Virtual Health Carts - Clinical Workflow

The purpose of the Virtual cart is to mimic the virtual interaction between Provider/Patient and Medical Assistant/patient in a clinical setting. This workflow is best practiced during a Telehealth or Hybrid schedule at a clinical level.

Equipment Needed per Care Team:

- X2 iPads
- X2 Stands/carts
- X2 exam rooms
- X2 ergonomic stools with backrest
- X2 external battery packs (optional)

Provider and Medical assistant will have their assigned cart.

Scheduling Appointments

1. All Telehealth visits should be scheduled for video (switch to phone only if not able to connect) and schedule can have a mix of virtual and F2F- no specific blocks needed
   a. CCR will offer patients requesting telehealth visit these video visit appointment slots, and verify the following:
      i. Does patient have a Smartphone or video capable device?
      ii. Inform patient appt could start 30 min before or after scheduled appt time.

Preparation of Appointments

2. PSR is to confirm appts the day before
   a. Insurance verified by Eligibility specialists.
      i. If Cash patient payment should be taken day of appt before appt has begun by PSR.

Beginning Appointment

Doxy. Me Video Call:

3. MA will initiate phone call to patient at their station.

[Script]: "Hello, Good morning my is Betty MA for Dr. NHC calling to see if you have a couple of minutes to get started with your Telemedicine Video Visit?"

   a. Verify the following:
      i. Name
      ii. DOB
      iii. Insurance/ self-pay (if self-pay insure that PSR has collected payment or added notes to bill patient)
      iv. Address
      v. Pharmacy of preference

b. Obtain consent to send link for video visit through text or e-mail depending on the device that will used to complete visit (Smartphone, iPad, Laptop, etc.)

[Script]: *"Do you give consent for us to send a Text/Email with the link to your video visit?"*
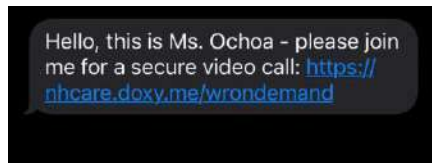
    i. If patient consents: (refer to the Images below each step for Patient's View)
        1. Send Text/E-mail through Doxy.ME
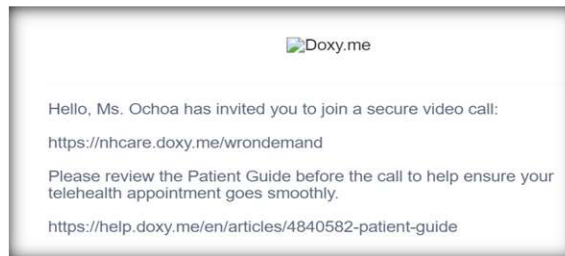
How to use Doxy.Me Workflow Link:
https://nhcare.sharepoint.com/:b:/s/Telehealth/Ecod9e_-yEZLja7LBmuOpKUB9PE96nCglabDTA2TQkXhng?e=N78NBY

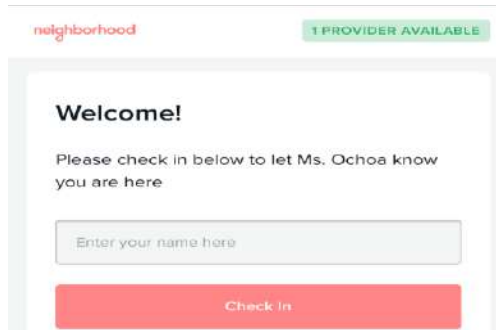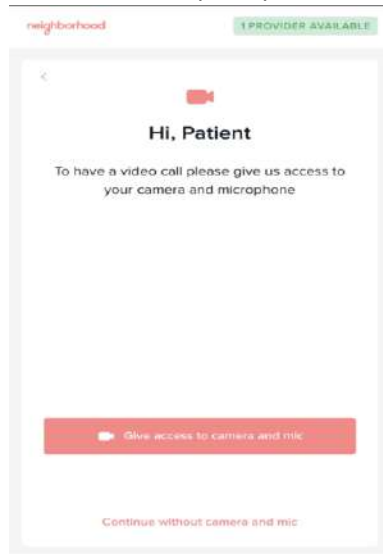   2. Prompt patient to open text/E-mail and click on the link.
        Cell View

> Hello, this is Ms. Ochoa – please join me for a secure video call: https://nhcare.doxy.me/wrondemand

E-mail View

> [Doxy.me]
>
> Hello, Ms. Ochoa has invited you to join a secure video call:
>
> https://nhcare.doxy.me/wrondemand
>
> Please review the Patient Guide before the call to help ensure your telehealth appointment goes smoothly.
>
> https://help.doxy.me/en/articles/4840582-patient-guide

        3. Patient will be directed to Web page. They will be Prompted to Enter Name and select Check-In.

> neighborhood   1 PROVIDER AVAILABLE
>
> **Welcome!**
>
> Please check in below to let Ms. Ochoa know you are here
>
> Enter your name here
>
> Check In

4. Patients will be prompted select to give Access to Camera and Mic


5. After selecting give access to Mic & Camera a Pop-up will show stating "Doxy would like to access Mic & Camera" Prompt patient to select "Allow"
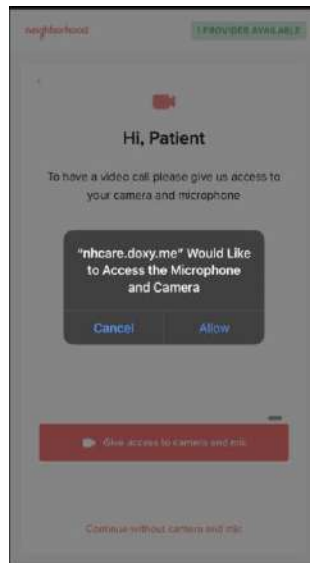
*** NOTE***

If you are on the phone with Patient during Step #5, the patient may receive a message stating **"Video & Mic are being BLOCKED by a different app"** this means the Phone call you are currently on is blocking patient from checking-in. Prompt patient to follow the same steps 2-5 and they should now have no problem connecting.

6. After patient has completed all step they will have successfully check in and will be in Provider waiting room ready to begin appointment.
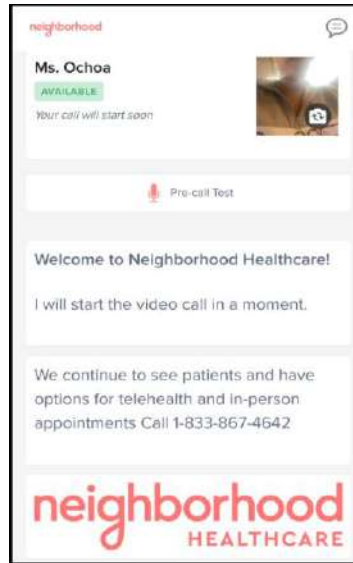
Digium Phone Call:

ii. If Patient Declines: Due to privacy or is having issues connecting to video platform Doxy.Me convert to a Phone visit at this time using the Digium App on the iPad. Your iPad Digium app will be assigned to your Ext and should be utilized the same as your phone at your station.

c. Once Patient is checked-in in the Patient Que on Doxy.Me or phone call through Digium app on the iPad you will roll your Virtual Cart to a patient exam room. Provider and Medical assistant shall have 2 exam rooms to utilize and provide patient privacy.

d. Proceed in the following sequence for completing virtual cart visit:
    i. MA in RM#1 > Patient Check in
        1. Merge any templates needed Ex: Phone/Video visit template.
        2. Obtain CC/HPI/Hx/Complete Alerts
    ii. MA in RM#1> Inform Provider via Teams patient is ready to be seen.
    iii. Provider in RM #2> Initiate's appointment with patient
    iv. Provider in RM #2> Informs MA via Teams patient is ready for Check-out.
    v. MA in RM#1> Initiates call/video with patient for Check-out.

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