

# Toolkit: Scheduled Virtual Visits Utilizing HIPAA Compliant Zoom Platform

CommonSpirit 



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# Virtual Care

## Definitions and Terms

Where can Virtual Care service be rendered?

*Distant site: where the Clinician delivering the service is located at the time the service*

*Originating site: location of the patient at the time the service (must be in the state where Clinician is licensed to practice)*

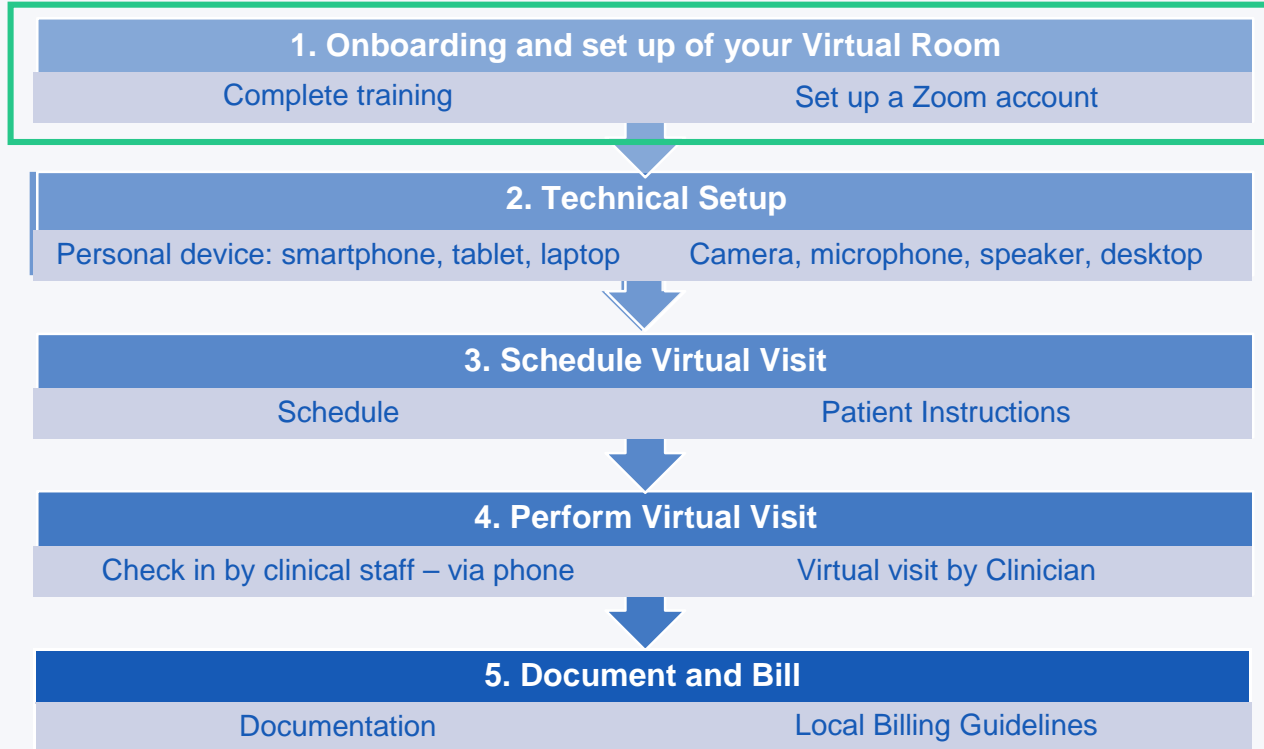
*Virtual Care Services performed via an interactive audio & video communication technology. The following requirements must be met:*

- *Interactive Audio & Video is required*

*Its do not qualify for Video visit*



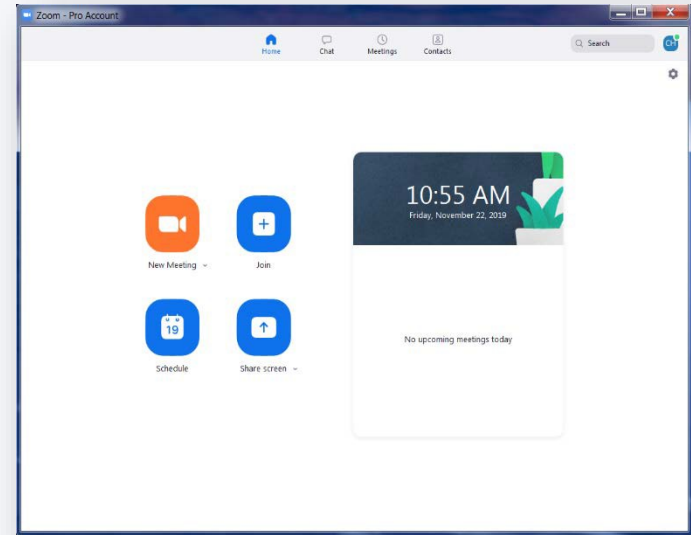
# Simple 5 Step Process



# What is Zoom?



- *HIPAA compliant Zoom platform will assist you in improving patient accessibility to healthcare and patient convenience via video visit*
- *Access can be through a smart device, laptop or desktop via internet connection*



# Activate HIPAA Compliant Zoom Account

You will receive an email to activate your HIPAA compliant Zoom application:

- Activate account
- Sign up with a Password

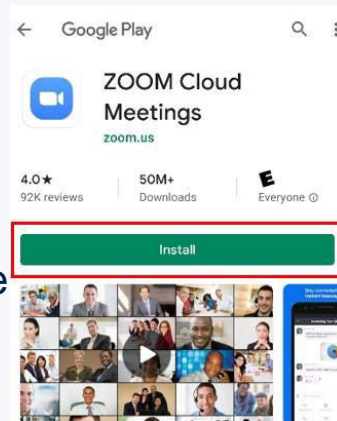
**Please use your work/corporate email address**

# Downloading Zoom

- Go to [zoom.us/download](https://zoom.us/download) to download Zoom onto your laptop/desktop

OR

- Go to the app store on your smartphone/tablet and download the **Zoom Cloud Meeting** app
- Follow the prompts to download Zoom on your device



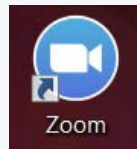
Andriod



iPhone

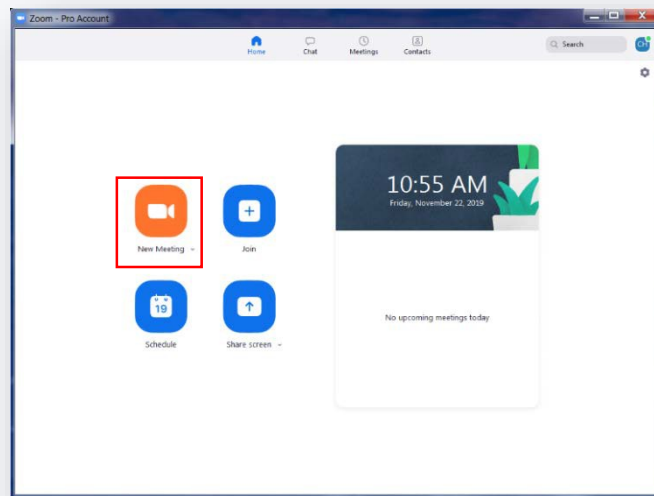
# Launch Video Visit (Desktop/Laptop View)

When patient is ready for video visit, open up your Zoom Account



Log into your Zoom account

Select **NEW MEETING** to start virtual visit





# Setup Zoom Application on Smartphones

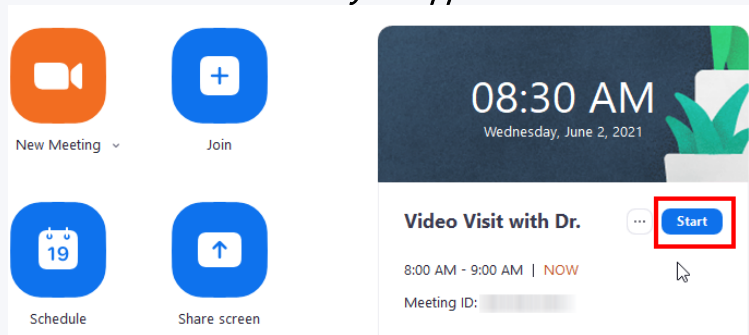
See Appendix A for detailed **Clinician** iPhone and Android instructions

See Appendix B for detailed **Patient** iPhone and Android instructions

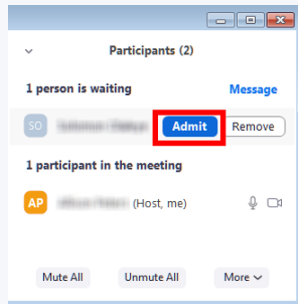
# ***\*\*Update Clinician workflow***

## ***Provider Workflow***

### ***1. Select Start next to your appointment***



### ***2. Select Admit for the patient that you are having your Video Visit with***

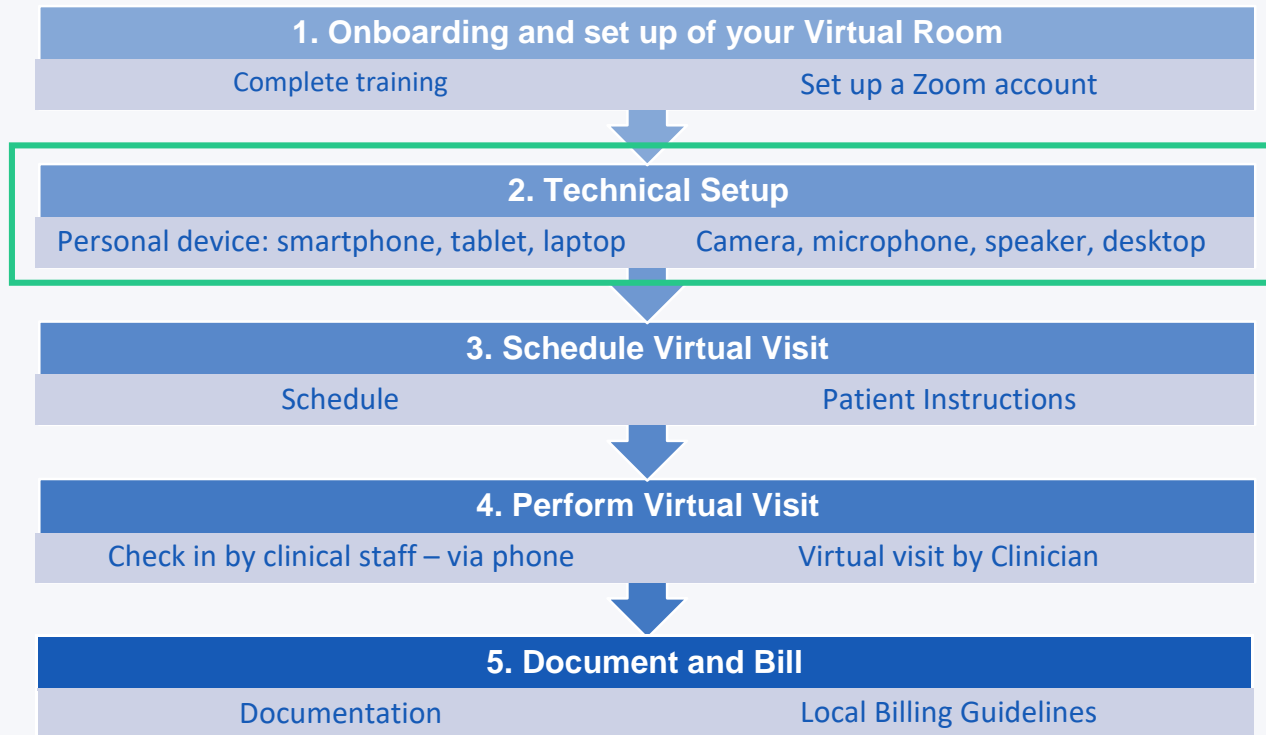


### ***3. Complete Video Visit with patient***

#### ***a. You can manage your Audio and Video Settings as well as Share Content with patient on the screen***

### ***4. When visit is complete, Select End Meeting***





# The Technical Setup

Any WIFI connected device with a camera/mic and a speaker is sufficient

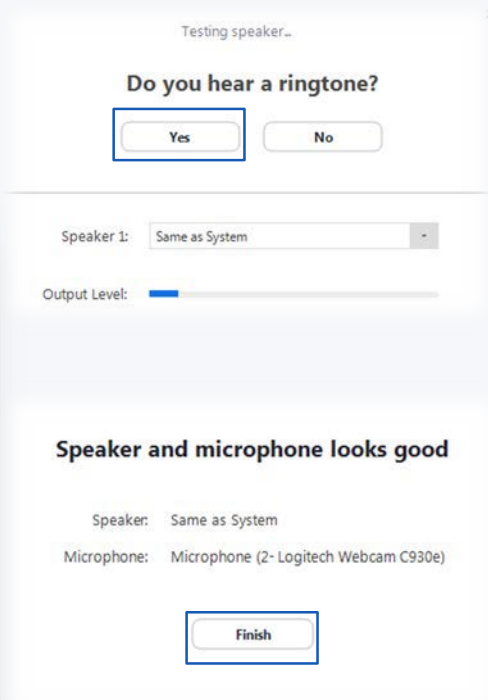
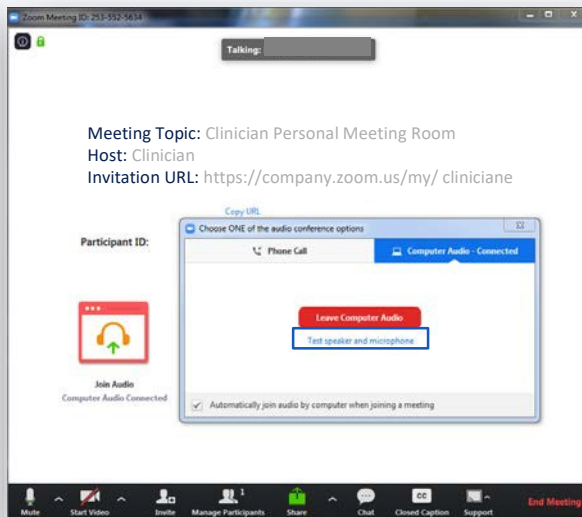
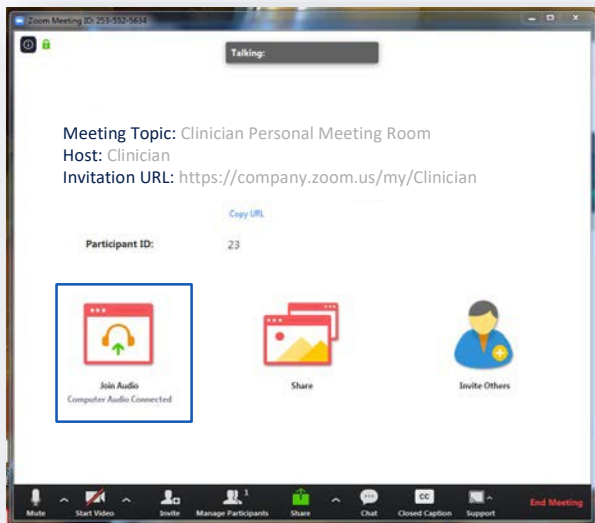
- Laptops, tablets, smartphones are all great solutions and require minimal setup
- Most plug in cameras have a microphone embedded
- If working from home, please make sure you have a way to access your EHR as well



\*See Appendix A for detailed phone instructions

# Audio Check

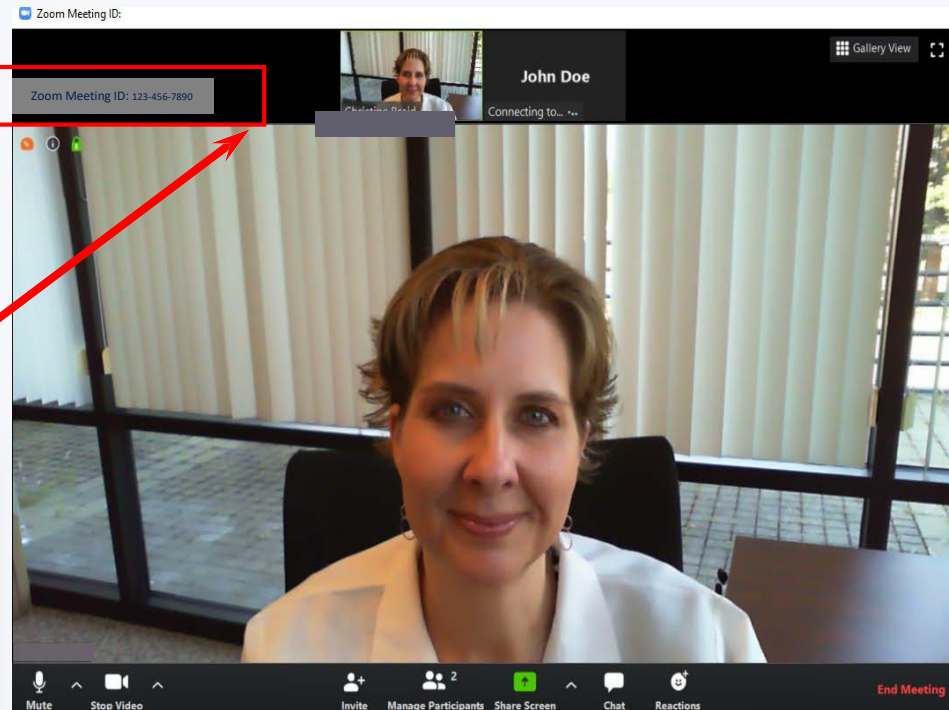
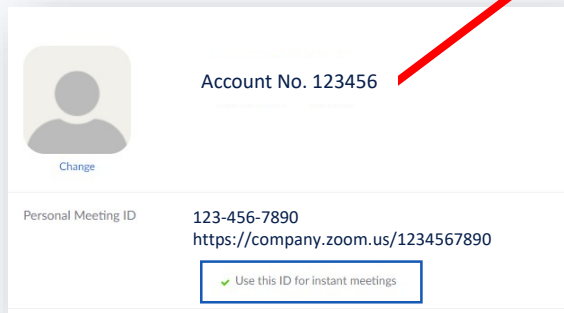
Always test your audio setting when initially logging into your Zoom Account



# Clinician: Making sure I'm in the right room

Zoom Meeting ID is displayed on top left

*Troubleshooting Tip: if you start a new meeting and get a different Zoom Meeting ID, check your settings and make sure the “Use this ID for instant meetings” box is checked*



# Telepresence Highlights

**Do:** Set up your station in a private area with a locking door

**Do:** Make sure background is clean and uncluttered and lighting is not directly behind you

**Do:** Center your image in the middle of the screen

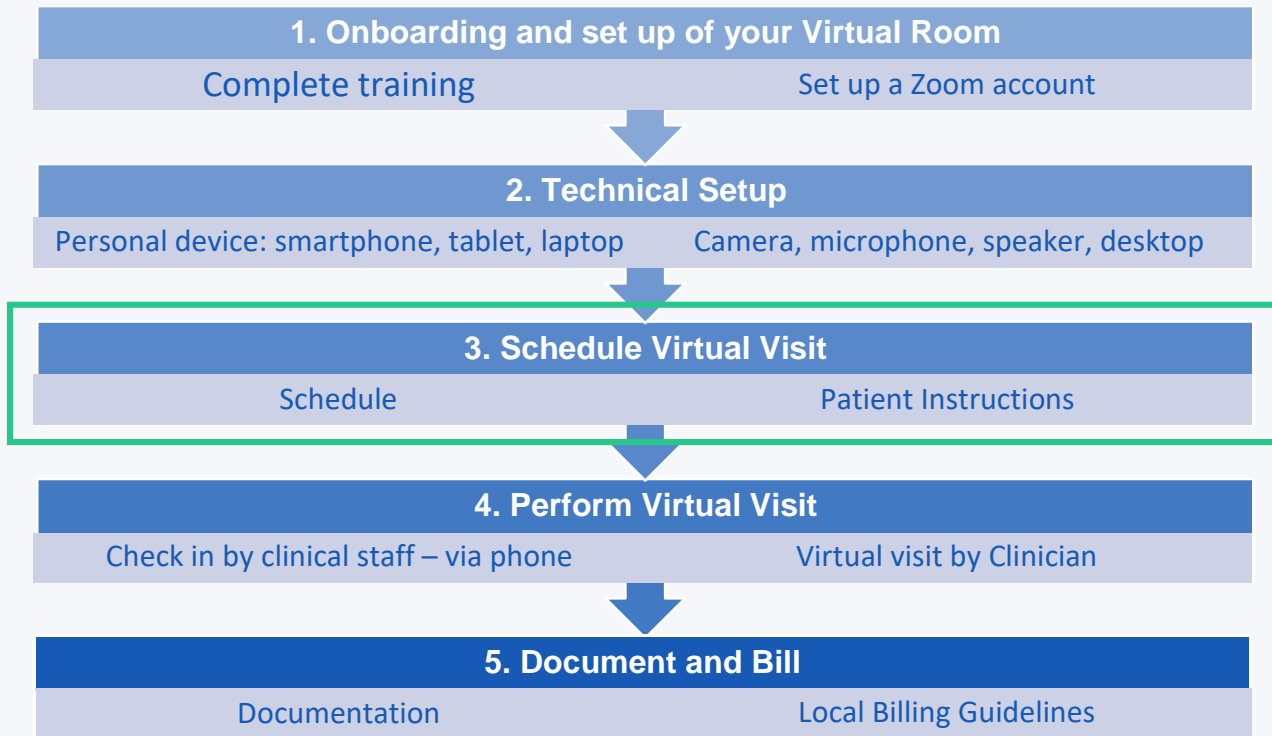


# Telepresence

## Highlights cont.

- Do:** If charting during the visit and looking away from the camera, explain to the patient to assure they understand you are not distracted
- Do:** Screen sharing can be utilized (if no other patient data is visible)
- Do:** If someone walks into your space during the visit, stop the visit and introduce
- Do:** Attire: Scrubs, white lab coats and name badges are highly recommended to build trust





# Scheduling Virtual Visits

- Zoom is a standalone video connection and can be utilized in parallel with any EHR
- Follow the established clinic workflow to schedule appointments and establish a process to indicate on Clinician schedule that visit will be completed virtually (visit code or Clinician schedule notes)
- Send visit information to patient with link and connection directions to patient\* and resend instructions with visit reminder

\*comply with local privacy and security standards when using patient's email

# Office Staff Process for Scheduling Zoom Patient Visit

- 1) Verify that the patient is eligible for a video visit
  - a) Does the patient have a device that has a Video Camera
    - i) Cellphone, Tablet or Computer
      - (1) If the patient does not have one of these they are not eligible and can be scheduled for a phone
      - ii) If the patient does have a device with Video the patient can be scheduled for a video appointment with the Clinician
        - (1) End User will verify that patient has Zoom set up on their device before sending Video Appointment invite
        - (a) Zoom Application has to be downloaded
        - (2) Schedule Zoom Visit
- 2) Scheduling appointment with patient
  - a) Office Staff will need to document in a message the following:
    - i) Patient's Consent for Video Visit
    - ii) Determine how patient will receive Video Visit information – if by personal email, consent is needed
    - iii) Complete any required screening questions (for example COVID-19)

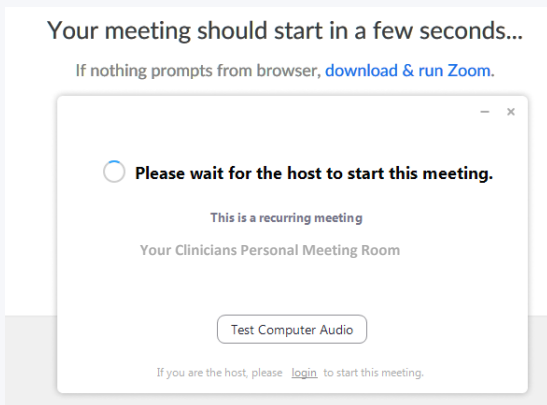
*See Appendix C for details on optional scheduling methods for Office Staff and Clinicians*

# Web Browser - Patient

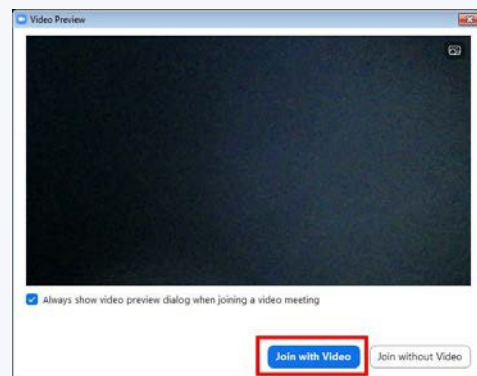
23

## At time of the Video Visit

- 1) Select on link provided by clinic
- 2) Patient will receive pop up stating *Please wait for host to start this meeting*



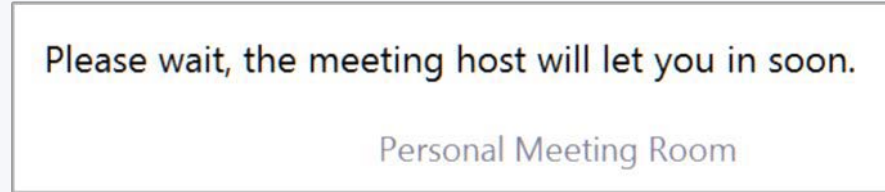
- 3) Video Preview box will populate; select **Join with Video**



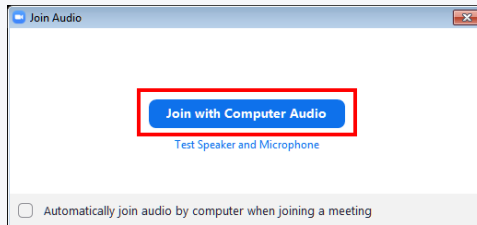
## Web Browser – Patient – Cont.

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4) Patient will get notification stating *Please wait, the meeting host will let you in soon*



5) Patient will need to select **Join with Computer Audio**



6) Clinician will complete video visit with patient

# Smart Devices -Zoom Patients Instructions

## Android:

Patient will need to download the Zoom Application

### Before Video Visit with Clinician

- 1) Go to the Google Play Store
- 2) Search **Zoom**
- 3) Select **Install**

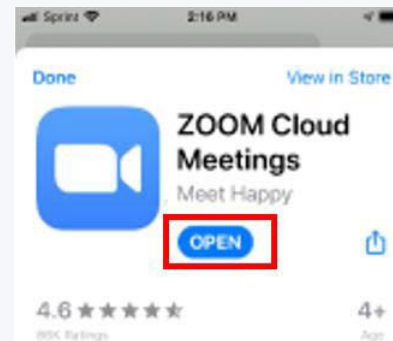


## iPhone:

Patient will need to download the Zoom Application

### Before Video Visit:

- 1) Go to the Apple Store
- 2) Search **Zoom**
- 3) Select **Install**



# Patient Instructions

Patient instructions are designed to include device specific options. Sharing of the instructions may be tailored in your division if desired.

Sharing instructions with patients:

1. Through the Patient Portal (if available)
2. No reply email (if available)
3. Over the phone

\*See Appendix B for detailed Patient instructions

## CONTENT

**Virtual Visit Instructions for: (Insert Clinician name)**

**Direct Link:** (insert Clinicians direct room link)

**Zoom Meeting ID:** (Insert Clinicians PMI)

Below are the three most common ways to get into the virtual waiting room depending on the device you will be using for your

### Direct link instructions:

Click on the direct link above (insert Clinicians direct room link) Follow the prompts to download **Zoom Cloud Meetings** app on your device

You will be placed in the virtual waiting room until the doctor arrives

OR

### Smartphone/tablet instructions:

Download the **Zoom Cloud Meetings app**; you do not have to create an account

Click "Join A Meeting".

Type the 10 digit meeting ID provided (Insert Clinicians PMI)

You will be placed in the virtual waiting room until the doctor arrives.

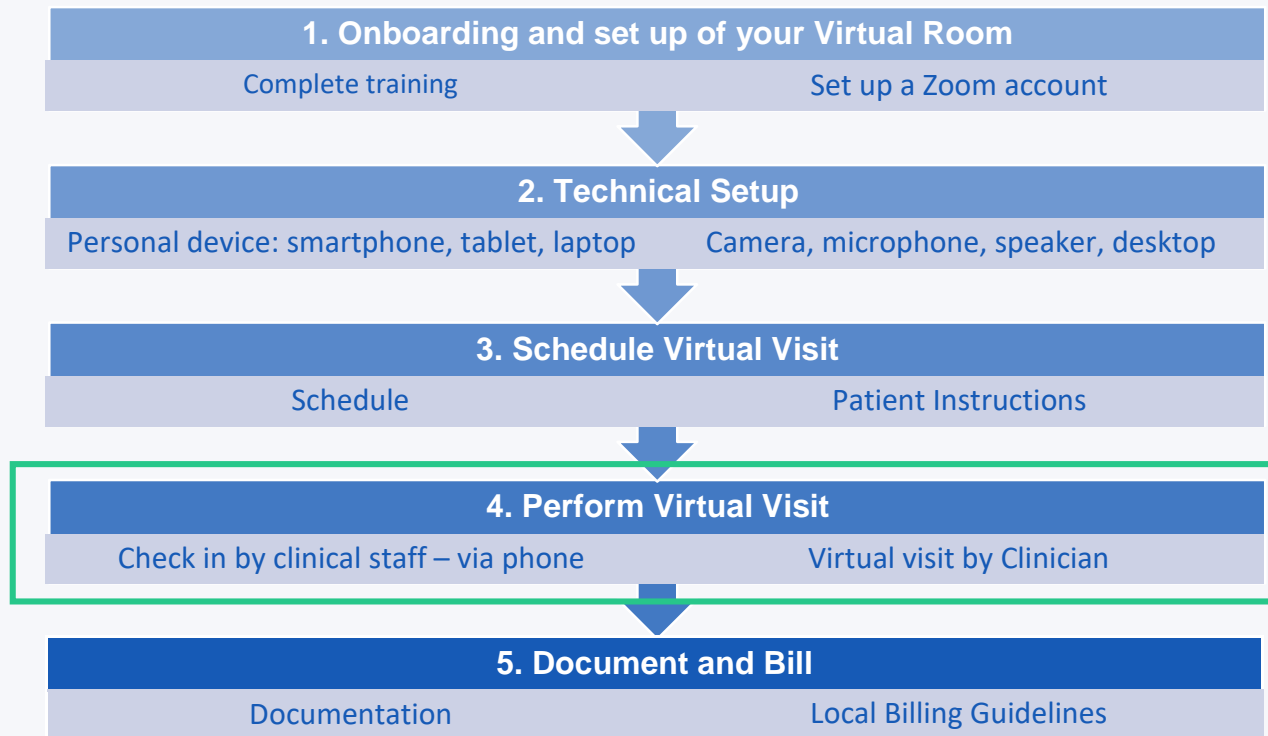
OR

### Laptop/desktop computer instructions

Click on the link: [www.zoom.us/join](https://www.zoom.us/join)

Type the 10 digit Meeting ID provided to you by the clinic (Insert Clinicians PMI) Your device will redirect you to download the Zoom application. Follow the prompts on the screen. If prompted to download or run, select "RUN".

You will be placed in the virtual waiting room until the doctor arrives.







# Medical Assistant - Recommended Workflow

## Preparing Patient for a Virtual Visit

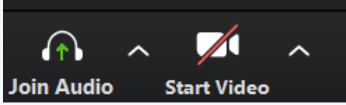

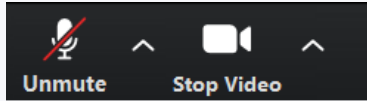
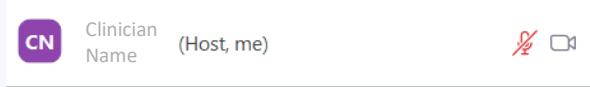
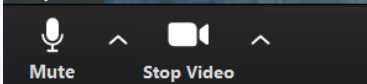

### Medical Assistant (MA) Process for Video Visit

- 1) MA will **call patient 15 minutes before** scheduled appointment
  - a) Suggested Script:
    - i) **Suggested script:** *“Hello, this is Employee Name, calling from [Clinic Department Name.] I am calling you as you had requested a Video visit with [Clinician Name.] Before we get started, can you please verify your full name and DOB? And do you consent to proceed with this Video Visit? Have you successfully arrived into the Zoom Waiting Room that was emailed to you?”*
- 2) MA will make sure that the patient has been able to successfully log in to Zoom, and Audio is working (see page 29 for audio issues)
  - a) Make sure **patient adds their legal name** when logging in
- 3) Once verified, **MA will arrive the patient**
- 4) MA will **complete Vitals**
  - a) Below are the sections to be completed for Video Visit Intake (**Follow your Clinic Protocols for your Intake on regular office visits**)
- 5) Let patient know that Clinician will be with them shortly; Hang up
- 6) Let Clinician know Patient is waiting

**Visit Summary** – At conclusion of visit MA will send a copy of the summary to patient by either:

1. Print visit summary and mail to patient
2. Send Visit Summary through Patient Portal

# If Your Patient Can't Get Audio

<p>Have the patient move their mouse. The icons on the right pop up and if it still says <b>“Join Audio”</b> then they have not connected to Audio</p>	
<p>Clinician: click on <b>“Manage Participants”</b> at the bottom of your Zoom screen. If the patient only has a camera icon, and not a microphone or phone icon, they have not connected to Audio</p>	
<p>Have the patient move their mouse. The icons on the right show up and if they are muted the audio icon will be a mic icon with a red line over it. Have patient click the icon to unmute.</p>	
<p>Clinician: click on the <b>“Manage Participants”</b> screen, the panel on the right will open with patient name. If you see a red mic icon with a slash through it, the patient was muted. Hover over the patient's name until the <b>“Unmute”</b> button appears and click it once to unmute</p>	
<p>If the patient is connected to audio in Zoom, it should show either a microphone (computer audio) or phone icon and say Mute underneath it</p>	
<p>Clinician: you would see the same icon in the manage participant screen</p>	

# Clinician Video Visit Workflow

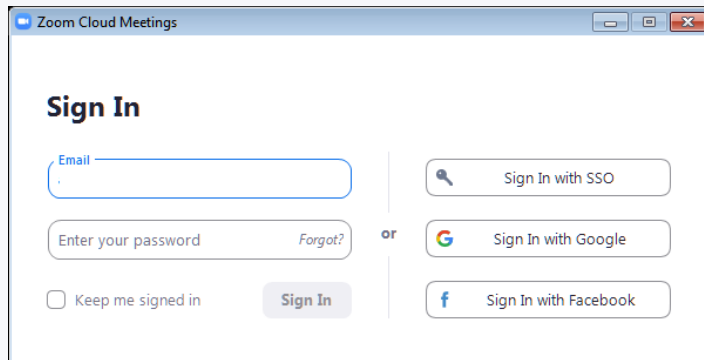
1) Open up your Zoom Account

a) Select icon on desktop



b) If no icon, use the link: <https://zoom.us/>

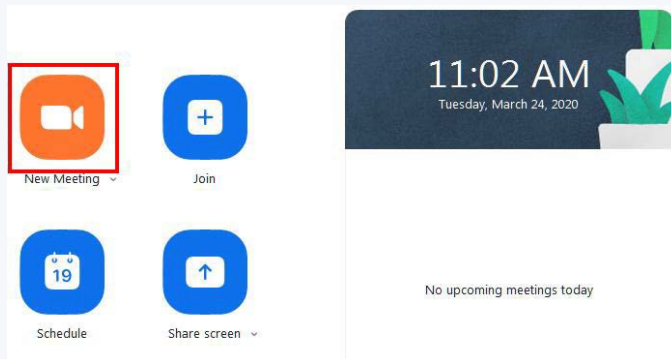
2) Log in to your Zoom account

A screenshot of the Zoom Cloud Meetings sign-in window. The window has a title bar that says "Zoom Cloud Meetings". The main content area is titled "Sign In". On the left, there is a form with an "Email" input field, a password input field labeled "Enter your password", and a "Forgot?" link. Below the password field is a checkbox labeled "Keep me signed in" and a "Sign In" button. On the right, there are three social sign-in buttons: "Sign In with SSO", "Sign In with Google", and "Sign In with Facebook". A vertical line with the word "or" separates the two columns of options.

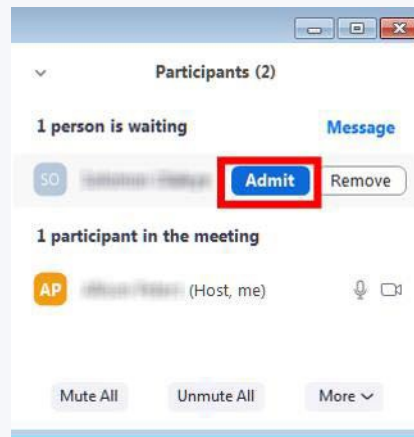
# Clinician Video Visit Workflow - Cont.

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## 3) Select **New Meeting**



## 4) Select **Admit** for the patient that you are having your Video Visit with



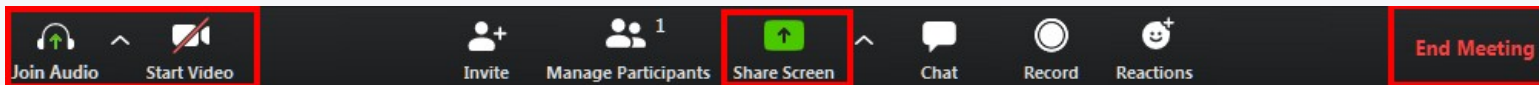
# *Clinician Video Visit Workflow - Cont.*

32

## 5) Complete Video Visit with patient

- a) You can manage your **Audio** and **Video** Settings as well as **Share Content** with patient on the screen

## 6) When visit is complete, Select **End Meeting**



## 7) Document Visit in EHR

- a) Please include in your chart note Patient Consent for Video Visit

i) Examples Below:

(1) **Informed Consent:** Patient gave verbal consent for Video Visit

(2) **Informed Consent:** The risks, benefits and alternatives to the virtual/video visit were explained to the patient and the patient consented to this modality of care. The visit was carried out on a secure line and all parties in the room were identified and approved by the patient prior to the consult. No technical issues were experienced. A level of care equivalent to in-person care was achieved.

Patient Location:

Clinician Location:

Patient informed of treating Medical Group:

Visit Type: Secured Interactive Real Time Video

Date of Service:

# State Specific Consent Requirements

Of the 21 Common Spirit Health states, written consent for telemedicine required in the following states:

- Georgia, Indiana, Ohio
- *Medicaid Only*: Colorado, Wisconsin

In most cases, documented verbal consent is sufficient.

- Recommended best practice in all states is to obtain verbal consent prior to every virtual visit and document

Reference: <https://www.cchpca.org/telehealth-policy/informed-consent>

# Consent

*\*Consent requirements vary by state, the following recommendations are for verbal consent*

## Recommended Scripting

- *“We are having this visit today on an encrypted, secure video channel. Nothing is ever recorded when we use video visits. Do I have your permission to care for you virtually?”*
- *“I want to be sure your privacy is protected.*

*On my end, no one can see or hear you but me.*

*On your end – is there anyone else in the room with you? Is it OK if they see and hear what we are talking about today?”*



## Recommended Documentation

Informed Consent: The risks, benefits, and alternatives to the virtual/video visit were explained to the patient and the patient consented to this modality of care. The visit was carried out on a secure line and all parties in the room were identified and approved by the patient prior to the consult. No technical issues were experienced. A level of care equivalent to in-person care was achieved.

PATIENT LOCATION: City, State

Clinician LOCATION: City, State

PATIENT INFORMED OF TREATING MEDICAL GROUP: Yes

VISIT TYPE: SECURED INTERACTIVE REAL TIME VIDEO

DATE OF SERVICE: Date

# Virtual Physical Exam

## Video and Patient Assisted Exam

**VS (need 3):** RR, temp, height, weight, pain, LMP - document as stated

**General Appearance:** development, nutrition, habitus, grooming

**Skin:** rash, lesions, ulcerations, appearance

**Eyes:** conjunctivae/lids, pupils, conjunctiva.

**Ears:** external exam, hearing assessment. Oropharynx: mucosa, palate, tongue, tonsils

**Mouth:** mucous membranes, lesions, still image of posterior oropharynx (symmetric, no exudate)

**Neck:** ROM, symmetry, self-exam for tenderness

**CV:** limited to pulse, BP

**Resp:** retractions, accessory muscles, chest wall palpation

**Abdomen:** distention, tenderness

**Musculoskeletal:** gait, station, inspection digits and nails, exam of joints (inspection, ROM, stability), strength/tone, atrophy/abnormal movements.

**Psychiatric:** complete exam

**Neurologic:** near complete exam, CN, sensation, strength (with assistant).

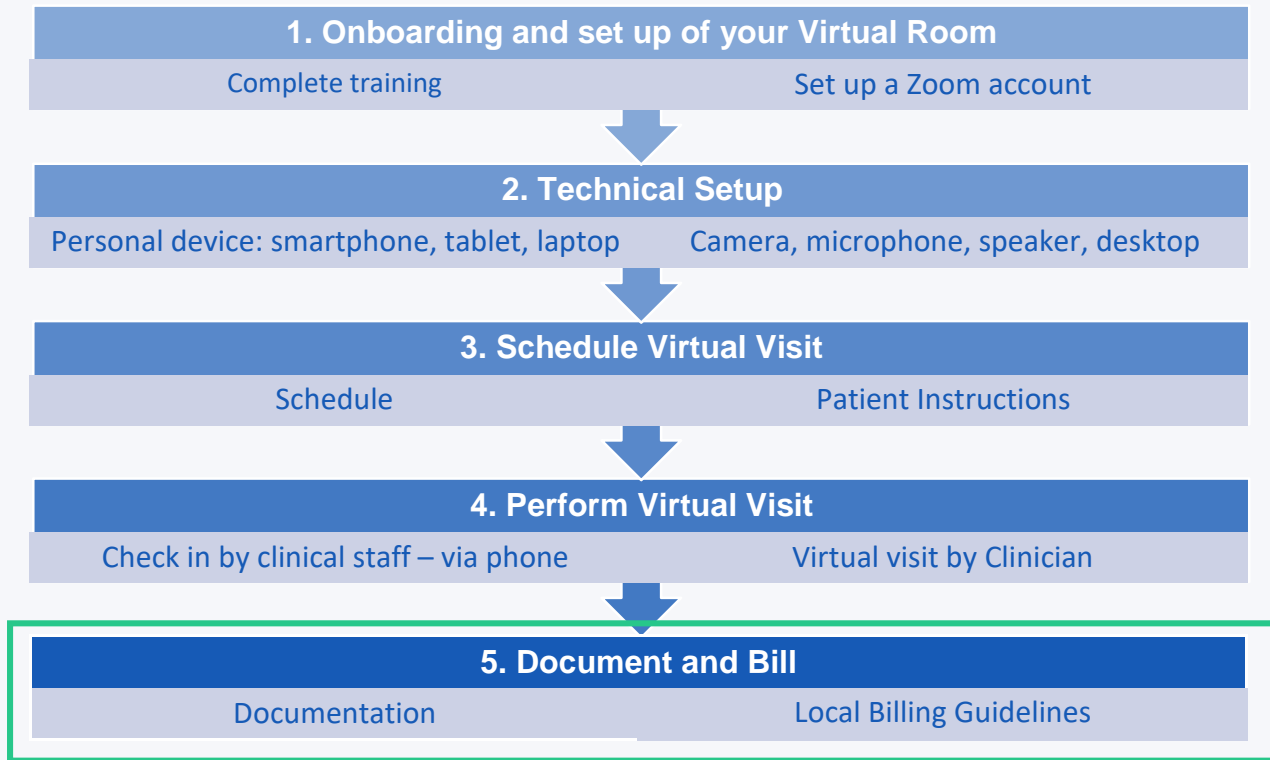




# How does the visit look on my phone?

See Appendix A for detailed **Clinician** iPhone and Android instructions

See Appendix B for detailed **Patient** iPhone and Android instructions



# Documentation Standards

Clinicians shall generate and maintain an electronic medical record for each patient for whom they provide care.

All communications with the patient (verbal, audiovisual or written) should be documented in the patient's medical record **on par with documentation standards of in-person visits.**

Clinicians should fully document the specific interactive telecommunication technology used to render the services. Document statement or one similar: **“Patient was seen via a secure interactive real time video”**

Recommend statement **“patient consented to service”** after informed consent has been obtained. **Document patient's location at time of service**

# Billing for Virtual Visits

Varies per state: Contact your Billing and Coding department for recommendations.

## COVID19:

Medicare restrictions are temporarily lifted and visits in all geographical areas are now covered during the COVID19 response (originating site “home” is still subject to specific conditions such as end stage renal disease, substance abuse with a mental health dx and Medicare Advantage)

# Appendix

Appendix A – Clinician Setup (iPhone & Android)

Appendix B – Patient Setup (iPhone & Android)

Appendix C – Software Support/Help

# Appendix A

## Instructions for iPhone

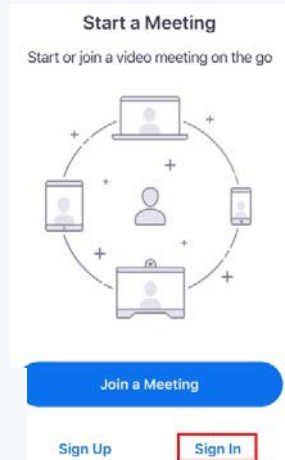
1) After you have signed up on your desktop; go to the **Apple Store**

2) Search **Zoom**

3) **Install** and select **Open**



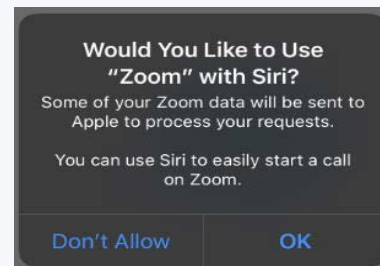
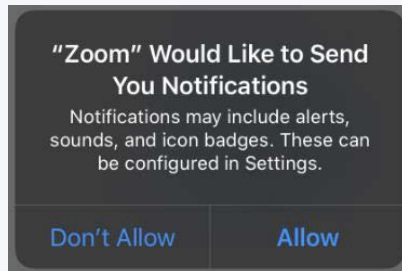
4) **Sign in**



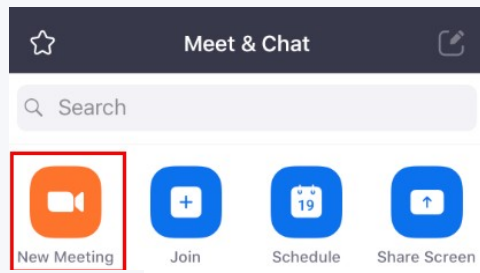
# Appendix A

## Instructions for iPhone - Cont.

### 5) Choose your desired settings



### 6) Select New Meeting

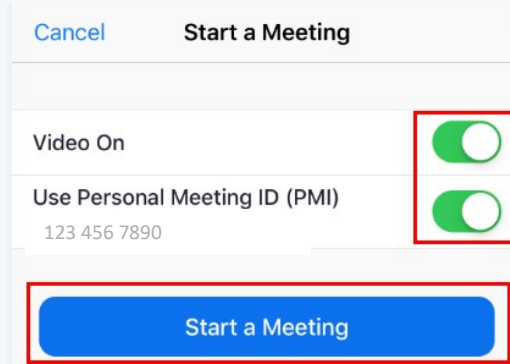


# Appendix A

## Instructions for iPhone -Cont.

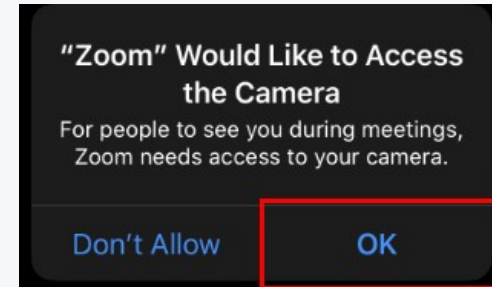
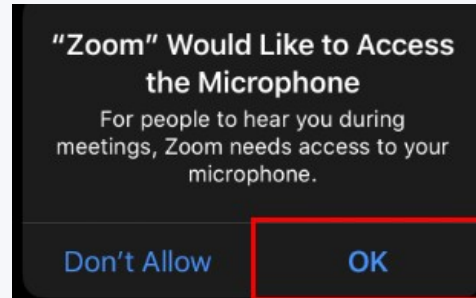
43

7) Make sure **Video** and **PMI** are set to **ON**; Select **Start Meeting**



8) Select **Allow** for *Microphone*

9) Select **Allow** for *Camera*





# Appendix A

## Instructions for Android

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1) After you have signed up on your desktop; go to the **Google Play Store**

2) Search **Zoom**

3) Select **Install**



4) Select **Open**

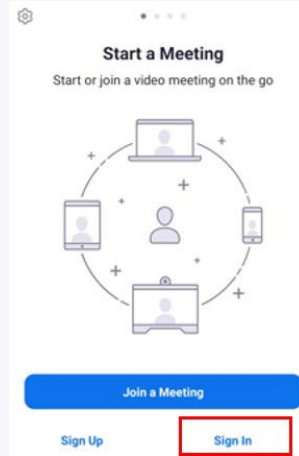


# Appendix A

## Instructions for Android – Cont.

45

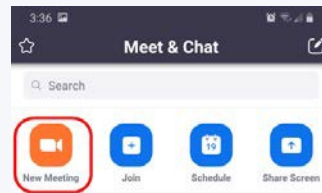
5) Select **Sign In**



6) Enter **Email and Password**; Select **Sign In**



7) Select **New Meeting**

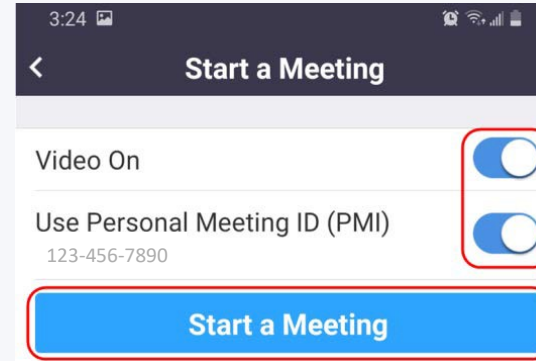


# Appendix A

## Instructions for Android –Cont.

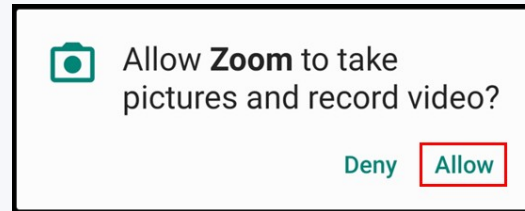
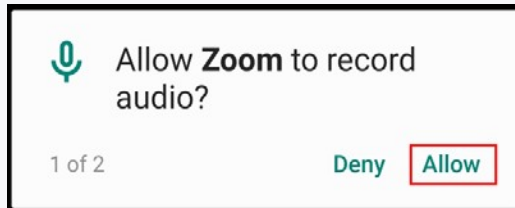
46

8) Make sure **Video** and **PMI** are set to **ON**;  
Select **Start Meeting**



9) Select **Allow** for *Audio*

10) Select **Allow** for *Video*

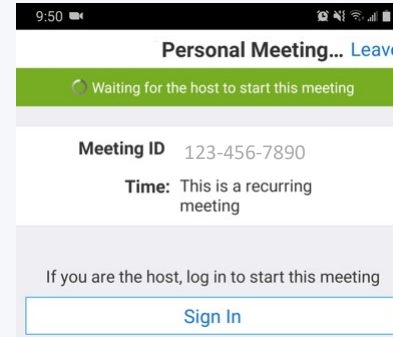


# Appendix B

## a) Zoom Patients Instructions

### At time of the Video Visit

- 1) Select link provided by office
- 2) Patient will be directed to the Zoom application
  - a) Patient will have a notification stating  
"Waiting For The Host To Start This Meeting"
- 3) When Clinician starts the meeting, the patient may be prompted to enter their name. Please enter *Legal Name*; Select **OK**



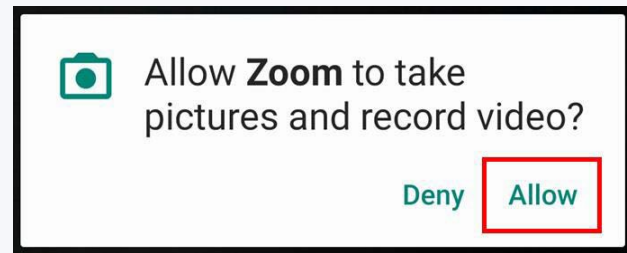
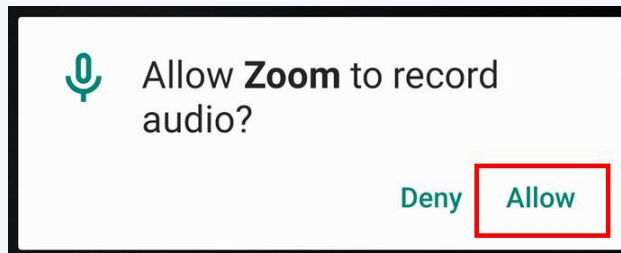
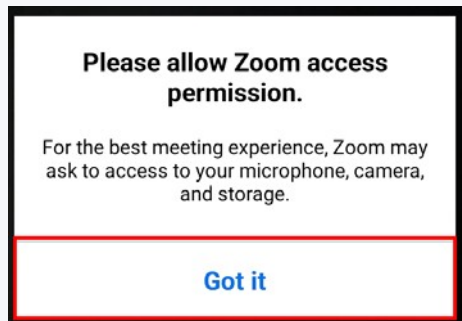
# Appendix B

## a) Zoom Patients Instructions – Cont.

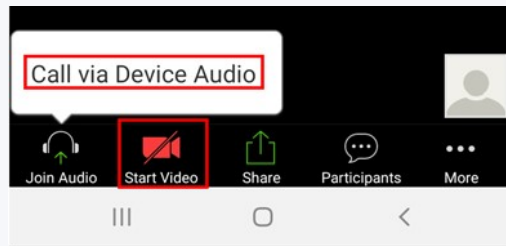
48

4) Once patient is let in to the Meeting room they will have to choose **Call via Device Audio**

a) If this is the first time patient is using Zoom they will have to **allow** the application to use **Audio and Video**



5) Connect to Audio and Video

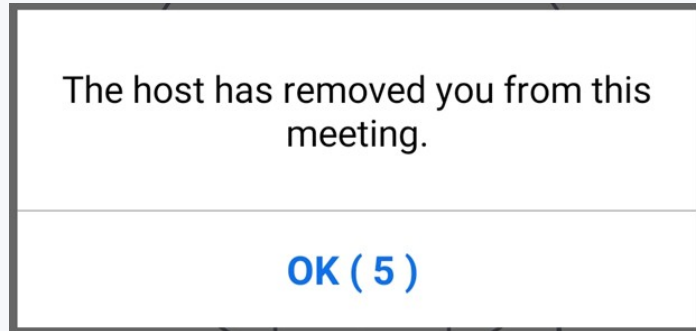


# *Appendix B*

## *a) Zoom Patients Instructions – Cont.*

6) Patient will have video visit with Clinician.

7) Patient will get the following notification when the meeting has ended



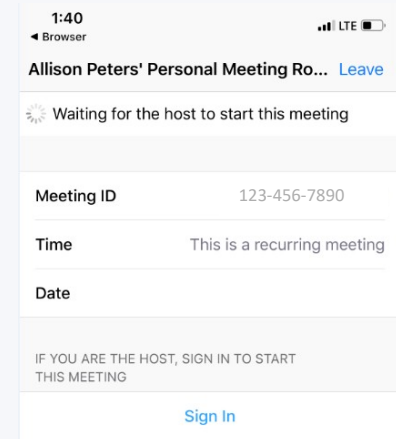
# Appendix B

## b) Patient i-Phone

At time of video visit

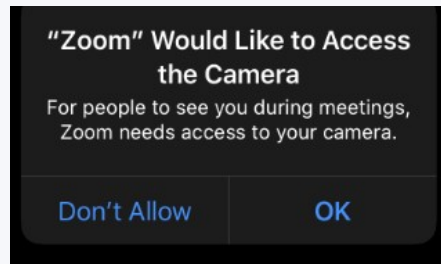
- 1) Select link provided by office
- 2) Patient will be directed to the Zoom application
  - a) Patient will have a notification stating  
*Waiting For The Host To Start This Meeting*

**NOTE:** Patient needs to ensure they are not in “**Safe Driving Mode**” on their phone as that will impede audio.

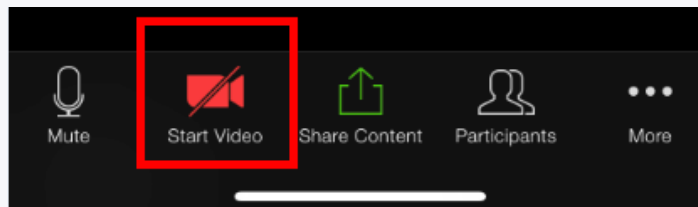
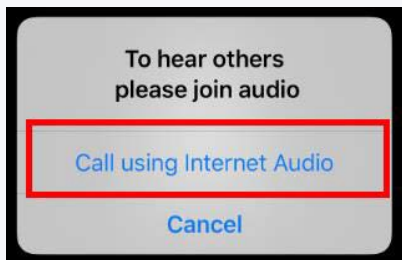


3) Once patient is let in to the Meeting room they will have to choose **Call via Device Audio**

a) If this is the first time patient is using Zoom they will have to **allow** the application to use **Audio and Video**. ( please make sure that you are not in “Safe Driving Mode”)



4) Connect to Audio and Video. Patient is ready to have a video visit with clinician





## *24/7 Support*

When calling the help desk please state that you need support for the **HIPPA Compliant Zoom Platform**.

You will then be routed to the Zoom support group

**IT Help Desk #: 1-877-321-0057**