

# Sample Telehealth Policies and Procedures

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## Guidelines for Everyone

### Overview:

We currently have two modalities for hosting telehealth visits, Zoom and WebEx.

The licensing model for Zoom is as thus:

1. Basic: A basic user is user without a paid license. A basic user can host meetings with up to 100 participants. If 3 or more participants join, the meeting will time out after 40 minutes. They cannot utilize user and account add-ons such as large meeting, webinar, or conference room connector.
2. Licensed: A licensed user is a paid account user who can host unlimited meetings on the public cloud. By default, they can host meetings with up to 100 participants and large meeting licenses are available for additional capacity. Licensed users have these additional features available:
  - a. Customize Personal Meeting ID
  - b. Record to the Zoom cloud (currently disabled)
  - c. Have a co-host
  - d. Assign others to schedule and schedule on behalf of
  - e. Utilize account add-ons such as conference room connector
  - f. Be assigned user add-ons such as large meeting, webinar, or personal audio conference
  - g. Customize Personal Link, if on a business or education account

**(Insert Name of Organization) has elected to use Zoom as their primary application to host visits.** In case of disruptions, WebEx can be used as a backup.

For (Insert Name of Organization), the general workflow is noted below. Refer to the applicable section(s) of the guide for more specific steps.

1. Determine if patient /visit could be telehealth
2. Do they have the internet and equipment (PC or laptop with Webcam, mobile device with webcam) to have a video visit
3. If the answer is yes, you can schedule a TH visit type in (insert EMR)
4. Have patient either go to (insert URL) or send forms to them
  - a. Forms required are (if a valid one is not on file):
    - i. Telehealth Consent Form
    - ii. Insurance information, Custody paperwork, etc.
    - iii. Other....
5. Have patient verbally consent to forms. Must be done with a witness and recorded on the form and in EMR reviewed and consented.
6. Provide patient with Zoom Quick Start Guide for Patients (separate document)
7. Scheduler sets up meeting in Zoom with patient and provider (see Zoom guide for Practice Designee)
8. Prior to the appointment:
  - a. Scheduler for the provider confirms:
    - i. Registration complete and verified.
    - ii. Consent forms completed
    - iii. Confirm appointments using (insert scheduling platform)
    - iv. Ensure they have the Zoom instructions and Zoom is loaded.

- v. Reschedule or Cancel appointments as appropriate
- vi. Provide the provider the Telehealth Data Forms (separate document) for confirmed appointments
- vii. Check in patient
- b. Provider tasks:
  - i. Uses (insert scheduling platform) to start and go through appointments.
  - ii. Provider starts Zoom meeting from link scheduler has provided
  - iii. Provider introduces self and credentials to patient (if never previously seen – required for TH Consent)
  - iv. Encounter occurs
  - v. Touch base with Scheduler, confirm all patients seen.
  - vi. Discuss who needs to be scheduled follow-up, no show, etc.
  - vii. Notates any encounter in which the Telehealth visit could not be completed, enter “NOTE TO BILLER” indicating that No Visit was done, so we can post an “Office Visit No Charge” to the FIN/Encounter Number.

**ALTERNATE PROCESS USING ZOOM PERSONAL MEETING ID AND WAITING ROOM (Differences in process noted in RED)**

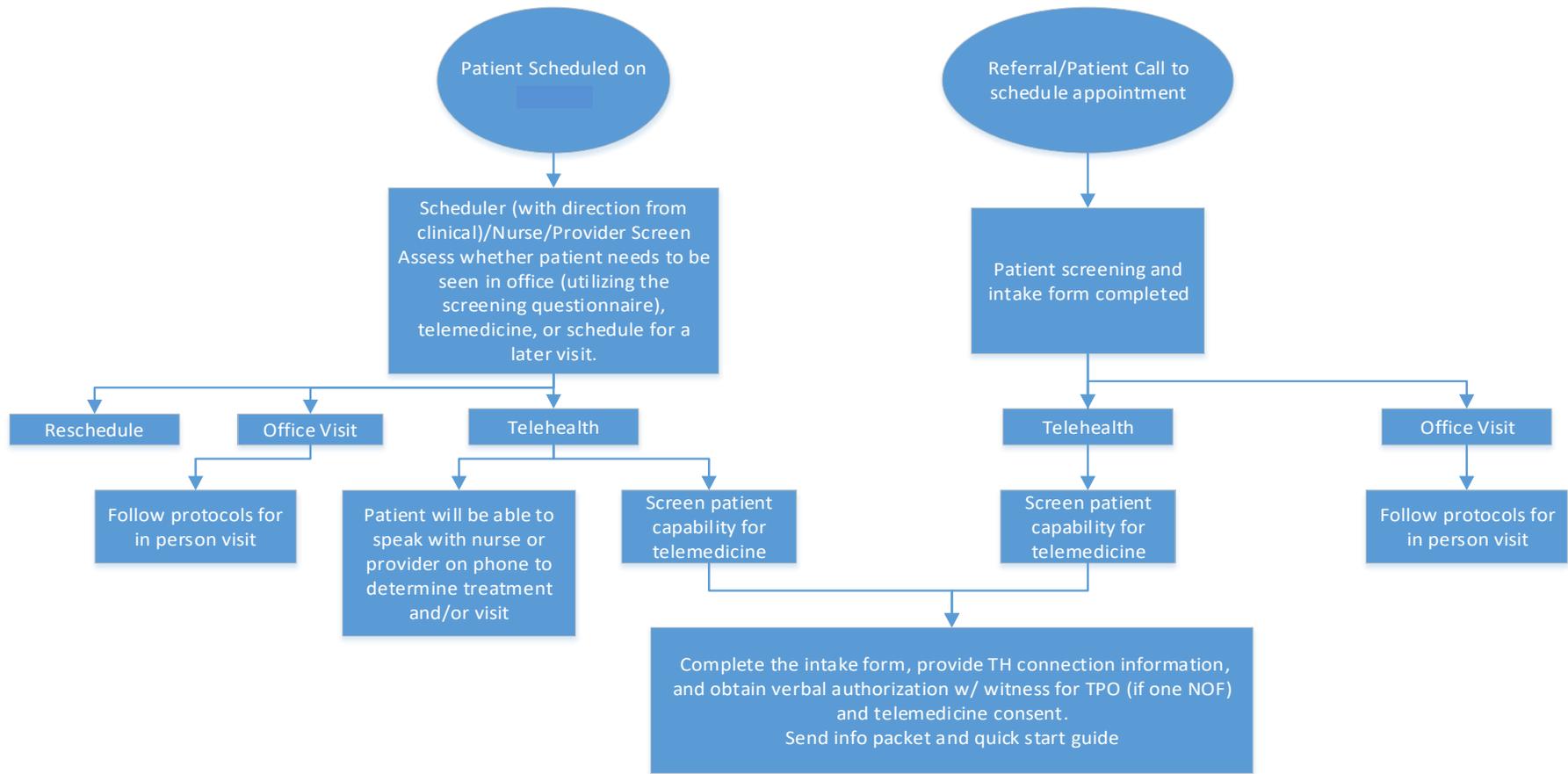
1. Determine if patient /visit could be telehealth
2. Do they have the internet and equipment (PC or laptop with Webcam, mobile device with webcam) to have a video visit
3. If the answer is yes, you can schedule a TH visit in (insert name of EMR)
4. Have patient either go to (insert URL) or send forms to them
  - a. Forms required are (if a valid one is not on file):
    - i. Telehealth Consent Form
    - ii. TPO
    - iii. Insurance information, Custody paperwork, etc.
9. Have patient verbally consent to forms. Must be done with a witness and recorded on the form and in (insert name of EMR) reviewed and consented.
  5. Provide patient with Zoom Quick Start Guide for Patients (separate document)
  6. Scheduler provides Private Meeting Room ID of provider
  7. Prior to the appointment:
    - a. Scheduler for the provider confirms:
      - i. Registration complete and verified.
      - ii. Consent forms completed
      - iii. Confirm appointments using (name of EMR/scheduling platform)
      - iv. Ensure they have the Zoom instructions and Zoom is loaded.
      - v. Reschedule or Cancel appointments as appropriate
      - vi. Email the provider the Telehealth Data Forms (separate document) for confirmed appointments
      - vii. Check in patient in (insert name of EMR)
    - b. Provider tasks:
      - i. Uses (name of scheduling platform) to start and go through appointments.
      - ii. Provider starts Zoom meeting with Personal Room ID (PMI) from website or mobile device (see Quick start for Zoom PMI with Waiting Room)
      - iii. Provider allows patient into the meeting from list of patients (may only be one patient in waiting room) in waiting room

- iv. Provider introduces self and credentials to patient (if never previously seen – required for TH Consent)
  - v. Encounter occurs
  - vi. If patient forgets to leave meeting, provider can remove patient from PMI back into the waiting room.
  - vii. Touch base with Scheduler, confirm all patients seen.
  - viii. Discuss who needs to be scheduled follow-up, no show, etc.
- c. Notates any encounter in which the Telehealth visit could not be completed, enter “NOTE TO BILLER” indicating that No Visit was done, so we can post an “Office Visit No Charge” to the FIN/Encounter Number.

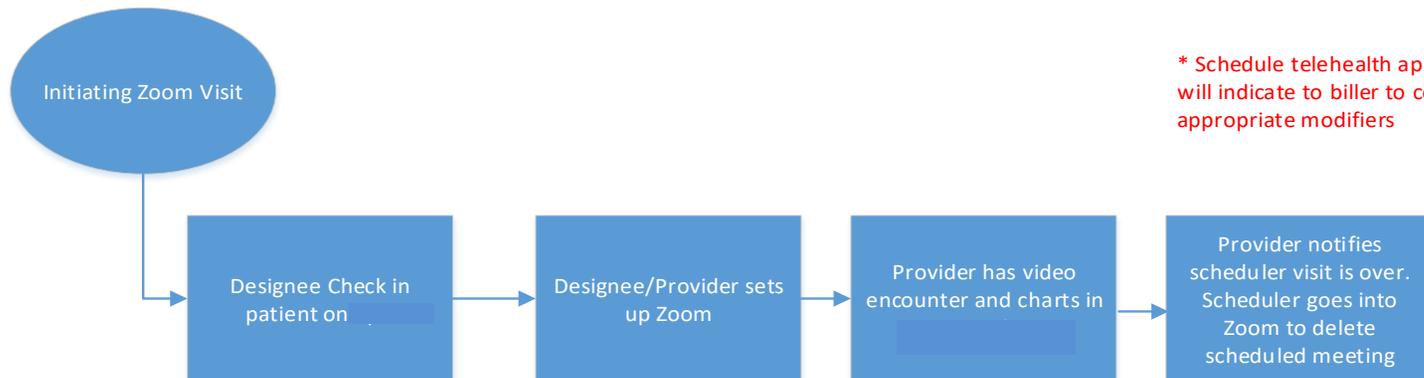
**If the personal meeting room is left unattended, it will time out. If you would like to keep the room open, but not stay in the room, “leave meeting”.**

**If you are scheduling siblings, please create separate encounters in (insert name of EMR). However only one meeting needs to be scheduled.**

# Sample Telehealth Workflow



## TeleHealth Visit



\* Schedule telehealth appointment type will indicate to biller to code with appropriate modifiers

## Zoom and WebEx security

With the recent uptick in online meetings due to the COVID-19 pandemic, there has been increased attention to platform security, in light of news regarding inappropriate acts by uninvited meeting participants. We wanted to share with you some of the security features, as well as best practices, of both Zoom and WebEx in terms of security.

- 1) Both Zoom and WebEx licenses are HIPAA compliant
  - a. We have signed BAA's with both
  - b. Both are end-to-end encrypted with AES 256-bit algorithms
  - c. Zoom has the feature to record the meeting locally turned off (this will not prevent a person within a room recording the visit on a separate device)
  - d. Zoom has the feature to download chat turned off
- 2) With both Zoom and WebEx, the security can be enhanced with some changes in process. These include:
  - a. Waiting Room
  - b. Enable wait for host to join
  - c. Lock a meeting
  - d. Enable/disable a participant or all participants to record
  - e. Use a meeting password

Because of the security issues recently, Zoom has taken steps to clarify some of their privacy policies. From the Zoom site:

“To be clear, in a meeting where all of the participants are using Zoom clients, and the meeting is not being recorded, we encrypt all video, audio, screen sharing, and chat content at the sending client, and do not decrypt it at any point before it reaches the receiving clients.”

We will be altering some of the workflows to ensure that unauthorized participants cannot join a meeting.

- 1) If you are currently using a waiting room with a Zoom PMI (personal meeting ID), then there is no change to your process.
- 2) If you are scheduling meetings (appointments) on behalf of a provider, please include a password so that participants without a password cannot join.
- 3) If you are scheduling your own meetings, then make sure you provide the password to your patient.

We hope this clarifies some of the security concerns regarding the platforms being used at (insert name of organization)

## For Providers

Before initiating any telehealth visits, please trial these with your Practice Manager, Director, and or staff.

This guide is designed to aid you in setting up your Zoom and WebEx account, schedule a meeting, and start a meeting. Reminder this is a guide. Practice specific workflows will need to be developed by you and your practice manager/director. The guide will have both Zoom and WebEx instructions. Note that the initial meeting should be done in Zoom. If there are issues with the Zoom application or patient is have issues with Zoom, please connect via WebEx. If neither of those options are available to the patient, your practice designee will inform you and speak with you regarding next steps. These next steps could be a visit by “Audio only” or an in office visit.

### Zoom Visit

Zoom should be used as the first option for telehealth visits. Please work with your practice to develop a workflow for scheduling and conducting a meeting. There will be two options for Zoom visits

- **Schedule a Meeting**
  - You and your designee have access to schedule an appointment. Note that basic users will have 40 minutes to speak with the patient. If you need more time please speak with your practice manger regarding your user access.
  - Must require a password for the schedule
- Example Process
  - Scheduler schedules meeting for provider (is host)
  - Scheduler ensures “join before host” is checked
  - Meeting information sent to provider and patient **this information must include password**
  - Telehealth meeting in (INSERT NAME)
  - When time comes, provider and patient enter meeting
  - Meeting occurs – provider sees patient
  - Upon completion, provider and patient leave meeting
  - Scheduler deletes meeting from their list
- **Personal Room Meeting (preferred method)**
  - Personal Room Meeting ID is specific to each user. To use advanced features in this room, you will need to be a licensed user. Please contact your manager regarding how to get your access
  - The personal meeting room can be on as long as the provider would like. Patients/parents/guardians would join the meeting and you would “Admit” them to the room.
- Example Process
  - Provider has a license for use with Personal Rooms (done once)
  - Provider one-time set-up of a waiting room with PMI (personal meeting ID)
  - Scheduler has the meeting ID’s for every provider so scheduler doesn’t need to create any meetings
  - Scheduler gives provider-specific meeting ID and instructions to patient on how to use Zoom and changing name displayed in meeting
  - Telehealth meeting in (insert)
  - When time comes, provider launches their personal meeting room and admits patient
  - Upon completion, provider moves patient back to waiting room or patient leaves
  - Provider can assign co-host to designee
    - Admit designee to personal room
    - Assign co-host to designee
    - As long as designee is in room, meeting does not end – provider can do other tasks

## WebEx

WebEx should be used as an alternative option for telehealth visits. There may be a time, that Zoom platform may malfunction, patient may issues getting on, or for other reasons. If this is the case please use the WebEx instructions guide. Reminder that WebEx is an alternative resource for conducting telehealth visits. Similar to Zoom, there are two options for WebEx visits.

- 1) Schedule a Meeting
  - a. We encourage you to schedule a meeting thorough the (insert name of organization).webex.com site, as this will create consistency and mask the schedulers personal KD email address
- 2) Personal Room Meeting
  - a. Similar to Zoom, WebEx has a personal room meeting that can be utilized to see patients all day.

## **Workflow for Providers**

Telehealth visits will have their own visit type in (insert name of EMR). The visit will be scheduled by the scheduler or the nurse. Once the visit is scheduled you and the patient will receive a form with information regarding the visit. The form will include:

1. Name of telehealth contact and relationship to patient: ie Suzanne Brixey, mom
2. Patient Name:
3. Patient MRN
4. Patient DOB
5. Patient Chief complaint
6. Meeting number (highlighted above), and password

### **Starting Telehealth visit:**

1. Clean surrounding area and ensure there is no PHI information in sight
2. Open Zoom application through their device ((INSERT NAME OF ORGANIZATION) computer, personal laptop, phone, etc.)
  - a. If opening zoom through laptop or workstation follow “Zoom User Interface through PC” instructions
  - b. If opening zoom through iPad, iPhone, or Android device follow “Zoom quick start for providers using iPads, iPhones, or Android devices” instructions
3. Before Initiating the visit introduce yourself, state your credentials and confirm telehealth consent. Be sure to include this is in your documentation.
4. Confirm patient name, patient DOB, and best contact number. Please explain to the parent/patient if disconnected for any reason you will contacted with a new meeting ID.
5. Conduct Zoom visit, noting there is a 40 minute limit on visit unless it was created by a licensed user
6. Once completed with the Zoom visit, document TH encounter in (insert name of EMR)
  - a. Documentation needs to include the outside of the “norm” reason as to why TH was

necessary (Refer to auto text instructions noted under Copying and Saving Telehealth Visit Header Autotext for (INSERT NAME OF DEPARTMENT))

- b. If “Audio Only” (no visual) documentation needs to include why audio only encounter was performed
- c. If no telehealth encounter could be provided please add a Note To Biller why and an “Office Visit No Charge” order.

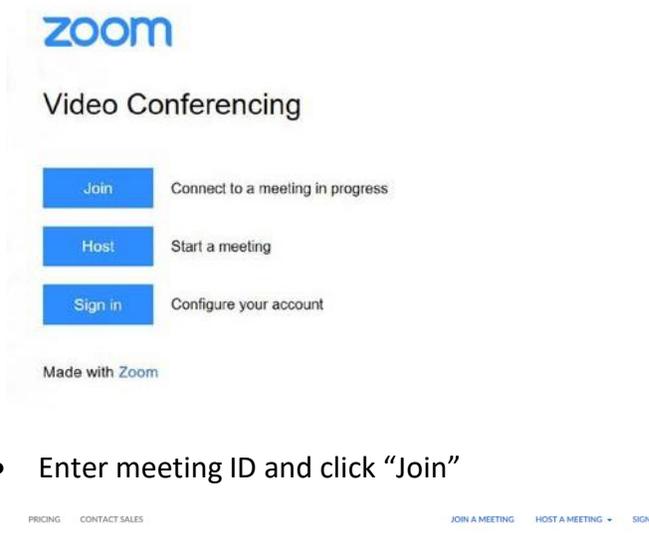
7. Return the Telehealth Data Form to practice designee/scheduler so meeting can be deleted and the form with PHI properly disposed of

Providers that opt to use the Zoom Personal Room should use the [Setting up Zoom Personal Room instructions below](#). Please note that your meeting room number is unique and should be shared with your staff that are scheduling appointments on your behalf.

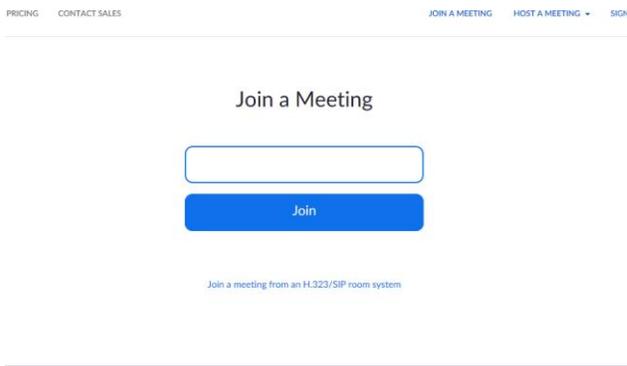
## Starting Zoom Meeting on PC/Laptop

Once you have scheduled meetings and ready to see patients for the day, follow the steps below to start the telehealth visit. Before allowing the patient to see your video please follow the “Initiating Zoom Visit Tips” in the guide.

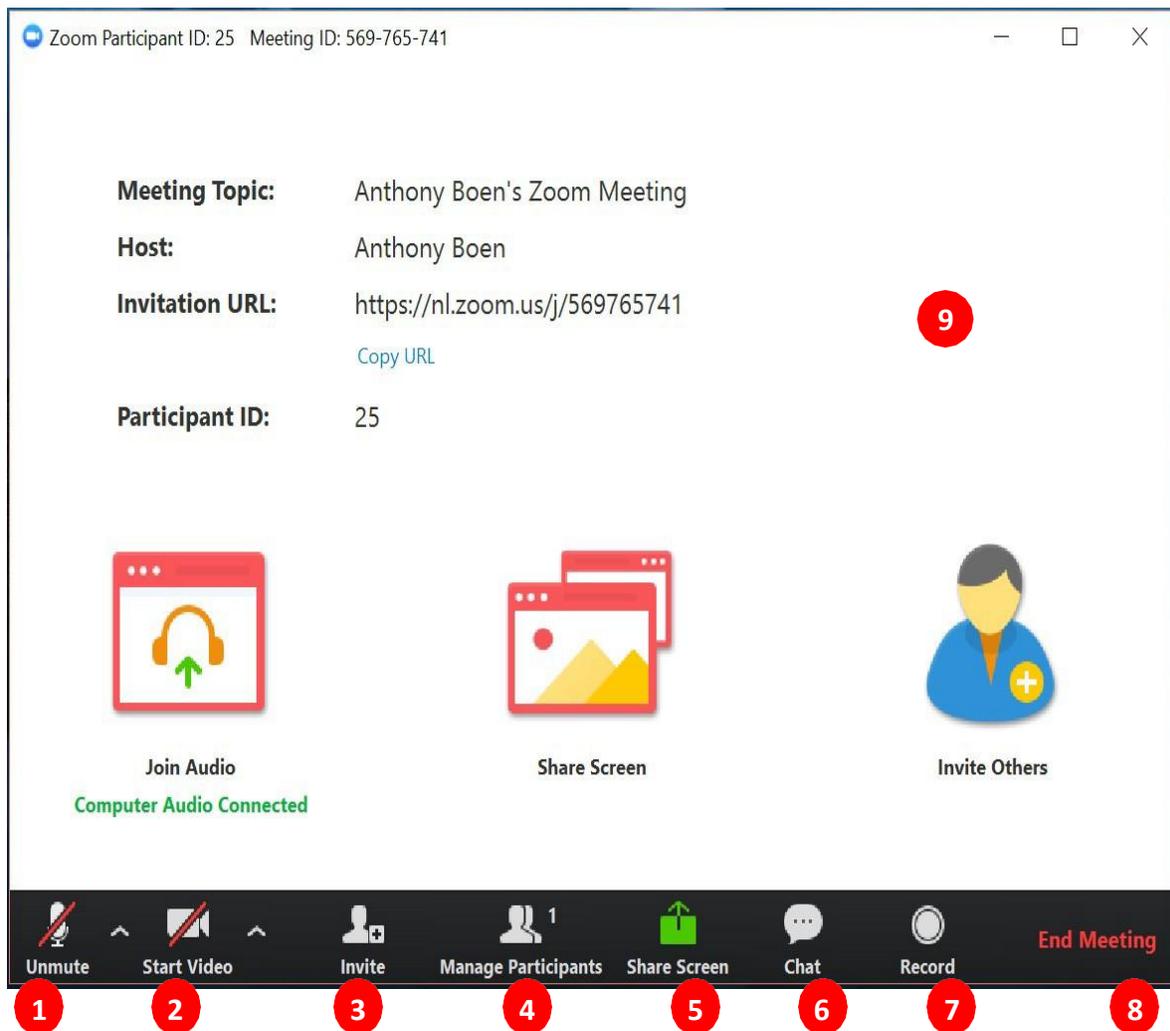
- Go to (insert name of organization).zoom.us and click Join a meeting



- Enter meeting ID and click “Join”



- If a line is crossed through “Unmute” and “Start Video”, Click them when you are ready to start the telehealth visit.



1. Mute or unmute your microphone
2. Start or stop your video feed
3. Invite participants to the meeting
4. Manage or view a list of meeting participants
5. Share your screen
6. Open the Chat window
7. Record the meeting (*ability to record is off for our account*)
8. Leave the meeting
9. Video Area

# Starting your Zoom Account

**Overview:** Zoom is a real-time web conferencing application much like Skype. Zoom can be downloaded and installed easily, and is available on Windows, PC, iOS, Android and Blackberry devices. This rest of this guide help will get you started using Zoom.

## Download and Install Zoom

**Click the appropriate link to download Zoom on your device. We recommend that your initial login is completed on a (INSERT NAME OF ORGANIZATION) workstation, within the (INSERT NAME OF ORGANIZATION) network. Follow the instructions for First Time users in this guide.**

1. Windows & Mac : <http://zoom.us/download> (download the Zoom Client for Meetings)
2. iOS: <https://itunes.apple.com/us/app/id546505307>
3. Android: <https://play.google.com/store/apps/details?id=us.zoom.videomeetings>
4. Blackberry: <https://appworld.blackberry.com/webstore/content/59949934>

## Equipment Requirements

(INSERT NAME OF ORGANIZATION) and Personal workstations/laptops equipped with webcam and microphone

- 1) Zoom may be accessed and used via (insert name of organization).zoom.us
- 2) The Zoom application does not need to be installed on the workstation/laptop
- 3) (INSERT NAME OF ORGANIZATION) Zero client workstations should not be used with Zoom

(INSERT NAME OF ORGANIZATION) iPads

- IS has pushed the Zoom app out to these devices. If the app is not on your practice's iPad, submit a ticket to IS with the asset ID.

(INSERT NAME OF ORGANIZATION) iPhone

- Install the Zoom app from iTunes

Personal iPads/Tablets/Phones

- Install the Zoom app from iTunes or Google Play

## Tips for Using Zoom

5. If you are using an external camera and/or microphone be sure to plug them in before opening the Zoom application. We recommend using a headset if possible.
6. Only 1 microphone and speaker system should be active per physical location. Otherwise the 2 systems may cause a loud screeching sound.

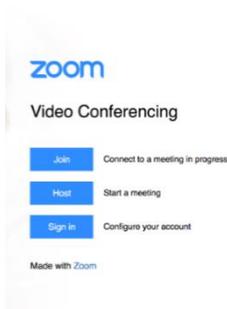
Video tutorial: <https://youtu.be/XhZW3iyXV9U>

***Recommend watching the first two videos on this tutorial***

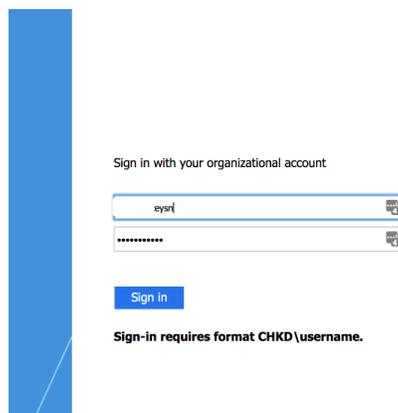
# First time sign in to Zoom to connect with (INSERT NAME OF ORGANIZATION) credentials (needs to be done the first time)

*If this is your first time logging into Zoom through your PC or laptop, please follow these instructions below.*

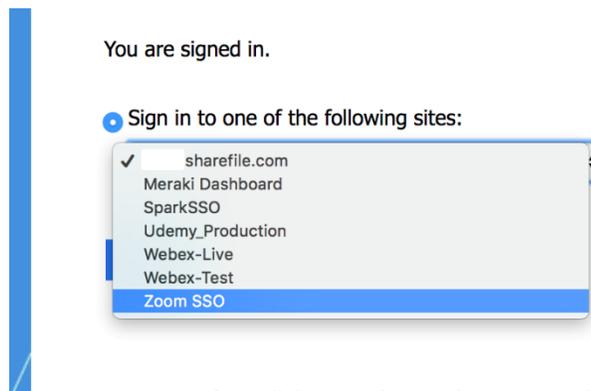
1. Go to Sign in to start process



2. Enter username and password in the (insert name of organization)\username format



3. Make sure that the Zoom SSO selection is highlighted



4. Click Sign-in to "Connect"
5. Once you click "Connect" you will see your profile. From there your account is created

## Scheduling a Visit in Zoom (Practice Designee)

Please work with your practice manager to discuss the best workflow for scheduling appointments. This guide will provide the process, however you will need to find a method that will best suit your practice. Although this states Practice Designee you (Provider) can schedule meeting from your account as well. Note if you schedule the appointment, you may not need to notate everything in step 12. Your practice designee will need to provide you with everything in step 12 and any other information you have developed in your practice specific workflow.

1. Go to (insert name of organization).zoom.us
2. Click on Sign In with your (INSERT NAME OF ORGANIZATION) network credentials
3. Go to meetings
4. Schedule a new meeting Settings:

The screenshot displays the Zoom 'Schedule a Meeting' interface. On the left is a navigation sidebar with 'Meetings' selected. The main content area is titled 'Schedule a Meeting' and includes the following fields and options:

- Topic:** My Meeting
- Description (Optional):** Enter your meeting description
- When:** 04/03/2020, 10:00 AM
- Duration:** 0 hr, 30 min
- Time Zone:** (GMT-4:00) Eastern Time (US and Canada)
- Recurring meeting:**
- Meeting ID:**  Generate Automatically,  Personal Meeting ID 837-153-0292
- Meeting Password:**  Require meeting password, 857430
- Video:** Host:  on,  off; Participant:  on,  off
- Audio:**  Telephone,  Computer Audio,  Both. Dial from United States of America. [Edit](#)
- Meeting Options:**  Enable join before host

A highlighted orange box contains the following text: "Your Zoom Basic plan has a 40-minute time limit on meetings with 3 or more participants. Upgrade now to enjoy unlimited group meetings. Contact Ody Granados. Do not show this message again".

5. In the "Description" add the Practice-Location- Provider-MRN
6. Make sure that length is changed to 30 minutes
7. Make sure the require meeting password box is **CHECKED**
8. Make sure video for host and participant buttons are set to **ON**
9. Make sure **ENABLE JOIN BEFORE HOST** is checked (see highlighted area below)

Last Revised (Insert Date/Time)

---

Recurring meeting

---

Meeting ID  Generate Automatically  Personal Meeting ID 837-153-0292

---

Meeting Password  Require meeting password # 857430

---

Video

Host  on  off

Participant  on  off

---

Audio  Telephone  Computer Audio  Both

Dial from United States of America [Edit](#)

---

Meeting Options

Enable join before host

Mute participants upon entry [🔒](#)

Enable waiting room

Only authenticated users can join

---

10. Click save to create meeting

11. Notate meeting ID and give information to patient along with Patient Information Packet and Zoom Quick Guide

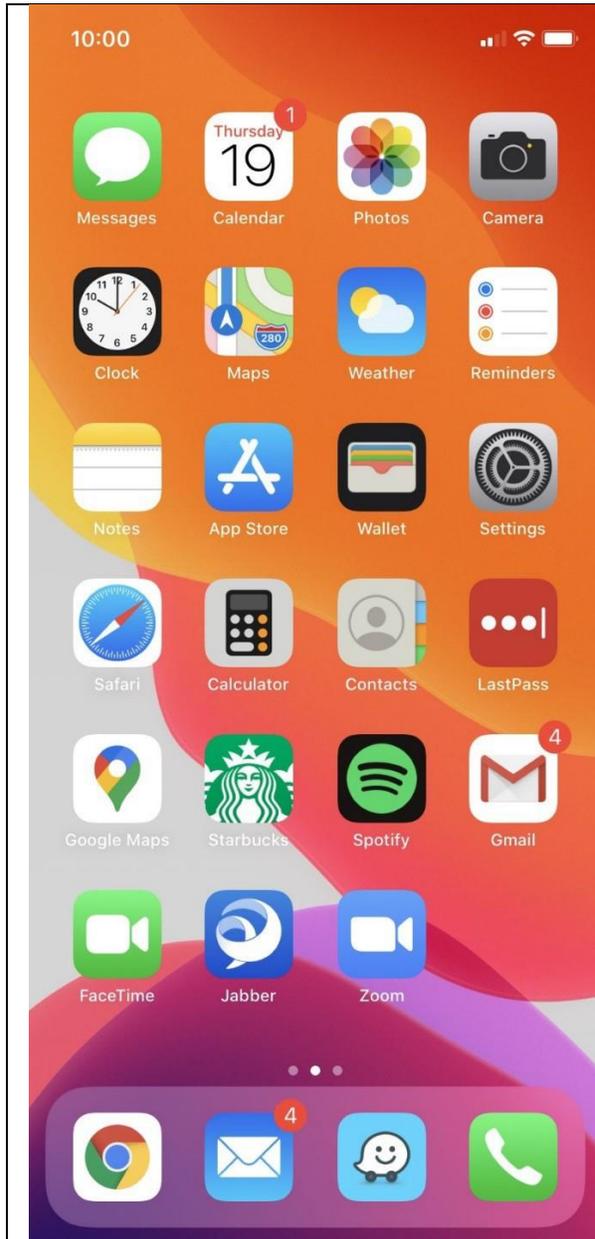
12. Give Provider meeting information along with (refer to Telehealth Data Form)

- a. Name of telehealth contact and relationship to patient: ie Suzanne Brixey, mom
- b. Patient Name:
- c. Patient MRN
- d. Patient DOB
- e. Patient Chief Complaint
- f. Meeting number and password (highlighted above)

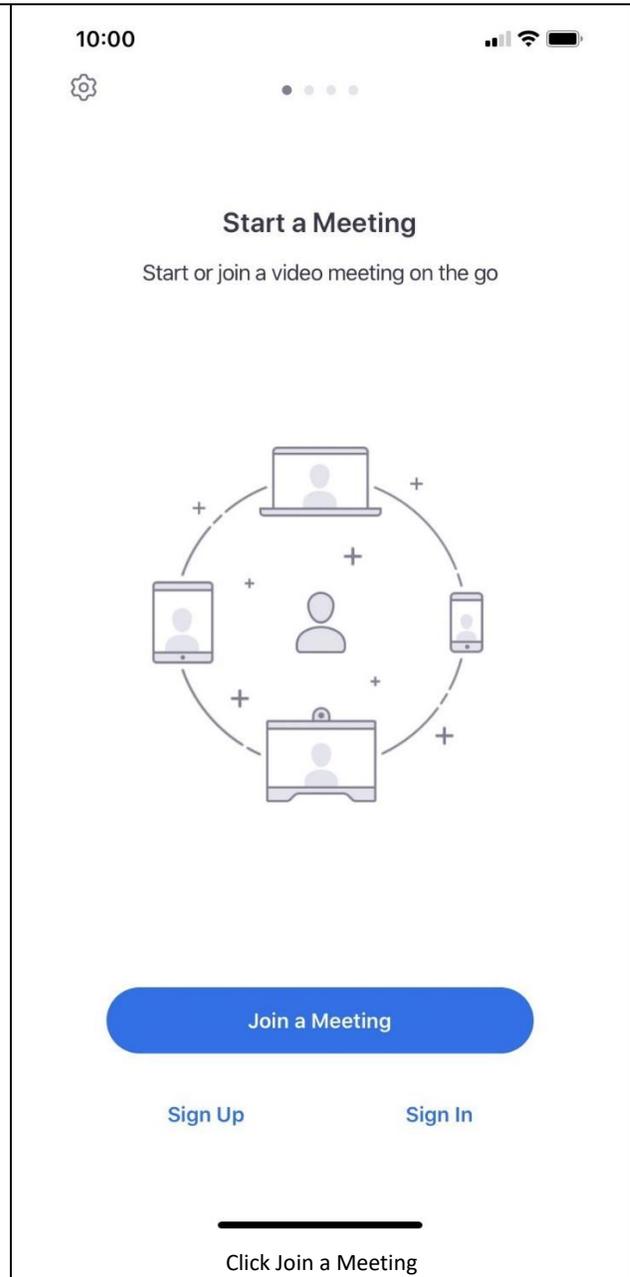
## Starting Zoom Meeting with iPads, iPhones, or Android devices

This guide is for patients that are already scheduled and you would like to conduct the meeting through your iPad, iPhone, or Android devices.

- Find the previously downloaded app on your device. If not downloaded, go to the “Start your Zoom Account” in the guide for instructions
- Click “Join a Meeting”

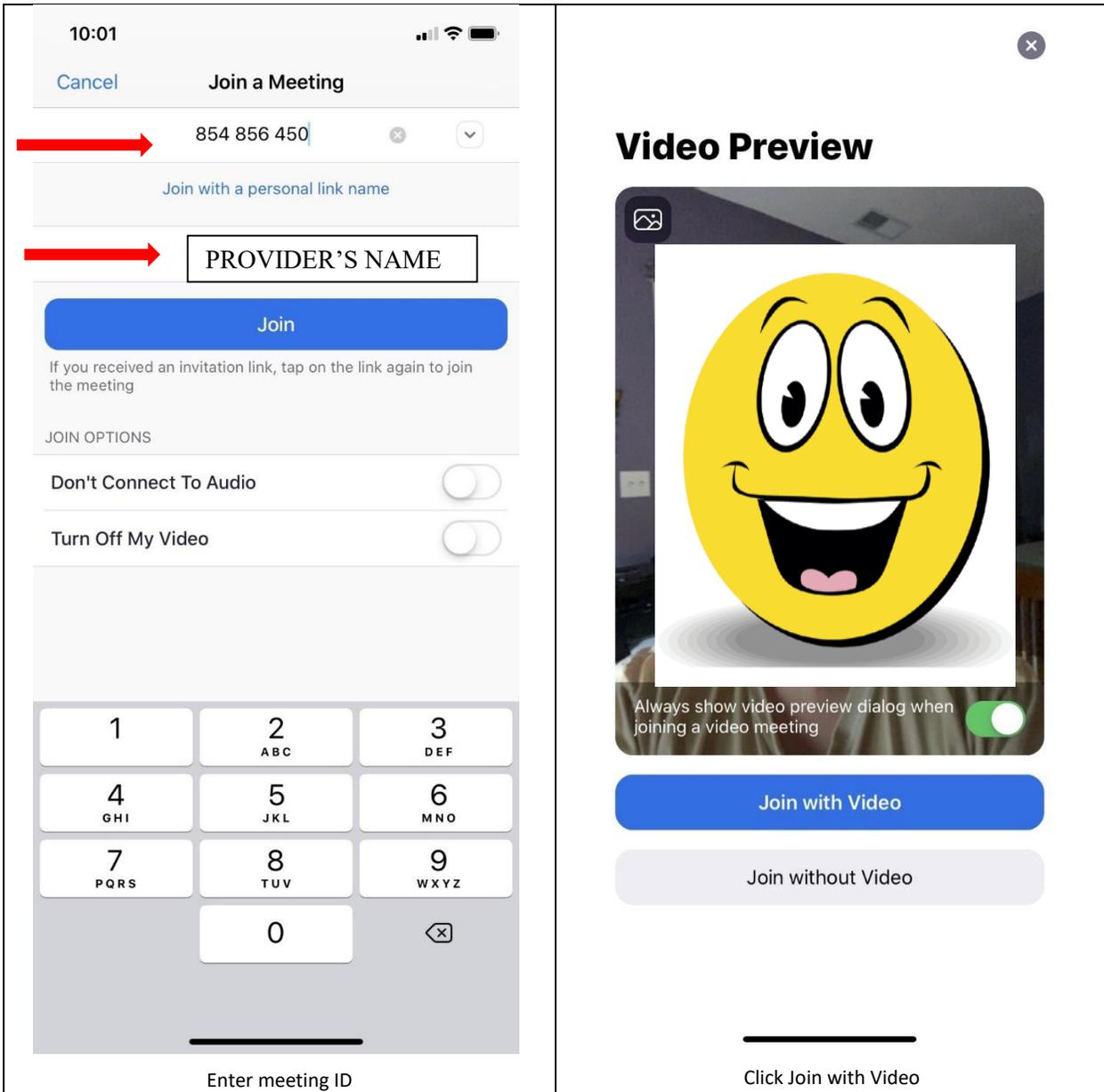


Launch Zoom



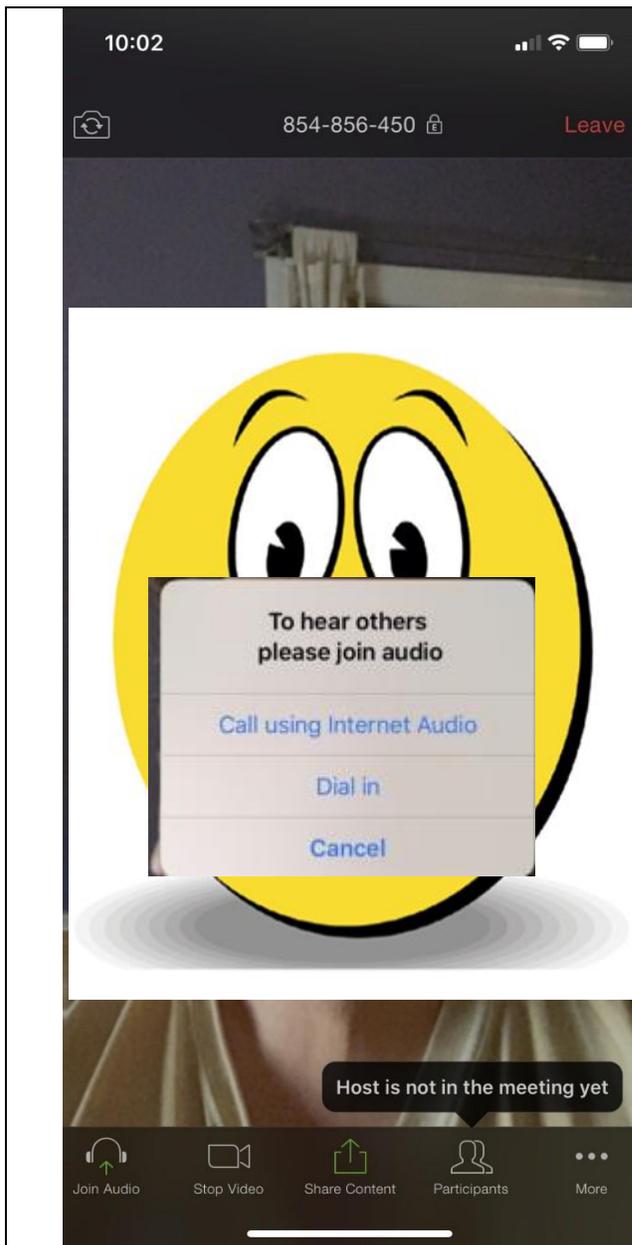
Click Join a Meeting

- Enter the Meeting number and your name
- Click “Join”

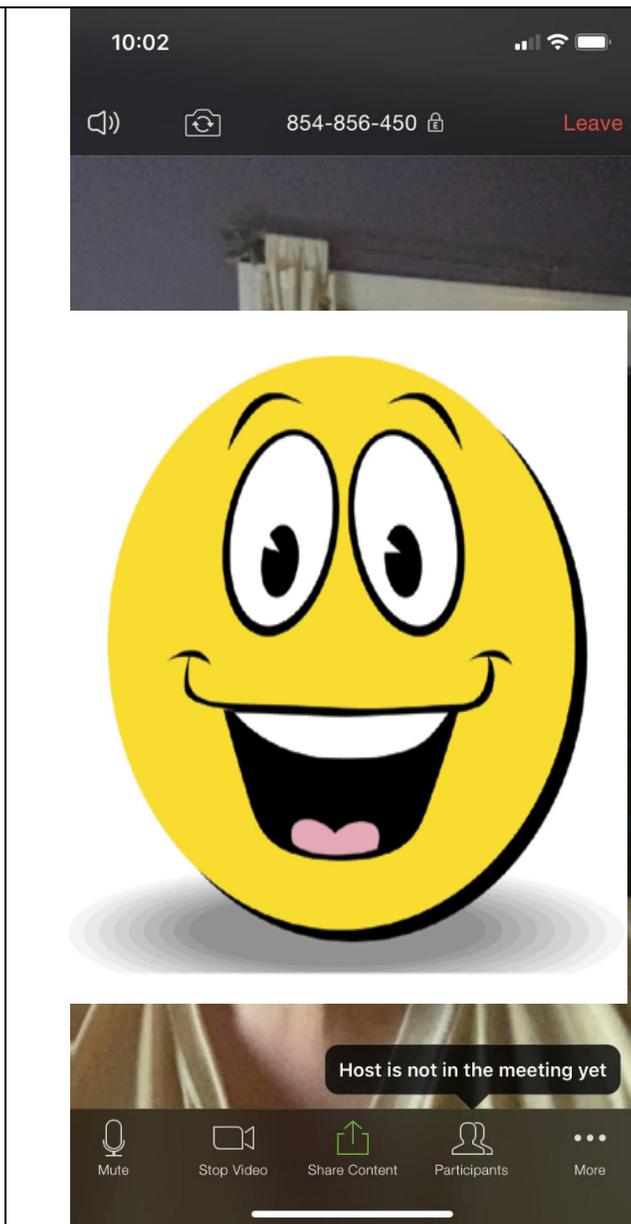


***Enter your name under Join with a personal link name***

- Click “Call using Internet Audio”
- Start the meeting with the appropriate greeting and patient identified questions outlined in the Provider Workflow below.



Click on Call using Internet Audio



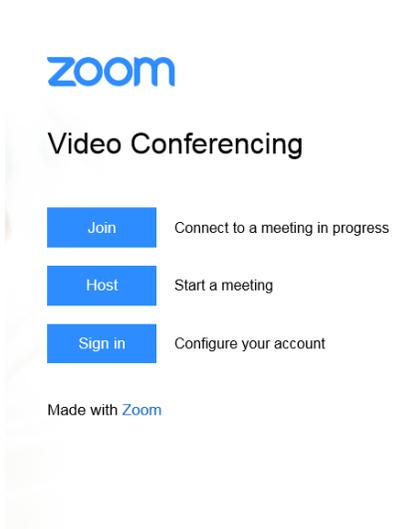
Please note that if your practice designee schedules the meeting, the “Host is not in meeting yet” will always remain on screen



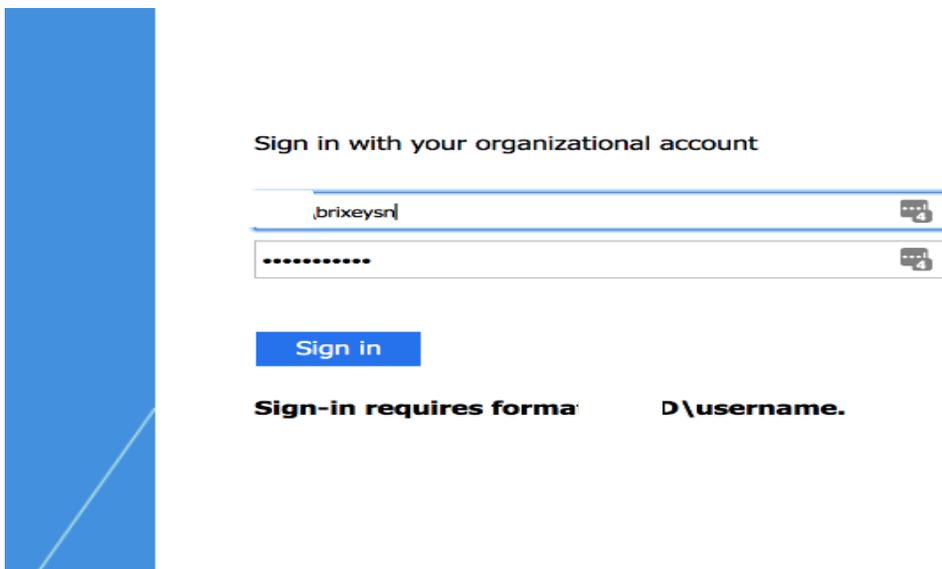
Now you're ready for your encounter. Please remember to click the red LEAVE link in the upper right corner to end the session.

# Setting up Zoom Personal Room

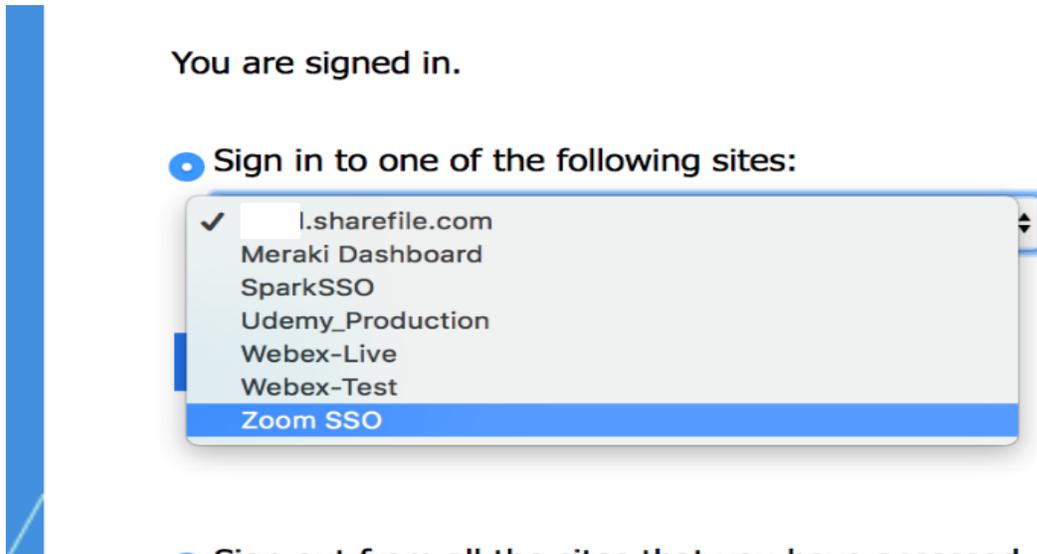
1. Type (insert name of organization).zoom.us in your web browser.



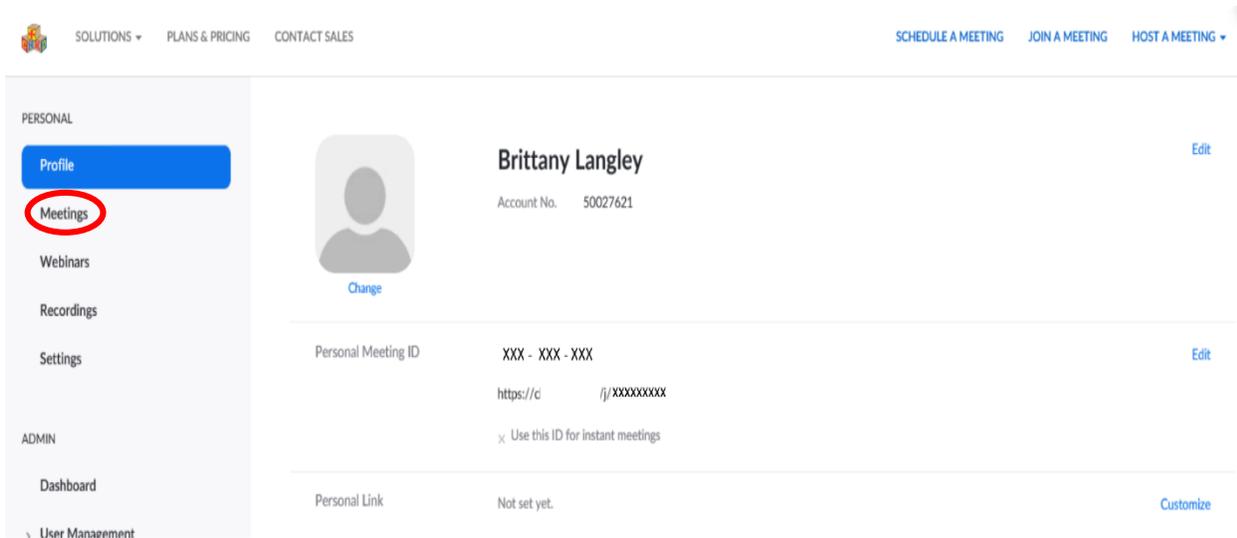
2. One the zoom website click "Sign In"
3. If this is your first time logging in please use steps 4-6. If this is not your first time logging in please skip to step 7 for logging in.
4. Enter you (INSERT NAME OF ORGANIZATION) username and password in the (insert name of organization)\username format



5. Make sure that the Zoom SSO selection is highlighted



6. Click Sign-in to connect
7. Once you are signed in you will see your profile. On the left hand tool bar select meetings.



## 8. Click “Personal Meeting Room”

The screenshot shows the Zoom web interface. At the top, there are navigation links: SOLUTIONS, PLANS & PRICING, CONTACT SALES, SCHEDULE A MEETING, and JOIN. On the left, a sidebar menu is visible with sections for PERSONAL (Profile, Meetings, Webinars, Recordings, Settings) and ADMIN (Dashboard, User Management, Room Management, Account Management, Advanced). The 'Meetings' section is highlighted. The main content area is titled 'Upcoming Meetings' and has three tabs: 'Upcoming Meetings', 'Previous Meetings', and 'Personal Meeting Room' (which is circled in red). Below the tabs is a 'Schedule a New Meeting' button. A table with columns 'Start Time', 'Topic', and 'Meeting ID' is shown, but it is empty. A message states: 'The user does not have any upcoming meetings. To schedule a new meeting click Schedule a Meeting.' Below this, there is a section titled 'Save time by scheduling your meetings directly from your calendar.' with three options: 'Microsoft Outlook Plugin Download', 'Chrome Extension Download', and 'Firefox Add-on'.

## 9. Click “Edit Meeting” at the bottom of the screen

The screenshot shows the Zoom web interface for a meeting. The top navigation links are SOLUTIONS, PLANS & PRICING, CONTACT SALES, SCHEDULE A MEETING, JOIN A MEETING, and HOST A MEETING. The left sidebar menu is the same as in the previous screenshot, with 'Meetings' highlighted. The main content area shows meeting details for 'Brittany Langley's Personal Meeting Room'. The details include: Topic, Time (with 'Add to' buttons for Google Calendar, Outlook Calendar (iCS), and Yahoo Calendar), Meeting ID (837-153-0292), Meeting Password (Require meeting password), Join URL (https://chkd.zoom.us/j/XXXXXXXXXX) with a 'Copy the Invitation' button, Video settings (Host: Off, Participant: Off), Audio settings (Telephone and Computer Audio, Dial from United States of America), and Meeting Options (Enable join before host, Mute participants upon entry, Enable waiting room, Only authenticated users can join, Record the meeting automatically on the local computer). At the bottom right, there are three buttons: 'Edit this Meeting' (circled in red), 'Start this Meeting', and 'Help'.

## 10. Click Enable waiting room and then Save

The screenshot shows the Zoom meeting settings interface. On the left is a navigation sidebar with sections for Webinars, Recordings, Settings, ADMIN, and Advanced. The main content area is titled 'Meeting Settings' and includes sections for Meeting Password, Video, Audio, Meeting Options, and Alternative Hosts. In the Meeting Options section, the 'Enable waiting room' checkbox is checked, and a red arrow points to it. At the bottom, the 'Save' button is circled in red.

Meeting Password	<input type="checkbox"/> Require meeting password
Video	Host <input type="radio"/> on <input checked="" type="radio"/> off
	Participant <input type="radio"/> on <input checked="" type="radio"/> off
Audio	<input type="radio"/> Telephone <input type="radio"/> Computer Audio <input checked="" type="radio"/> Both
	Dial from United States of America <a href="#">Edit</a>
Meeting Options	<input type="checkbox"/> Enable join before host
	<input type="checkbox"/> Mute participants upon entry
	<input checked="" type="checkbox"/> Enable waiting room
	<input type="checkbox"/> Only authenticated users can join
<input type="checkbox"/> Record the meeting automatically on the local computer	
Alternative Hosts	<input type="text" value="Example: mary@company.com, peter@school.edu"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

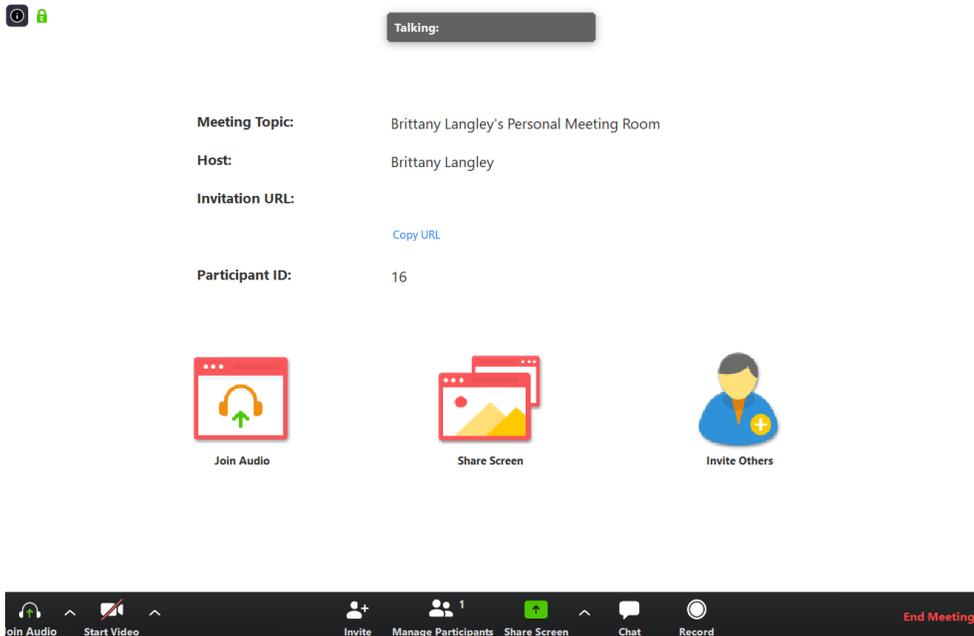
## 11. Once you are ready to start seeing patients click "Start Meeting"

The screenshot shows the Zoom Personal Meeting Room page. The top navigation bar includes 'SCHEDULE A MEETING', 'JOIN A MEETING', and 'HOST A MEETING'. The main content area is titled 'Personal Meeting Room' and displays meeting details such as Topic, Time, Meeting ID, Meeting Password, Join URL, Video, Audio, and Meeting Options. The 'Start Meeting' button is circled in red.

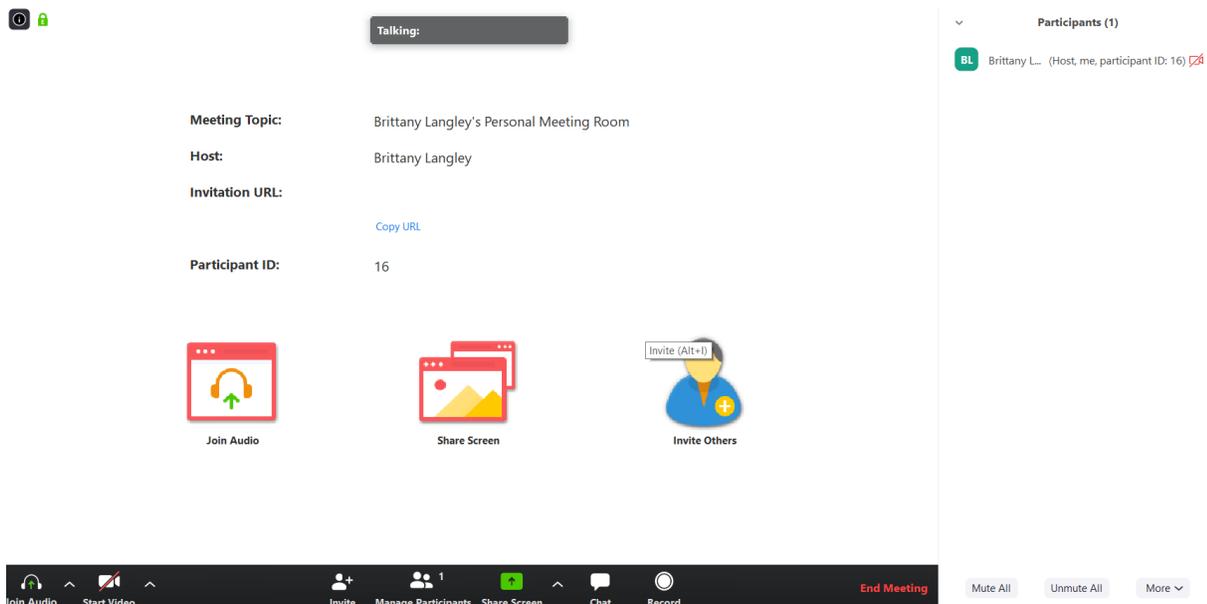
Upcoming Meetings	Previous Meetings	Personal Meeting Room	Meeting Templates
Topic: Brittany Langley's Personal Meeting Room			
Time: Add to <a href="#">Google Calendar</a> <a href="#">Outlook Calendar (.ics)</a> <a href="#">Yahoo Calendar</a>			
Meeting ID: 837-153-0292			
Meeting Password: <input type="checkbox"/> Require meeting password			
Join URL: <a href="https://chkd.zoom.us/j/8371530292">https://chkd.zoom.us/j/8371530292</a> <a href="#">Copy the invitation</a>			
Video	Host	Off	
	Participant	Off	
Audio: Telephone and Computer Audio			
Dial from United States of America			
Meeting Options	<input type="checkbox"/> Enable join before host		
	<input type="checkbox"/> Mute participants upon entry		
	<input checked="" type="checkbox"/> Enable waiting room		
	<input type="checkbox"/> Only authenticated users can join		

## Starting a Personal Meeting Room

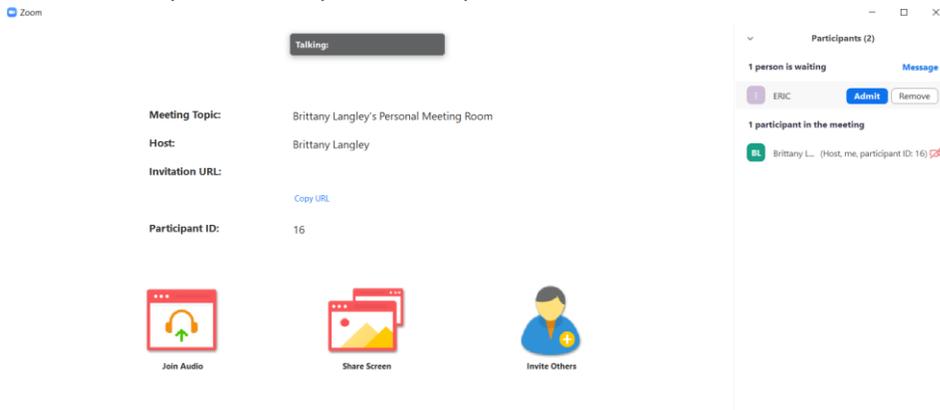
1. Once you click “Start Meeting” in personal meeting room this screen below will appear.



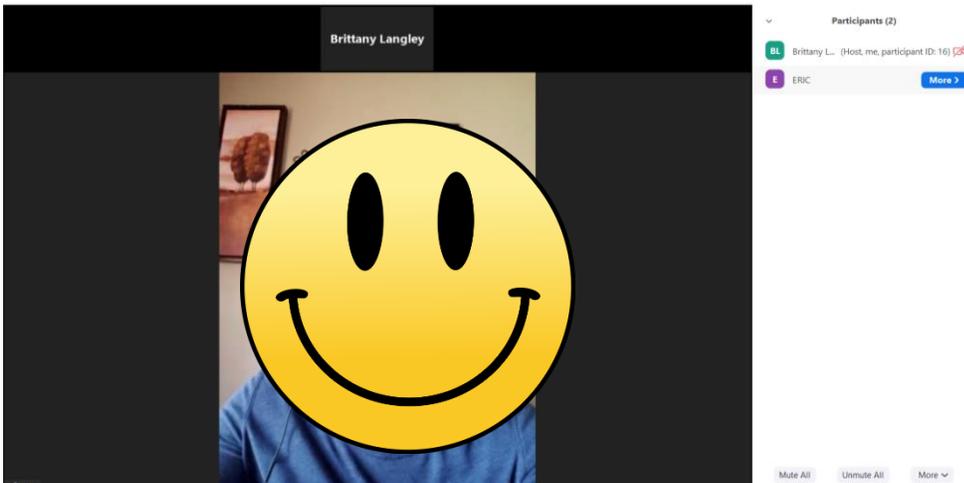
2. Click “Manage Participants” to view people ready to join your meeting room. Once you click this Participants will appear on the right hand side of the tool bar



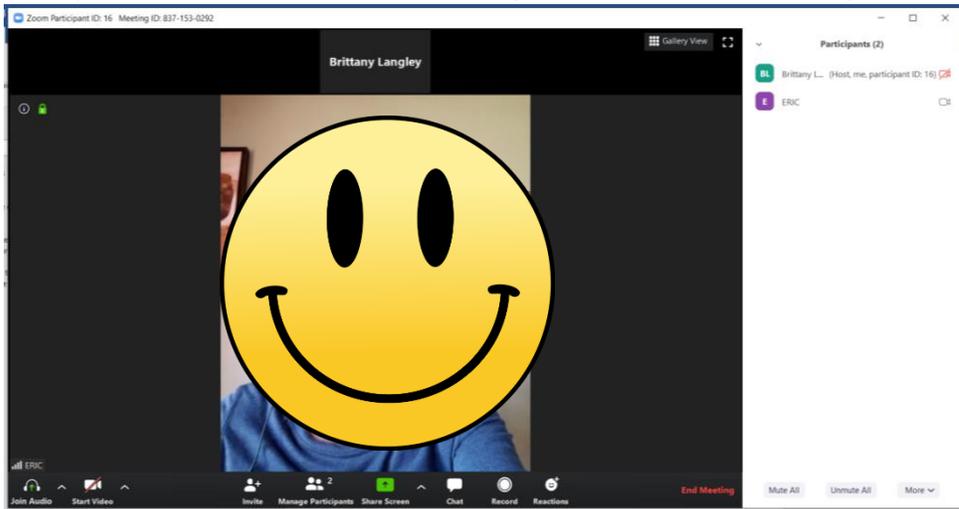
3. Once you are ready to see the patient click "Admit"



4. Once you click "Admit" they will be allowed in and their video will start



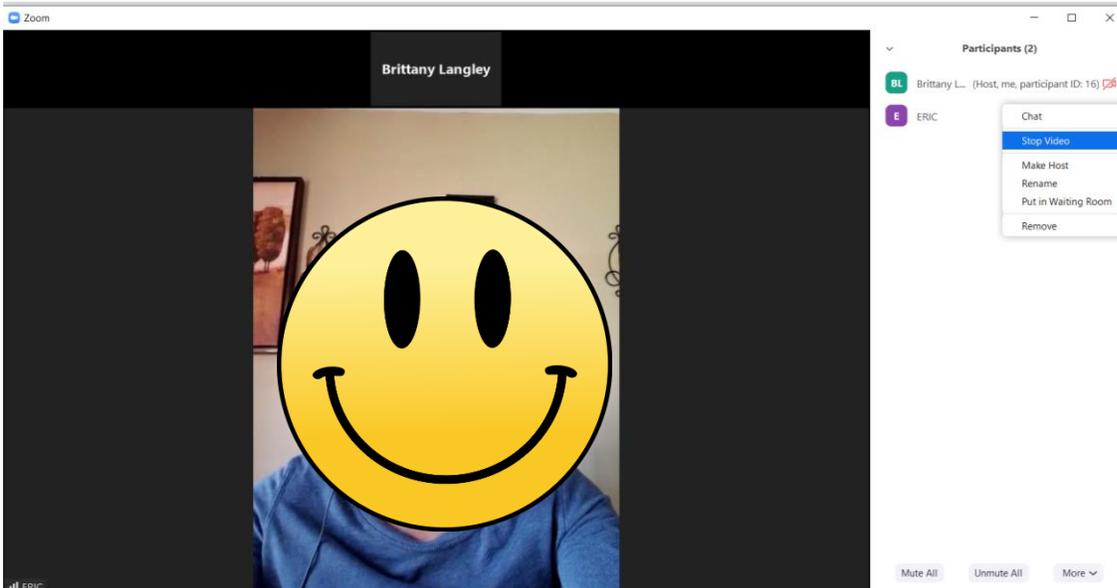
5. Once you finish the visit, click “End Meeting” and select “Leave Meeting”.



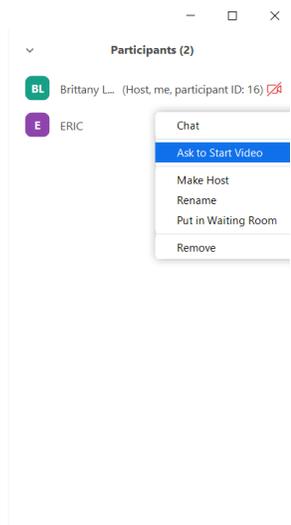
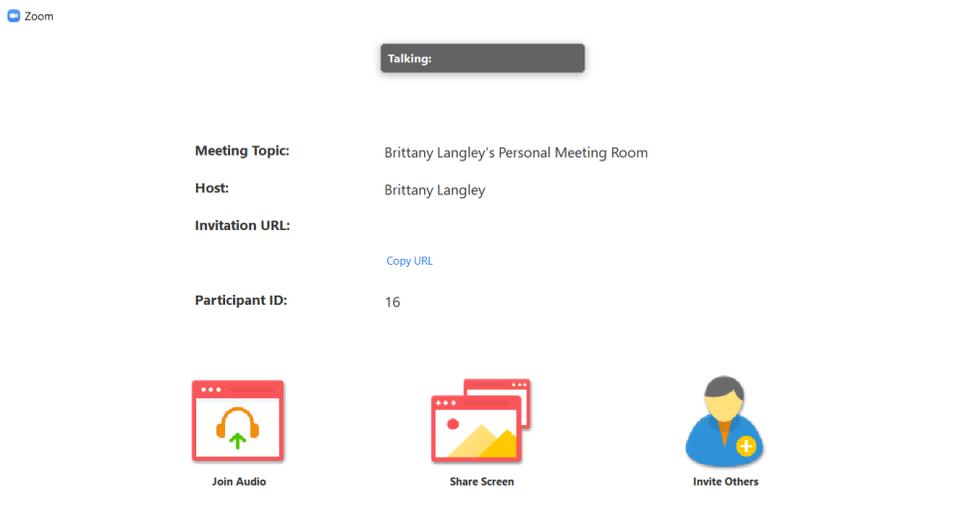
## ZOOM Personal Room Tips

### Stop and Start Video

1. If you would like to stop the video but not the visit, click “Stop Video” beside patient name.



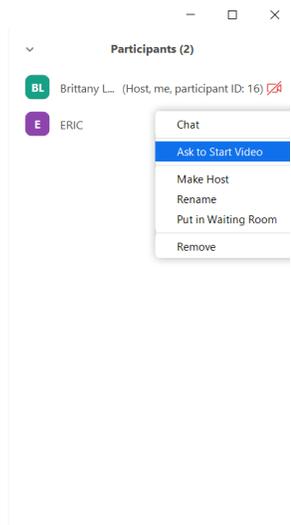
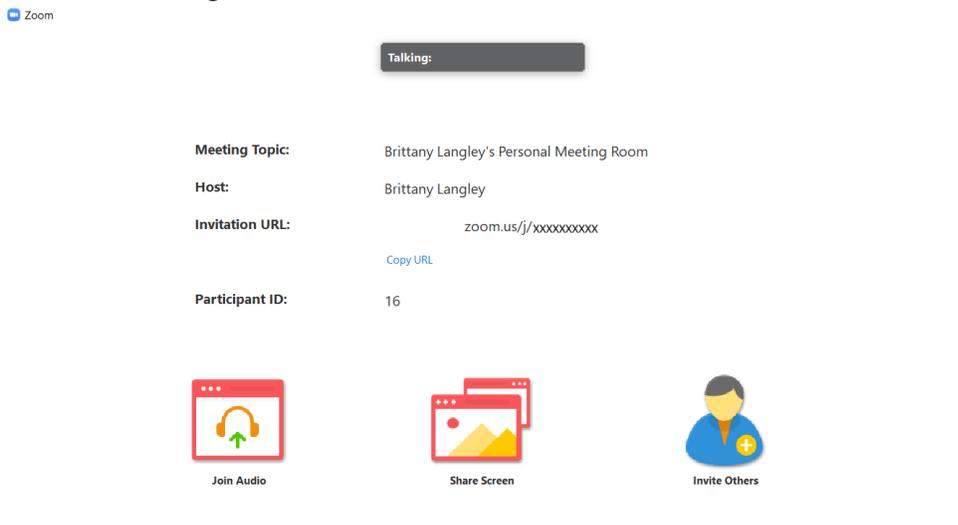
2. Once you are ready to start the video again click, “Ask to Start Video”



3. Patient will have start the video on their phone/tablet/PC

### Change patient name

1. On the right side of screen click "Rename"



2. Type in the name of the patient

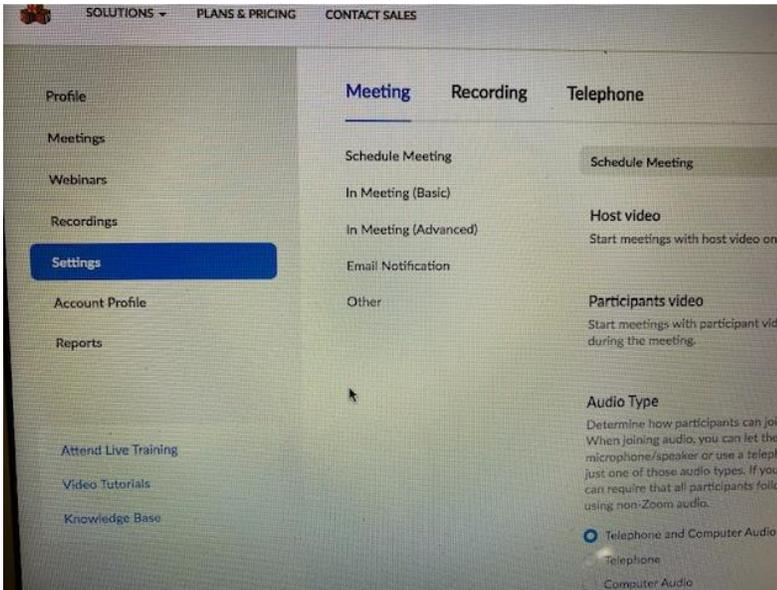
### Bottom Screen Options

1. Hover over the bottom of the screen to the options

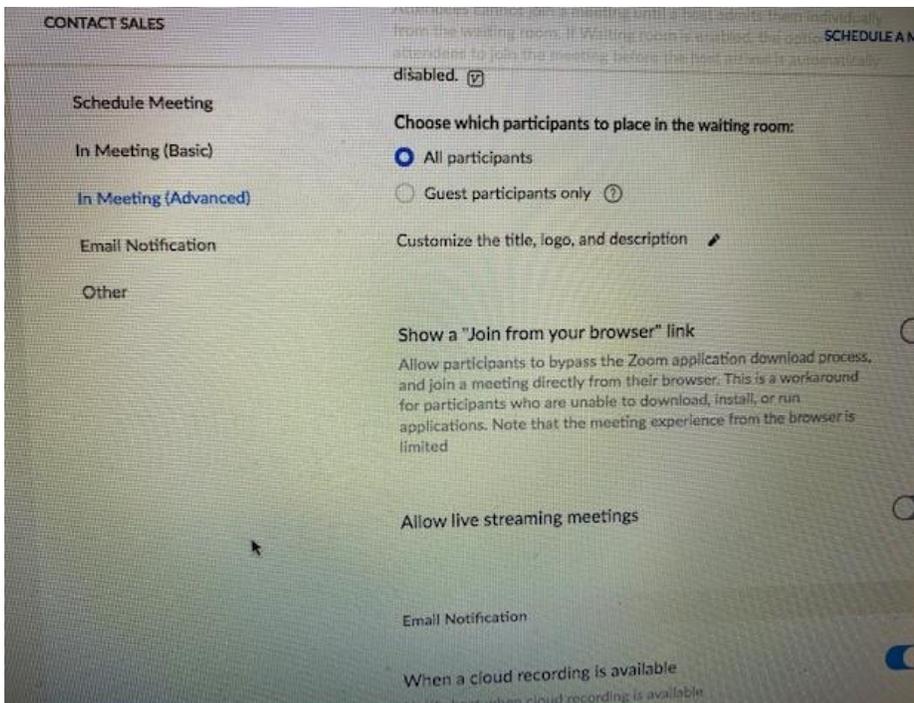


## Customize Your Waiting Room

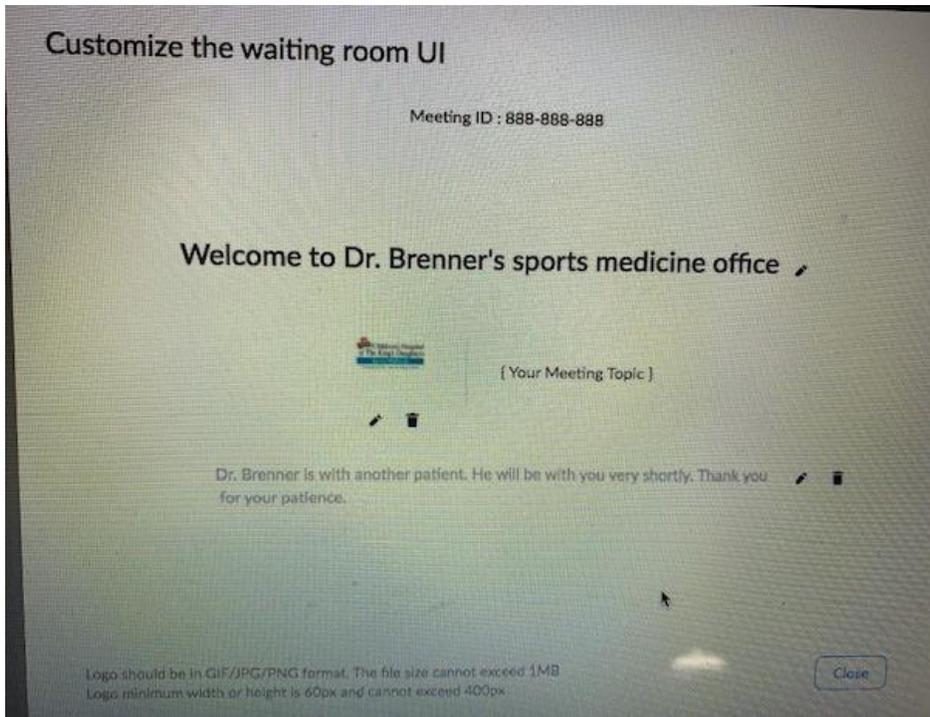
1. Sign in to Zoom account
2. Click on Settings on left column



3. Click on In Meeting (Advanced)
4. Scroll down to see option on right side "Choose which participants to place in waiting room"

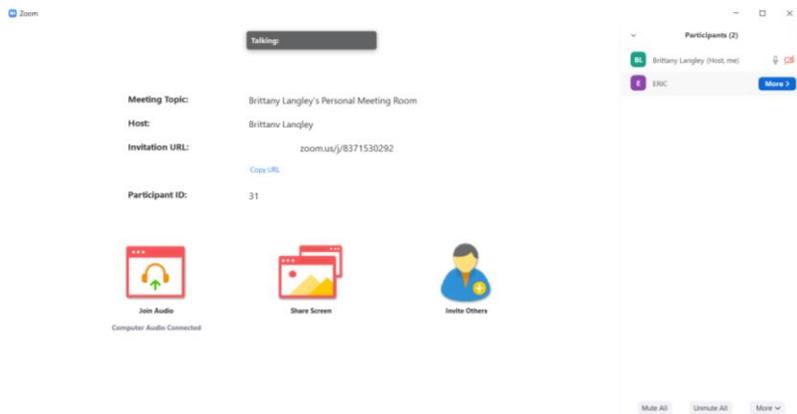


5. Click on pencil next to "customize title, logo and description"
6. Click on pencil on items you want to customize
7. Click Save

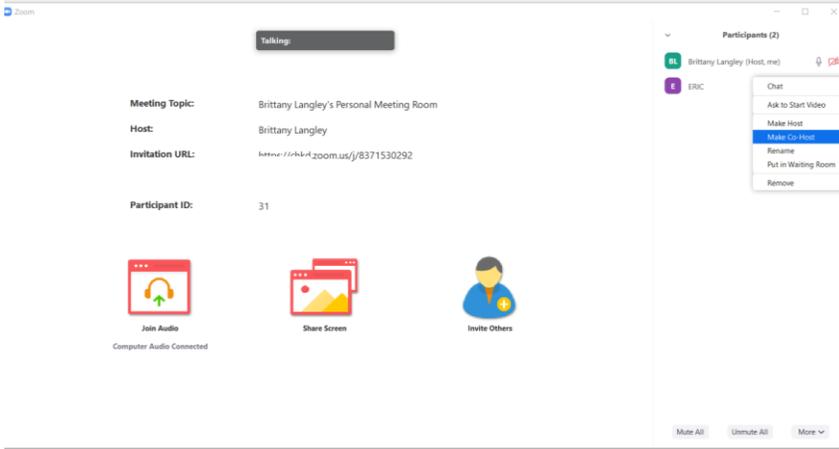


### Adding a Co-host

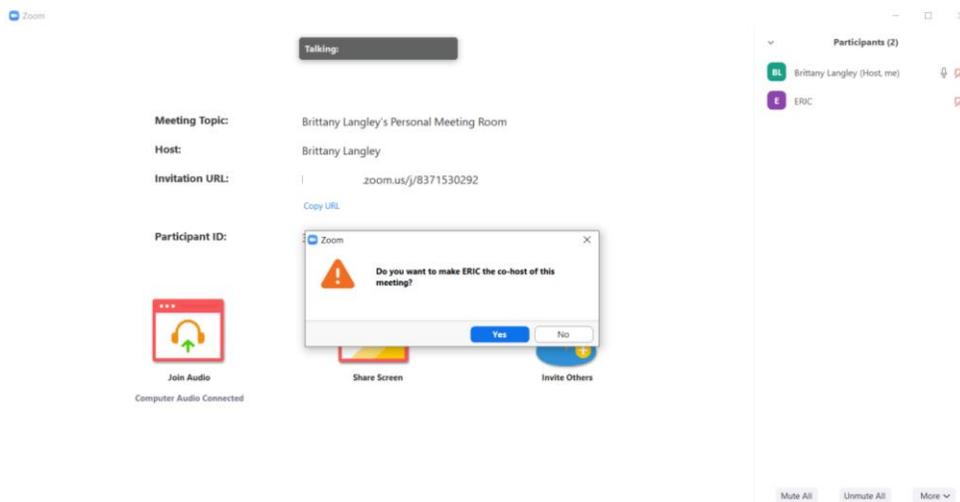
- 1) Once you have started the meeting "Admit" the person you wish to be a co-host
- 2) Hover over their name and click "More"



- 3) In the drop down box select "Make Co-Host"



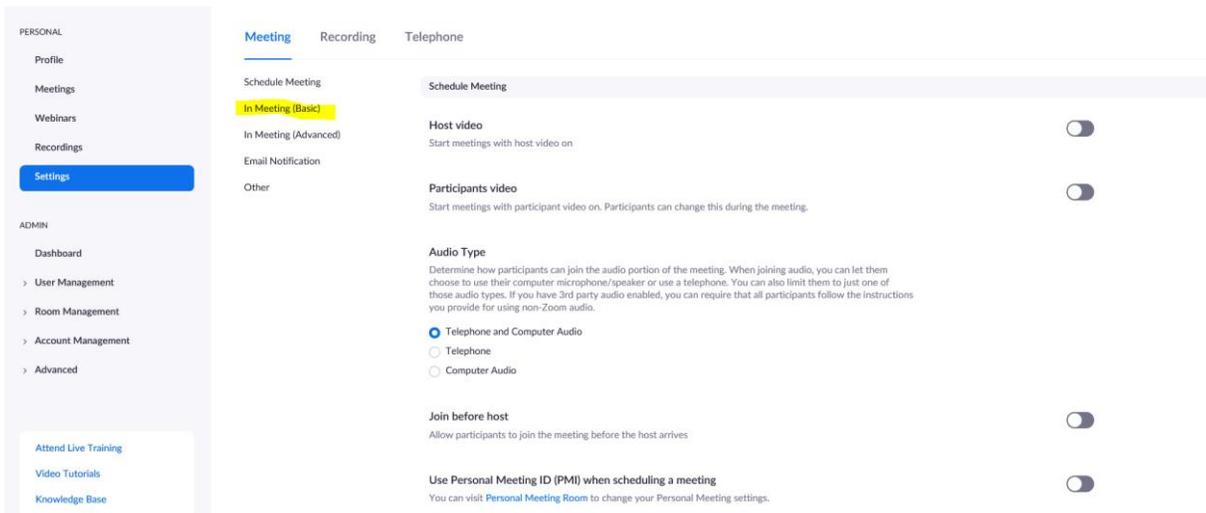
4) Click “Yes” to approve



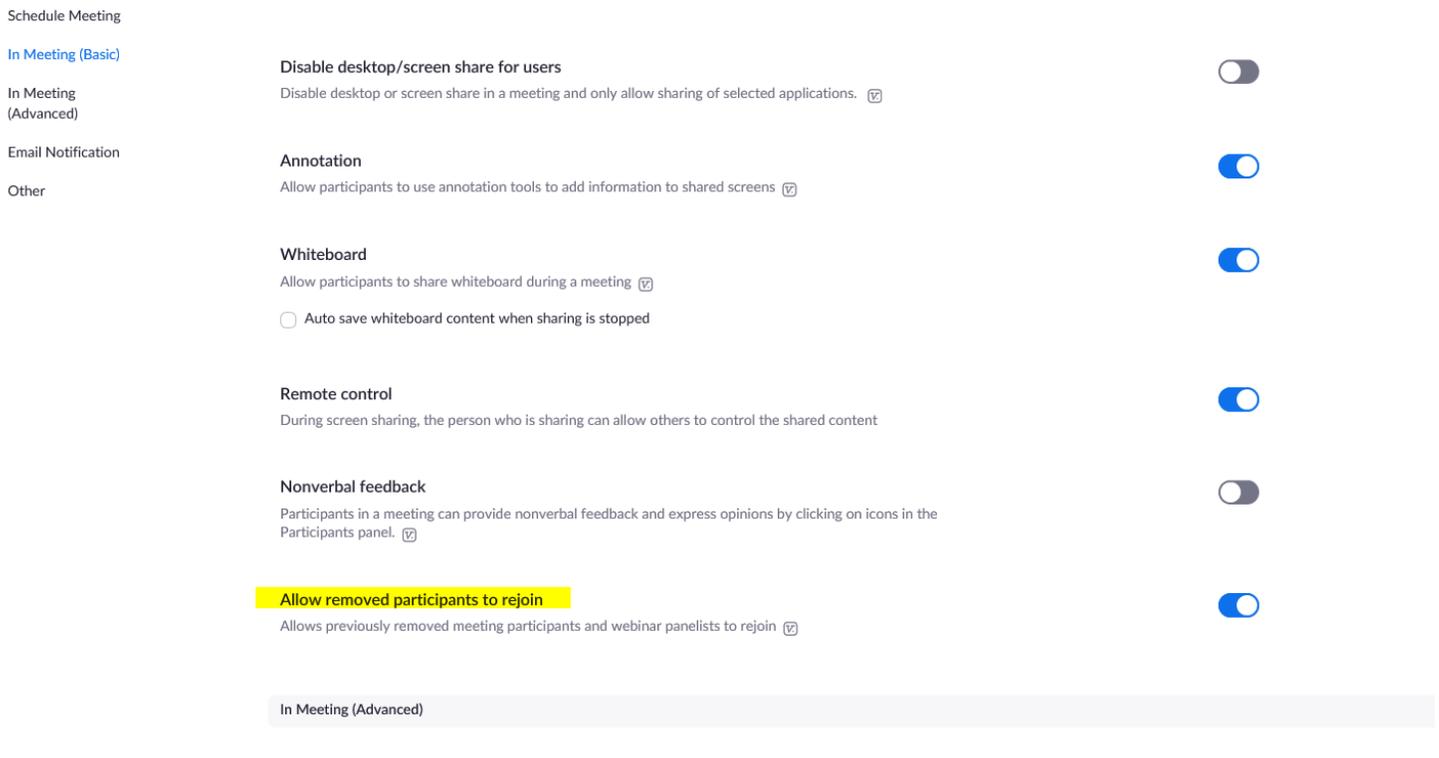
### **Allowing Removed Patients to Rejoin Waiting Room**

Once you remove a patient from the waiting room they will no longer be able to join the current and future meetings. If you would like to add them again to be able to join the meeting after you remove them, please follow these steps below:

1. Log onto Zoom with your PC/laptop
2. Click Settings and then click “In Meeting (Basic)”



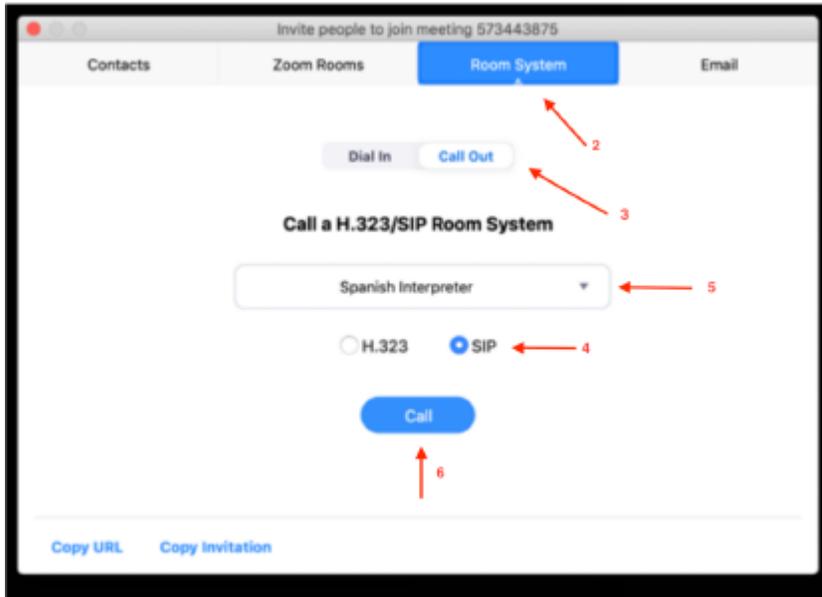
3. Scroll down until you see “Allow removed participants to rejoin” and select it



## How to use Stratus in Zoom

- 1) In a meeting, click “Invite”
- 2) Click “Room System”
- 3) Select “Call Out”
- 4) Click on SIP radio button
- 5) Select language
- 6) Click Call

Interpreter will join the meeting.



## For Practice Managers/ Directors/ Practice Designee

This area of the guide is designed to aid Practice Manager, Directors, and Practice Designee on how to use the Zoom and WebEx platforms and establish a workflow with your providers. At the end of this guide is an Appendix of an example of what another office has used. Please follow the steps in the “For Providers” section of this guide in starting your Zoom Account, First Time signing into Zoom, Scheduling a Zoom meeting for PC, and any other resources that will help the workflow you have designed with the physician.

## Workflow for Schedulers

*Please work with your Practice Manager/Director/Division Director to implement the workflow below as it applies to your division(s).*

### Patient Scheduled on (INSERT NAME)

In response to the COVID-19 pandemic, we are expanding our services through telehealth. To ensure we provide our patients with the proper resources and care, we have developed a workflow to support you in managing various scenarios. As we are moving to social distancing we want to determine if patients have an immediate need to be seen in the office, rescheduled, or have a telehealth visit. Please follow the steps and guidance below.

Patients that are already scheduled for an office visit will need to be called to assess patient needs for an in office appointment.

Caller: Hello this is [Your Name] calling from [Your Division]. I see you have a scheduled

Last Revised (Insert Date/Time)

appointment for [DATE, TIME, and LOCATION]. (INSERT NAME OF ORGANIZATION) is strongly encouraging Telehealth appointments to aid in limiting exposures for our patients and staff. While we are seeing some patients in office, in an effort to keep you safe, we are seeing most patients using Telehealth. During your Telehealth visit, the physician will decide if the patient requires xray, labs, or an in-person exam. For a Telehealth appointment, you would need a laptop, tablet or cell phone that has both audio and video chatting capabilities. The application we use is Zoom. Would you be interested in scheduling a telehealth appointment today?

Conduct the assessment

*Note: If parent/guardian/patient does not want to conduct the screening, advise them that we would have to reschedule their visit. If they are experiencing a medical emergency or need immediate care, please direct them to an emergency room that is closest to them.*

Rescheduled: If it is determined that patient needs to reschedule their appointment please schedule their appointment after (INSERT NAME OF ORGANIZATION) recommended date.

Office Visit: If it is determined that the patient needs to come into the office for a visit, please follow the current office visit protocols.

Telehealth: If it is determined that the patient would be best served with a Telehealth visit, please ask the patient the following questions:

1. Do you have a computer, laptop, smart phone, or tablet with a camera and microphone for joining sessions?
2. Do you have a working internet connection?

They must answer yes to both questions in order to have a successful video telehealth visit. If the patient does not have the necessary tools and technology, please alert the nurse or provider to determine if patient needs to be seen in office or conduct a telephone (audio only) visit.

For a telehealth visit, the scheduler must review and obtain the applicable forms (listed below) verbally with a witness. On the forms, you must notate forms were reviewed with the parent. Example: *“Parent directed to (INSERT NAME OF ORGANIZATION).org website to electronically view and read consent form. Consent form reviewed with the parent. Parent verbalized reviewing and understanding of the consent form with any questions answered.”*:

1. Make sure the patient is scheduled in (insert name of EMR) with the TH visit type.  
***The TH visit type will not allocate a copayment in (insert name of EMR).***
2. Telehealth Consent Form (if needed- valid for 1 year)
3. TPO (if needed- valid for 1 year)
4. (INSERT NAME OF DEPARTMENT) is requiring a parent/guardian present for the telehealth visit. Rare exceptions may occur without a parent/guardian. In this event, review and obtain the Unaccompanied Minor Form/

**When the above forms do have to be obtained Verbally, use the “Verbal” status when adding these documents types in (insert name of EMR) under Registration > Documents and Notices**

5. Obtain/ Verify insurance information, custody paperwork, etc
  
6. Log in to Zoom and schedule the appointment and notate the meeting ID number to give to parent/guardian, provider, and interpreter (if needed). Utilize the Zoom Scheduling Process for Practice Designee to schedule the appointment
7. Complete Patient Intake Form
8. Once you obtain the information, provide the parent/guardian/patient Telehealth connection information and send Telehealth Information Packet and How to Use and Install Zoom. Additional forms are found on [https://www.\(insert name of organization\).org/Patients-and-Families/Patient-Forms/](https://www.(insert name of organization).org/Patients-and-Families/Patient-Forms/)

Provide provider with (refer to Telehealth Data Form)

- a) Name of telehealth contact and relationship to patient: ie Suzanne Brixey, mom
- b) Patient Name:
- c) Patient MRN
- d) Patient DOB
- e) Patient Chief complaint:
- f) Meeting number (highlighted above)

*The provider will return the Telehealth Data form to practice designee and/or scheduler to properly discard.*

## **Referral/Patient call to schedule an appointment**

In response to the COVID-19 pandemic, we are expanding our services through telehealth. To ensure we provide our patients with the proper resources and care, we have developed a workflow to support you in managing various scenarios. As we are moving to social distancing, we want to determine if patients have an immediate need to be seen in the office, or have a telehealth visit. Please follow the steps and guidance below.

### Referral Workflow

Call patient and discuss patient concerns. Conduct an initial travel screening and complete the intake form. Discuss the potential ability for a telehealth visit and their willingness to try this option. Then conduct the assessment.

### Caller Workflow

Parent/Guardian/Patient calls to schedule an appointment discuss their concerns, initial travel screening, and complete the intake form. Discuss the potential ability for a telehealth visit and their willingness to try this option. The conduct the assessment.

*Note: If parent/guardian/patient does not want to conduct the screening, you will advise them that we would have to reschedule their visit. If they are experiencing a medical emergency or need immediate care, please direct them to the emergency room closest to them.*

### **Office Visit or Telehealth Visit**

Office Visit: If it is determined that the patient needs to come into the office for a visit, please follow the current office visit protocols

Telehealth: If it is determined that the patient would be best served with a Telehealth visit please follow the Patient Scheduled on (INSERT NAME) Telehealth instruction

### **Initiating Zoom Visit Tips**

Before beginning a Zoom visit please exam your surrounding area. Make sure any information that contains PHI is not in sight, clean the desk or room area, and close the door behind you. Use Zoom Quick Start guide to Start Zoom meeting.

### **Avoid Common Errors**

- Not checking equipment and starting on time
- Not following HIPAA guidelines
- Not checking the background
- Staying within the screen
- Inappropriate clothing choices
- Incorrect eye gaze
- Not muting the mic
- Charting and looking down
- Forgetting the “small talk”

### **Steps to Remember**

- Assure a consent for telehealth has been obtained
- Secure your area for privacy
- Assure that you are seen and heard by the client
- Have a clear beginning, middle and end of the visit

- Lean into the camera
- Nod your head for encouragement
- Use words of empathy

*\*Remember to ALWAYS mute your audio prior to a visit. Do not say anything around the computer that you would not want clients to hear*

## WebEx Telehealth Guide

*Use as an alternative if Zoom is not working properly*

**Overview:** Cisco WebEx is (INSERT NAME OF ORGANIZATION)HS's corporate teleconferencing solution. Cisco WebEx can be downloaded and installed and is available for Windows, PC, iOS, and Android. This guide will help you get started with WebEx

- iOS iPhones/iPads – Search for and download Cisco WebEx Meetings in the **App Store**
- Android – Search for and download Cisco WebEx Meeting in the **Google Play Store** or **Amazon Appstore for Android**. After opening WebEx Meetings, accept the Terms and Conditions to use the app.
- Windows & Mac - <https://www.webex.com/downloads.html> (run and follow download directions)

### Equipment Requirements

(INSERT NAME OF ORGANIZATION) and Personal workstations/laptops equipped with webcam and microphone

4) WebEx may be accessed and used via [https://\(insert name of organization\).webex.com](https://(insert name of organization).webex.com)

5) The WebEx application does not need to be installed on the workstation/laptop

(INSERT NAME OF ORGANIZATION) iPads

- If WebEx is not installed on the device, submit a HEAT ticket to IS with the asset ID.

(INSERT NAME OF ORGANIZATION) iPhone

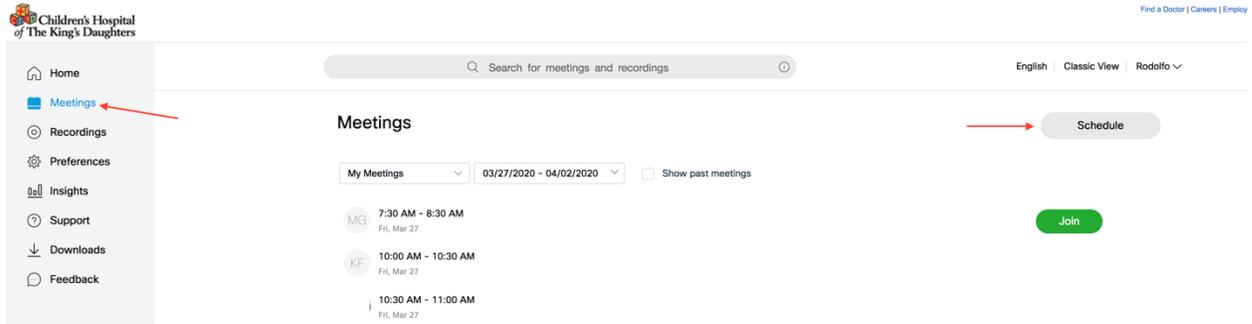
- Install the Cisco WebEx Meetings app via the App Store

Personal iPads/Tablets/Phones

- Install the Cisco WebEx Meeting app via the App Store, Google Play or Amazon Appstore

## WebEx Quick Start for Scheduler/Practice Designee

- Go to (insert name of organization).webex.com
- Click on Sign In with your (INSERT NAME OF ORGANIZATION) network credentials
- Go to meetings
- Schedule a new meeting



- Change topic to <Practice or Division> <Location> <Provider> <MRN> (e.g. GI Oakbrooke Smith 123456) and Meeting Password to 1234

**Schedule a Meeting** Meeting templates Webex Meeting

Schedule for: Myself

Meeting type: Webex Meetings Pro Meeting

\* Meeting topic: GI Oakbrooke Smith 123456

\* Meeting password: 1234

Date and time: Friday, Mar 27, 2020 10:00 am Duration: 10 minutes (UTC-04:00) Eastern Time (US & Canada)

Attendees: Separate email addresses with a comma or semicolon

Show advanced options ^

Audio connection options

Enter the meeting password

Date and time: Friday, Mar 27, 2020 9:00 am Duration: 1 hour

Attendees

Show advanced options ^

Audio connection options

Agenda

Scheduling Options

- Make sure meeting password is **1234**

- Add email of provider **AND MAKE PROVIDER ALTERNATE HOST**

Meeting type: Webex Meetings Pro Meeting

\* Meeting topic: GI Oakbrooke Smith 12345

\* Meeting password: 1234

Date and time: Friday, Mar 27, 2020 10:00 am Duration: 10 minutes  
(UTC-04:00) Eastern Time (US & Canada)

Recurrence

Attendees: Separate email addresses with a comma or semicolon

→ SB Suzanne Brixey  | 

Show advanced options ^

Audio connection options

Agenda

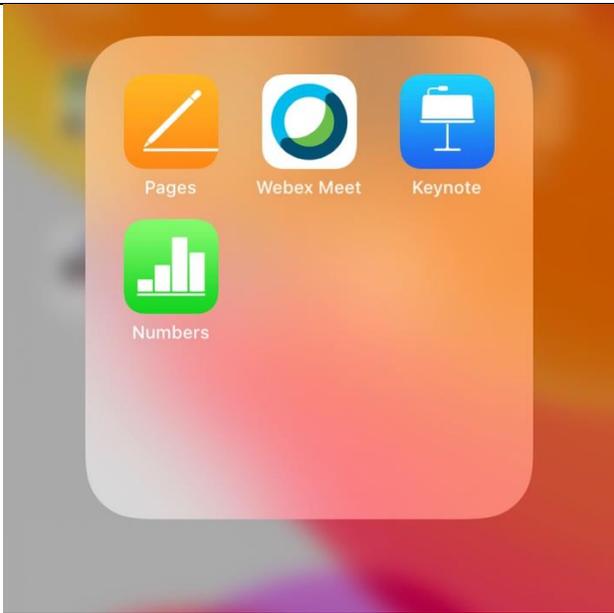
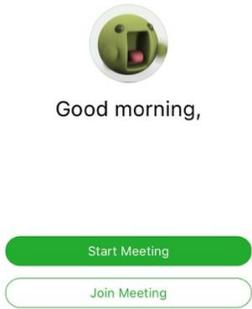
↑ Click this icon to make provider an alternate host

- Click schedule to create meeting
- Inform provider that meeting is ready and provide the following information:
  - Name of telehealth contact and relationship to patient: i.e. Jane Doe, mom
  - Patient Name:
  - Patient MRN
  - Patient DOB
  - Patient Chief complaint:
  - Meeting number:

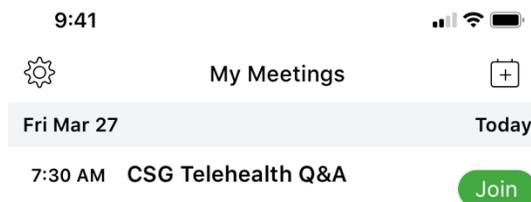
# WebEx Quick Start for Providers

MOBILE:

Process is the same for iPads, iPhones, or Android devices

 <p>Launch WebEx</p>	<p>Sign in to see all of your upcoming Webex meetings or to schedule a new meeting.</p> <p>Join Meeting Sign In</p> <p>Don't have an account? Sign Up</p> <p>Click Sign In</p>
<p>Email rodolfo.granados@chkd.org</p> <p>ENTER SITE URL</p> <p>.webex.com</p> <p>Use your (INSERT NAME OF ORGANIZATION) credentials to connect</p>	 <p>Good morning,</p> <p>Start Meeting</p> <p>Join Meeting</p> <p>When logged in, you get to your landing screen</p>

Swipe right to see your list of meetings, click join on correct meeting.



DESKTOP

Login to (insert name of organization).web.com

The screenshot shows a web application interface. At the top right, there are links for 'Find a Doctor', 'Careers', 'Employees', 'Locations & Directions', 'English', 'Classic View', and a 'Sign In' button with a red arrow pointing to it. Below this is a 'Join a Meeting' section with a text input field labeled 'Enter meeting information'. The main section is titled 'Personal Room' and includes a profile picture, a URL 'https://t...ebex.com/meet/rgranados', and a 'More ways to join' link. Below this are two buttons: 'Start a Meeting' with a dropdown arrow and 'Schedule'. The 'Upcoming Meetings' section lists three meetings:

Meeting ID	Time	Meeting Title	Action
MG	7:30 AM - 8:30 AM Fri, Mar 27	CSG Telehealth Q&A	Join
KF	10:00 AM - 10:30 AM Fri, Mar 27	CSSG Telehealth discussion	
	10:00 AM - 10:10 AM Fri, Mar 27	GI Oakbrooke Smith 12345 SAMPLE FOR GUIDE	Start

At the bottom of the meetings list is a link 'View all meetings'. A red arrow points to the 'Start' button for the third meeting.

Your web landing page has your list of meetings. Click Join to enter the meeting.

## Appendix- Sample Operational Workflows

### SAMPLE 1

- **How to schedule an appointment in (insert name of EMR)**
  - Pre- register appointment
    - Patient Options
    - Registration
    - Verify ALL information Demographic information
    - PCP information
    - Patient Contact information
    - Additional information page
    - Guarantor information
    - Insurance information
    - Click Finish
  - Verify current (expires after 1 year) or obtain new **Treatment and Payment Consent (TPO)**
    - If new TPO is needed, review the document with the patient  
**Patient can review forms online by going to:**
      - (insert name of organization).org
      - For Patients and Families
      - Patient Forms
      - Consent Forms (TPO and Telehealth)
    - If verbally reviewed and consented, obtain 2 party witness
  - Obtain **Telehealth Consent** –If verbally reviewed and consented, obtain 2 party witness
    - Review documents with the patient – Follow above steps
    - Review form with patient (Print, witness and scan into EMR and (insert name of EMR))
  - Verify how would the patient like to receive paperwork related to the appointment
    - Scanned and emailed
    - Mailed
  
- **How to schedule an appointment in Zoom**
  - Go to (insert name of organization).zoom.us
  - Click on Sign In with your (INSERT NAME OF ORGANIZATION) network credentials
  - Go to Meetings
  - Schedule a new meeting
  - **MUST BE DONE ON EVERY ZOOM APPOINTMENT for accurate data collection:**  
**Add in the TOPIC section this format- <location> <MRN> <Provider last name>**
  - Make sure that length is changed to 30 minutes
  - Make sure require meeting password is **UNCHECKED**
  - Make sure **VIDEO** for the **HOST** and **PARTICIPANT** is set to **ON**
  - Make sure **ENABLE JOIN BEFORE HOST** is checked
  - Click **SAVE** to create meeting
  - On the next screen, select the **Outlook** button to add the Zoom meeting to the provider's Outlook calen(insert

name). Departments may choose to leave out this step.

- Notate the **Meeting ID #** and give the information to the patient
  - Inform the patient that they will need to download the Zoom app
  - They must have the **Meeting ID #** to connect to Zoom with Provider
- Add the **Meeting ID #** in the **(insert name of EMR) Appointment Notes**
- Complete the Telehealth Data Form and provide to the provider (Department preference)
- Delete meetings at the end of the day or upon completion of the visit

- **Instruct patient on how to install and use Zoom**

- Download Zoom app (app will have a blue background with a white camera)
- Open Zoom app and click on the JOIN a Meeting button
- Enter the meeting number and click Join
- Click Use Video
- Click Call Using Internet Audio
- Enter the session
- Click “Leave meeting” after meeting is over

- **Important Appointment notes for (INSERT NAME OF EMR)**

- Meeting ID #
- Phone only- if patient isn't going to be able to connect via video
- TPO and TH Consent on file (Department preference)
- Best contact phone # (Department preference)
- Email or Mail (Department preference)

### **Day of Appointment Workflow Ideas:**

1. Check all scheduled meetings to ensure the following items are correct
  - a. Make sure require meeting password is **UNCHECKED**
  - b. Make sure **VIDEO** for the **HOST** and **PARTICIPANT** is set to **ON**
  - c. Make sure **ENABLE JOIN BEFORE HOST** is checked
2. Ensure that the provider has a device with video and audio capabilities. Test the device.
3. 5-10 minutes prior to the appointment
  - a. Call the patient to ensure they are ready for the meeting
  - b. Confirm the meeting ID # with the patient
  - c. Check in the appointment
4. 5 minutes prior to the appointment
  - a. Remind the provider about the appointment
  - b. Confirm the meeting ID # or direct them to use the Outlook calen(insert name) invitation link
5. The provider and patient both join the meeting at the scheduled time. The patient will use their Zoom app and add the meeting ID #. The provider can join through **(insert name of organization).zoom.us** or through the Outlook calen(insert name) invite link.

## Tips and Ideas:

Remind all video participants to choose JOIN MEETING WITH COMPUTER AUDIO and to enable the video camera and microphone icons once the video starts.

The HOST (meeting scheduler) **should not select START MEETING** if they have scheduled multiple meetings for the same day and time.

Departments may choose to assign one staff member to act as the scheduler/host per provider.

The Patient Intake Form (handwritten) will be completed when the Zoom scheduler/host cannot schedule and register the (insert name of EMR) Telehealth appointment. The intake form is to be given to the Registrars or scheduling staff who have access to complete (insert name of EMR) scheduling and pre-registration process.

In the event Zoom is not available, WebEx may be an alternate solution. (Developing workflows)

Superusers (identified staff that have been given additional licensure) can adjust the Zoom meeting window to greater than 40 minutes.

If provider or department email addresses are being shared with patients out of necessity, use this disclaimer:

*Your child is important to us. This email is not monitored on a regular basis. \_\_\_\_\_@(insert name of organization).org a way to deliver information requested by your provider. This may include a depart summary, education materials, action plans, etc. related to your recent telehealth visit.*

*For any other questions, concerns or assistance, please contact the \_\_\_\_\_ office at 668-\_\_\_\_ or by My(INSERT NAME OF ORGANIZATION) patient portal.*

Departments may also choose to include nursing staff in the appointment workflow by:

1. Once the (insert name of EMR) appointment is Checked In, call the patient prior to the Zoom appointment to complete departmental nursing process (Department preference)
2. Participate in the visit or finish the visit by making follow up appointments, scheduling tests, arrange for delivery of depart instructions or teaching, etc.
3. Follow up on all Tasks associated with the appointment (Department preference)