## Multi-Role – Telehome: Video Visit Workflow Quick Start Guide

### All Roles – Using Zoom
- Installing and Setting up a Zoom Account (If Needed) ................................................................. 2
- Assigning Zoom Meeting Scheduling Privileges (Providers Only) .................................................. 5
- Logging Into Zoom ......................................................................................................................... 7

### OAS Staff
- Adding a Telehome Block to Provider’s Templates ........................................................................... 9
- Potential Telehome OAS Script/Consent ....................................................................................... 10
- Scheduling a Zoom Meeting ........................................................................................................ 11
- Changing an Existing Appointment to a Telehome Visit ............................................................. 14
- Scheduling a Telehome Appointment ....................................................................................... 15
- Sending Zoom Information to the Patient via Email ..................................................................... 16
- Sending Zoom Information to the Patient via MyChart ............................................................... 18
- Checking In/Checking Out a Telehome Appointment ................................................................... 19
- If the Appointment Needs to be Canceled or Rescheduled ......................................................... 19

### Providers
- Launching the Telehome Visit using Video with Zoom ................................................................. 20
- Doximity Dialer ............................................................................................................................. 23
  - For Android phones: .................................................................................................................. 23
  - For iPhones: .............................................................................................................................. 23
- Blocking Caller ............................................................................................................................ 23
- Interpreter Services ..................................................................................................................... 24
- Documenting the visit in eRecord .............................................................................................. 24
- Select a Level of Service: ........................................................................................................... 27
  - Note: ......................................................................................................................................... 27
- Close the Encounter ..................................................................................................................... 28

---

**Please Note:**

All screen shots were either provided by EPIC or taken from the URMC eRecord Test System. No actual patient PHI was used in this document.
All Roles – Using Zoom

Installing and Setting up a Zoom Account (If Needed)
All Providers and designated/assigned scheduling staff

Users will need URMC Zoom accounts. We sometimes call our Zoom accounts “Zoom Pro”.

If you encounter any issues during the install and/or set up of a Zoom account, please contact the ISD Help Desk at: (585) 275-3200 or HelpDesk_ISD@URMC.Rochester.edu

1. Go to https://urmc.zoom.us in a web browser.
2. Enter your URMC email in the email box and click Sign Up Free button.
3. Follow the instructions to verify your email address.
4. Normally, Zoom will install the first time you click on a Zoom meeting link. However, if you are hosting a meeting and don’t have the client installed, open https://zoom.us/download and download the meeting client for your PC.
5. Once downloaded, sign into your URMC Zoom account using the **Sign In with SSO** button.

6. The Company Domain is **URMC**.
7. Zoom will open the URMC domain sign-in page. Enter your URMC domain **username** and **password**. Click **Sign In** when finished.

8. The Zoom application will now open and you will be logged in.
Assigning Zoom Meeting Scheduling Privileges (Providers Only)
Provider are to assign scheduling staff privileges. Scheduler will ONLY use the provider’s zoom account to schedule, not their own account; the scheduler needs an account to be able to set up on behalf of all providers. Zoom does not allow multiple meetings to be scheduled at the same time on one account. One scheduler may be assigned to multiple provider accounts.

1. Click the gear icon in the Zoom application.

2. Click Advanced Features on the right and then click View Advanced Features. You may need to enter your URMC username and password again if you have been logged out of the Zoom webpage.
3. Zoom opens in your web browser again. Make sure you are on the Settings tab (on the far left of the page) and scroll to the bottom of the webpage until you see the Schedule Privilege section.

4. Click the + symbol next to Assign scheduling privilege to.

5. Enter the URMC email address of the person or persons that schedule your patients. Click Assign once the emails have been entered.
Logging Into Zoom
1. Open the Zoom application and click Sign In.

2. Select Sign in with SSO.
3. Enter urmc and click Continue.

4. If required, log in with your urmc domain username and password (like you would for your email or computer).

If you do not remember your password, or are experiencing difficulties, contact the ISD Help Desk for assistance: (585) 275-3200 or HelpDesk_ISD@URMC.Rochester.edu.
OAS Staff

Adding a Telehome Block to Provider’s Templates

**This step is not mandatory but if no block for Telehome or a block that includes Telehome is used, the appointment will take the duration of the time slot you are scheduling into.**

Provider’s templates can have a Telehome Block associated with the template. Each Telehome Visit Type does not have a duration associated with the type. With the visit type block on the template the appointment duration will take on the duration of the block. If there is no block with Telehome, the appointment will take on the duration of the time slot you are scheduling into.

Adding the Telehome block to a provider’s template. The Telehome visit type will be 30 minutes in this example – matching the slot length built on the template.
Potential Telehome OAS Script/Consent

OAS should confirm whether the patient is MyChart active or not and offer to set the patient up if they are not.

“Our primary goal at UR Medicine is to provide the very best quality of care in an environment that is safe for everyone. Given the public health risks surrounding the potential spread of this new virus we are reaching out to you today to see if you would like to move your in-person appointment to a video visit with your provider. The provider will contact you via an application called zoom (we will forward you the information) at the same time as your scheduled in-person appointment. Medical information shared with your provider during this visit will be documented and safeguarded just as it would during an in-person visit. There may be a fee associated with a videoconference visit but it’s typically lower than the cost of an in-person appointment.

Would you like me to change your in-person appointment to a video visit? Do you have a MyChart account (if no would you like to set one up)? If you do not have a MyChart account and do not wish to set one up we can send the zoom invitation and information to you via email. In the email we will include the date of the appointment, your provider’s name, the link to the zoom meeting and a consent form. I wanted to make you aware that URMC cannot control the security of email messages once we send them, we need your permission to email you. Could you please provide me with your email address and phone number you can be reached at if the provider needs to contact you?”

*** If sending information via email, you need to receive verbal consent from the patient and check the box next to verbal consent. Please add the following language to the bottom of the consent form “verbal email consent obtained” or “email ok”. This form is sent to scanning to be placed in the patients record.
Scheduling a Zoom Meeting

1. Open Zoom from your computer.
   
   - There may be more than one view depending upon which version of Zoom is installed. Both are similar and offer the same options.

2. Select the Schedule option to schedule a new Zoom meeting.
3. Double-check / change the following settings:

   - **Topic**: Change to the patient’s first initial and last name (i.e. M. Smith).
   - **Meeting ID**: Generate Automatically
   - **Password**: do not check this box
   - **Video**: Turn on Host and Participant
   - **Audio**: Telephone and Computer Audio
   - **Calendar**: Other Calendars (you will see options after clicking Schedule)

4. Click **Advanced Options** to adjust more settings.

   - **Enable join before host**: check this option so the patient may join before the provider
   - Leave all other options unchecked

5. Click **Schedule**.
6. Copy the Zoom **meeting link** into the email to the patient or MyChart message. This link will also be used in the appointment notes.

![Zoom meeting link](https://umc.zoom.us/j/751195731)

7. To view meetings you already have scheduled, click **Meetings** in the Zoom application.

![Zoom meetings](https://example.com/zoom-meetings.png)
Changing an Existing Appointment to a Telehome Visit

This is the same workflow you use today with Change Appointment. Call the patient and confirm they are okay with converting their appointment from in-person to a video visit with the provider.

1. Change the visit type to **Telehome** and update the **Notes** section to include the **Zoom URL**, **patient phone number**, and **reason for appointment**.
2. The change reason is **Converted because of COVID-19 concerns**.
Scheduling a Telehome Appointment

Appointment notes:

- Indicate it is a video encounter, add the Zoom URL, the patient’s phone number, and reason for appt.

Select the Telehome visit type and finish schedule the appointment like normal.

The appointment arrival location will be the patient’s home. You will also see this information on the Appointment Review screen.
Sending Zoom Information to the Patient via Email

If attempting to send a message through MyChart and the patient cannot be found in the “To” field, this means the patient is not signed up for MyChart and an email will need to be sent. When possible, encourage the patient to sign-up for MyChart.

Displayed below is a template that can be used for emailing patients for telemedicine visits.

| Remember to paste the Zoom URL link and the 10 digit Zoom Meeting ID |

Dear __________,

Thank you for scheduling your telemedicine appointment with us. Using our secure software that you can download to your mobile device, we will be able to connect you with your care provider without your needing to come to our office. We are excited to be able to offer this convenient way to connect with your provider.

As discussed with you previously over the telephone, below are the instructions for your scheduled appointment through our secure Telemedicine platform, Zoom.

Date: ***

Time: ***

Provider: ***

Zoom URL and 10 digit Zoom Meeting ID: ***

**Step 1:** Review the attached consent form.

- Read this form prior to your appointment.
- If you have any questions, or do not agree, please call the office to discuss your concerns. You may need to schedule an in-person appointment instead. Your provider will again obtain your verbal consent during the appointment.

**Step 2:** Install Zoom.

- From your mobile device (iPad, iPhone, Android tablet, etc.), go to your App Store and download the free Zoom Cloud Meetings App onto the device you will be using. If using a computer, ensure you have a camera, speakers, and mic. You may also use your phone for audio and the PC for video (these options present when you open the meeting URL on PC). One the app is installed on your device, clicking the meeting URL will launch Zoom.
- Once the app is installed on your device, you SHOULD test Zoom by clicking the meeting URL which will launch a website that will ask you to then open the Zoom Application. Launch Zoom.

  - For Android devices (Google Play), download the Zoom Cloud Meetings app here: [https://play.google.com/store/apps/details?id=us.zoom.videomeetings](https://play.google.com/store/apps/details?id=us.zoom.videomeetings)
  - For Apple devices (App Store), download the Zoom Cloud Meetings app here: [https://apps.apple.com/us/app/zoom-cloud-meetings/id546505307](https://apps.apple.com/us/app/zoom-cloud-meetings/id546505307)
  - For desktops (Windows or Mac), download the Zoom Cloud Meeting app here: [https://zoom.us/support/download](https://zoom.us/support/download)
Step 3: The Zoom Meeting Location

- Go to a private, quiet, well-lit location where you are getting a good Internet connection for this appointment.
- **PLEASE NOTE:** It is highly recommended to use Wi-Fi at your home or work. If you are meeting over a cellular network (example: 3G, 4G etc.), this will use a considerable amount of your data (additional data fees may be charged from your wireless carrier if you go over your data limit).
- **Equipment** – Please ensure you have video capability on your device (phone, tablet, computer) for this visit

Step 4: Zoom Meeting

- About **5 minutes** before your appointment you can either click on the same link you used before to test the link or open the Zoom application on your phone/tablet or computer and select "join a meeting". Then enter the 10 digit meeting ID above.
- When you see yourself in the Zoom meeting, you've completed the steps correctly. On PC you can do audio either from the PC or your phone.

Wait for your health care provider to arrive. You may receive a message that the host is in another meeting. Please stay online for at least 15 minutes into your appointment time. Your provider might be running late with another patient.

**Zoom Help Center website**

HELP IS HERE! If you are having any technical issues, please contact us immediately.

Thank you for allowing us to be partners in your care,

*(Your Clinic Name and Your Clinic Phone Number)*
**Sending Zoom Information to the Patient via MyChart**

1. Once patient has been selected, search “.zoom” to display a list of SmartPhrase options.
2. Select the “ZOOMURL” SmartPhrase.

3. The .ZOOMURL SmartPhrase should contain all the information and instructions needed for the patient to connect to the meeting.
Checking In/Checking Out a Telehome Appointment

Arrive and check out a telehome appointment from the DAR before or at the scheduled appointment time as a standard process or if not possible, at the end of each session or each day.

Read the checkout comments from the provider, either from the Check Out workflow or using the Check Out Comments DAR column (since no patient will be stopping by the check-out desk) and then call the patient to schedule any follow up appointments, etc.

Follow up appointments can be one of your regular visit types and converted to a Telehome visit type at a later point (if needed).

End of Day Process – Needs to be followed to ensure all patients have been checked in and completed as current workflows dictate.

If the Appointment Needs to be Canceled or Rescheduled

If the patient would prefer to cancel or reschedule their appointment, use one of the new cancel reasons of COVID-19 Patient Concerns or COVID-19 Location Change Concerns. You will also begin to see the new MyChart cancelation reason citing COVID-19 concerns.

Future appointments can be one of your regular visit types and converted to a Telehome visit type at a later point (if needed).
Providers

Launching the Telehome Visit using Video with Zoom

1. For a Video encounter your OAS will add the Zoom meeting ID number to the Notes column on your schedule.

2. Try to launch the Zoom meeting from the application. Open the Zoom application on your desktop and click Meetings. Start the appropriate Zoom meeting.
3. If you have trouble with the above method, copy the URL from the eRecord appointment and open the Zoom application. Click **Join** to launch the Join Meeting pop up.
4. Type the meeting number into the Meeting ID field.
5. Click **Join**.
6. You’ll be asked how you want to join the meeting to hear the audio. If you choose Join with Computer Audio you’ll use the microphone on your computer to speak to and listen to the patient. If you choose phone call you’ll see a number to call to speak to and listen to the patient.

- When you call the patient, you’ll want to be sure you are in a private location within the clinic.
- The use of a headset is strongly encouraged.
- If you cannot use an office phone or your computer audio and need to use your cell phone be sure to use a service like Doximity to prevent disclosure of your cell phone number.
Doximity Dialer
This or another mechanism can be used to mask your phone number from patients. Doximity dialer works directly within the Epic Haiku app, but *you do not have to use Haiku* – you can simply enter the patient’s number in Doximity dialer.

For Android phones:
- Install and log into the Doximity app
- Install and log into Epic Haiku (if using)*
- Open a patient's chart on Haiku*
- Tap on the patient's phone number and select Doximity to place the call

For iPhones:
- Install and log into the Doximity app from the app store
- Install and log into Epic Haiku from the app store
- Tap on the main Settings icon on your iPhone
- Scroll down and tap on Haiku settings
- Scroll down and select Doximity under Place Calls Using
- Open a patient's chart on Haiku
- Tap on the patient's phone number and Doximity will launch
- Or, Block Caller ID using *67

Blocking Caller
You have the option to block Caller ID either temporarily or permanently using any cellular network.

- Enter *67
- Enter the number you wish to call (including area code).
- Tap Call. The words "Private," "Anonymous," or some other indicator will appear on the recipient's phone instead of your mobile number.
Interpreter Services
For foreign language needs, the provider would dial 1-800-481-3293 and when prompted, enter account 50103287 and your Department PIN. If the visit is directly related to COVID, enter tracking PIN 7400. If you do not know your Department’s PIN number, please contact Interpreter Services at 275-4778 or email us at Interpreter_Services@urmc.rochester.edu.

From the Cyracom App:
The Cyracom App can be downloaded and accessed on an Apple, Android, or workstation on wheels with camera.

- New users (please contact Interpreter Services at 275-4778 to obtain Log-in Access)
- Select language from drop down menu.
- Languages available in video have a camcorder symbol. Others are audio only.
- Enter patient’s MRN.
- For video ensure camera is clear, unobstructed, and at appropriate angle for use.
- A mobile cart is recommended to use with an iPad or other similar devices.
- Internet must be robust and reliably accessed and visual set up must be monitored for quality.
- Note: If the volume is too low, use an AUX cable directly with an iPad, phone or workstation. Bluetooth speakers do not work with this App.
- For more information, click here: Interpreter Services Resources

Documenting the visit in eRecord
1. You will need to add the patient’s Chief complaint for these visits. Follow these steps:
2. Click the Rooming Tab - if you have removed the Rooming tab, use Chart Search to locate it.
3. Click Visit Info.
4. Add the patient’s Chief Complaint.
5. Click Close.
6. Navigate to the Plan tab to add the Visit Diagnosis as well as adding any Follow Up and Patient Instructions as you would for any clinic visit.
7. To complete your note, use the URMC Telehome Video Note SmartPhrase. Type .urmctelehomenote to pull it into your note. Complete the note by filling in the SmartLists and Wildcards.

- **Attestation**: use the URMC Telehome attest SmartPhrase. Type .urmctelehomeattest or .telehomeattest to pull it into your note. Complete the note by filling in the SmartLists and Wildcards.

8. Complete the note by filling in the SmartLists and Wildcards.

9. Sign the encounter.
Note: For MVA or WC telehome telephone visits, continue to use the appropriate Progress Note type. For documentation in the note, use the URMC Telehome Required documentation SmartPhrase.

Type .telehomerequireddoc to pull it into your note. Complete the note by filling in the SmartList.

My Note

The plan was discussed with the patient and the patient/patient rep demonstrated understanding to the provider’s satisfaction.

Consent was previously obtained from the patient to complete this telephone consult, including the potential for financial liability.

[TIME SPENT:28923] minutes was spent reviewing the EMR and management of this patient.
Select a Level of Service:
Billing for telehome video visits is based on documentation, level of service, and/or time. We ask that you use the following codes accordingly:

- For video visits, please choose the appropriate ambulatory E/M or CPT codes that you would normally use for a regular clinic visit based on documentation, level of service and/or time. For example: 99201, 99202, 99203, 99204, 99205, 99211, 99212, 99213, 99214, or 99215.

Note:
- Some specialties, such as Behavioral Health, may have specialty CPT codes. Check with compliance if you believe it may apply to your specialty.
- Residents may conduct video visits; services are only billable if the supervising physician personally evaluates the patient via video (either separately or in conjunction with the Resident). Supervising physician bills based on the total actual time they personally spent with the patient via video.
- Follow supervision rules that apply to fellows for video visits with their existing required supervision level for in-person services.

To add Level of Service buttons to your LOS view in eRecord, click the wrench.

Hover over one of the empty boxes and add the above codes.

- Anytime you are unsure of what code to bill, use 99999.
Close the Encounter

You should close your encounter as you would for a normal outpatient visit, paying specific attention to the Level of Service section outlined above and specific documentation needed for telehome telephone visits, also outlined above.

**Auto Communications Note:** letters for this visit type will automatically go to PCP and referring provider for departments who currently have this process in place upon close of the encounter.

**Telehome Visits:** Providers can open the encounter, click “start the visit” from the pre-charting activity, and close a telehome encounter without it being arrived. The arrival process must be completed at some point prior to end of day processing.

**Standard Office Visits:** Providers can pre-chart on the encounter but it must be arrived prior to signing the visit.
Multi-Role - Telehome: Video Visit Workflow Quick Start Guide

© 2020 Epic Systems Corporation. All rights reserved. Certain information contained herein is confidential and must be treated accordingly. After Visit Summary, Analyst, ASAP, Beaker, BedTime, Break-the-Glass, Breeze, Cadence, Canto, Care Elsewhere, Care Everywhere, Charge Router, Chronicles, Clarity, Cogito ergo sum, Cohort, Colleague, Comfort, Community Connect, Country Connect, Cupid, Epic, EpicCare, EpicCare Link, Epicenter, Epic Earth, EpicLink, EpicOnHand, EpicWeb, Haiku, Healthy Planet, Hyperspace, Identity, IntraConnect, Kaleidoscope, Light Mode, Lucy, MyChart, MyEpic, OpTime, OutReach, Patients Like Mine, Phoenix, Powered by Epic, Prelude, Radar, RedAlert, Region Connect, Resolute, Revenue Guardian, Rover, SmartForms, Sonnet, Stork, Tapestry, Trove, Trusted Partners, Welcome, Willow, Wisdom, With the Patient at Heart and World Connect are registered trademarks, trademarks or service marks of Epic Systems Corporation in the United States and/or in other countries. Other product or company names referenced herein may be trademarks of their respective owners. U.S. and international patents issued and pending.

This guide is based on Epic 2019.