Quick Start guide for Virtual Health
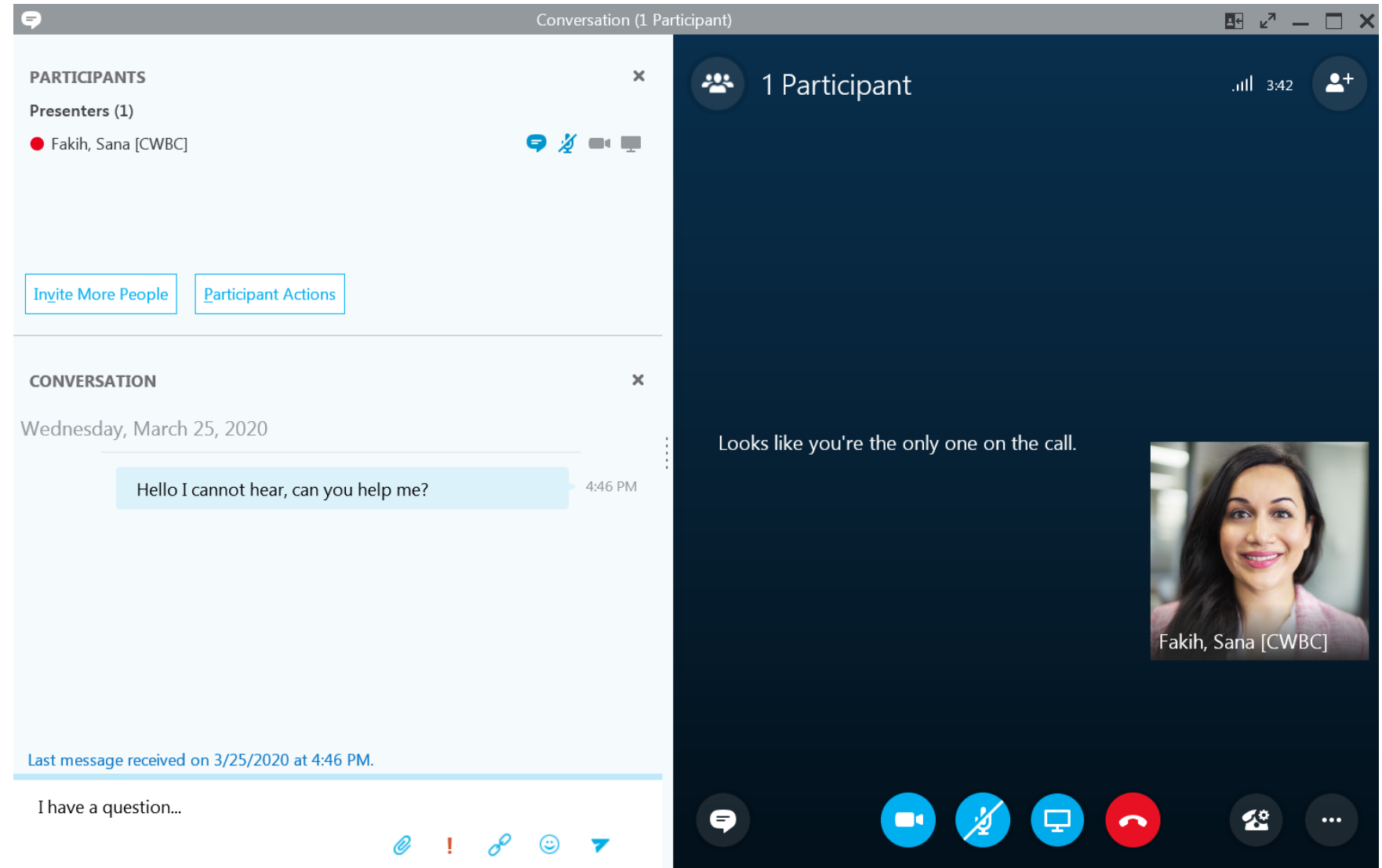
March 31, 2020

Technical Housekeeping

- Please keep yourself on **mute** to decrease any background noise

- **To ask questions**, **unmute** yourself or **type** in the chat box function.

- If you are **having technical issues**, let us know in the **chat box**, or **email the support trainer** (email provided before the session)

- If you need to leave the meeting click on

Learning Objectives

Learners will understand:

1. The principles of virtual health.
2. Clinical requirements for conducting virtual health visits.
3. The impact of virtual health visits on patient and family experience.
4. How to differentiate between the different virtual health solutions.
5. How to set up, support or conduct a virtual health visit using Skype for Business and Zoom.
6. How to locate resources available to support virtual health visits for themselves, and for patients and families.

What is Virtual Health and Why Use It?

What is it?

- **Virtual health** refers to a patient centred model focused on connecting patients, families and providers, using technology to optimize wellness, specialty care and outcomes.

- **Examples and uses include:**
  - Virtual visits
  - Remote home monitoring
  - Clinical digital messaging
  - Technology used to reach children in remote communities
  - Provide urgent advice to front line clinicians

Why Use it?

- On-line easy access and support

- Peer networks within regions

- Patient centered care – meeting the patient where they feel comfortable

- For safety during public emergencies and it is important to use this modality during the COVID-19 pandemic

Virtual health is ANY non face to face communication with patients.
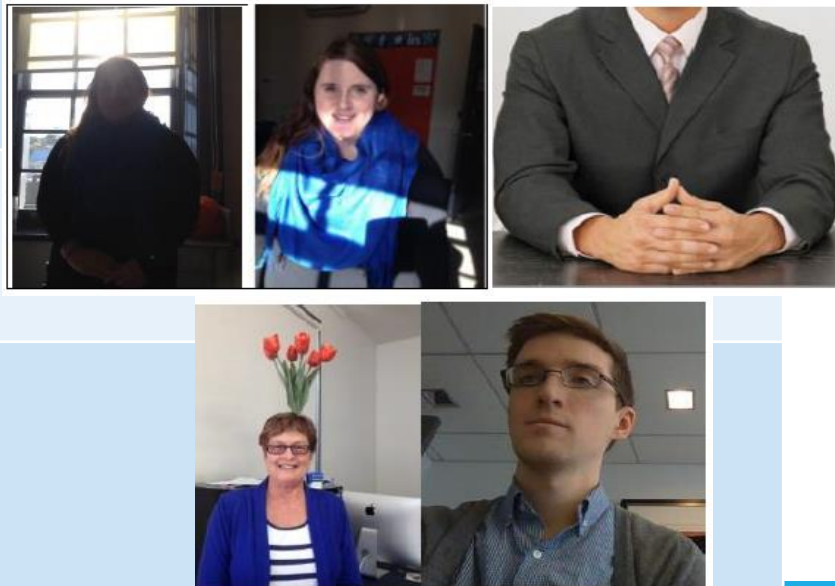
Current Virtual Health Solutions

1. Enable participants to talk see and hear each other

2. Provide instant messaging (IM)

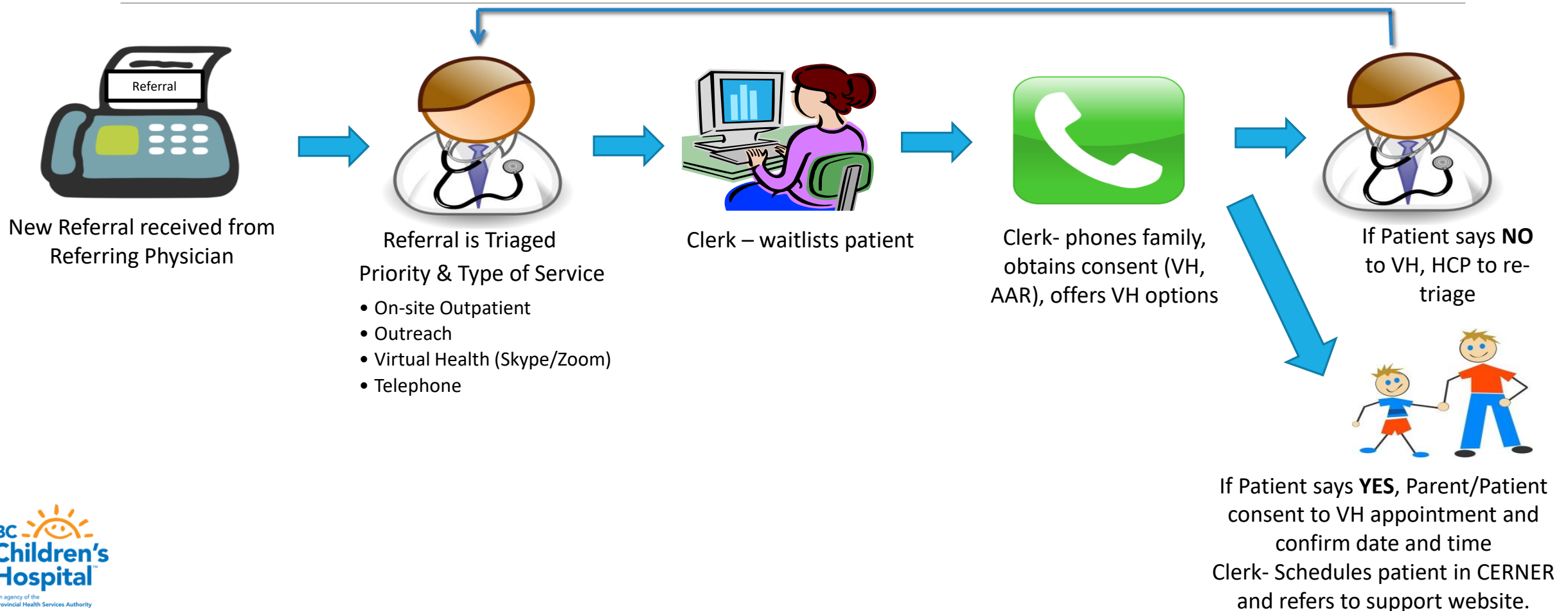3. Provide content sharing on desktops, such as documents and presentations.

	ZOOM	SKYPE for BUSINESS
	VIDEO/AUDIO VISIT CHAT	VIDEO/AUDIO VISIT CHAT
PROVIDER NEEDS		
Virtual Health Visit 1:1 or 1:many	✓	✓
Document sharing	✓	✓
Messaging	✓	✓
Remote monitoring	✗	✗
DEVICE COMPATIBILITY		
Mobile device (iOS/Android)	✓	✓
Desktop/ Laptop	✓	✓
PRIVACY AND SECURITY		
Privacy review	✓	✓
Security review	✓	✓
Patient consent required	✓	✓

Clinical Requirements for Virtual Health

Before the Virtual Appointment	During the Virtual Appointment	After the Virtual Appointment
1. Set the stage by securing a quiet and private space that allows for confidential conversations.	1. Ensure patient privacy of personal information, communications and consulting space are upheld. No recording.	1. Report any patient safety events as per in-person clinical care guidelines.
2. Ensure good WIFI if not on PHSA wired Network.	2. Introduce yourself and other clinicians in the virtual event.	2. Document on the virtual event as per your clinical requirements.
3. Test your Audio. Use a headset for excellent audio quality. Mute mic when not talking.	3. Confirm identity of the patient, parents/caregiver and others in the room. Do not admit participants that are not relevant to the virtual event.	
4. Take time to make sure your video image is centered, with good lighting and no distractions in the background.	4. Ensure that the patient-provider relationship is respected just as if it was a face to face encounter.	
5. Ensure materials that you need for the visit are ready to share ex. PDF's, Powerchart results.	5. Ensure that patient is in a private space and on private WIFI as established in the Virtual Health Agreement.	

Scheduling a Virtual Health Appointment

HCP- Healthcare Provider
AAR- Automatic Appointment Reminder
VH- Virtual Health

New Referral received from Referring Physician

Referral is Triaged
Priority & Type of Service
- On-site Outpatient
- Outreach
- Virtual Health (Skype/Zoom)
- Telephone

Clerk – waitlists patient

Clerk- phones family, obtains consent (VH, AAR), offers VH options

If Patient says **NO** to VH, HCP to re-triage

If Patient says **YES**, Parent/Patient consent to VH appointment and confirm date and time
Clerk- Schedules patient in CERNER and refers to support website.

BC Children's Hospital™
An agency of the Provincial Health Services Authority

Introducing Virtual Health to Patient & Family

1. Your clinical operational leads have created standardized processes and a toolkit for you to follow.

2. Your clinic/ program will determine if alternate virtual health solutions are necessary.

3. There are scripts and email templates to follow.

Virtual Health Equipment

- There is IMITS approved equipment for virtual health.
- This approved equipment will be delivered to you.
- In the meantime, please use a personal headset with microphone.
- We would suggest using the headset from your smartphone – it has both the earbuds and also a microphone incorporated.
- The headset needs to have a 3.5mm jack plug to use on your desktop/laptop.

Skype

Skype
for Business

Skype for Business: Basic or Standard Account?

- All BC Children's & Women's staff were given a Skype for Business BASIC account when Skype for Business was downloaded on our computers.

- The BASIC account permits the user to join the Skype for Business event.

- Skype for Business STANDARD accounts give the clinician/clerk the ability to book a skype for business event.

- Check with your operations leads on which account you need!

- You know you have a STANDARD account, when you create a virtual health appointment and the PHSA phone number and Unique Conference ID # are generated.

→ Join Skype Meeting
Trouble Joining? Try Skype Web App

Join by phone
[PHSA] 604-675-4199 (PHSA)   English (United States)
Find a local number

Conference ID: 3243794
Forgot your dial-in PIN? | Help

1. Click on Microsoft Windows icon

2. Search for Skype for Business 2015 in the program search bar

3. Right Click on Skype for Business 2015. Select Pin to Taskbar.
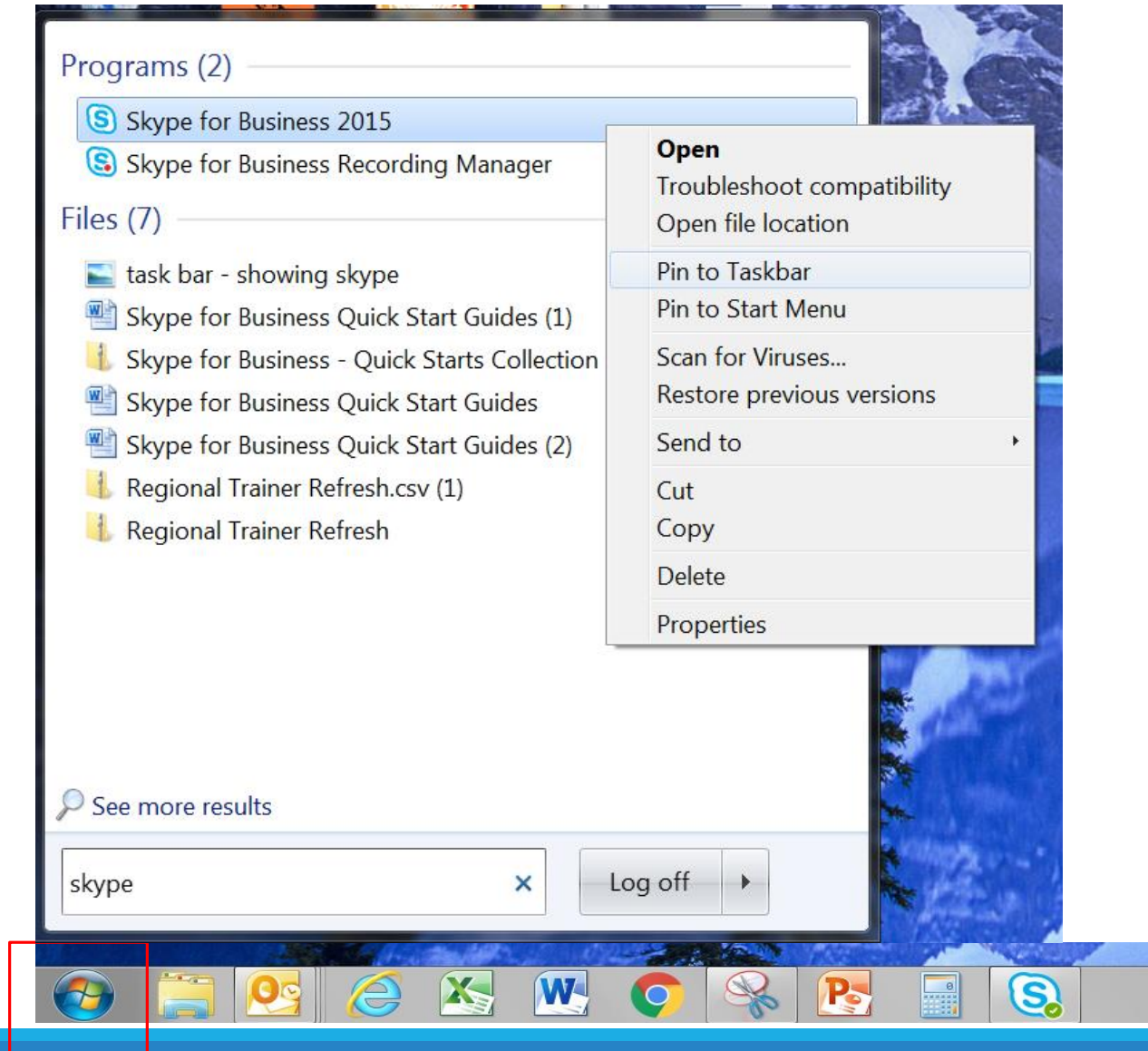
Schedule a meeting – for clerks or as designated by operations

1. Go to Outlook Calendar and click on **New Skype Meeting** Icon
2. Skype Meeting link will be added in to invite.
3. Complete the appointment date/time.
4. Insert patient and clinician email (Hide if requested)
5. Fill out Subject line: Example: *Virtual Health Visit Dr. Z with MM (Patient Initials)*

1. From the email invite click **To**...

2. Go to **Global Directory** and Click on their name

3. Click on **Resources**

4. Answer **No**

Setting Up and Testing Audio

This setup needs to be tested in advance of meeting:

1. Click **Select Primary** Device icon
2. Select **Audio Device** setting
3. Select the device you want to use
4. Check **Call Quality**
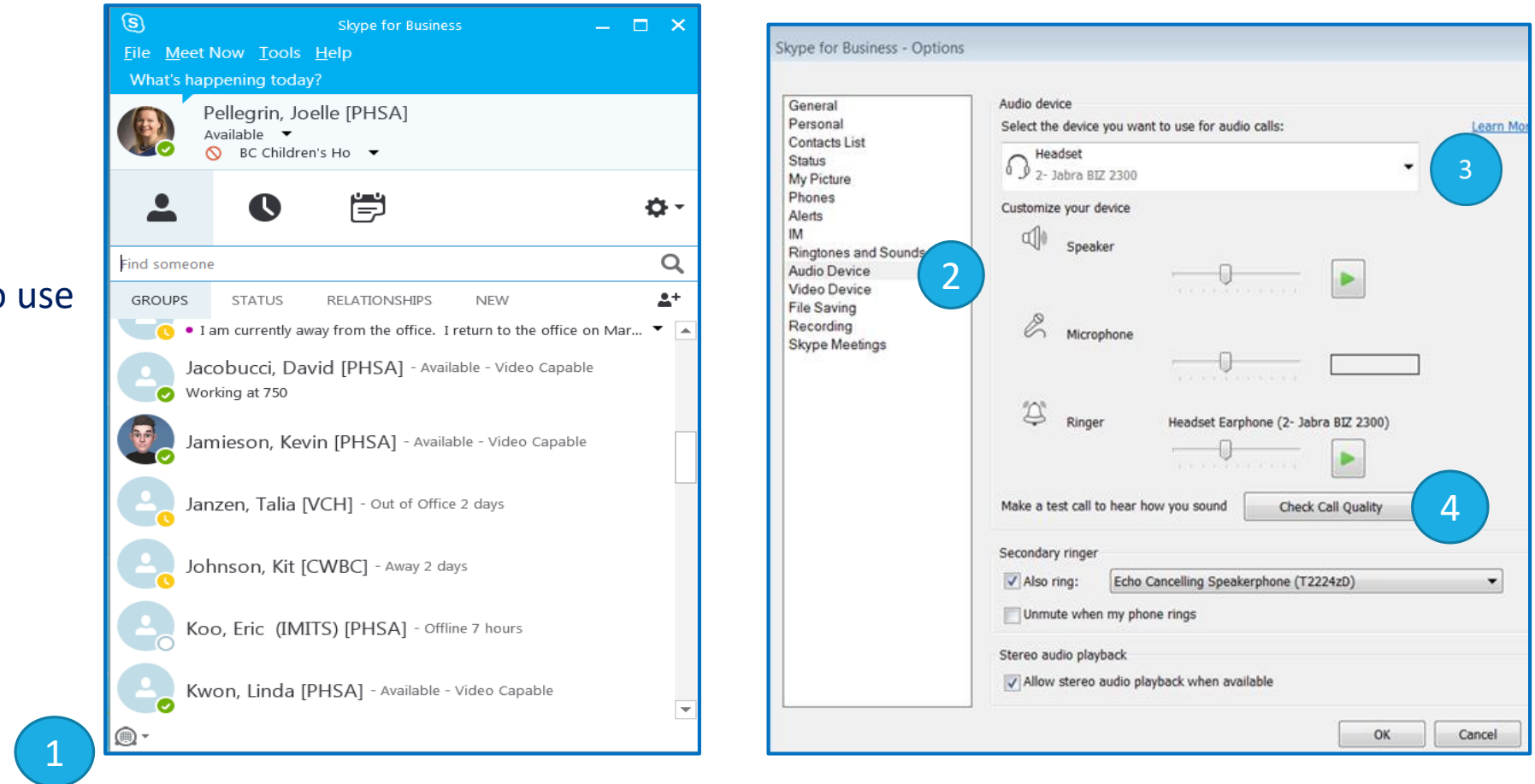
Setting Up and Testing Video

1. Select **Video Input setting**

2. Select device

3. Click **OK**

Via Computer Tool Bar

1. Click **Skype for Business** Icon on bottom tool bar **or** browse through the Windows start menu and open Skype for Business

2. Click on **Calendar** icon All Skype for Business links appear in blue.

3. Double click on the meeting link
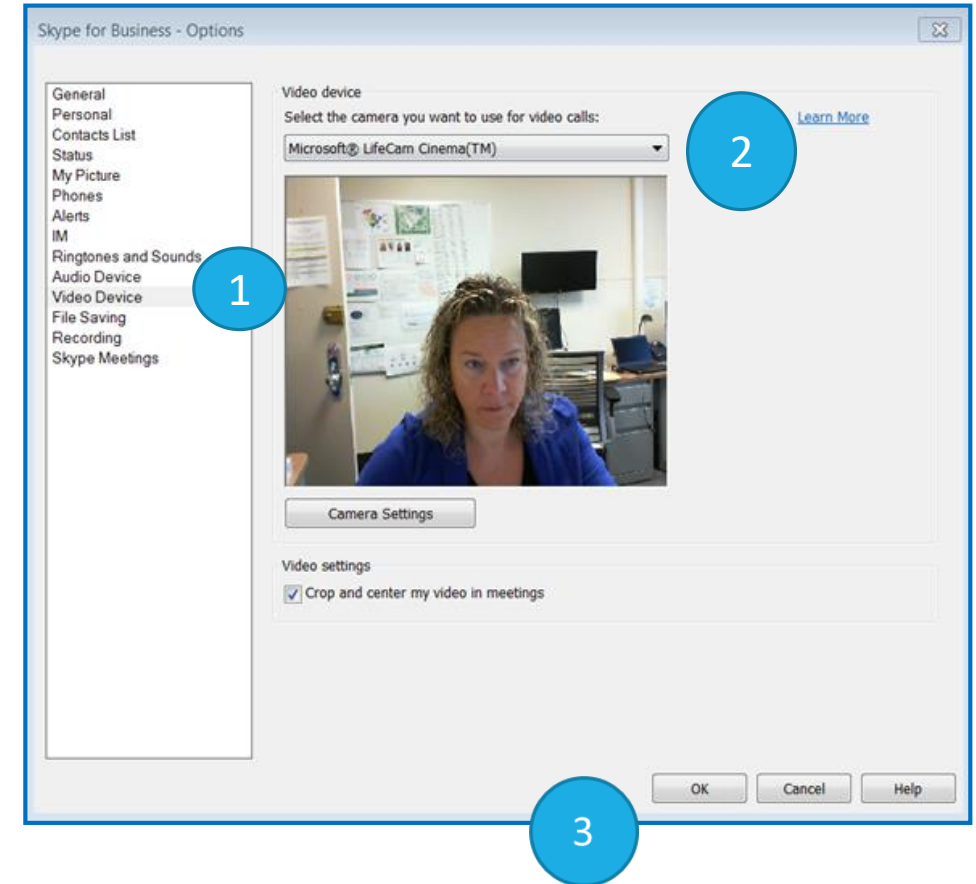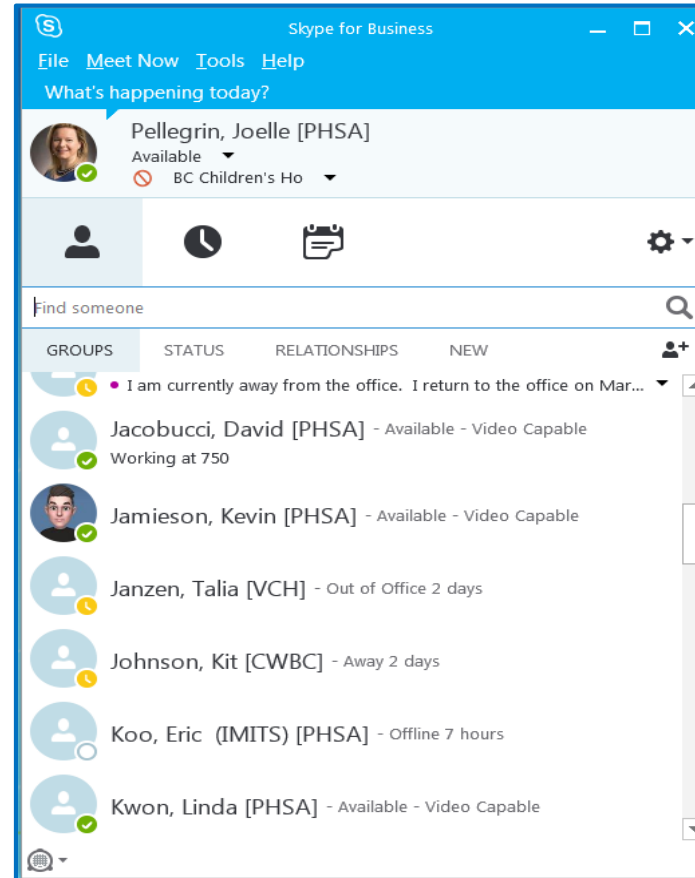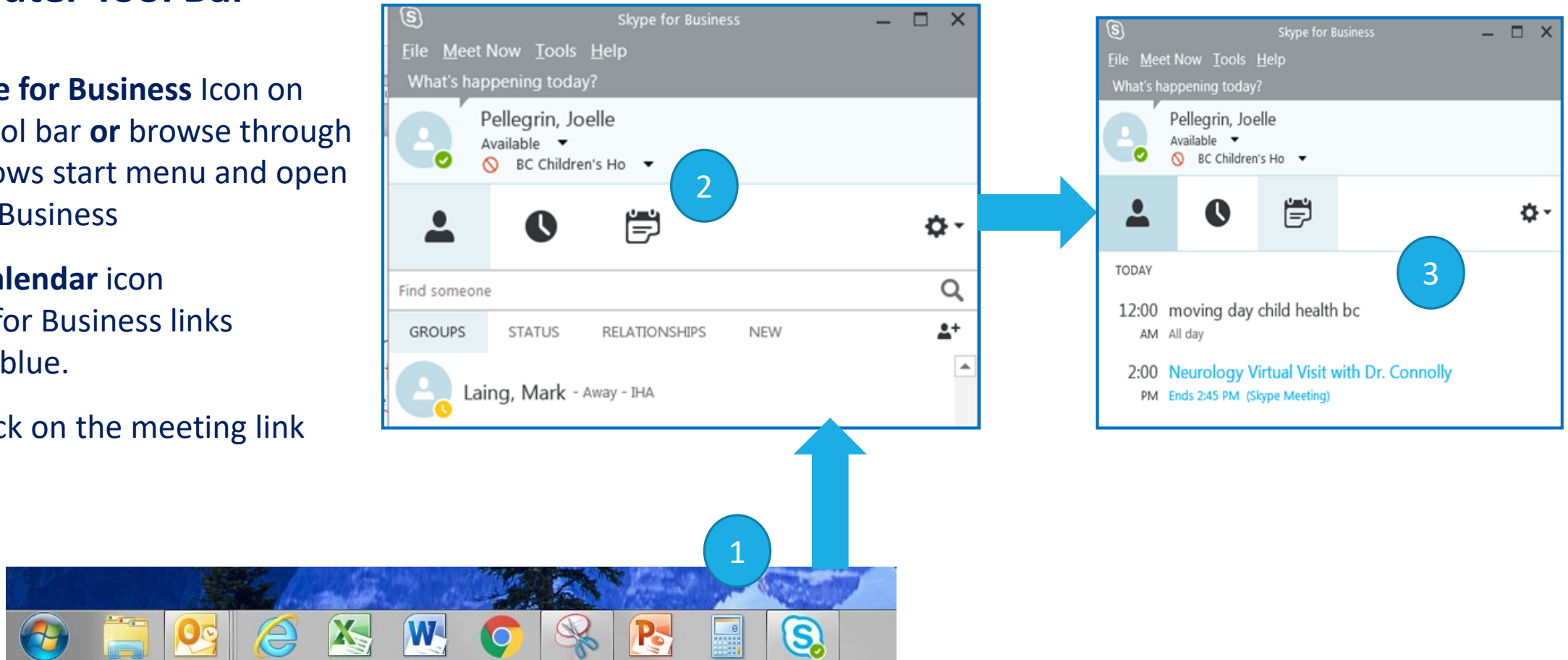
Starting a Virtual Meeting

Via Outlook Calendar

1. Click on **Meeting Invite**
2. Click on **Join Skype Meeting**

Opening Meeting

Skype for Business will open new browser page

- Click on **Open URL Lync Protocol**
- Do **not** click on Join with the Skype Meetings App
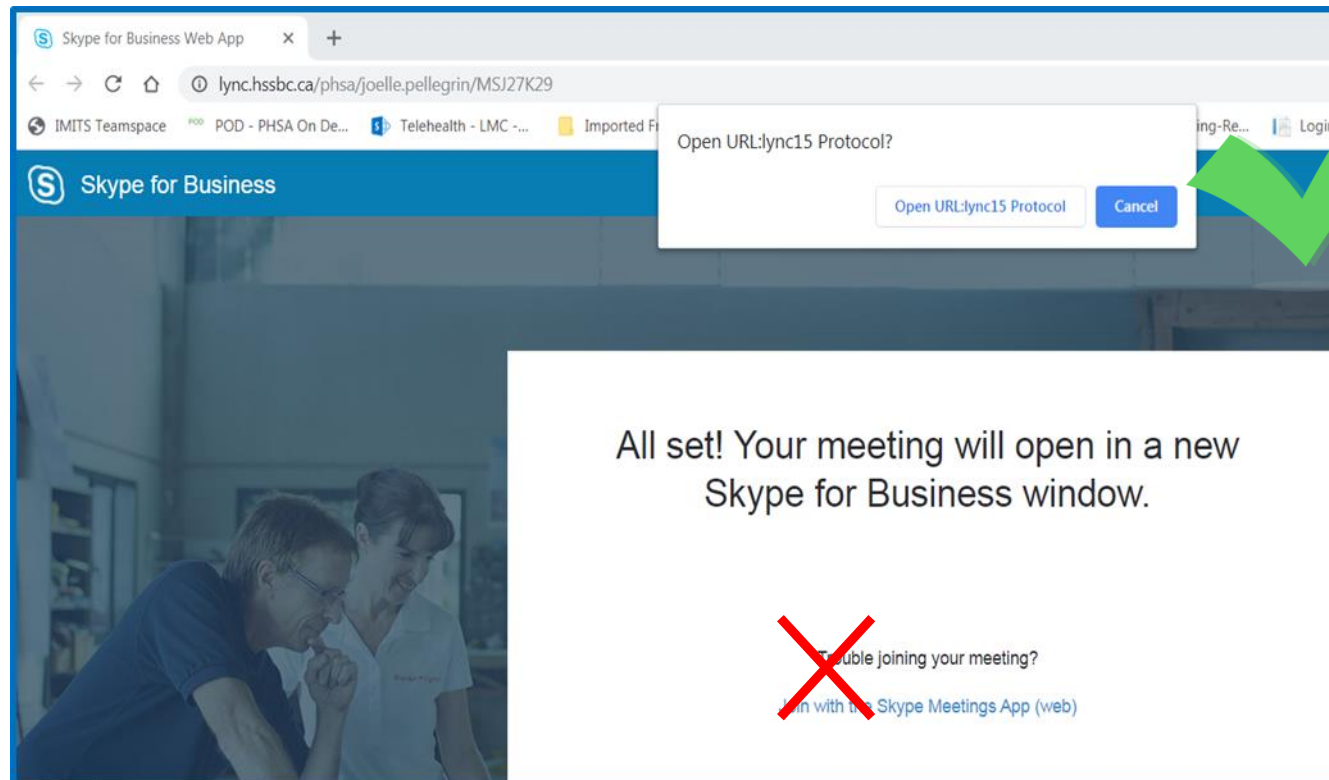
Conducting a Meeting

1. Click on video icon
and click **START MY VIDEO**

2. Unmute mic

3. Clicking on Participant Icon
will open the Participants/Chat
Window

4. Clicking on Instant
Messaging/Chat icon will also
open this window
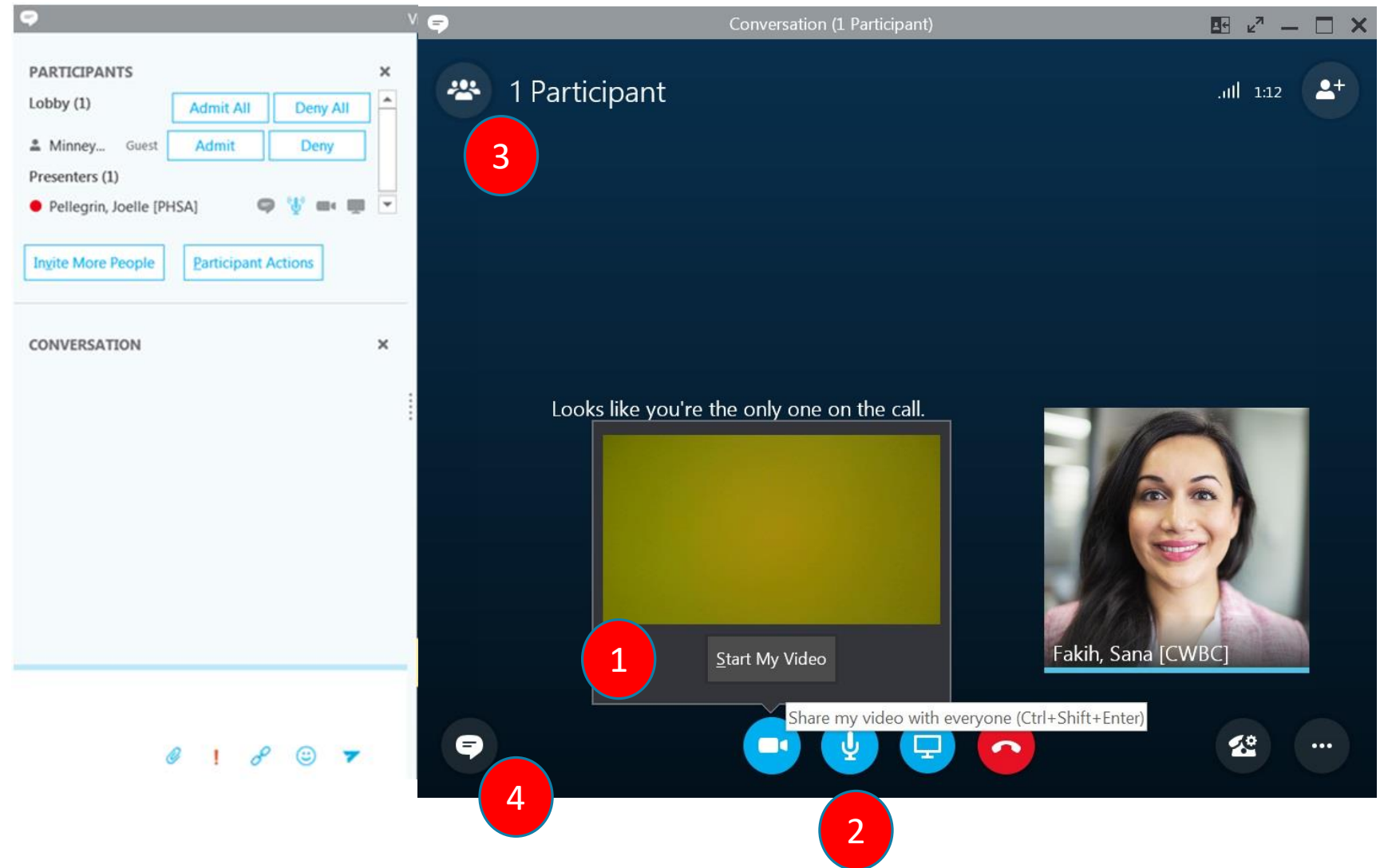
Conducting a Meeting: Admitting Patient

1. Click on **ADMIT** to an external guest.

2. The patient will be listed in the left hand column under participants.

3. Use the Instant Messaging chat box to communicate with patient if needed.
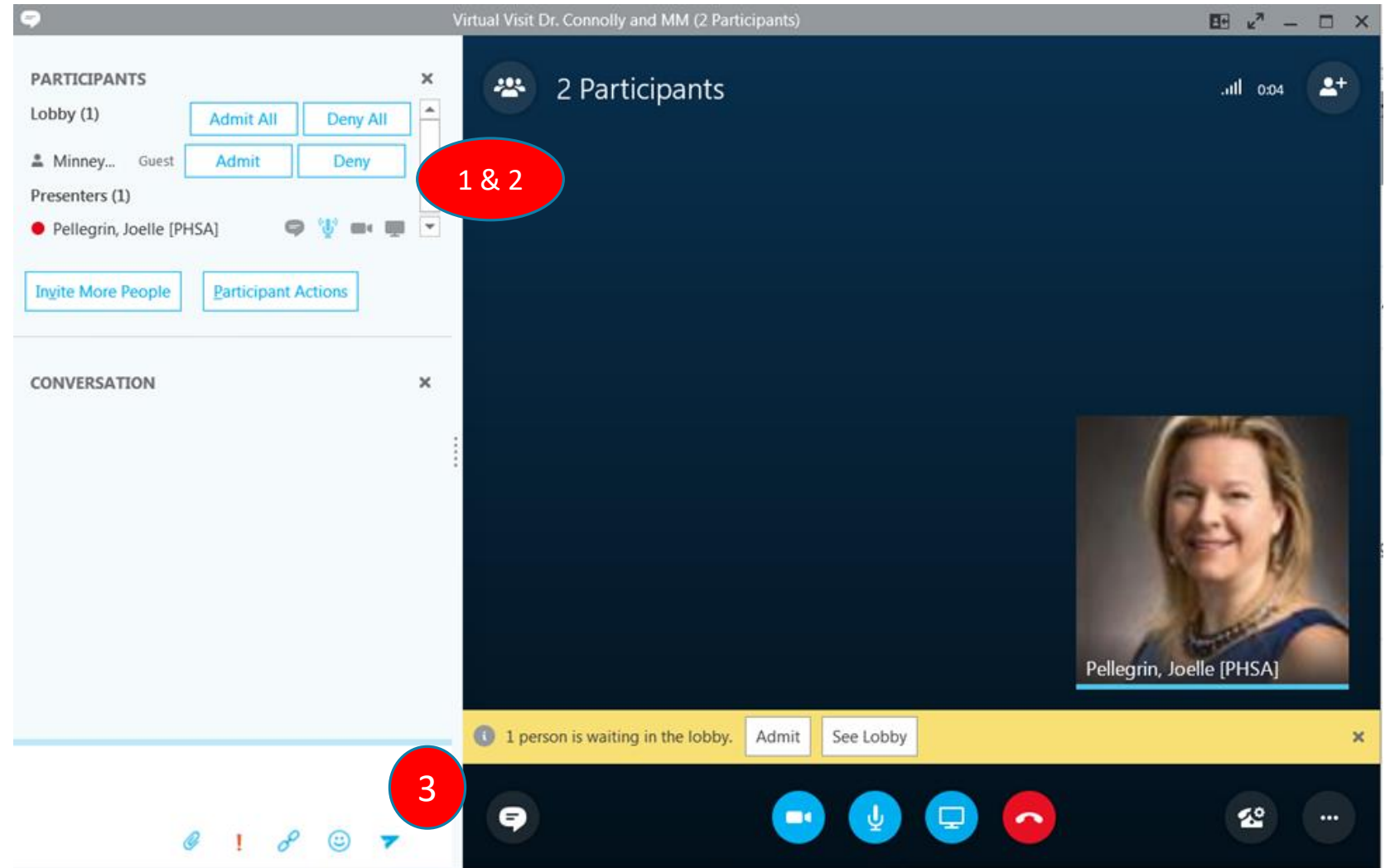
Audio: If You Cannot Hear Patient

1. Click on **Participants Icon** to open the participant window
2. **RIGHT click on the patient name**
3. Click **Unmute**
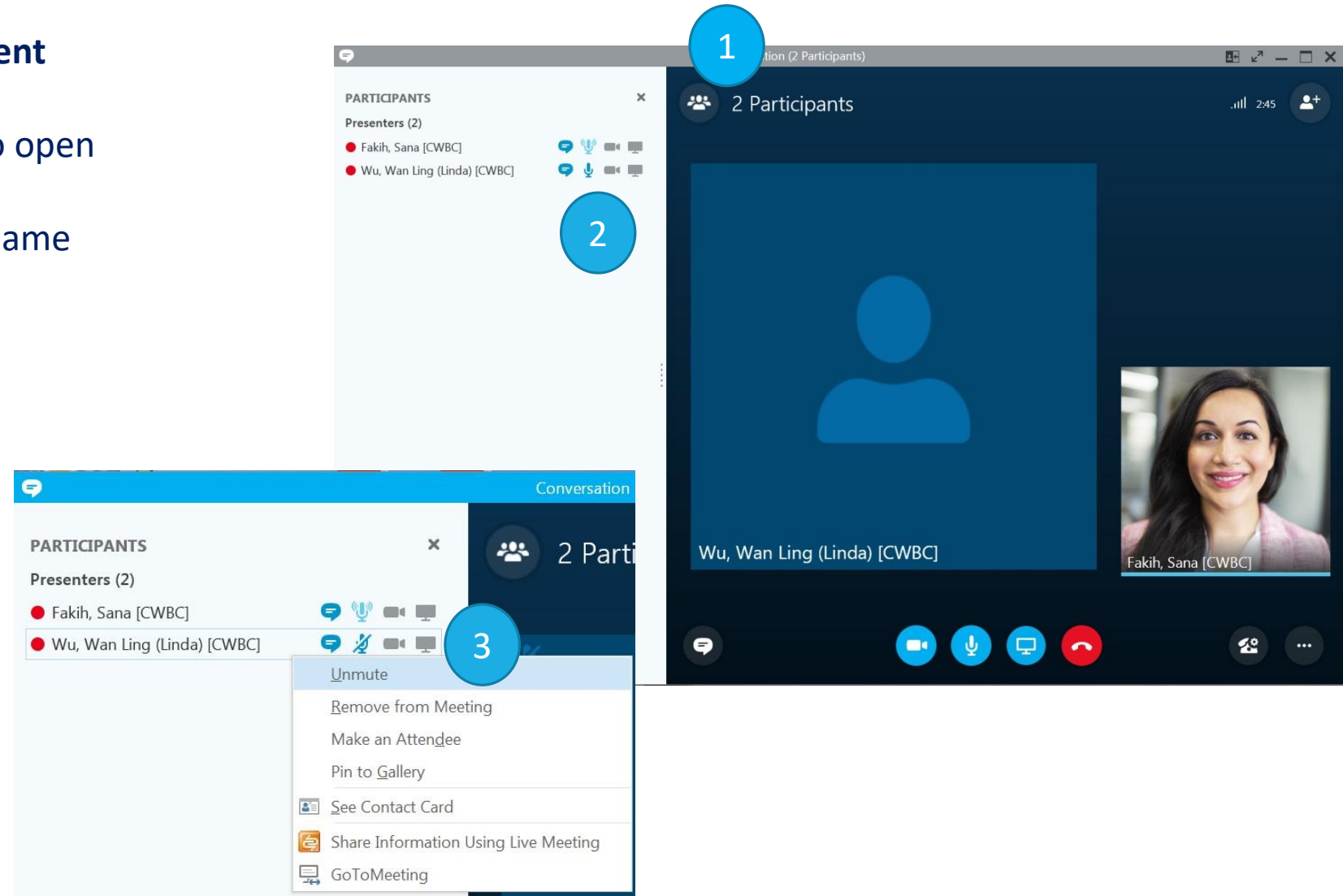
Audio: If the Patient Cannot Hear You

1. If the patient cannot hear you, click **Telephone cog wheel icon**

2. Click on correct device.
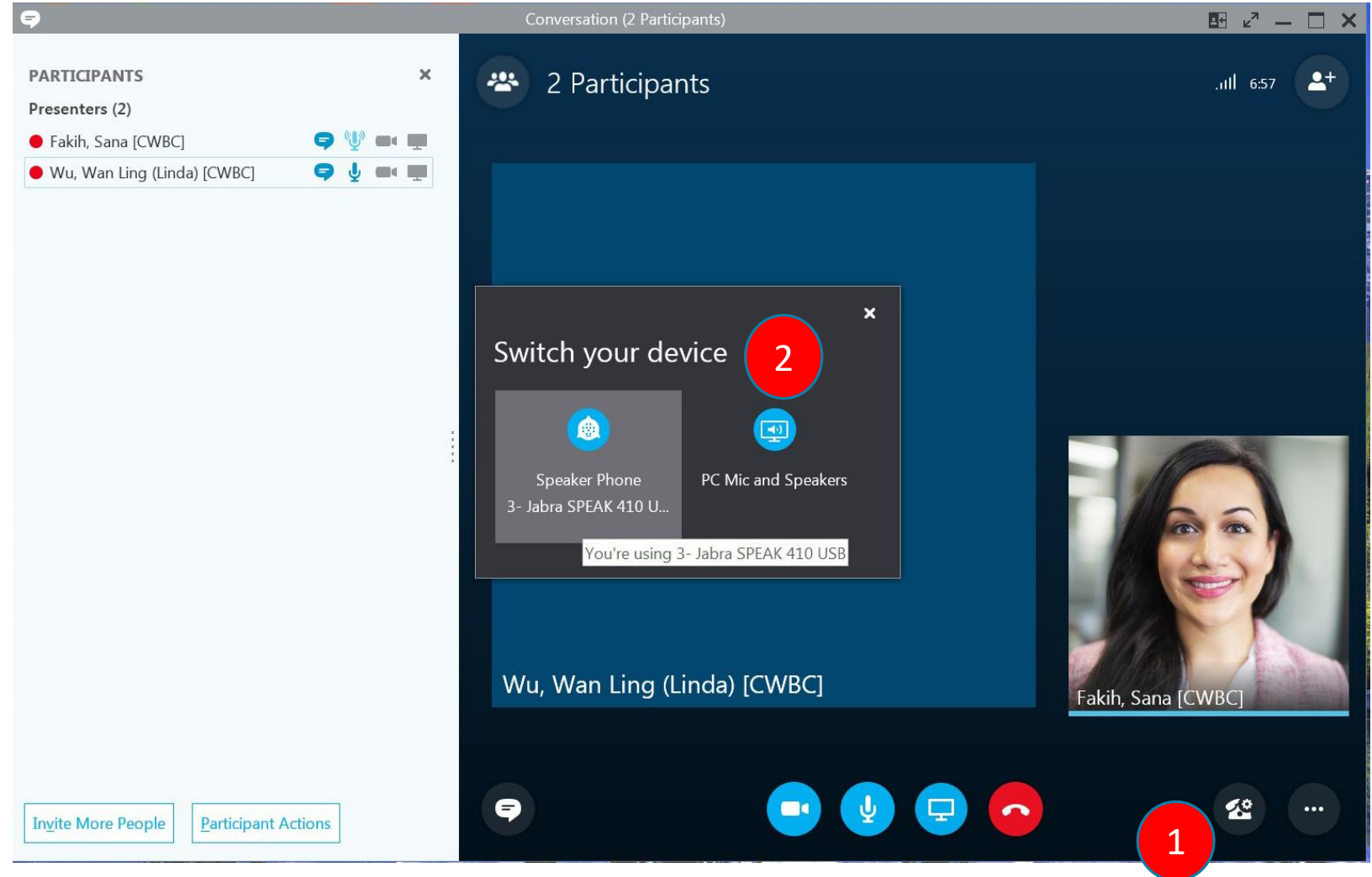
Presenting Desktop

Close any windows or files that you don't want to share!

1. Click on Computer Icon
2. Click Present Desktop
3. Click on Present
4. Click Stop Presenting on the top banner of your screen once finished
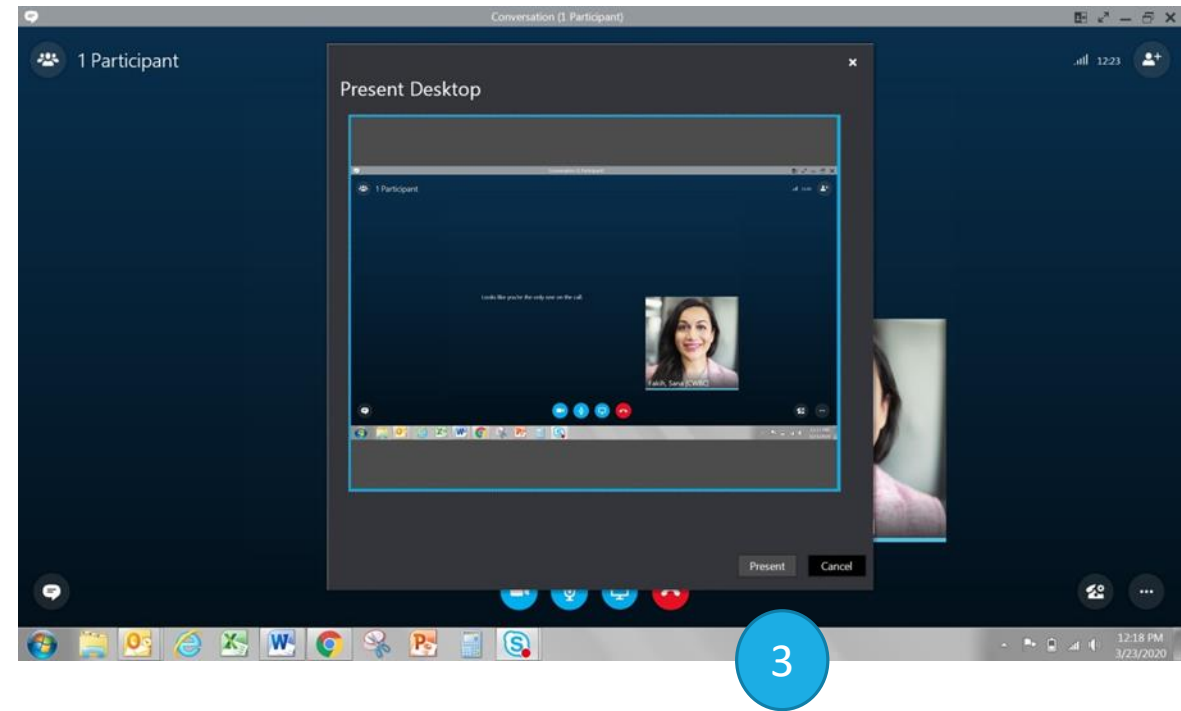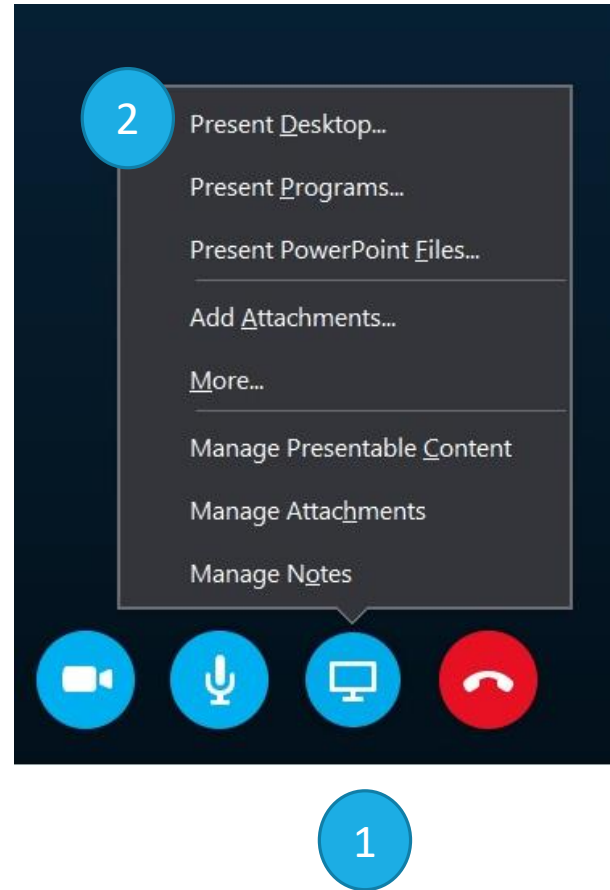
End Meeting

To remove everyone from the meeting:

1. Click the **Ellipses icon**

2. Click **End Meeting**.

3. Click **OK** on the prompt to continue.

This closes the window and disconnects everyone from the meeting, including those participants who called in.
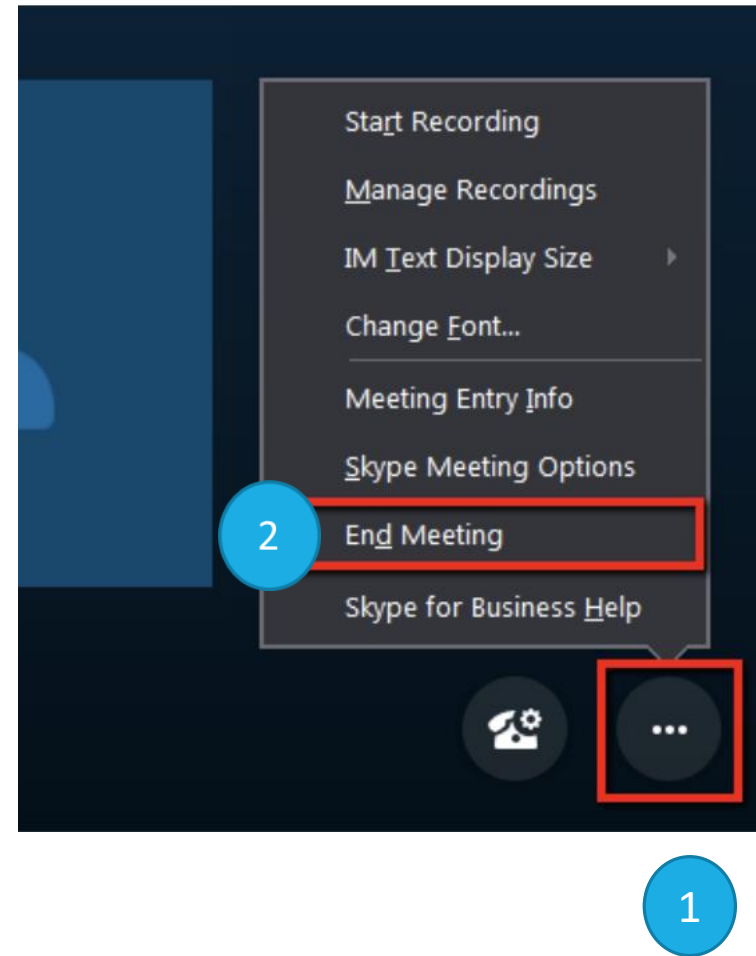
Quick training guide for Zoom
Adopted from Office of Virtual Health Zoom Training Documents

Notes before we begin

C&W staff who have requested Zoom accounts have access to:

- Zoom web browser (www.zoom.us) to schedule virtual health webinars.
- Zoom Desktop app to Join your Zoom virtual health webinars from your PHSA PC or Laptop wired into the PHSA network.
- Zoom mobile app (you need to download it on your mobile device) to Join your Zoom Virtual Health Webinars.

Zoom web browser for scheduling

IMPORTANT!! You must use the <u>web browser </u>of ZOOM for scheduling

To set up clerk scheduling privileges
Note: Multiple clerks can be assigned to schedule on a provider's behalf

1. Go to www.zoom.us and sign in to your Zoom account by **entering your user name** and password

    - Click **Settings** and scroll down to **Other**

2. Under **Scheduling Privilege**, click + sign next to **Assign scheduling privilege to.**

3. Enter one or more email addresses in the window, separated with a comma.

4. Click **Assign.**

Schedule Privilege

You can assign users in your account to schedule meetings on your behalf. You can also schedule meetings on behalf of someone that has assigned you scheduling privilege. You and the assigned scheduler must be on a Paid plan within the same account.

Assign scheduling privilege to   **+**   **2**

No one

Assign scheduling privilege

example: sales.ea@company.com,marketing.ea@company.com   **3**

Enter the email addresses of those who can schedule meetings on your behalf. Use a comma to separate multiple email addresses.

4   Assign   Cancel

Zoom - Booking Virtual Health Visits

Go to www.zoom.us and sign in to your Zoom account by **entering your user name** and password

1. Click on the **Webinars tab** (<u>not</u> meetings)

2. Click on **Schedule a Webinar.**

3. Complete the webinar details (use department templates for messaging).

3b. Under **Schedule For** choose the provider you want to schedule from the dropdown menu.
Note: If you do not see the provider in the list, they have not given you access to book on their behalf.

4. Type in any **alternative hosts** (e.g. other clinicians, team members, etc.)

3b

4

Zoom - Invite the patient to the virtual visit

1. Now that webinar is scheduled, scroll down to invitations > click **Invite PANELISTS >** click **Edit**

   *NOTE :Inviting as **panelist** allows patients to have video and audio access (vs. attendees)*

2. Enter patient's name and email address (verify each address).

3. Click **Save**. The patient will be sent an invitation via email

1. Now that the webinar is scheduled, Click **Email Settings**
2. Click **Edit** next to the **No reminder email to the Attendees and Panelists** to adjust the settings.
3. Select the reminder options and click save.
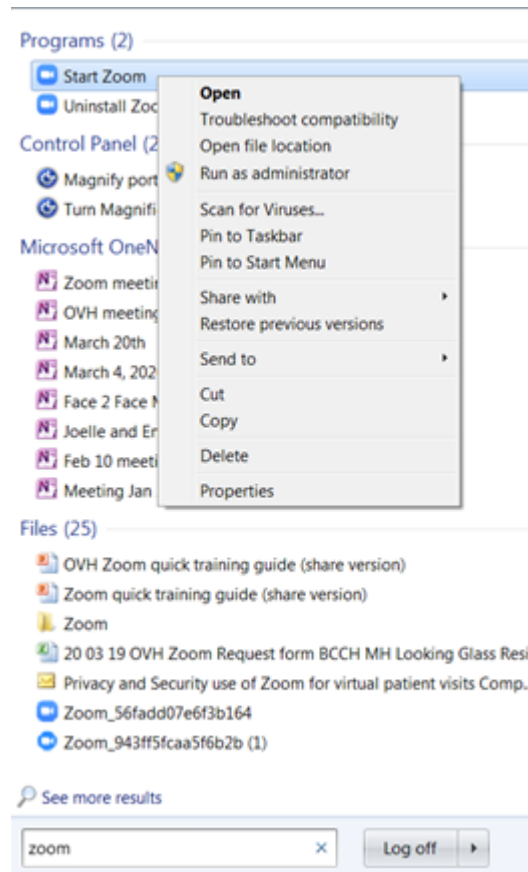
Conduct the virtual care visit on the Zoom Desktop

Pin Zoom on your taskbar

1. Click on Microsoft Windows icon

2. Search for Zoom in the program search bar

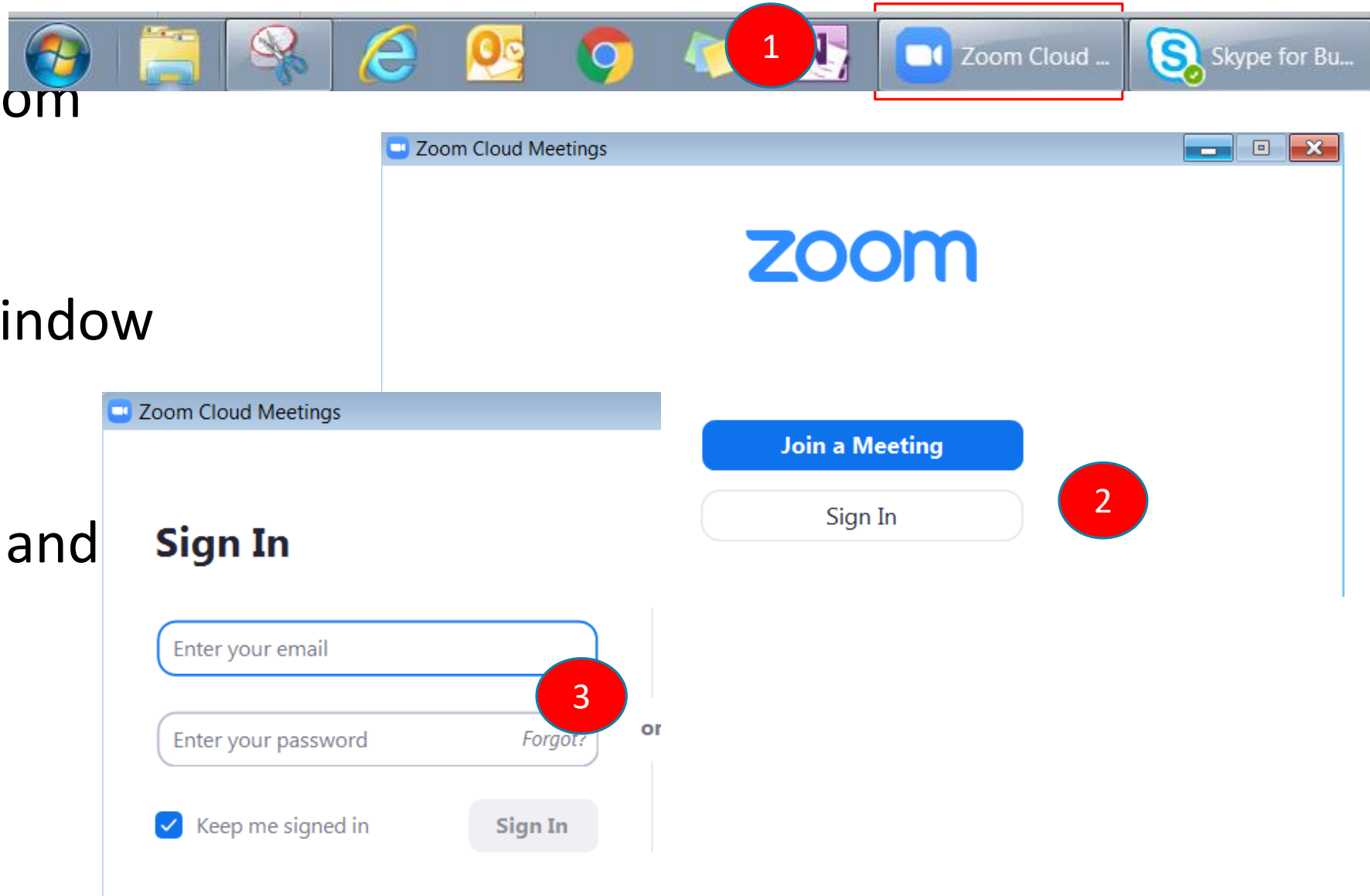3. Right Click on Zoom. Select Pin to taskbar.

Open Zoom Desktop

1. Double click on Zoom icon from Taskbar
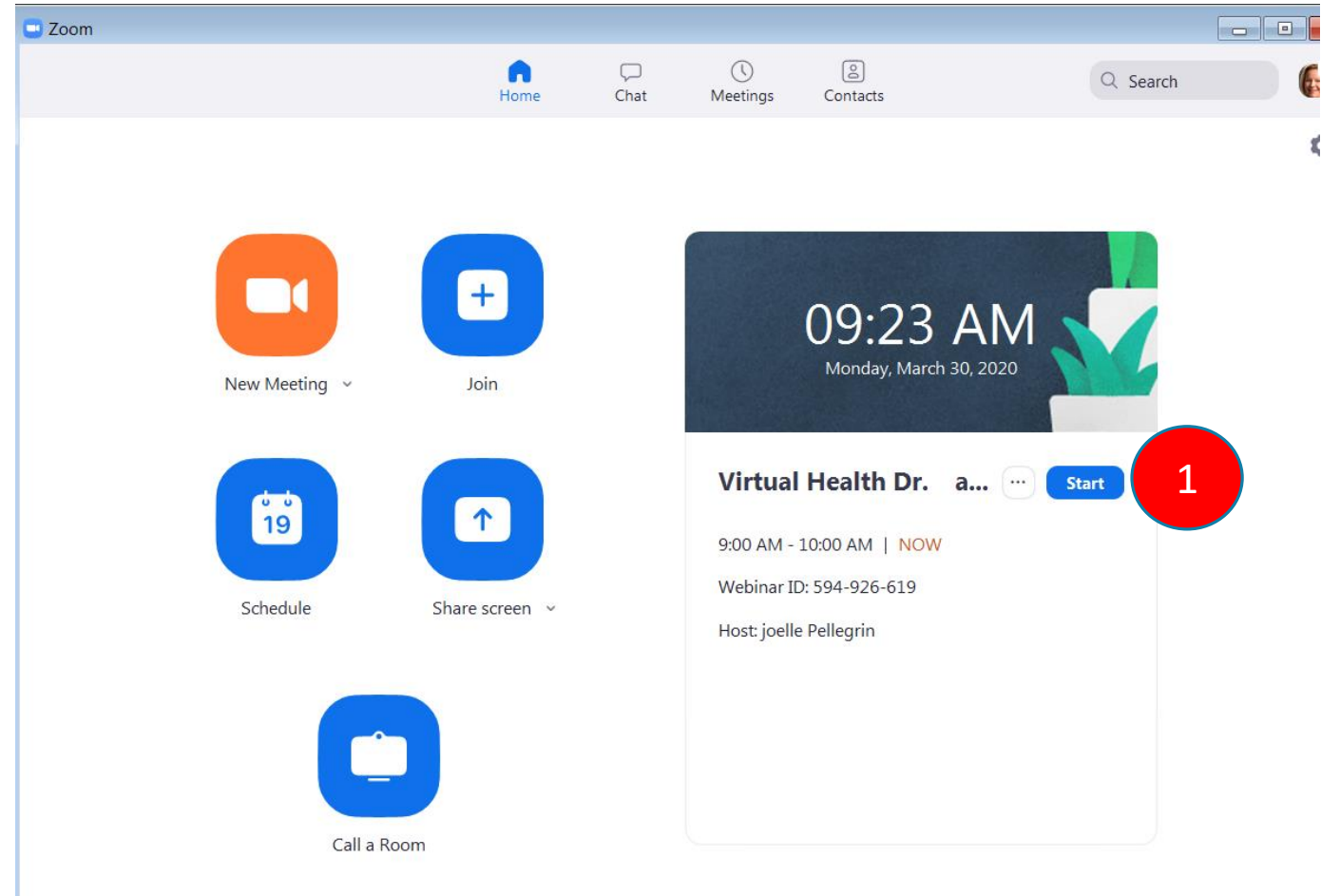
2. Zoom Meetings window opens. Click Sign in.

3. Sign in with email and password (already registered on www.zoom.us)

1. From your Zoom calendar, select the virtual health visit and click on START. This calendar lists previously scheduled Zoom webinars.

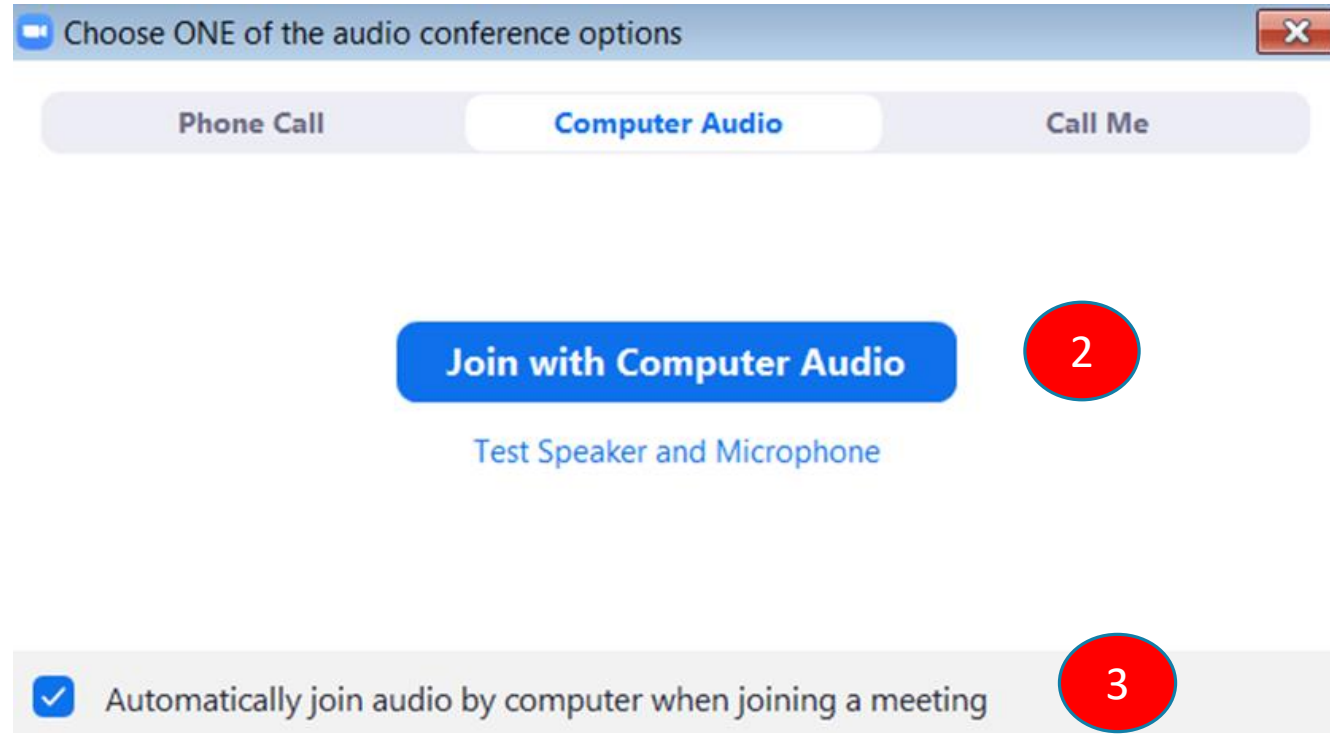You will be launched into the Zoom webinar.

2. Join with Computer Audio

3. Check "automatically join audio by computer …."

Choose ONE of the audio conference options

| Phone Call | Computer Audio | Call Me |

Join with Computer Audio ②

Test Speaker and Microphone

☑ Automatically join audio by computer when joining a meeting ③

When joining the zoom webinar, you automatically have audio and video turned on.

Click on the **🎤 Mute** to ensure you are connected to the correct microphone and speaker.
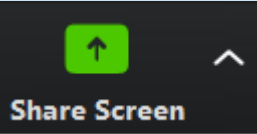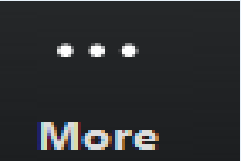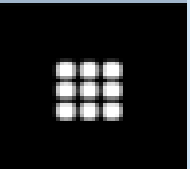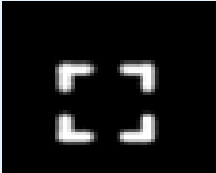
Click on to ensure correct connection to video source. **📹 Stop Video**
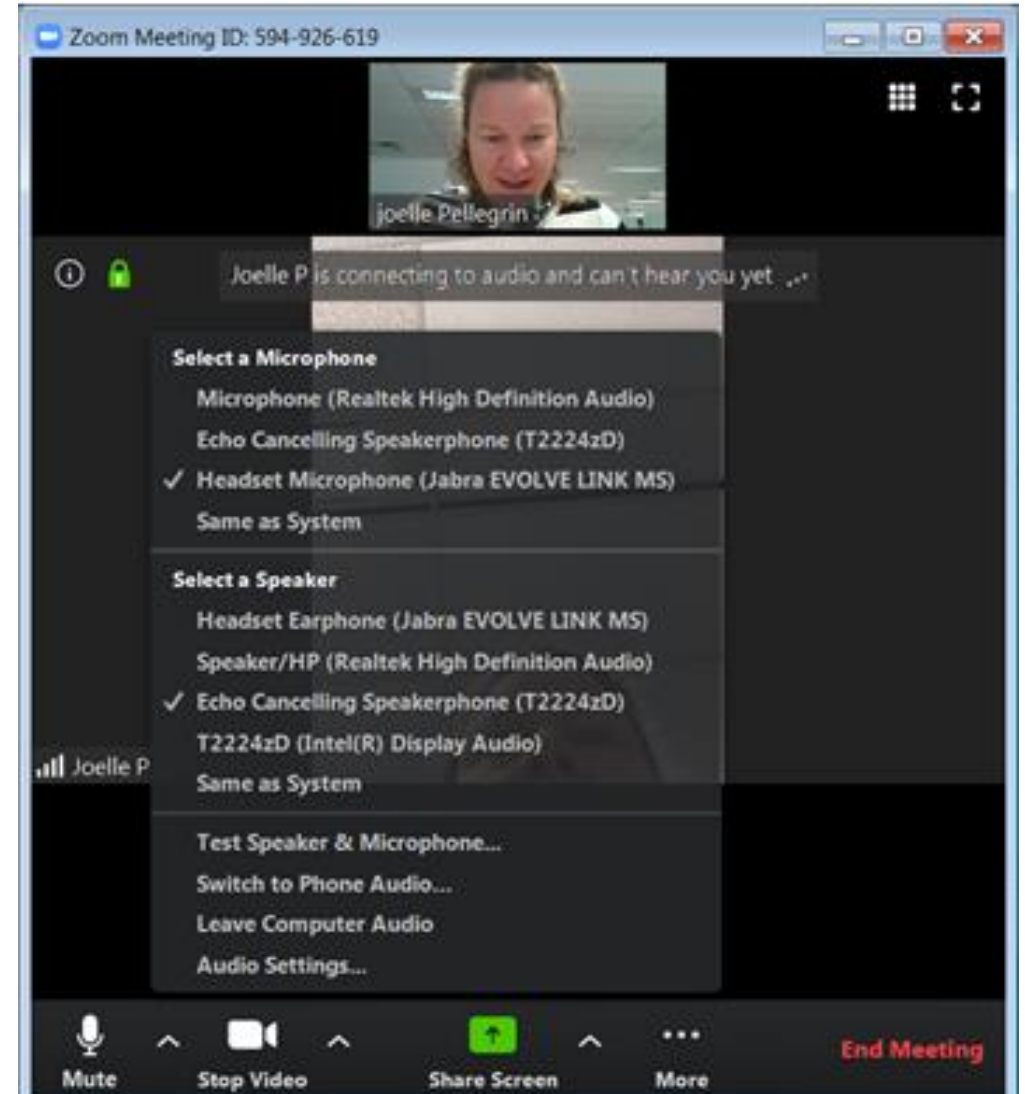
Join a Virtual Health Webinar from Zoom Desktop

Icon	Functionality
Share Screen	To share a PDF/protocol/Lab results in Cerner powerchart
More	Opens up a menu for participant list, chat, Q&A, Polls Participant list: mute/unmute panelists.
	Select group views
	Full Screen option
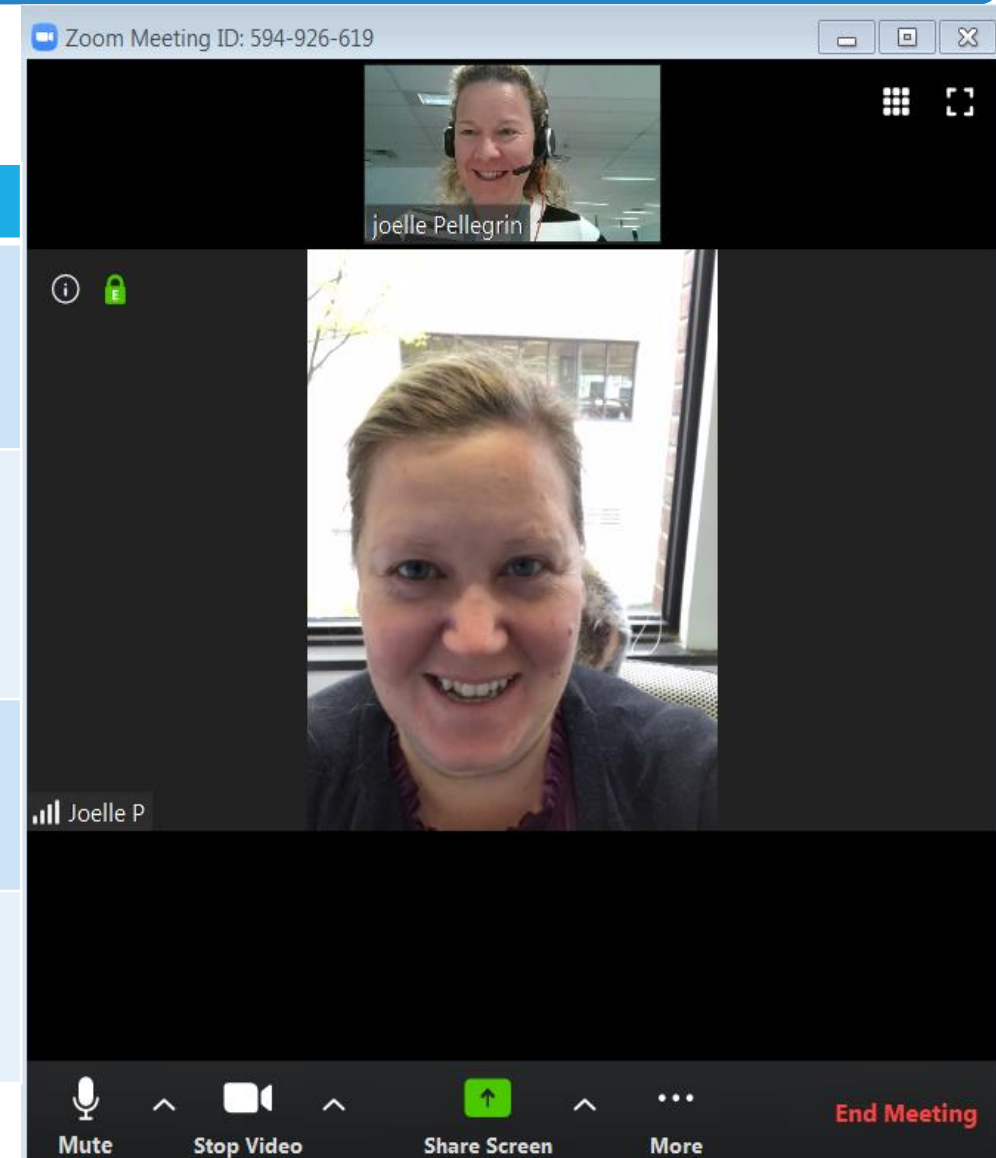
Zoom app on your mobile device— used for conducting the virtual care visit

Conduct a Virtual Health Visit with your Patient from your Mobile App

- **Important Note: Please use LTE data to conserve hospital bandwidth!**
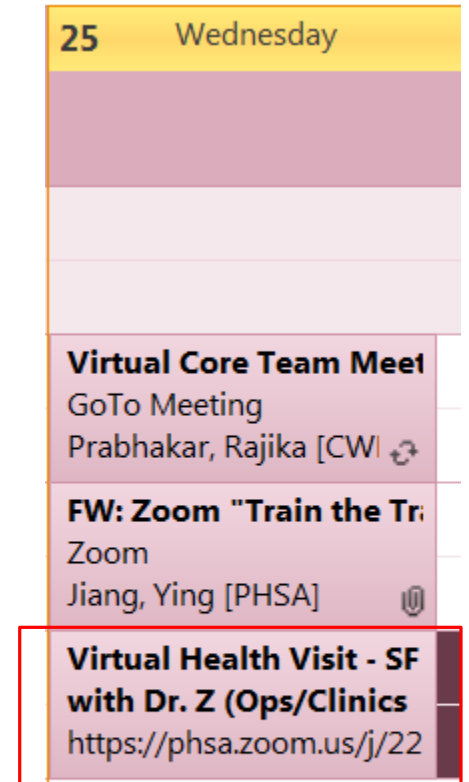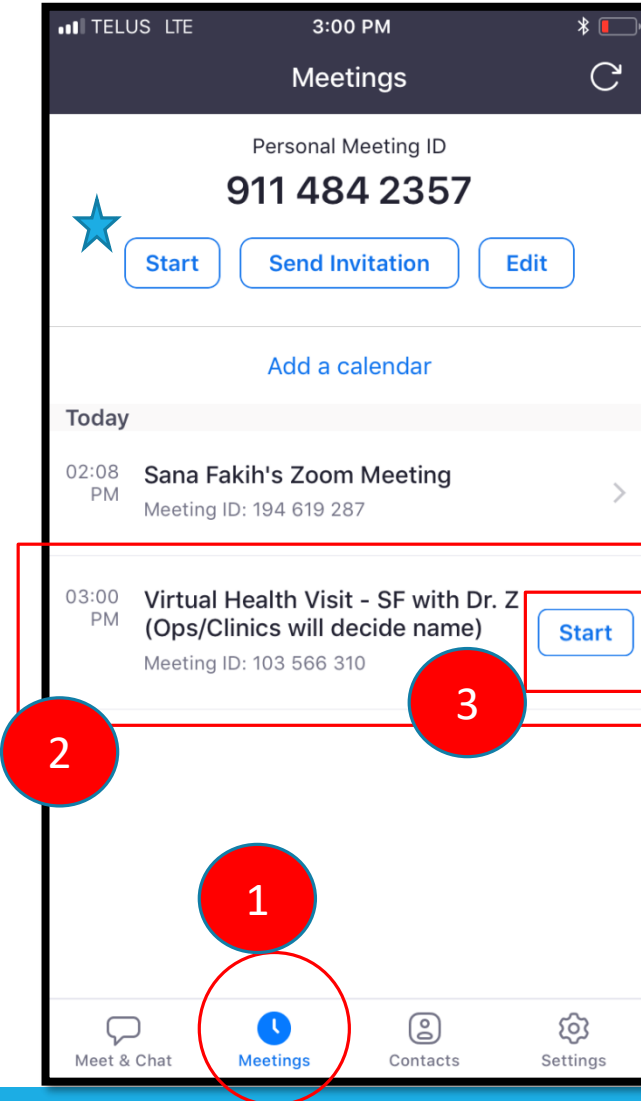
  - **Set-Up Step 1: Download the Zoom Cloud Meeting app**
  - **Set-Up Step 2: Open the Zoom app and Sign In**

Step 1: Locate your Virtual Health Visit (previously scheduled) to Start it

1. Tap Meetings in the lower tool bar
2. Locate the Virtual Health Visit you would like to start
3. Tap **Start** if you would like to immediately start the visit
   - Or, Tap the **visit name** to view details and then tap **Start** when ready
   - Or, If the meeting is scheduled in your **calendar**, you can click to join from there. The app will automatically open if it is already installed.
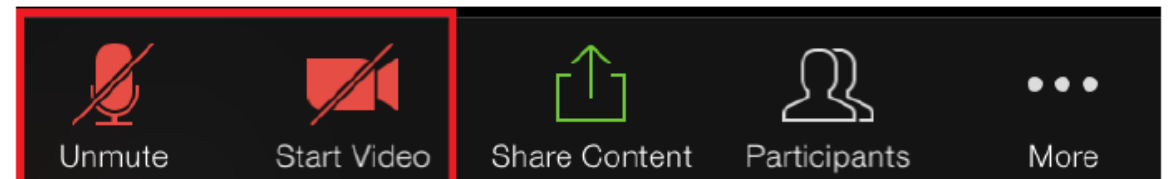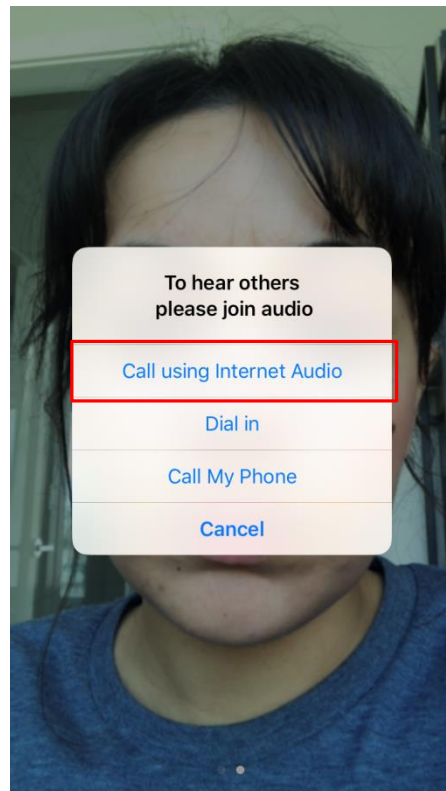
⭐ Will take you to an instant meeting (will talk about later).

Step 2: Allow ZOOM access to your camera and microphone (required the first time you use the app)

Step 3: Start your camera feed and unmute your microphone
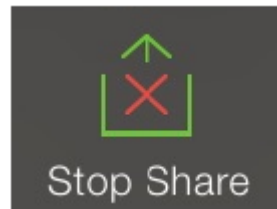
Step 4a: Share Content
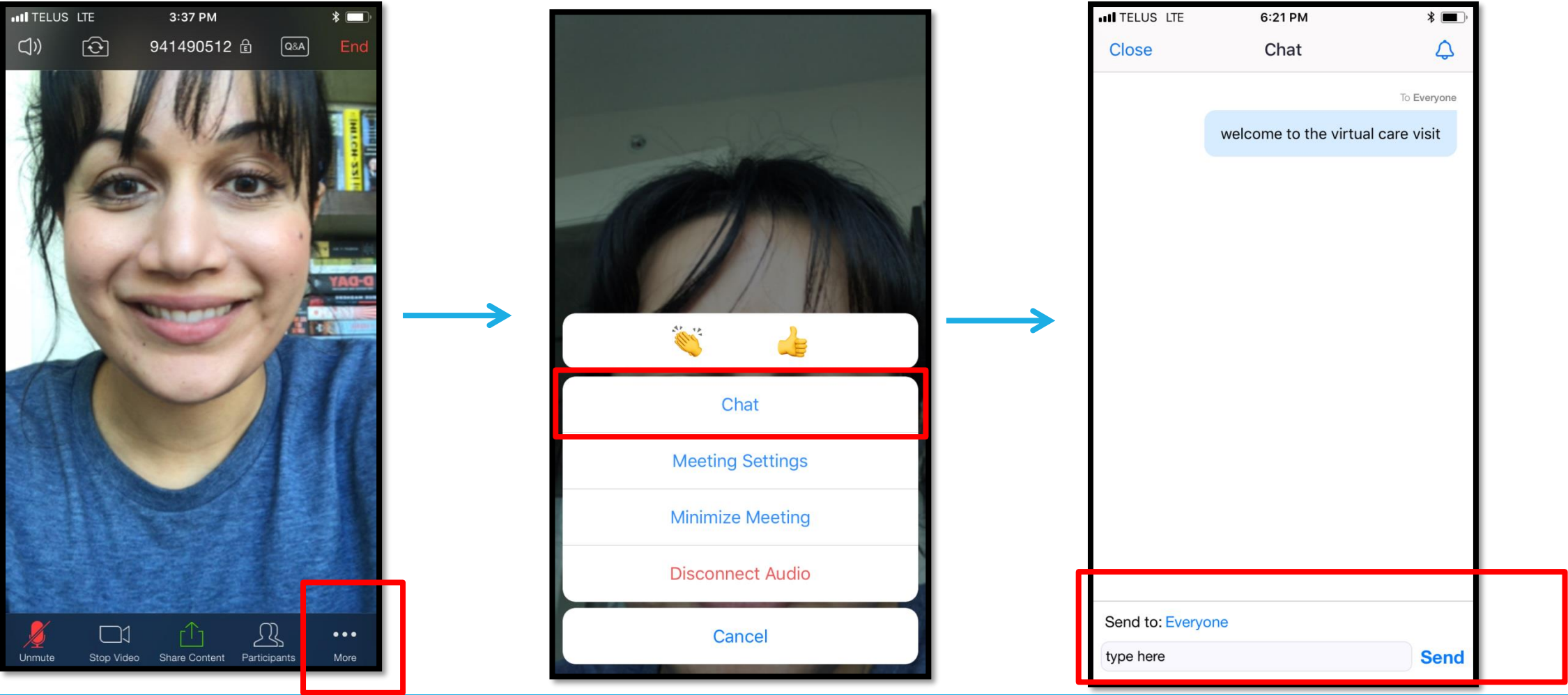
1. Tap **Share Content**
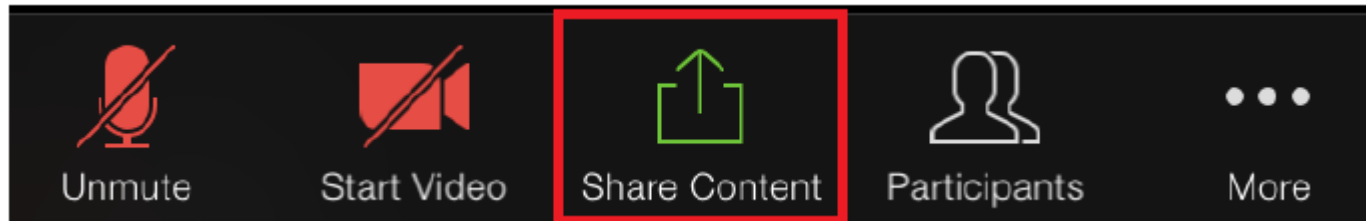
2. Select the source and content to share

3. To stop sharing, click **Stop Share** in the top tool bar.

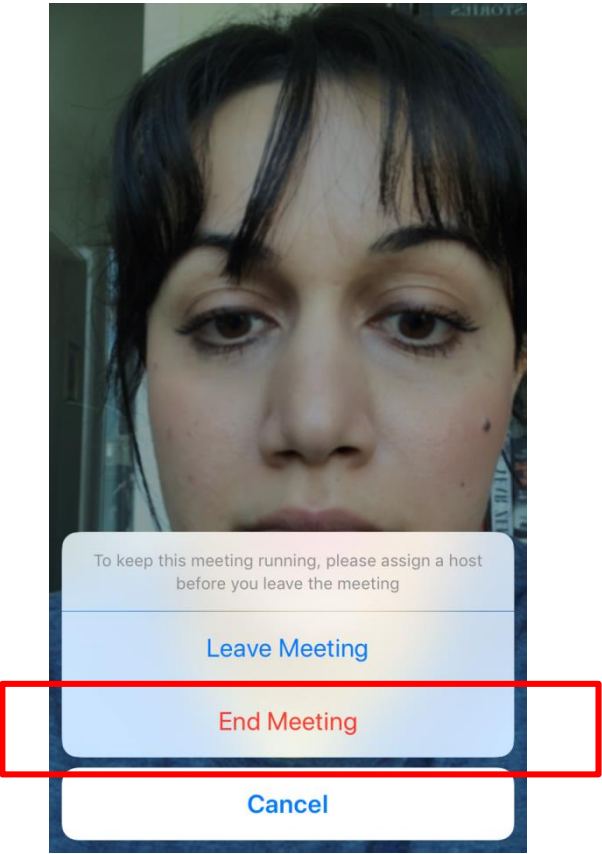Note: You will not be able to see the patient while sharing content.

Step 4b: Use the Chat Function

Step 5: End Meeting

How to set up an instant meeting with Zoom Mobile App

Please turn off WiFi and use your LTE data to conserve hospital bandwidth

1. Log in to Zoom Mobile App and on the homepage tap on **New Meeting**

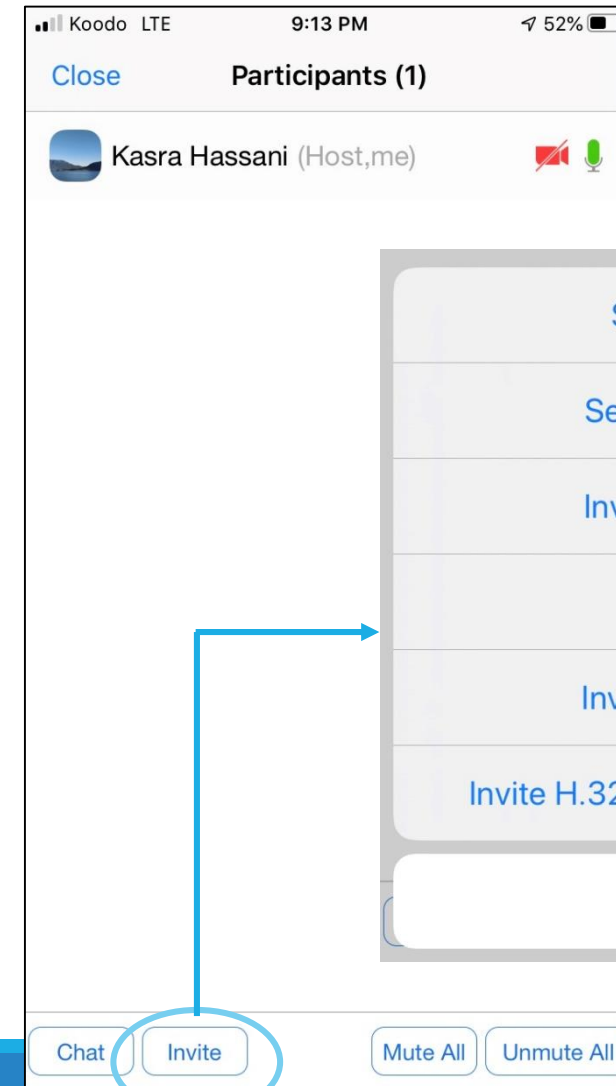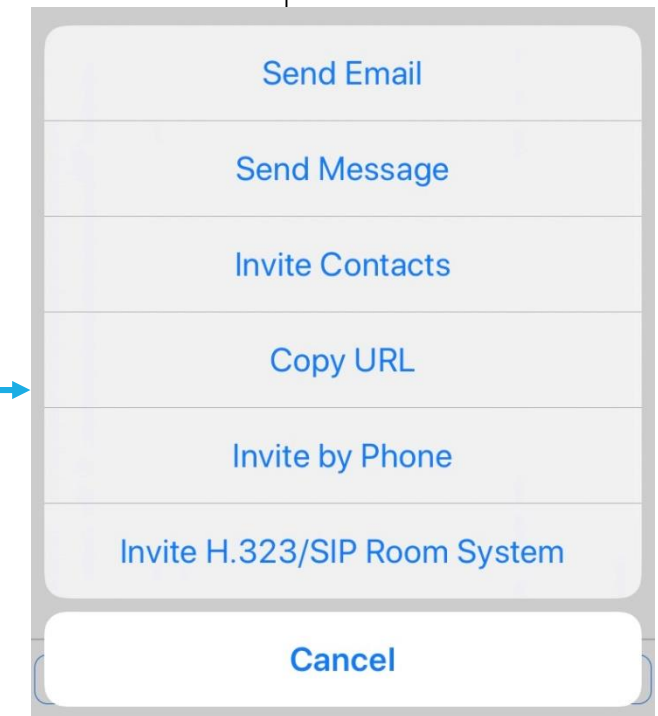2. Tap on **Start a Meeting**

3. To invite participants, tap on the **Participants** icon at the bottom
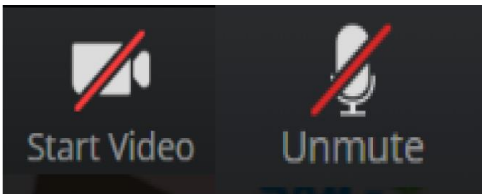
4. Tap on **Invite** at the bottom.

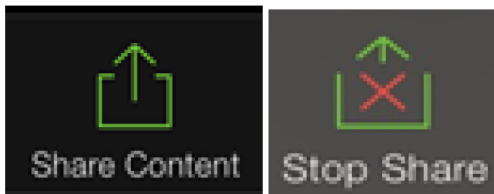5. You can invite by email, Text message, Contacts, Copy and send URL, or Phone

6 Start or stop your **video** or **mute or unmute** yourself by tapping on the icons at the bottom

7 Tap on **Share Content** button to share content such as your screen.

8 Choose the content that you want to share.

Screen

Photos

iCloud Drive

Box

Dropbox

Google Drive

Microsoft OneDrive

Website URL

Bookmark

Cancel
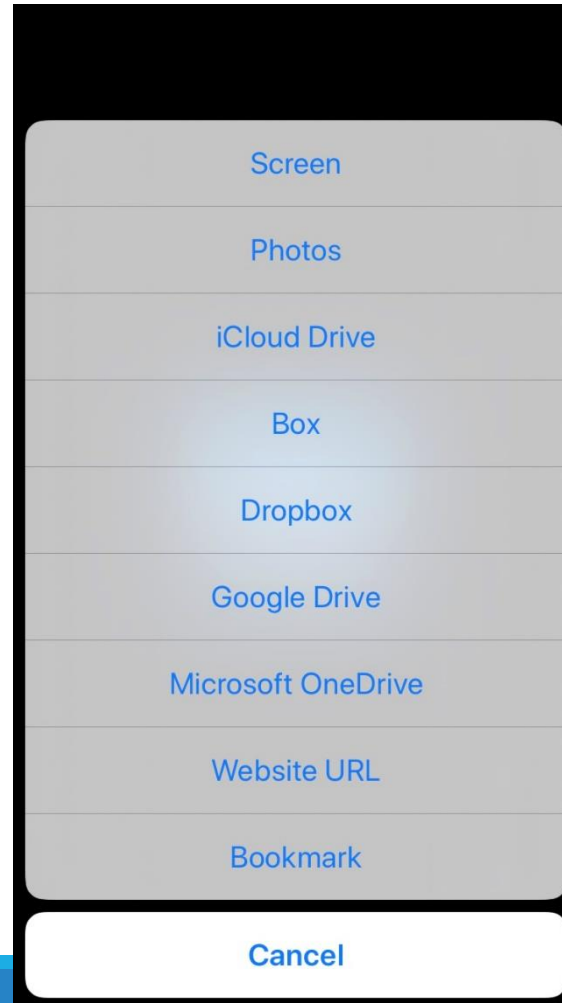
9 To send a **chat** message, select the **More** icon at the bottom right and select chat from the menu options.
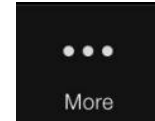
If chat option unavailable, select **Participants** and at the bottom tap on **Chat.**

Chat   Invite   Mute All   Unmute All
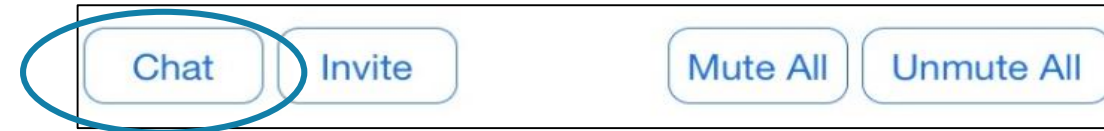
The chat will be sent to **all participants by default**. To chat with a specific participant, tap on their name in the list of participants.

10 To **mute** or **unmute** participants, tap on **Participants** and tap on their name to mute or unmute.
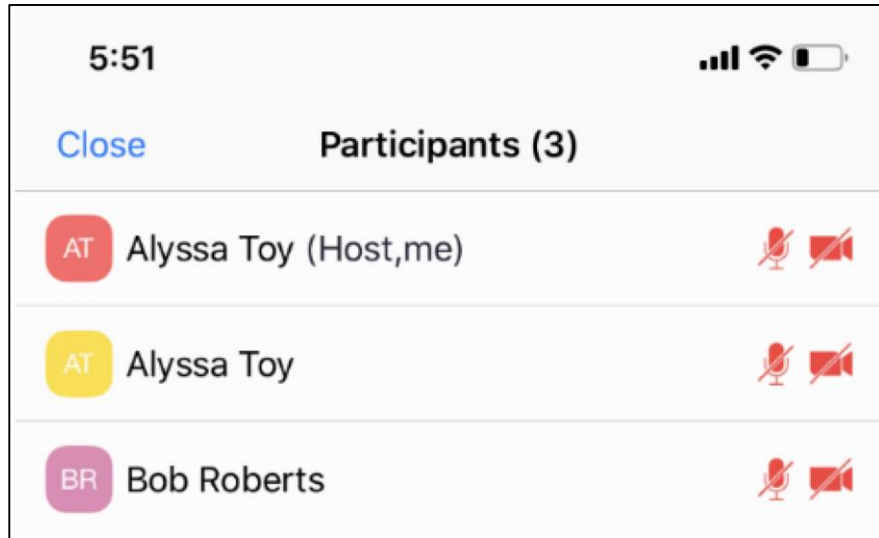
To **mute** or **unmute** all participants, tap on the icons below in the Participants list.
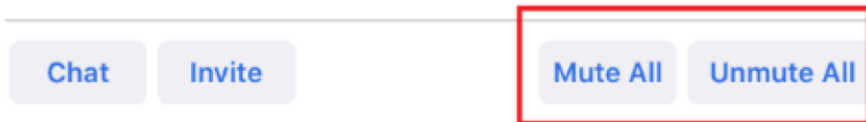
11 To end meeting, tap on **End** at top right corner, then select **End Meeting** on the menu.

Do NOT choose Leave Meeting. If you do, the meeting may continue after your exit. Make sure to select **End Meeting.**
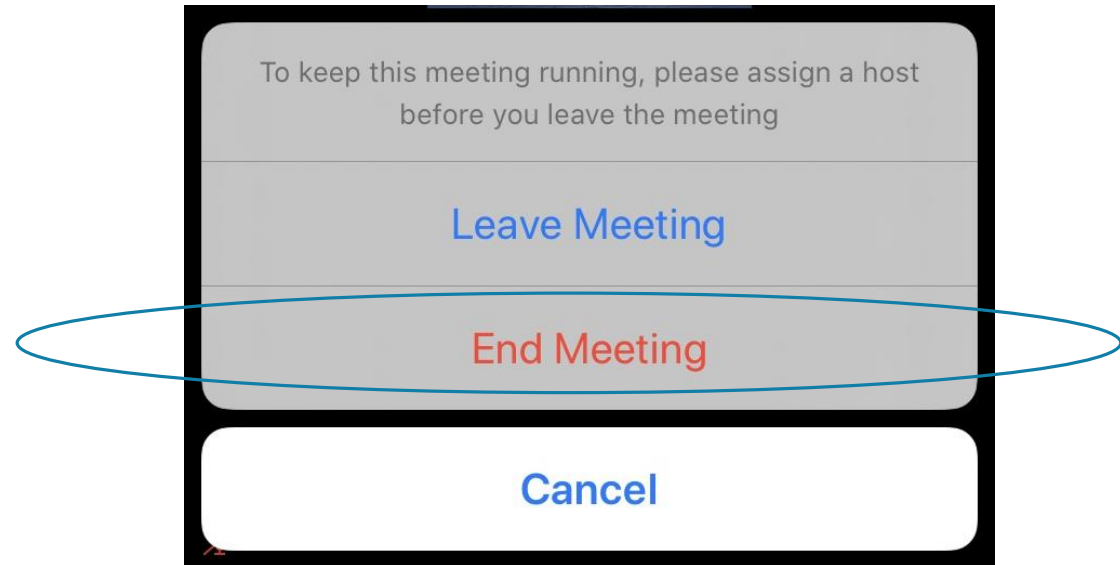
Supported operating systems

- macOS X with macOS 10.7 or later
- Windows 10
- Windows 8 or 8.1
- Windows 7

Supported browsers

- Windows: IE 11+, Edge 12+, Firefox 27+, Chrome 30+
- Mac: Safari 7+, Firefox 27+, Chrome 30+
- Linux: Firefox 27+, Chrome 30+

Please refer to the Doctors of BC:

https://www.doctorsofbc.ca/

Ministry of Health and Doctors of BC are working in partnership to address any fee code constraints. Information will be updated as changes are made.

Contact for Additional Information

Who do I go to for help?

Technical Issues
- Search on Virtual Health Resource documents at Child Health BC
- Ask your Clinic Colleagues - If you want to be a Superuser, let your operational leaders know
- Office of Virtual Health Training Documents
- IMITS 604-675-4299

Virtual Health Training Registration
- Sign up on PHSA Learning Hub
- Child Health BC – Melissa Coop, CHBC Senior Leader Provincial Education , mcoop@cw.bc.ca

Operational Procedures and Accounts
- See your Clinic / Program Operational Leads

Survey

Course Survey Link:

https://rc.bcchr.ca/redcap/surveys/?s=J7HLWMXKKT

Please tell us to what extent you agree with the following statements.	Strongly disagree	Disagree	Neither Disagree or Agree	Agree	Strongly agree
The training was RELEVANT to my learning needs.	○	○	○	○	○
I have the KNOWLEDGE and SKILLS to be successful in supporting or conducting a virtual patient visit	○	○	○	○	○

What can we do to improve the training?

_____

_____

Please tell us of any additional support you need to conduct virtual patient visits.

_____

Any Questions for Us?

**From our team to yours thank
you for all of your hard work and dedication at
this difficult time. Stay safe, healthy and take care
of yourselves!**