HEALTH CARE HOME
COLLABORATIVE

Video Consultations

Tool Kit

20th March 2020 Version 1

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Useful Links

- *Ministry of Health* Covid-19 Checklist

- Telephone Triage Powerpoint

- *Medtech:* Poster

- *ManageMyHealth*: System Requirements

- Webinair: *ManageMyHealth* Video Consultations

Benefits

- Allows a patient and clinician to see and talk to each other even though they are in different locations
- Suitable for Patients/Provider that are self-isolating and cannot come into the practice.
- Increases patient access by avoiding travel and waiting time
- Video allows more accurate transfer of clinical information than telephone consultation
- It can allow many to many rather than one to one – whanau support or Specialist advice and support with the patient and the GP/Nurse
- Greater efficiencies – for patient and clinician to come together and being seen by the right clinician at the right time

Patient Cohort

- Those patients with accessibility issues – due to affordability, mobility issues, living remotely, lack of transport options
- Patients with Communicable diseases
- Following up patients rather than first consultations
- Continuity of patients is key – relationships
- Not as appropriate in an acute setting
- Consent

Considerations

- Technical - (including recommended website browser)
- Network and bandwidth
- Design and functionality of equipment – laptops (Two devices required one for writing Clinical Notes one for Video Function.
- Privacy and Confidentiality
- Scheduling (Invoicing and workflow)
- Contingency Planning – IT failure, patient needing an examination, becomes unwell during a consultation
- Room Set Up

Patient Engagement

- Understanding the value proposition
- Education
- Being aware of cultural appropriateness
- Running it past consumer groups/patient advisory groups
- Marketing

Booking a Video Consult over the Phone

*Good Morning/Afternoon (Practice Name) you are speaking to XXXX. How can I help you?*

Patient Requests an appointment

Do you need an appointment today, or will the next available do?

" Dr XXXX is trying a new system whereby he does a virtual consult /video consult. Do you think your problem could be managed in this way. If not then we can do the usual booking system. If you feel it may work then…"
Find a video consult appointment

Use the Usual Phone triage Or appointment slot

Health Care Home Collaborative
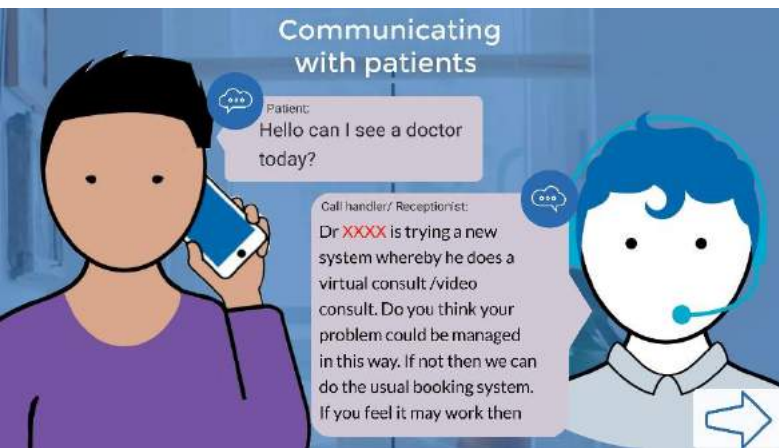
Email to patients for Video Consult

Dr xxxx is trialling video consultations as a way of making access to care easier for you, in the comfort of your home, office or anywhere else you might choose!   The video consultation service complements our face to face consultations and offers a very convenient option for care.

You can request a video consultation with Dr xxxx by asking one of our patient services team, or a Nurse.   Once your consultation is booked you will receive a text with a link to the website (insert link) You will be asked to check in on this site at the time of your consultation. You will need a computer or smart-phone with a camera and sound / microphone.

The types of problems that might be suitable for video consultation are:

(example only for your editing – this is the list if found on a 'dr anywhere website')

- Ear infection
- Sore throat
- Urinary tract infections
- Colds and flu
- Skin irritations
- Eye problems
- Fever
- Constipation and diarrhea

You can also request a video consultation for your child (or not) .
video consultations are not recommended for ….

- Breathlessness
- Acute or severe chest pain
- Actively bleeding or deep wounds or lacerations
- Psychosis or delusions
- Suicidal thoughts
- Persistent vomiting
- Severe abdominal pain
- Inability to control bowel movements or urination
- Severe headache or giddiness
- Sudden onset numbness, weakness or slurred speech
- Fainting spells, presyncope, or syncope
- Injuries with suspected fractures or dislocations presenting as severe pain, open wounds, deformity, severe bruising or swelling, loss of sensation, limb weakness etc.
- Sudden loss of vision

If the consultation is deemed not suitable for video, you will be offered a face to face appointment. You will not be charged for the video consultation.

Video Appointments

Using doxy.me

Virtual health involves providing clinical health services, education and care to patients remotely using emerging and new digital and telecommunication technologies. The Royal New Zealand College of General Practitioners (the College) supports the use of telehealth and technology-based services where it assists GPs and rural hospital doctors to provide safe, quality health care, improve health equity and increase service efficiency.

A video appointment is where the doctor and patient use information and video conferencing technologies to communicate with each other. Visual and audio information are exchanged in real time but the doctor and patient are not physically present in the same consultation room (The New Zealand Medical Council).

WHAT TO CONSIDER WHEN OFFERING VIDEO APPOINTMENTS?

1. Promoting the opportunity to patients
2. Type of video technologies to use and how to carry out the appointment
3. How patients book for a video appointment
4. What, how and when to charge
5. Getting prescriptions, lab test forms etc. to

patients after the consult
6. Integration with PMS/portal

TIPS FOR UNDERTAKING VIDEO APPOINTMENTS IN THE PRACTICE

1.   Promoting the opportunity to patients
- Print posters and place them in strategic areas in the practice including the bathrooms.
- Print brochures or wallet cards for all staff to give to patients.
- Include information about video appointments in practice newsletters.
- Add a line about video appointments to patient recall or results letters.
- Video appointment information dominantly displayed on the home page of the website and in Portal appointment information.
  - Send out a bulk email or TXT/SMS message to your patients.
  - Post an article on social media such as Facebook or Twitter.

2.   Type of video technologies to use and how to carry out the appointment
- There are many different video solutions i.e.
  Vidyo; Skype for Business*.
- Doxy.me https://doxy.me/ provides an easy, secure video technology solution.
- There are 3 pricing plans to choose from (including a free plan) with various functionalities and customisation.
- You can sign up for a trial and practice using it with colleagues or friends.
- If you are on one of the paid versions, you can customise your virtual waiting room with your own text and practice logo's.
- To carry out the appointment, launch the doxy.me URL. Minimise your PMS screen and the URL (video) screen so they both take up half of the screen.

3. How patients book for a video appointment

- Via Patient Portal patients need to specify they want a video consult by typing 'video' or 'video appointment' into the appointment reason.
  Your team then need to send an email to the patient confirming the appointment and provide instructions on how they connect in to the virtual waiting room.

  - Provide training to reception staff on taking bookings via phone and updating appointment book. Once an appointment is made, use a template email that includes instructions on how patients connect to the appointment.
  - Update after-hours message to tell patients they can book video appointments on portal.

* **Personal Skype does not provide a secure or private platform for clinical consultations**

4. What, how, when to charge

- You can charge the same amount as you would for a face-to-face consult (based on providing a 15 minute video appointment).
- There are a number of options as to how and when to charge patients: (1) after the appointment, through the PMS your team could generate and email the invoice through to the patient with your practice bank account number; (2) after the appointment, post the invoice to the patient with your practice bank account number. NB: Pre-pay options as part of the booking process are being investigated.

5. Getting prescription, lab tests etc. to patients after the appointment

- As part of the video appointment, if medication is going to be prescribed, ask the patient which pharmacy they would like to collect the prescription from and fax the prescription straight to pharmacy.
- If lab test/ X-Ray is ordered, fax to location that patient will be visiting.

6. Integration with PMS/portal

- Currently bookings done through patient portal will integrate to the PMS appointment calendar.

COMMON QUESTIONS

What do I need to think about to make the video high quality for myself and the patient?

1. Video quality adapts to internet speed, so the faster and more stable your broadband connection (or mobile signal), the better the video quality you will receive.
2. Use webcam with noise cancelling abilities that helps to eliminate echo and audio feedback.
3. Face a light source, reduce background noise, have a clean and professional background, and sit between 2 and 4 feet from webcam.
4. Firefox browser gives a good reliable connection. Chrome is also effective.

How do patients link into a video appointment? How do I know once they have entered the virtual waiting room?

Once a patient has booked, email them the URL link and instructions on how to connect in to the virtual waiting room.

From a patient perspective, if they open the link

on their iphone or ipad, the link directs them to the doxy.me app to download – if they open the link on their non-apple device, laptop/desktop computer, it sends them to website. They then check-in to the virtual waiting room. In your virtual waiting room, the patient shows up on the left hand side of the screen under 'Patient Queue' when they enter waiting room. You then double click on the patient to video call them. *If you do not recognise the patient or if it has been a long while since you have seen them, it is advisable you get the patient to tell you their date of birth to confirm their identity.*

How secure is Doxy.me?

Secure data transmission and patient privacy is a top priority for doxy.me. They utilize state-of-the art security and encryption protocols, making doxy.me compliant with HIPAA and HITECH requirements.

How do I sign up for a doxy.me waiting room?

Go to the doxy.me website at https://doxy.me

ManageMyHealth™

Medtech MMH Video Consultation- Health Centre Steps

1. Overview

This module explains how to activate and control the settings for the Video consultations (appointments). Before we proceed with this guide please ensure that the ManageMyHealth Online appointments are activate and published based on the steps listed in the "MMH Online Appointments Guide". Only when the online appointments are setup and published we will be able to activate the ManageMyHealth Video Consultations.

2. Allocating the Video Consultations slots

a. To allow appointment slots for Video Consultations please open the "Modify Appointment Template" screen on Medtech Evolution by following File>Options>Appointment>Template path. Chose the provider you want to make the changes for.

b. Please enter the letters **MMHVC** in the "Session Name" column for all the slots you would like to have Video Consultations. Note: In the above example screenshot all appointments between 01:00 PM and 05:00 PM are allowed for Video consultations. All other slots are not. Similarly run the same step for all providers you wish to configure the Video Consultation slots.

c. Click **OK** to save changes.

3. Video Consultations activation and Setup.

(Note: You must have already subscribed for the Video Consultation feature with the ManageMyHealth support team<support@managemyhealth.co.nz>

a. Logon to ManageMyHealth™ portal as an administrator.

b. Click on **Video Consulation Settings** under the **Systems Menu**
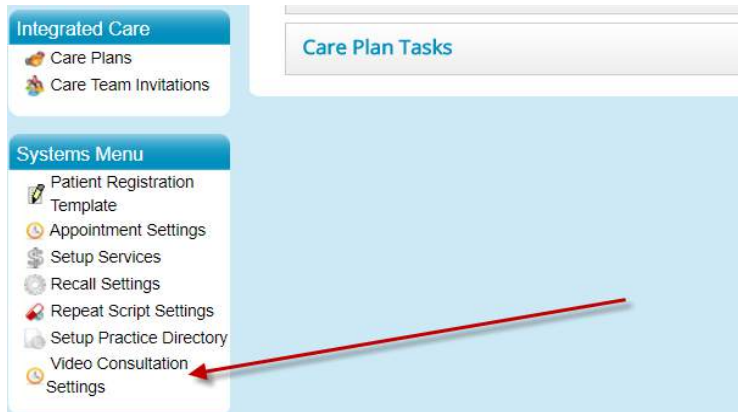
c. Click on **'Edit'** at the bottom of the page.

The following screen is displayed under the Video Consulation Settings page and each option has been elaborated.

I. **Enable video Consultations –** Selecting "Yes" here will activate the Video consultation slots online and the patients can now book them.

II. **Allow patient to choose a face to face appointment on a Video Consultation Slot –** Selecting "Yes" here will allow patients to use this slot either for Video Consultation or a face to face. Selecting "No" here would mean that this slot can only be booked for a Video consultation.

III. **Number of minutes before a patient can join the Video Consultation –** This enables the "Start Video" button for the patient, to begin the Video, the number of minutes before the appointment as selected by you.

IV. **Video Consultation Timeout-** If the appointment is getting delayed either from the GP or the patient-The consultation remains active for these minutes post the scheduled end of the appointment .Example : You have chosen the 'Timeout' as 10 minutes. There is a 15 minute appointment scheduled for 1:45 PM. However for any scheduling reasons the patient or the provider are not able to join the Video-this link will still work until 2:10 PM. Post 2:10 PM –This Video consultation will have expired and a new one needs to be booked.

V. **Give patient grace period –** This is applicable only if a patient is late and hasn't joined the Video consultation on time. Whatever time chosen here will extend the appointment time by that many minutes.

VI. **About Video Consultation** – Anything that is typed here is displayed for the patient to read before booking the appointment.

VII. **When to use Video Consultation-** Anything that is typed here is displayed for the patient to read before booking the appointment.

VIII. **When not to use Video Consultation** Anything that is typed here is displayed for the patient to read before booking the appointment.

IX. **Terms & Conditions** Anything that is typed here is displayed for the patient to read before booking the appointment.

Once you make all the changes-please click on "Save" to confirm and apply the changes. Similarly to make any changes to the On-Demand Video Settings by clicking on the "On Demand Video Consultation setting tab"
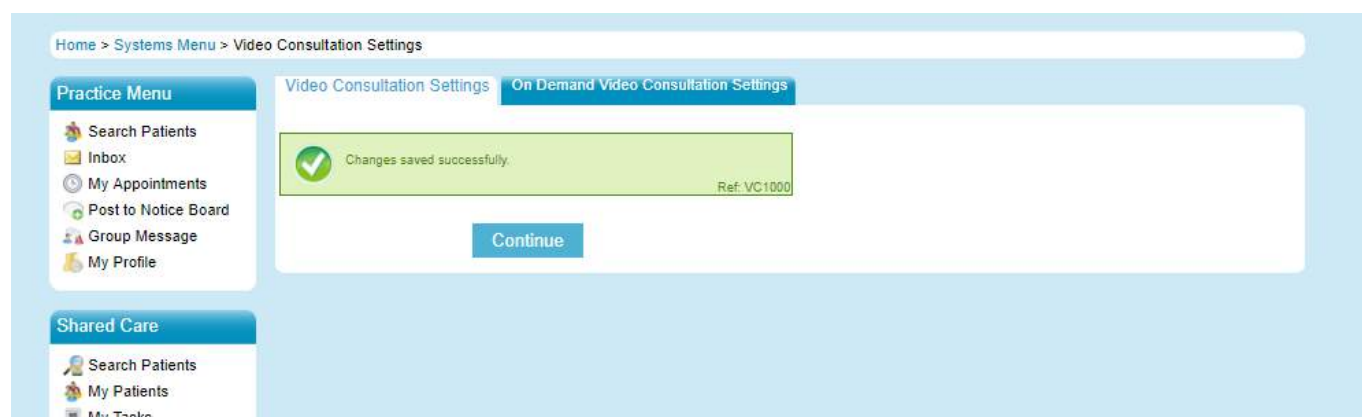
4. Booking a Video Consultation(Patient View)

Note: A Patient can book and initiate a Video Consultation only using the 'ManageMyHealth' App on an Android or an Apple device.
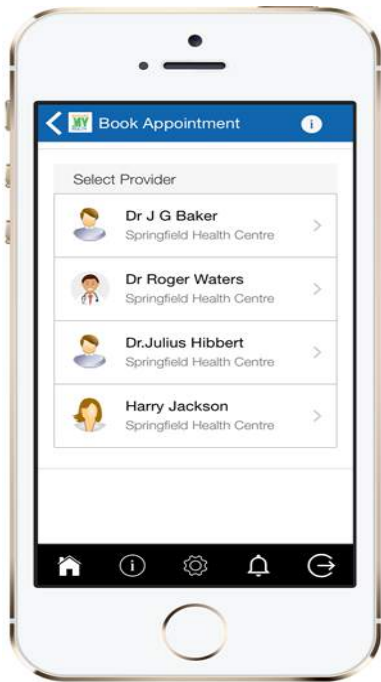
a. Patient to Login to the ManageMyHealth App using the email address and password.

b. Patient to click on 'Book Appointment'. Here a patient can see the upcoming appointments booked or click on 'Book appointment'. Click on 'Book appointment'.

c. The patient will need to select the intended 'Provider'.

d. The patient can now navigate through the day/date fields to choose an appointment. All the Video consultation slots will have a Video icon next to it. The patient will need to pick the desired slot.
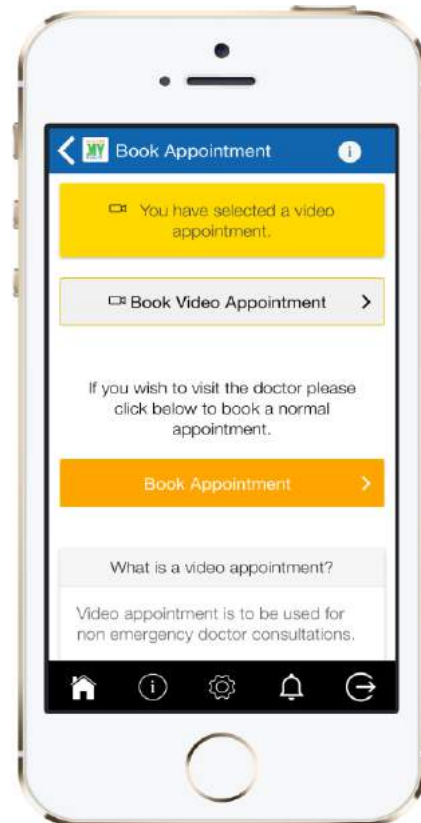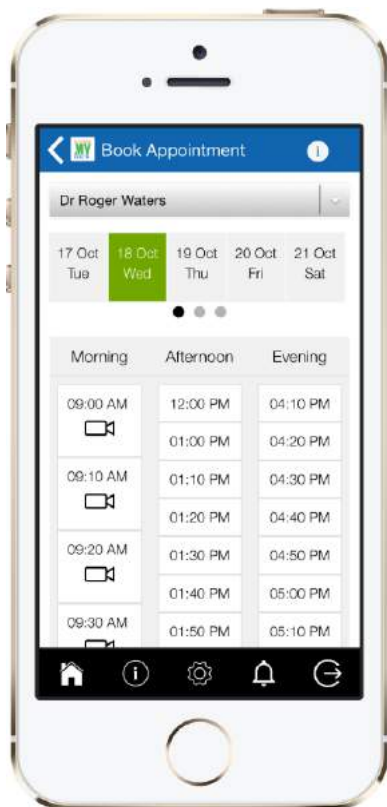
e. The patient will now read all the instructions /terms and conditions inset by the practice and click on 'Book appointment'. On this screen the patient has the choice to book a normal appointment or go back if he/she doesn't wish to proceed with a Video Consultation.

f. Request completion screen-Once the patient has completed booking the appointment a message is displayed that the request was made.
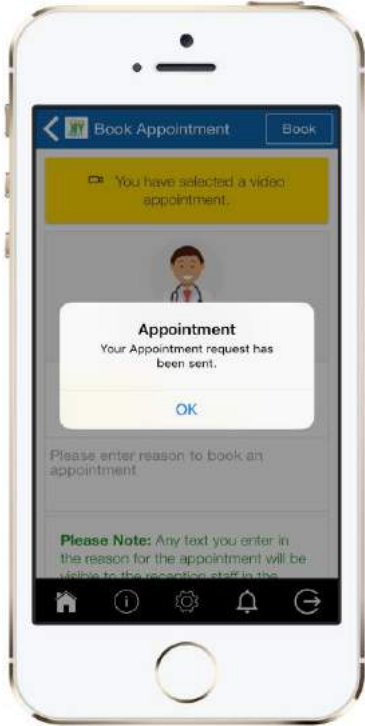
PMS Appointment Book View- The below screenshot shows what the appointment book will look like after a Video consultation has been booked.

| Time	Patient	Note
9:00 A	ANDREWS Rob	MMH: VC:
9:15 AM	MMHVC	
9:30 AM	MMHVC	
9:45 AM	MMHVC	
10:00 A	MMHVC	
10:15 A	MMHVC	
10:30 A	MMHVC	
10:45 A	MMHVC	
11:00 A	MMHVC	
11:15 A	MMHVC	
11:30 A	MMHVC	
11:45 A	MMHVC	
12:00 P	MMHVC	
12:15 P	MMHVC	
12:30 P	MMHVC	

Sam Eaves (SFE)   23 Mar 2018   Friday

The Note section would have the letters MMH: VC (which stands for ManageMyHealth Video Consultation), which will indicate this is a Video slot, followed by the comments entered by the patient.
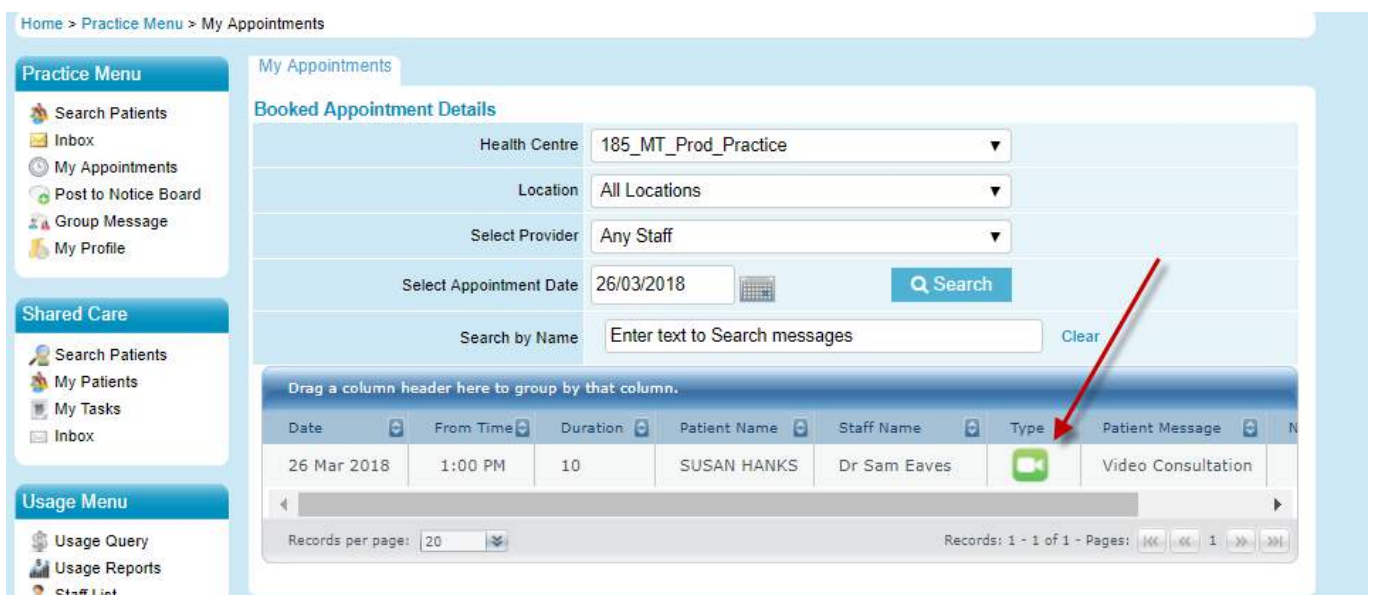
5. Joining a scheduled Video consultation

You can join a scheduled Video consultation either through the ManageMyHealth™ portal or the ManageMyHealth™ app.

I. Joining a scheduled Video consultation through the ManageMyHealth portal.
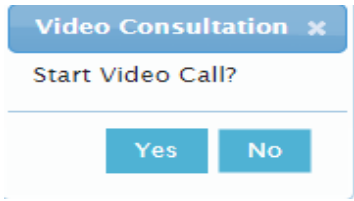
a. Logon to ManageMyHealth™ portal.

b. Click on 'My Appointments' under the 'Practice Menu'
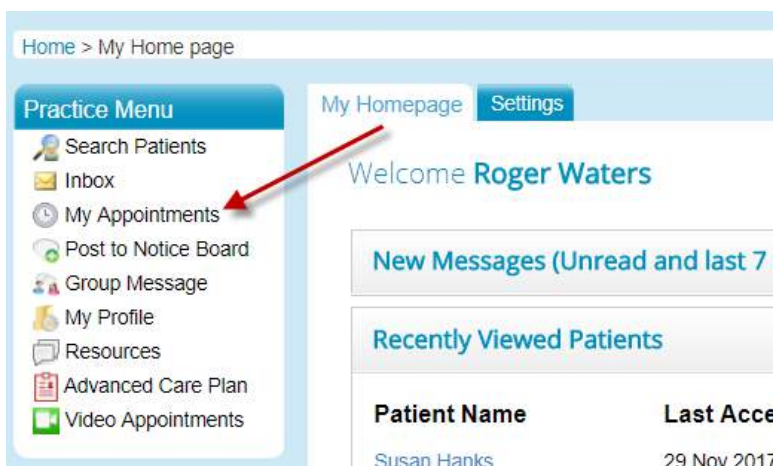
c. Select Appointment date(which will be defaulted to todays today) . Here you can see the relevant patient's name and the video consultation time that's been scheduled. Please click on the 'Video' icon under 'Video Consult'.
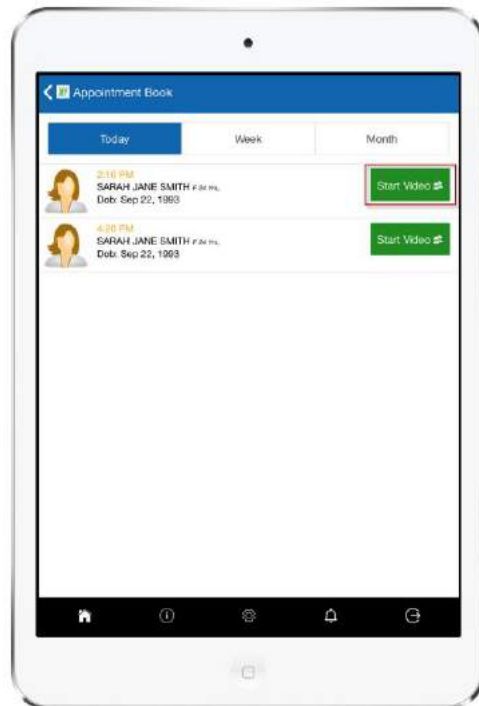

d. Click Yes-when prompted to 'Start Video call'

II. Joining a scheduled video consultation through the ManageMyHealth™ App.

a. Logon to ManageMyHealth™ app.
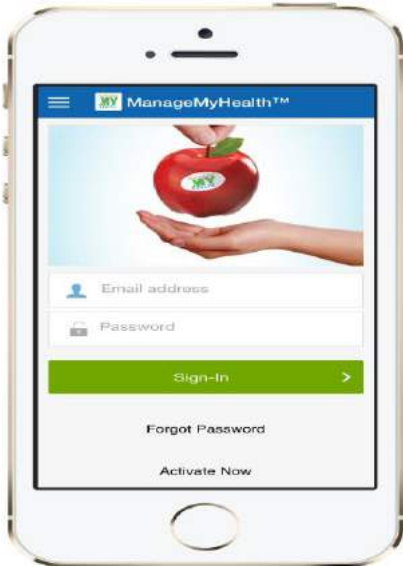
b. Click on 'Book appointment'. Here you will see all your upcoming appointments listed which you can sort by Today/Week/Month.

c. Once you see the video begin please click on the 'Green phone dial icon' on the bottom of the screen to begin the consultation.

6. Joining an On Demand Video consultation

You can join a scheduled Video consultation either through the ManageMyHealth™ portal or the ManageMyHealth™ app.

I. Joining an On demand consultation through the ManageMyHealth portal.

III. Logon to ManageMyHealth™ portal.

IV. Click on 'On demand Video Consultation' under the 'Practice Menu'

V. Select Appointment date(which will be defaulted to todays today) . Here you can see the relevant patient's name and the On demand Video consultation. Please click on the 'Video' icon under 'Video Consult'.

VI. Click on 'Start Video call'

VII. Joining an On demand video consultation through the ManageMyHealth™ App.

d. Logon to ManageMyHealth™ app.

e. Click on 'On demand Video consultation. Here you will see all your upcoming On demand Video consultations.

f. Once you see the video begin please click on the 'Green phone dial icon' on the bottom of the screen to begin the consultation.

Note: Depending on your setup the Green 'Start Video 'button may activate a few minutes before the appointment or only exactly at the time of the appointment.

Video Appointments

Using Health365

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HOW DO WE GO ABOUT STARTING VIDEO APPOINTMENTS IN OUR PRACTICE?

Contact our Health Care Home Programme Manager Lindsay Havens hch@procare.co.nz for further information and assistance.

MyPractice Clinical Triage Tool User Guide

MyPractice have created a triage tool to help you assess patients requesting same day appointments and determine the most appropriate intervention for them.

Accessing the triage form

1. When you have a patient up, select 'Clinical Report'	
2. Select 'Forms' and in the first column double click 'Triage'	

3. Complete the assessment form following discussion with the patient	

Accessing the reporting

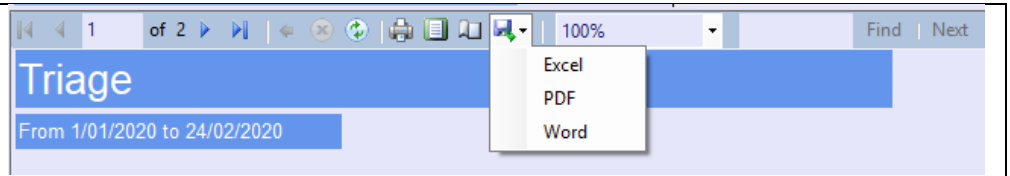|	
1. Under tools, select 'Reports' and then 'Report Viewer' 2. On the right hand side of the 'Report Viewer' page, under 'General', scroll down and look for 'Triage' and select it	
3. Select the date range for the report you wish to view, and click 'Ok'	
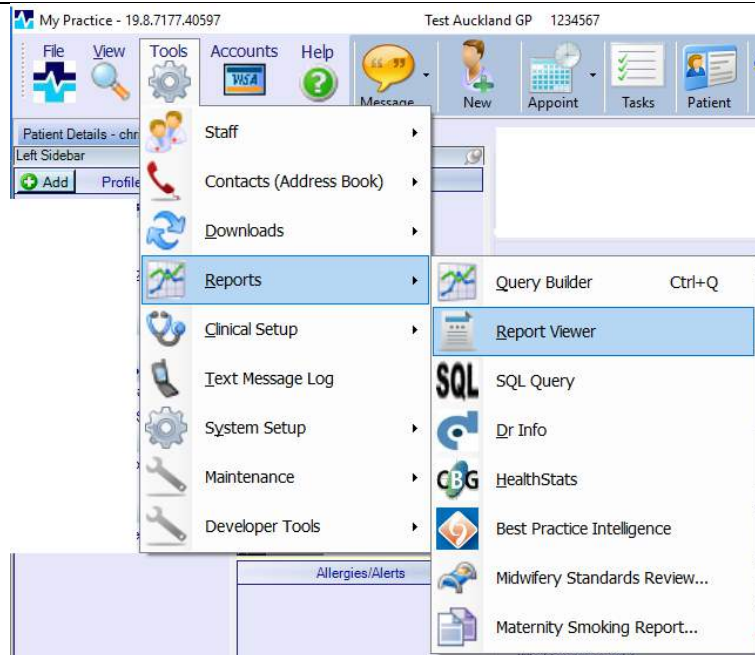
4. Select the format you would like to export the report as:	

Using the reports

These reports can be used to help you identify the number of acute appointments you need to keep available each day. Identify the number of patients that required an appointment today (either Face to Face or virtually) and average this number across your providers. For example, if 10 patients per day required a same day appointment with a GP, and you have 5 doctors, reserve 2 appointments per day per GP.

The time allocated to the triage each morning can also be determined from the reports. If you have an average of 20 phone calls per day requesting same day appointments, and each phone call is approximately 2-3 minutes, then 30 minutes should be sufficient to cover the days calls. If you have multiple GPs undertaking triage, then the time per GP will be less.

Understanding the best time to undertake triage is important, to make sure you capture the bulk of the calls coming in. if the majority of the calls come in during your first half hour, then undertaking triage after this would be appropriate.

Virtual Consultations within myindici Patient Instructions

Booking a virtual consultation with your GP

You will need access to myindici Patient Portal, if you don't have myindici call your medical centre to discuss this.

1. Login to myindici via the website or app
2. Go to Appointments > Book an appointment
3. Find available time slot and book appointment using appointment type 'virtual consult'

Beginning your virtual consultation

1. Before your appointment is scheduled to start, login to myindici on your smartphone or tablet (via the app – available for download on iOS or Android)
2. Click appointments > My Appointments

Before you begin the video call you can test your microphone and speakers by clicking 'Test Video Call'

3. Click Start Consult
4. A new screen will open, enter your name in the pop-up window
5. Wait for your GP to join the call
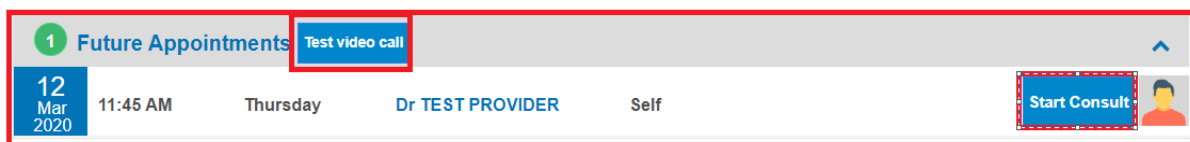
You can chat with your GP using the chat box on the bottom right of the screen

Once the call is finished click END in the top right corner to close the call.
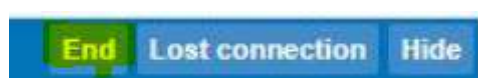
Paying for the virtual consultation

Your Medical Centre will either add the amount owing to your account to be paid next time you visit the practice or send you an invoice.

Virtual Consultations within indici

Virtual consultations are managed through the patient portal myindici, patient must be registered and activated.

It is recommended that patients use the myindici app (available for download on iOS and Android). This is to reduce any potential troubleshooting you may be asked to do around microphones, cameras, webcams not working.

Equipment

You will need a webcam camera to plug into your PC for virtual consults – specs?

Costs

There is no additional cost to the practice or patient for using this service.

There are no additional charges for using the free version of Doxy. It will prompt you to upgrade your plan occasionally, but you don't need to.

Part One:

Doxy Integration – cerate a Doxy account

Creating a Doxy account is the easiest way to configure virtual consultation. Follow the 'how to configure Doxy for Virtual Consult' guide available within the help guide - https://indicidocs.atlassian.net/wiki/spaces/IUM/pages/1095598177/Doxy+Integration

Note: This needs to be configured for each provider, with their email address. Then enter the URL sent via email to 'My Settings' within their logins.

Part Two:

Setting up Virtual Consults

Before Providers can initiate virtual consultations, the following configurations need to be made per provider within indici

1. Click *Configurations > Configurations Dashboard > Patient Portal Settings > Video Consult Configurations > Provider Video Consult Configurations*
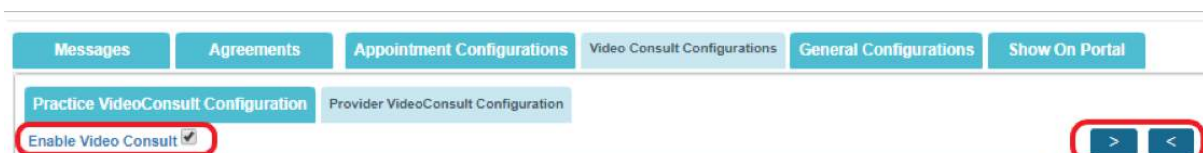
2. Tick enable Video Consult
3. Complete integration with Zoom or Doxy
4. Add the appropriate users to the right column, using the arrows
5. Click update to save

Edit Rosters

Rosters need to reflect the correct consult type to enable virtual consultations,

1. Open the users roster settings, *Administration > Staff Roster > Roster*
2. Find the appropriate user using the Provider search filed
3. Click the edit button to open
4. Open the existing recurrence patterns and make the required changes. Depending on preference,
   a. Set appointments as F2F but allow Virtual Consult - Video to be booked into these slots
   b. Select Virtual Consult- Video but allow F2F to be booked into these slots
   c. Select Virtual Consult – Video for a set time within a session as dedicated virtual consult time

Note: for ease of patients continuing to book appointments, option A is preferred.

5. Save all changes
6. Save recurrence pattern
7. Repeat process for all appropriate clinicians

Booking a virtual Consultation – from indici

1. Search patient
2. Open the appointment book screen
3. Book appointment into appropriate available video consult – video appointment slot or ensure appointment type is virtual consult – video
4. Save

Booked appointment will have an icon of a video recorder.

Note: patient will also be able to book my indici.

Beginning the virtual consult

Please ensure all prerequisites are complete before continuing, if any aren't configured correctly virtual consultations won't work.

Prerequisites:

- Doxy account created and configured against indici
- Providers enabled for virtual consults within myindici configurations
- Rosters include virtual consult appointment types
- Patient activated for myindici and video consult enabled within enrolment form
- Appointment booked

Patient

1. Login to myindici – via app
2. Open Appointments > My Appointments
3. The connect button will appear when one hour is left before appointment start time. Click the connect button to join
4. Patients can update basic demographic information before the consult starts
5. Patient then waits until Provider initiates consultation

Provider

1. Appointment will mark as arrived once patient has joined the virtual consult
2. Open consultation
3. Click blue video icon on toolbar – a separate tab will open

*Note: Click Pre-Call Test to test microphone and camera if required*
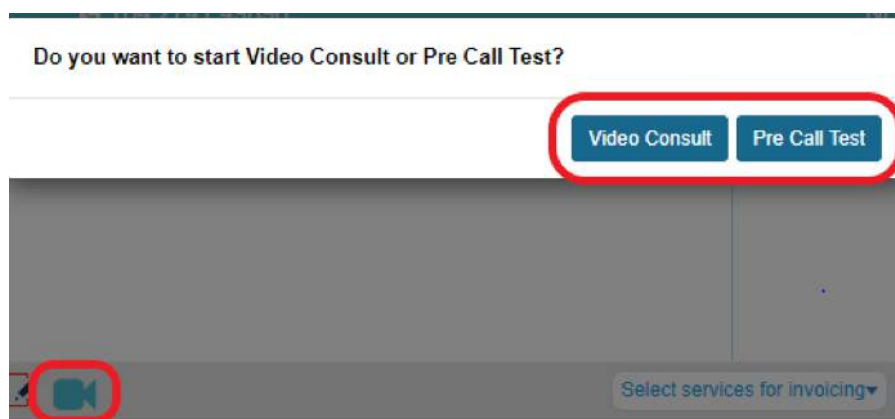
4. Begin consultation

Within Doxy

Note: the first time you will be prompted to enter email address and password for Doxy, click remember me so you don't have to do it again.

a. Use the arrows – and x in the top corner to expand and minimise the video screen
b. Click the three lines on the left to see the waiting room
c. Click the video icon under the patient name to begin consultation

d. A chat feature is included if required
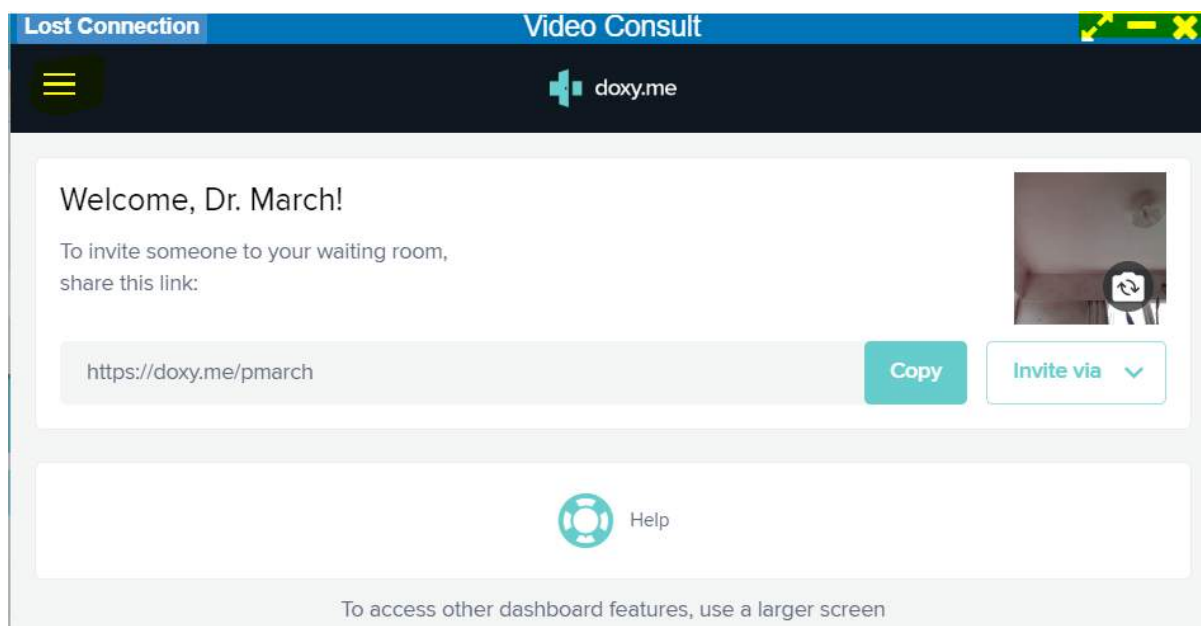
5. At the end of the consultation, click the x within Doxy to close the virtual consult window
6. Enter notes like usual
7. select services and finish consultation like usual

Other items to note:

Item to Note	Things to consider	Mitigations
Video quality of Virtual Consult	How many GPs are doing virtual consults at the same time? Quality of internet patient is using	Turn of camera when/if not required
Patient has technology issues e.g., webcam or microphone not working on a PC		We suggest that patients use the app when entering a virtual consult (this is outlined in the patient handout)

Here is a link to a video explaining the different ways video consults can be configured - https://drive.google.com/open?id=1s11MHBY0_o64--MAgTHOHzb5KyjOBmGm
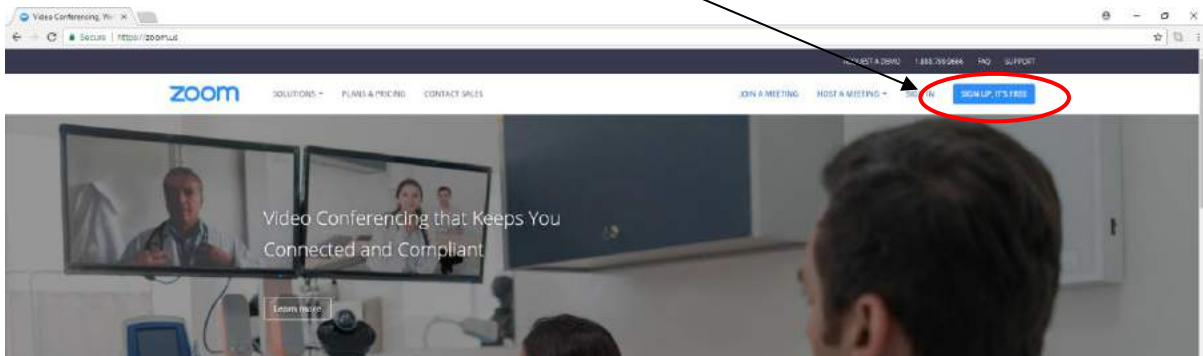
USING ZOOM FOR MEETINGS

A. For the organiser

The organiser is the one who hosts the meeting via Zoom. He/she will need to set up a Zoom account, schedule the meeting and send invitation out other attendees. Step-by-step instruction is below:
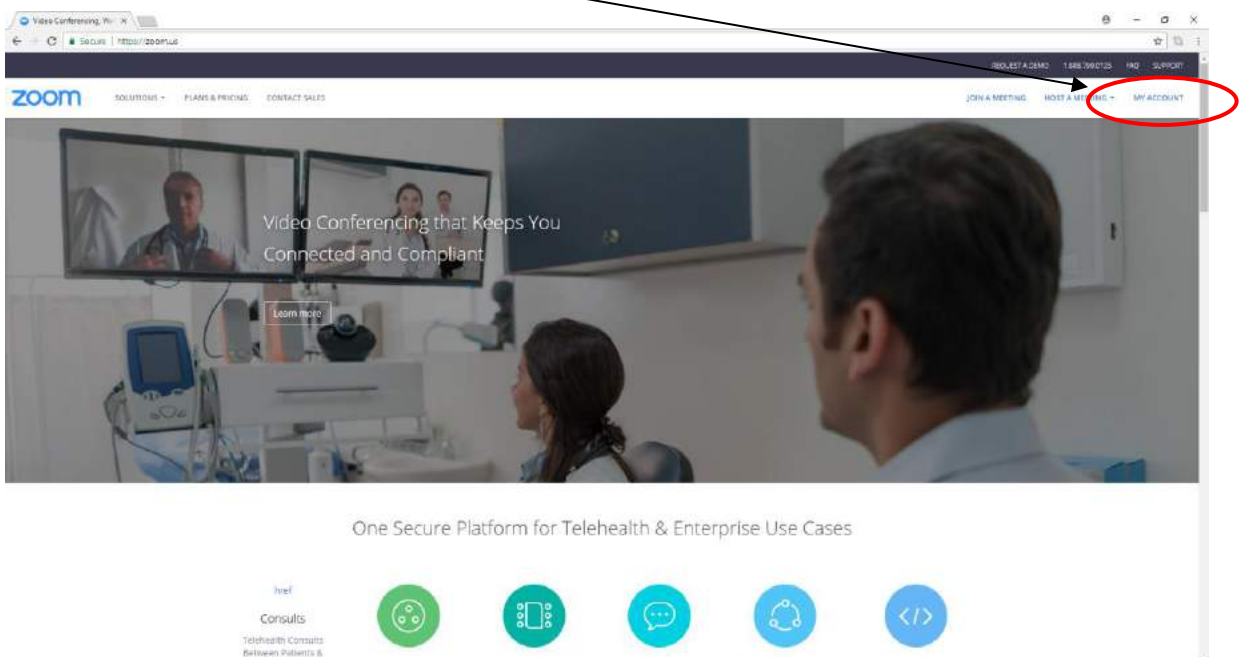
1. Setting up a Zoom account

a. Go to Zoom website: https://zoom.us/

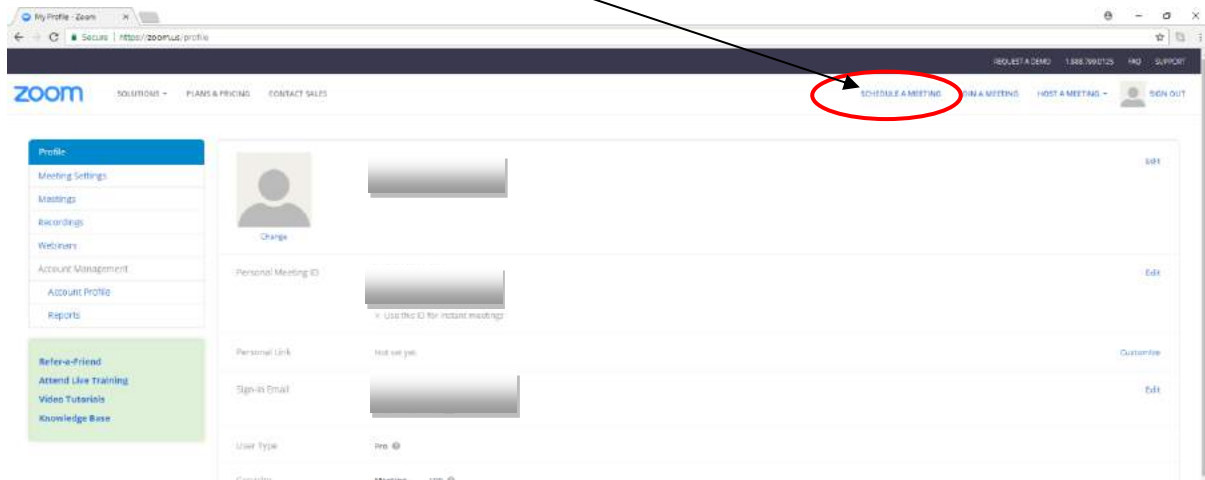b. Click on "Sign up, it's free" to create your account

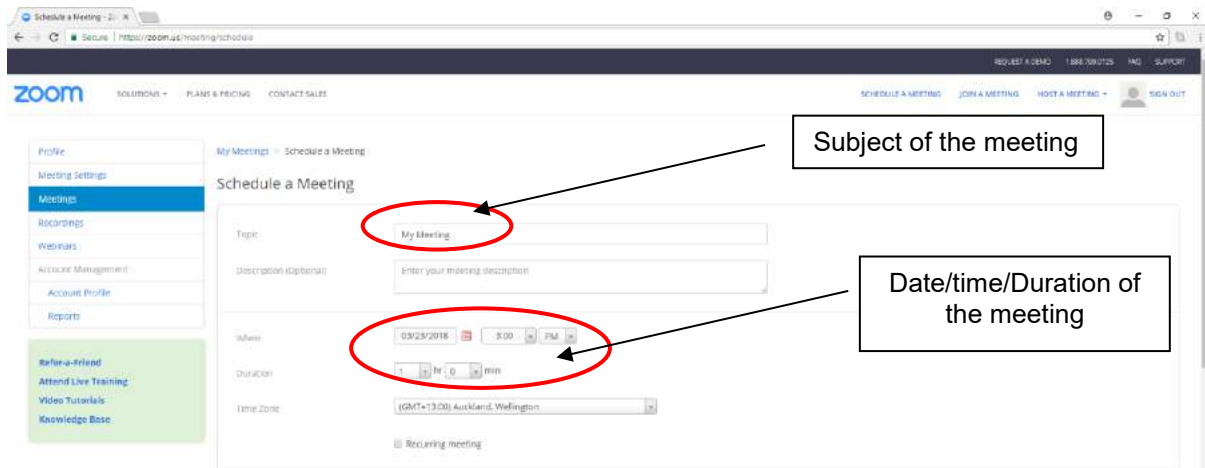c. Follow the prompts to complete your registration

2. Scheduling a meeting

a. Logging into your Zoom account

b. Click onto "My account"

c. The following page will appear – Click on "schedule a meeting"

d. Filling in the details of the meeting

Subject of the meeting

Date/time/Duration of the meeting

e. Once you finish filling in the detail, click on the "save" button at the bottom of the page - You will be lead to another page where detail of the meeting is summarised (including the link for others to join the meeting)

This is the link to be sent to attendees
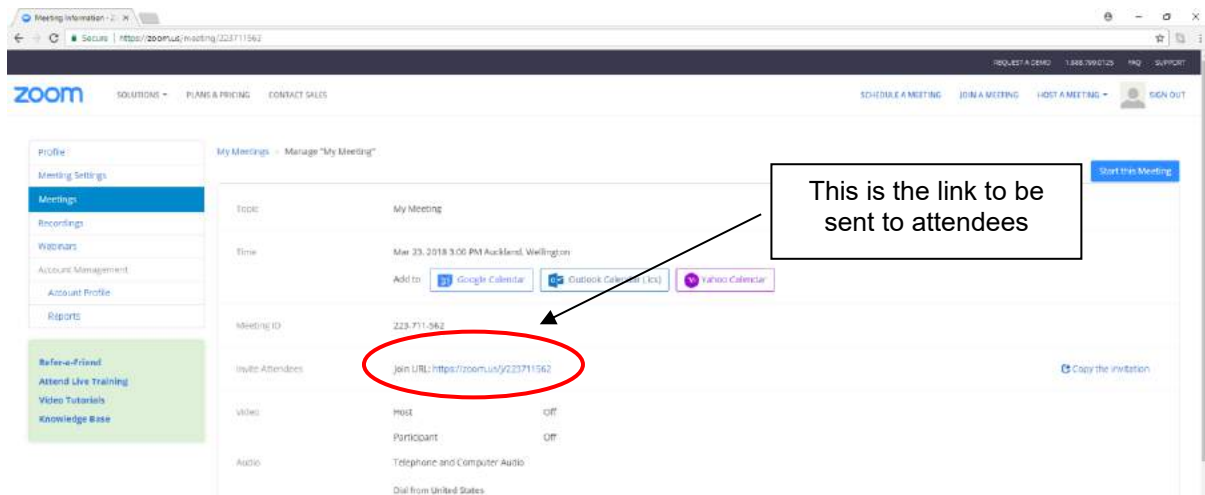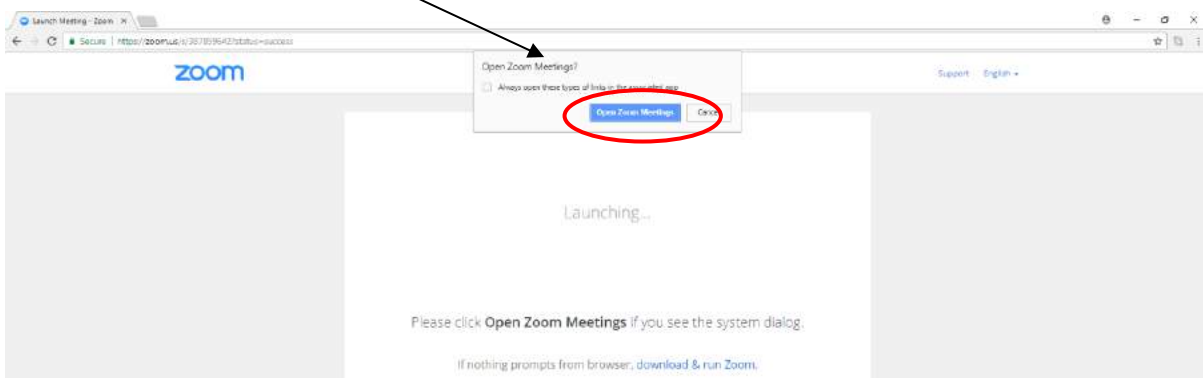
3. Sending an invitation

- Prepare a traditional outlook/gmail invitation
- Include the link (above) to join the meeting in your invitation
- Send

4. On the day/time when the meeting is scheduled, as the organiser, you will need to host the meeting before others can join in. To host a meeting:
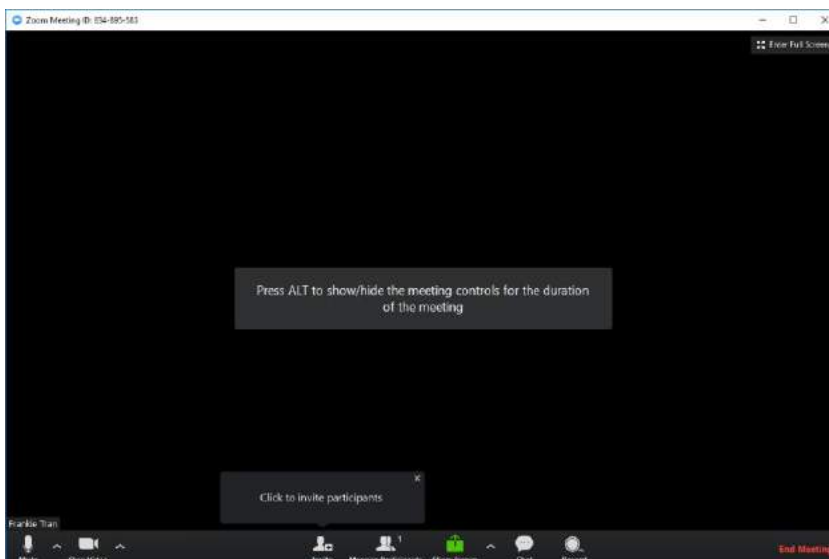
b. Click on "Host a meeting" – Please select "with video on"
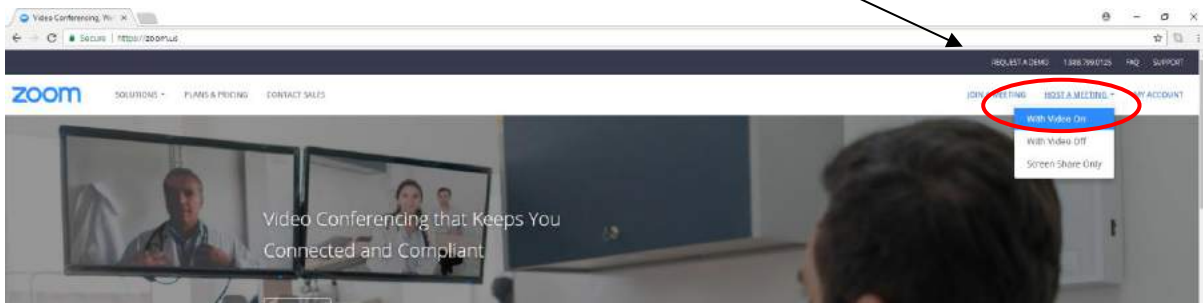
c. Click on "Open Zoom Meetings"

d. Wait for your video starts – Your meeting is set up and ready for others to join in
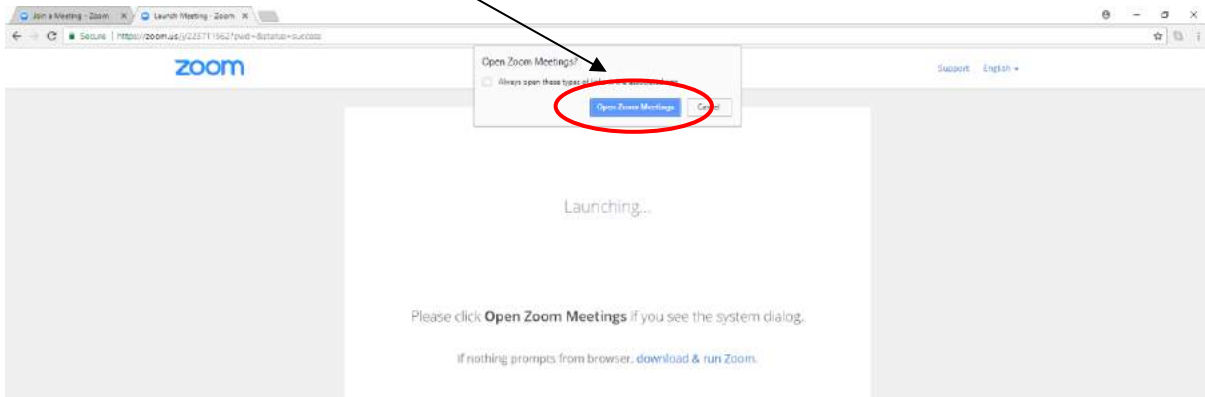
B. For the attendees

Attendees should receive the link to join included in the meeting invitation. If not, please contact the organiser to ask for the link.

1. To join a Zoom meeting, simply insert the link provided in the invitation into the webpage URL address box and press Enter

2. Click on "Open Zoom Meetings"

3. You will be directed to the meeting

MANAGE MY HEALTH

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