to: <https://workspace.partners.org/Citrix/UniversalWeb/>
    - b. Click **Apps** on the top toolbar.
    - c. Click **All**.
    - d. Type “**mgh virtual**” and then press **Enter**.
    - e. Click **MGH Virtual Visit Reminder**.



2. Enter the providers name in the **Lookup Clinician By Name** field, and press **Tab**.

Lookup Clinician By Name:

3. Verify that the clinician’s abbreviated name and virtual visit links appear below (if so, the one-time set up has been completed and you can skip to step 5).

Clinician Name:	<input type="text" value="Dr LS"/>
To:	<input type="text"/>
Video Visit Link:	<input type="radio"/> Doxy Link: <input type="text" value="https://doxy.me/drlarrystratton"/> <input checked="" type="radio"/> Zoom Link: <input type="text" value="https://partners.zoom.us/j/836105"/>

**4. One-time setup: Update provider profile**

- Change the provider name to an abbreviation (ex. “Dr S”, or “Dr LS”) that you’ll be able to identify who it is but also make the email more PHI compliant.
- Add in the zoom links for each clinician. The tool does not find them automatically and they must be manually entered.


Video Visit Link:	<input checked="" type="radio"/> Doxy Link: <input type="text"/>
	<input type="radio"/> Zoom Link: <input type="text"/>

5. The provider schedule for 7 days out appears on the right-hand side of the window. **NOTE:** If provider practices in more than one location, appointments will be grouped by each department.

MGH EVERETT FAM CARE Tuesday 4/7/2020	
Select Appt	1236548 : PATIENT 2 TESTING Appt Dt:4/7/2020 1:45:00 PM TM: STDA VV Establis DEP: MGH EVERETT FAM CARE PtEmail: Patient2@email.com Pt Phone:
Pt info to Epic Inbasket	
ReSelect	9874561 : PATIENT 3 TESTING Appt Dt:4/7/2020 2:00:00 PM STDA VV Established DEP: MGH EVERETT FAM CARE PtEmail: patient3@email.com Pt Phone: <b>sent to patient3@email.com by JD123 on 4/7/2020 1:21:50 PM</b>
Pt info to Epic Inbasket	
Select Appt (No Email)	1234567 : PATIENT 1 TESTING Appt Dt:4/7/2020 3:30:00 PM TM: STDA VV NEW DEP: MGH EVERETT FAM CARE PtEmail: Pt Phone:
Pt info to Epic Inbasket	

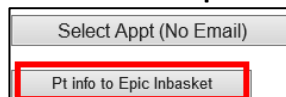
6. Review the email status on the provider schedule for those with a STDA visit type:

Status	Action	Action Steps																				
Select Appt	Send email reminder to patient	<ol style="list-style-type: none"> <li>1. Confirm visit type is <b>Standalone (STDA prefix)</b>.</li> <li>2. Click the <b>Select Appt</b> button.</li> <li>3. Notice the patient’s appointment details pull into the left-side of the window. <table border="1" data-bbox="451 1108 1166 1291"> <tr><td>Subject:</td><td>Upcoming Virtual Visit with: Dr LST</td></tr> <tr><td>Patient Name:</td><td>PATIENT 2 TESTING</td></tr> <tr><td>Patient MRN:</td><td>3216549</td></tr> <tr><td>Appt Date:</td><td>4/6/2020</td></tr> <tr><td>Appt Time:</td><td>2:30 PM</td></tr> </table> </li> <li>4. Be sure the Zoom radio button is selected. <table border="1" data-bbox="451 1350 1153 1444"> <tr> <td>Video Visit Link:</td> <td><input type="radio"/> Doxy Link: <a href="https://doxy.me/drlarrystra">https://doxy.me/drlarrystra</a></td> </tr> <tr> <td></td> <td><input checked="" type="radio"/> Zoom Link: <a href="https://partners.zoom.us/j">https://partners.zoom.us/j</a></td> </tr> </table> </li> <li>5. Add a message (optional).</li> <li>6. Click the <b>Send to Pt</b> button. <table border="1" data-bbox="451 1537 943 1661"> <tr> <td>Body</td> <td>I look forward to seeing you at this Virtual Visit.</td> </tr> <tr> <td colspan="2"><input type="button" value="Send to Pt"/></td> </tr> </table> </li> <li>7. A confirmation message appears that message was sent. When a message is sent to the patient, a BCC copy of the email is also sent to the front desk scheduler’s email. <table border="1" data-bbox="451 1753 729 1829"> <tr> <td><input type="button" value="Send to Pt"/></td> </tr> <tr> <td><b>Message Sent</b></td> </tr> </table> </li> <li>8. The status in the provider schedule changes to <b>ReSelect</b> on the right-hand side.</li> </ol>	Subject:	Upcoming Virtual Visit with: Dr LST	Patient Name:	PATIENT 2 TESTING	Patient MRN:	3216549	Appt Date:	4/6/2020	Appt Time:	2:30 PM	Video Visit Link:	<input type="radio"/> Doxy Link: <a href="https://doxy.me/drlarrystra">https://doxy.me/drlarrystra</a>		<input checked="" type="radio"/> Zoom Link: <a href="https://partners.zoom.us/j">https://partners.zoom.us/j</a>	Body	I look forward to seeing you at this Virtual Visit.	<input type="button" value="Send to Pt"/>		<input type="button" value="Send to Pt"/>	<b>Message Sent</b>
Subject:	Upcoming Virtual Visit with: Dr LST																					
Patient Name:	PATIENT 2 TESTING																					
Patient MRN:	3216549																					
Appt Date:	4/6/2020																					
Appt Time:	2:30 PM																					
Video Visit Link:	<input type="radio"/> Doxy Link: <a href="https://doxy.me/drlarrystra">https://doxy.me/drlarrystra</a>																					
	<input checked="" type="radio"/> Zoom Link: <a href="https://partners.zoom.us/j">https://partners.zoom.us/j</a>																					
Body	I look forward to seeing you at this Virtual Visit.																					
<input type="button" value="Send to Pt"/>																						
<input type="button" value="Send to Pt"/>																						
<b>Message Sent</b>																						

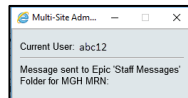
														
<p><b>Reselect</b></p>	<p>None</p>	<p>No action needed, email has already been sent to patient.</p>												
<p><b>Select Appt (No Email)</b></p>	<p>Need to obtain email address</p>	<ol style="list-style-type: none"> <li>Log into Epic.</li> <li>Open the patient's Appointment Desk.</li> <li>Call the patient using the patient's preferred phone number.             <div data-bbox="451 508 993 646" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p><b>Patient Summary (Edit)</b></p> <p>Birmingham, Jim " (46yrs)                  30 Gainsborough Boston MA 02115</p> <p>Reg Status: Ver      DOB: 10/26/1973                  SSN: 648-17-9362      Preferred Language: English                  Home: 617-555-4879      Mobile: 617-555-1237</p> </div> </li> <li>If patient answers the phone, follow steps below, otherwise skip to step 5 -             <div data-bbox="451 718 1464 1827" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p style="text-align: center;"><b>If patient answers the phone</b></p> <ol style="list-style-type: none"> <li>Standard greeting + below scripting:                     <p style="margin-left: 40px;"><i>"I am calling from Dr. X office about your upcoming virtual visit. In order to send you a link and reminder I need your email address. Do you have one you can provide and I will update our system?"</i></p> </li> <li>If yes, click the <b>Edit</b> link in the <i>Patient Summary</i> section of the patient's Appointment Desk. If no, proceed to step 8.                     <div data-bbox="479 1033 755 1081" style="border: 1px solid black; padding: 2px; margin: 10px 0;"> <p><b>Patient Summary (Edit)</b></p> </div> </li> <li>Click the <b>pencil</b> icon next to the <i>Email</i> field.                     <div data-bbox="470 1159 852 1270" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Contact information:</p> <table border="1"> <thead> <tr> <th>Number Type</th> <th>Number</th> </tr> </thead> <tbody> <tr> <td>1 Home Phone</td> <td>617-555-4879</td> </tr> <tr> <td>2 Work Phone</td> <td></td> </tr> <tr> <td>3 Mobile</td> <td></td> </tr> </tbody> </table> <p>Email: <input type="text"/></p> </div> </li> <li>Enter the patient's email address and click the <b>Add</b> button.                     <div data-bbox="470 1327 828 1423" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Edit Email Addresses</p> <p>New email: <input type="text" value="jim@email.com"/> <b>Add</b></p> <p>Email addresses:</p> <table border="1"> <thead> <tr> <th>Default</th> <th>Email Address</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>jim@email.com</td> </tr> </tbody> </table> </div> </li> <li>Click <b>Accept</b>.</li> <li>Open the Virtual Visit Reminder Tool (could take ~5 minutes to appear) and notice the email status for the patient is now <b>Select Appt</b> and email address is now on file for patient.                     <div data-bbox="470 1585 1042 1663" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p><b>Select Appt</b></p> <p>1236548 : PATIENT 2 TESTING                  Appt Dt: 4/7/2020 1:45:00 PM TM: STDA VV Establish                  DEP: MGH EVERETT FAM CARE                  PtEmail: Patient2@email.com Pt Phone:</p> </div> </li> <li>Follow steps above for the <b>Select Appt</b> status.</li> <li>If no, update the visit type on the appointment to Telemedicine-Phone. This will flow over to the Virtual Visit Reminder Tool in ~5 min and update visit type. No further action is needed.</li> </ol> </div> </li> </ol> <p>5. If patient does not answer, see steps below (otherwise, skip to next section) -</p>	Number Type	Number	1 Home Phone	617-555-4879	2 Work Phone		3 Mobile		Default	Email Address	<input checked="" type="checkbox"/>	jim@email.com
Number Type	Number													
1 Home Phone	617-555-4879													
2 Work Phone														
3 Mobile														
Default	Email Address													
<input checked="" type="checkbox"/>	jim@email.com													

If you cannot reach the patient

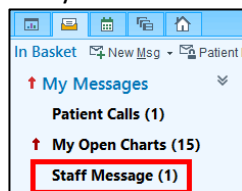
1. Click **Pt Info to Epic Inbasket** button in the Virtual Visit Reminder Tool.



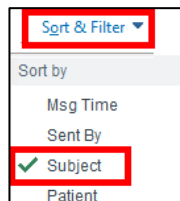
2. A confirmation message will appear.



3. Once you've gone through the list of patients, open your In Basket in Epic to find your Staff Message(s) for follow-up.



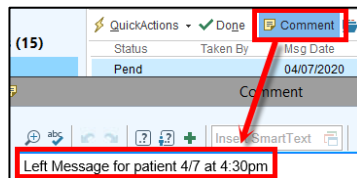
4. Click the **Sort & Filter** drop-down and choose **Subject**.



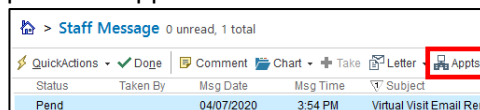
5. Find the subject: **Virtual Visit email reminder ping** and call the patient(s).
6. Follow steps above in previous section if you reach patient. If you still cannot reach patient, leave a message for the patient using standard greeting:

*"I am calling from Dr. X office about your upcoming virtual visit. In order to send you a link and reminder I need your email address. Please call me back at <#> and I will update our system."*

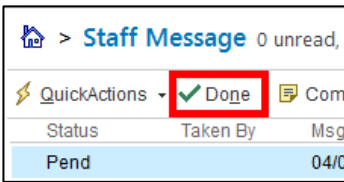
7. Use the **Comment** button to record each attempt at reaching the patient.



8. Continue to callout to patient to ensure resolved prior to appointment.
9. To add the patient's email address, click the **Appts** button to jump to the patient's Appointment Desk.



10. If you have completed adding the patient's email address, click the **Done** button.



11. Follow steps above for **Select Appt** status.

*\*Please see Appendix for examples of emails patient will receive for Zoom.*

7. Email the patient the appropriate Zoom Setup Guide for Patients:
  - a. [Zoom Setup Guide for Patients - Computer](#)
  - b. [Zoom Setup Guide for Patients - Mobile Phone or Tablet](#)

## Post-Appointment Monitoring of DAR

Best Practice is for front desk staff to monitor their Department Appointment Report (DAR) the day after the appointment (T-1).

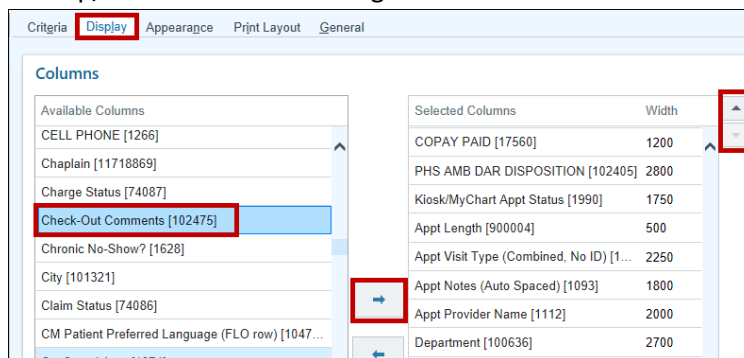
- Review the Check-Out Comments and Follow-Up columns for comments from providers after virtual visits.
- Follow-up with patients to ensure the next appointment is scheduled (if applicable).

1. 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:

1. Select your saved private DAR.
2. Click the **Display** tab.
3. Select **Check-Out Comments [102475]** from the Available Columns list and click the right facing arrow to add to the Selected Columns section.
4. Select **PHS AMB DAR disposition [102405]** from the Available Columns list and click the right facing arrow to add to the Selected Columns section.
5. Use the Up/Down arrows on the right side to move columns to the desired location.



6. Click **Save**.

### Using a Standard PHS DAR

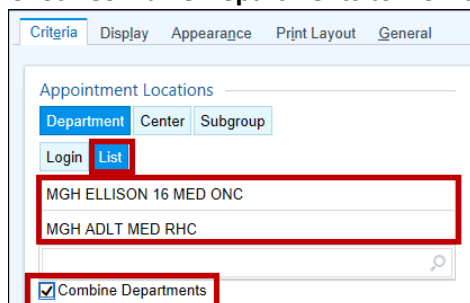
If you're using a **PHS Standard DAR**, it defaults both columns:

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

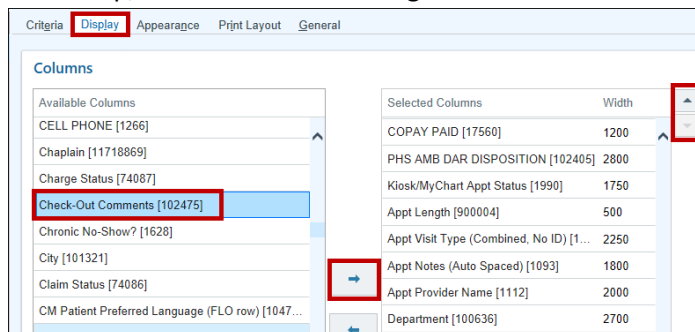
The standard DAR is set to look at your log-in department. Your area may check in for multiple departments or need to see fewer types of appointments in the DAR.



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 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**.
7. Once saved, the DAR will show up under your name in the listing on the left side of the Available Settings section on the left of the Report Settings window.

2. Run your DAR for T-1.
3. 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.
  - a. If a patient requires a follow-up appointment, please see instructions for [Order-Based Ticket Scheduling](#).

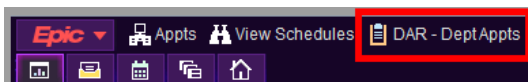


## Monitoring Virtual Visit Statuses in Cadence

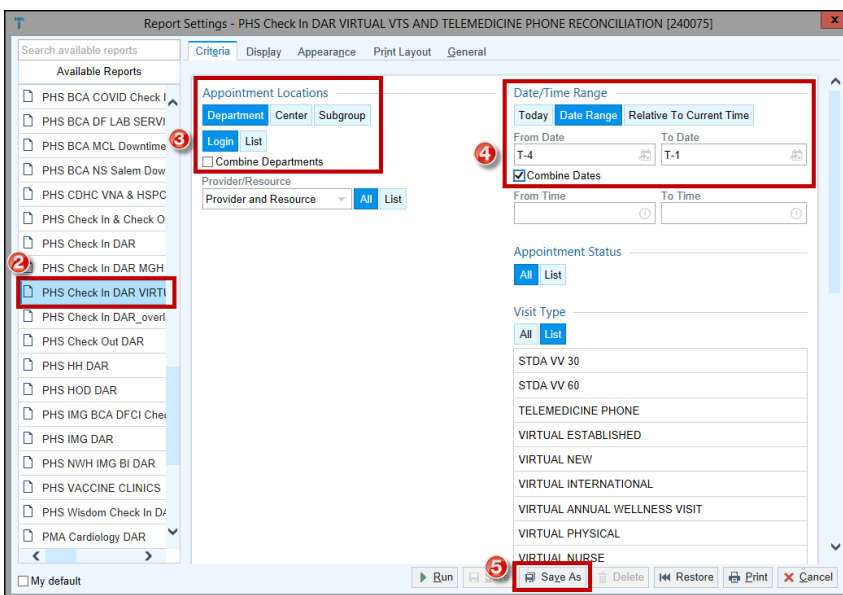
Front Desk staff typically **do not** need to Arrive Telemedicine-Phone or Standalone visit types, as there is logic built into Cadence specific to these visit types to auto-complete during batch end of day processing (**after 4 days from date of service**) if the provider has begun charting within the encounter.

Staff should monitor the **PHS Check In DAR VIRTUAL VTS AND TELEMEDICINE PHONE RECONCILIATION [240075]** DAR to check for appointments that are in danger of no-showing during EOD processing. After confirming the visit occurred, front desk staff can manually check-in appointments to ensure they do not no-show.


1. Click the **DAR- Dept Appts** button on the Hyperspace toolbar (or click the **Epic** button > **Scheduling** > **DAR – Dept Appts**).



2. When the DAR Report Settings window opens, select the template on the left-hand side: **PHS Check In DAR VIRTUAL VTS AND TELEMEDICINE PHONE RECONCILIATION [240075]**.
3. Ensure the **Login Department** check box is selected or click the **Combined Department** checkbox to add additional Epic departments below.
4. The default date range is **T-4 to T** to capture visits that are not auto-completed.
  - a. Update the **To date** field to **T-1** to filter out today’s appointments.
  - b. To view the full date range on the same report, check **Combine dates**.
5. You can create a private copy by clicking **Save As**, then rename your report.



6. Sort the DAR by the **VV Encounter Started** column (click twice to view icons on top).
  - a. This column displays an icon if an encounter will no-show during EOD. You can hover your mouse over the icon to view the message:

Status	VV Encounter Started	Encounter Status	Reason for Visit/Call	Lvl of Service	Visit Type
Sch		Encounter not closed			TELEMEDICINE PHONE

Provider Started Encounter. Appointment will No Show if it is not checked in or the encounter is not completed within 4 days of the DOS

- b. Is a **Lvl of Service/ Reason for Visit/Call** documented?
  - i. If **YES**, follow your department procedure on following up with the provider (i.e., send an In Basket message or email to provider) to confirm the visit took place. If so, check-in the appointment from the DAR to prevent the status flipping to no-show.
  - ii. If **NO**, no action is required. The visit will no-show during EOD processing.

## 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 contact MGH eCare Telemedicine at [MGHeCareTelemedicine@PARTNERS.ORG](mailto:MGHeCareTelemedicine@PARTNERS.ORG).
- For Epic-Integrated practice questions, please email the Center for Telehealth at [MGHTeleHealth@partners.org](mailto:MGHTeleHealth@partners.org).
- [Ambulatory Management Virtual Visit Toolkit](#)
- For more information about registering for a Doximity account or conducting a virtual visit via Doximity, see [Completing Standalone \(STDA\) Virtual Visits Using Doximity Dialer](#)

**Patient Support**

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

### Zoom Patient Reminder Email Example

Below is a sample reminder email of what patients will receive, for reference.

You have a Virtual Visit Scheduled with: Dr LST

The Video Appointment is scheduled for : 4/8/2020 at 10:15 AM

---

Link to Virtual Visit Portal: <https://stratton.zoomzoom.com>

---

Your clinician has scheduled your visit using Zoom

**Attending a Virtual Visit with your Provider**

- Please log in to Zoom 15 minutes prior to your appointment time.
- Please make sure you have access to your telephone (either home phone or mobile phone) and your provider's phone number in case you get disconnected or are unable to participate in the virtual visit.
- Reference the link to attend the virtual visit from Partners Patient Gateway.



**Set up/Log in Steps**

- Click on the link sent by your provider to join your virtual visit.
  - PC/Mac desktop or laptop first-time users may use any web browser to download Zoom software at [zoom.us/download](https://zoom.us/download).
  - iOS/Android mobile phone, tablet users may use any mobile web browser.
- If prompted, allow Zoom to access your device's web camera and microphone.
- Begin your virtual visit
  - PC/Mac desktop or laptop users with a webcam and microphone will select Join with Computer Audio; users without a webcam and microphone will select Call Me or Phone Call.
  - iOS/Android mobile phone, tablet users will select Join with Video then select Call Using Internet Audio for iOS or Call via Device Audio for Android.
- You are now in the virtual visit waiting room. Your provider will appear when ready and begin the virtual visit.

**Making the Most of Your Virtual Visit**

- Prepare your questions for the provider ahead of time.
- Have your medications in front of you.
- Set yourself up in a comfortable space in your home where you can speak privately to the provider.
- Make sure there is enough lighting, but avoid any excessive backlighting, which can cause your device to cast a shadow over your face. Excessive backlighting can come from sitting in front of a window.
- Look directly into the camera when speaking to the provider.
- If using a phone, put it on speaker, so you can look directly into the video.

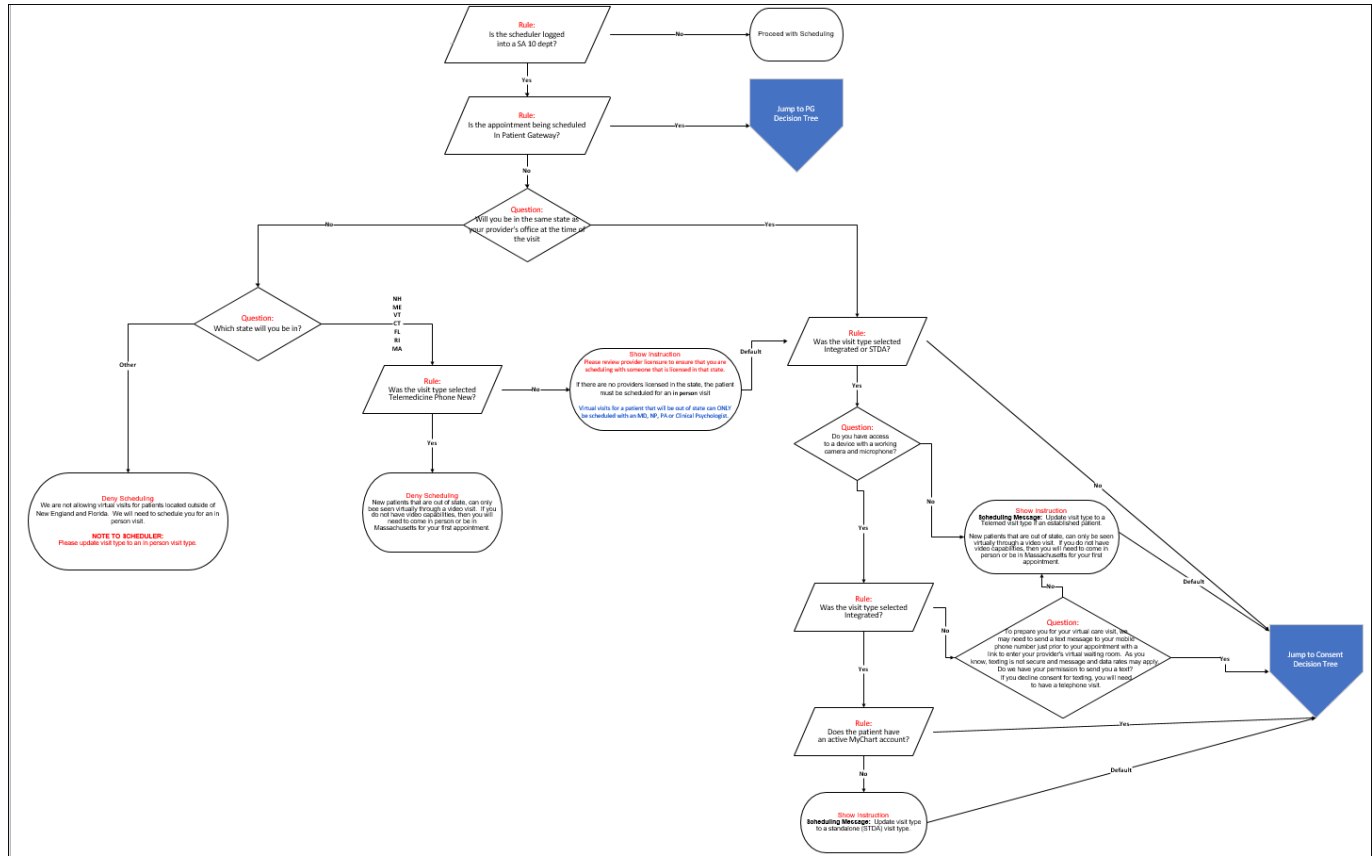
## Frequently Asked Questions

Question	Answer
<b>Out-of-state (OOS) patients</b>	
Can <u>new</u> or <u>existing</u> patients be scheduled for a Standalone Virtual Video visit if they live out of state?	After July 1, 2021, virtual visits should be <b>conducted</b> only for patients in New England and Florida, and only with Attending Physicians, NPs, PAs, and Clinical Psychologists licensed in those states. See <a href="#">Clinician FAQs</a> for more details.
Can <u>new</u> or <u>existing</u> patients be scheduled for a Telemedicine visit if they live out of state?	<u>Existing</u> out-of-state patients may be scheduled for a <b>Telemedicine Phone Established [555066]</b> visit type using the same guidelines noted above for Standalone Virtual Video visits.  <u>New</u> patients <u>must be in-state</u> to participate in a <b>Telemedicine Phone New [555214]</b> visit type.
<b>Changes to Provider Licensure</b>	
 What if a provider becomes licensed in one of the approved states? How do I update the Provider Lookup table?	If a provider has obtained a license to practice in an approved state, please notify the Centralized Credentialing Office (CCO) at <a href="mailto:PHSCentralCredentialingOfficeExpirables@partners.org">PHSCentralCredentialingOfficeExpirables@partners.org</a> .  It is important to maintain up-to-date licensure information for scheduling and billing purposes.
<b>Interpreter Scheduling for Out-of-state patients</b>	
 Do interpreters need to be licensed in different states to provide services for out-of-state patients?	No. Since interpreters are not providing clinical care, they do not need to be licensed in the patient's state.

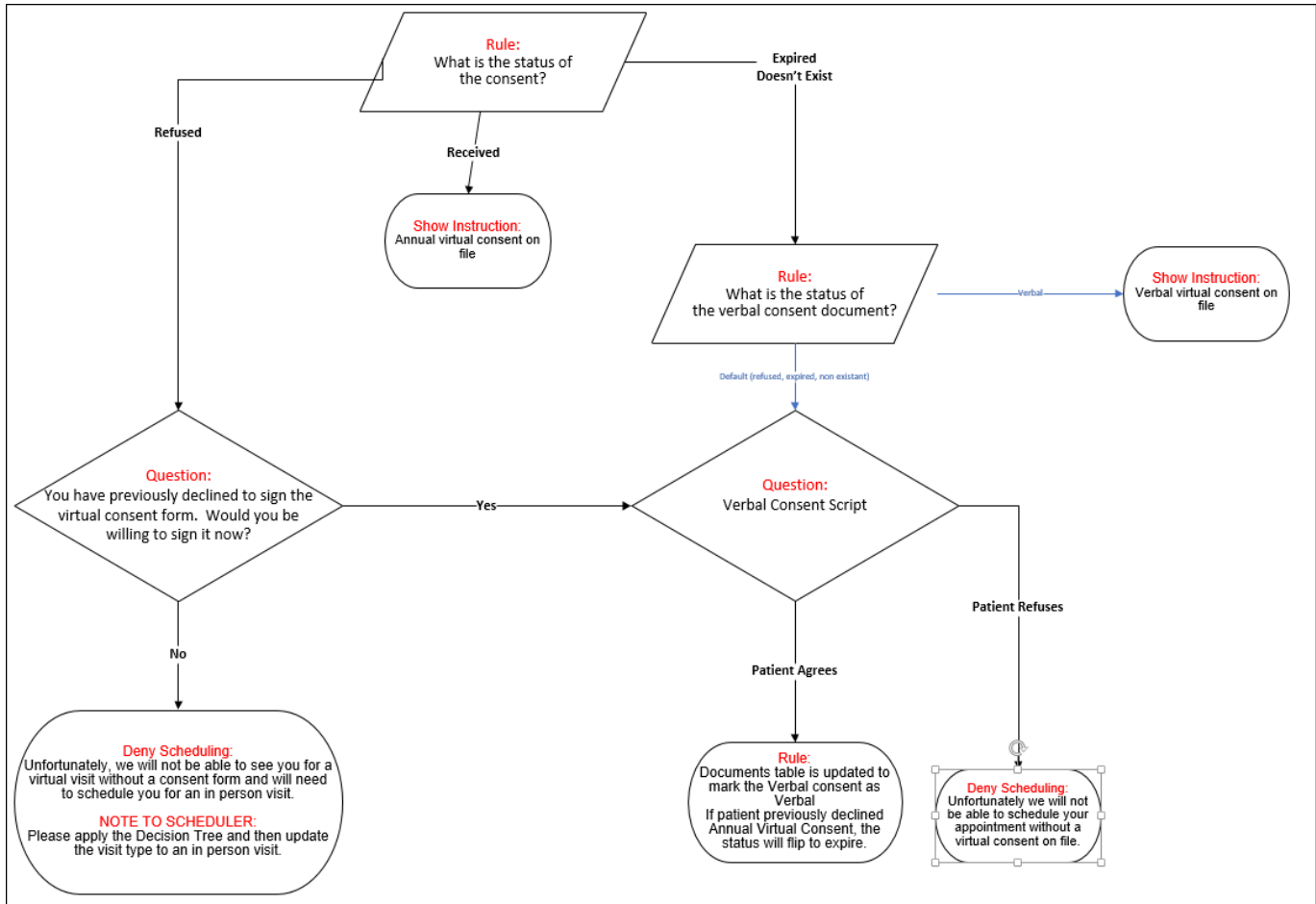
Patients without Telemedicine Technology (SmartPhone, Computer, Internet)	
<p>If a patient doesn't have the technology (SmartPhone, computer, internet, etc.), can they still be scheduled for a virtual visit?</p>	<p>Yes. Schedule the patient for either a <b>Telemedicine Phone Established</b> or <b>Telemedicine Phone New*</b> visit type.</p> <p>*New patients who live out of state should not be scheduled for new telemedicine visits.</p>
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 Taskforce: It depends on the level of vision loss.</p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• If not, a telemedicine phone would be best</li> </ul>
<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> <p>1) <u>Deaf Patients (ASL Interpreter)</u></p> <ul style="list-style-type: none"> <li>• Schedule virtual video visit</li> <li>• Request a virtual visit with a Deaf patient by emailing the following information in advance to <a href="#">Susan Muller-Hershon</a> and cc <a href="#">Melissa Calverley</a>, include -             <ul style="list-style-type: none"> <li>○ Patient Name</li> <li>○ MRN</li> <li>○ Appointment date/time</li> <li>○ Department contact name/phone</li> <li>○ Virtual platform being used</li> </ul> </li> </ul> <p>NOTE: If the request is for the same day, please call the Interpreter Services Department at 617-726-6966</p> <p>2) <u>Late-Deafened/Non-Sign Language Patients (CART remote transcription service)</u></p> <ul style="list-style-type: none"> <li>• Schedule virtual video visit</li> <li>• Email same information above in addition to             <ul style="list-style-type: none"> <li>○ Provider email address</li> <li>○ Patient email address</li> </ul> </li> </ul>

# Virtual Visit Decision Tree

Please zoom in for best viewing experience:



## Virtual Care Consent Decision Tree



## Patient Gateway Self-Scheduling Decision Tree

