



Virtual clinic workflow using zoom breakout rooms

ZOOM Clinic Etiquette

1. Virtual Concierge is Zoom Host and all Care Team members are Co-Hosts
2. All staff names will be renamed to include their role/credentials and pronouns. Example: Jane Smith, CTMA (She/her)
3. **ALL Staff must have their camera ON and introduce themselves and their roles when interacting with patients- this is for legal proposes and a good patient experience**
4. Co-Hosts are to avoid the Leave Room button, unless confirmed with Host no patients are in the "main room". Instead, Co-hosts to move between rooms using the Breakout room button
5. Each provider gets 4 "exam room" breakout rooms allocated, as well as a designated "Care Team Room"
6. Providers to one of their available "exam rooms" for a quiet space, or when speaking to patients on the phone
7. All communication in regards to pt's can be done in either a combination of the following: eCW Office Visit screen (S Jelly Bean), IM (either skype or Teams), or verbally within the "Care Team" breakout room
8. Providers should return to the designated "Care Team" breakout room regularly to be available for verbal communication (T jellies, visit planning, CAIR review, any review of outstanding items)
9. "Back Office" breakroom is intended as a space where Providers and other care team staff who are on same zoom clinic link can join throughout the shift to document pt visits, and collaborate/bounce idea's off other providers and care team staff
10. "Breakroom" is to be used when staff members are on their break

21 Breakout room's needed for 3 providers, to be named as follows:

- Exam Room 1
- Exam Room 2
- Exam Room 3
- Exam Room 4
- Exam Room 5
- Exam Room 6
- Exam Room 7
- Exam Room 8
- Exam Room 9
- Exam Room 10
- Exam Room 11
- Exam Room 12
- [Provider first name] Care Team Room
- [Provider first name] Care Team Room
- [Provider first name] Care Team Room
- [Provider first name] MH/BH Exam Room
- [Provider first name] MH/BH Exam Room
- Breakroom
- Back Office
- MA Back Office
- Overflow room 1

Care Team Virtual Visit Workflow

1. Host marks pt ARR on appt card, upon seeing pt in the virtual waiting room
2. Host verifies pt's Name, DOB, and either one of the pt's phone numbers or addresses
3. Host assign's pt to available exam room for provider, and changes visit status to READY
4. CTMA notes READY status, assigns room in eCW Check-in/out button and changes status to IN, then joins pt in "exam room"
5. Once CTMA completes "rooming" the pt. They change status to READY
6. Provider notes the READY, changes status to PROV, joins pt in exam room and conducts the visit.
7. Once provider completes their visit, they change status to DSCH
8. With rare exception notes/ billing should be done by the end of visit/day
9. All pt should have Flu education material published through Santovia (Seasonal)
10. Orders should be entered in eCW (MA's cannot carry out verbal orders)

