Operational Steps by Role (PMI Workflow)

Each clinic and section will have to determine if they will be using unique Zoom Meeting IDs or a Provider's Personal Meeting ID (PMI). If a section has a scheduling resource covering multiple providers, please follow the guidance below to utilize PMI workflow. The scheduler would have a list of providers and their corresponding PMI Zoom link that they would use to schedule patients.

NOTE: The provider **MUST** follow the steps in the Provider Start Guide that enables the waiting room **AND** disables chat. Make sure the Scheduler has the provider's Personal Meeting ID

Scheduler

Scheduling a visit

1. Call patient that has been deemed appropriate for telehealth
2. Determine if the patient has the technological capability for telehealth using the Technology Requirement algorithm

   Note: If provider can and wants to use FaceTime that is also a question to ask patients "Can you use FaceTime?"
3. Ask if the patient would want to schedule a telehealth appointment. If NO, then either keep the existing appointment or reschedule for a future appointment.
4. If YES, verify patient contact information to send relevant training and visit information (email address, phone number)
5. Determine time for the telehealth appointment based on provider availability

   Note: If using FaceTime then request and verify the information to initiate a FaceTime call with the patient and disregard creating a meeting in Zoom. Schedule patient and send the provider an Outlook invite with the patients FaceTime contact information
6. If Zoom is being used then inform the patient that you will be sending them training documents to help them prepare for their visit and a link they will use to access their appointment on the day of the visit. They are asked to follow the provided instructions and test their connection at least 24 hours in advance.
7. Copy the provider's specific Personal Meeting ID and paste that into the patient's appointment information.
8. Create an Outlook invite and send appointment invitation to provider (and any participating Care Team Members) with Patient's name, appointment date and time

The Scheduler should make themselves available as a frontline troubleshooting resource for the patient if they experience difficulty with Zoom. There are also resources available at https://support.zoom.us.

Day of the visit

1. Make sure you coordinate with the provider to ensure patient has been arrived following the visit

Patient

Prior to the start of a telehealth visit patients must do the following:

- Follow and complete the training instructions for the device they will use for the telehealth visit
- Test their internet connection and ensure their camera and microphone are working by using the test link included in their training materials

If they are unable to complete these tasks then they should contact the provider's office for assistance or to cancel/reschedule their visit. Please provide a way for them to contact a telehealth resource leading up to and on the day of the visit in case there is an escalation (ex: provider is running late)

Provider/Care Team

At least 24 hours before a scheduled telehealth visit the provider should do the following:

- Ensure the device (laptop or PC with a webcam and microphone) they will conduct the visit on is configured properly by following and completing the instructions in Provider Guide
- Test their internet connection and device configuration using the included test link in the Provider Guide (https://zoom.us/test)
- Update the following Settings in your Zoom account:
  - Disable Chat feature
  - Enable Waiting Room
- Review Zoom Web Browser User Guides to understand the process to Admit a patient into the Room when they are in the Waiting Room

Day of visit

1. Find a quiet and private location with a calm background
2. Open patient's chart in PowerChart for documentation
3. Review your Outlook invite to determine if visit is conducted via Zoom or FaceTime
   a. If Zoom, copy and paste link into a web browser outside the VDT
      i. You will be notified when Patient has entered the Waiting Room
   b. If FaceTime, initiate FaceTime call
4. Admit patient to the room when they enter the Waiting Room (See provider guide)
5. Introduce yourself, provide an overview of the visit, and instructions on how to contact your office in case of an emergency.
6. Request identification from patient and confirm identity of patient
7. Conduct consult
8. Document the visit as if it were in person, but include that the visit occurred using telehealth via live A/V interaction
9. Provide follow-up instructions including when/if to schedule a follow up, prescription information, etc.
10. Invite the patient to end the call if they do not have additional questions
11. Code the appointment using the CPT codes that would be used for in person care, but attach the 95 modifier
12. Keep your Zoom room open and you will be notified as patient's join the Waiting Room for their appointment