WUSM Telehealth (Zoom Integration) Visits

This tip sheet outlines the workflow for scheduling Telehealth visits with Zoom integration for WUSM staff. Any Telehealth Zoom appointments should be scheduled with an appointment date of 7/09/2020 or after.

The patient must have an active MyChart account to have a WU Zoom Visit. You can easily see from Storyboard before scheduling if a patient has an active account by the MyChart icon. An appointment can still be scheduled but the patient must complete the activation process before the appointment date.

Scheduling a WU Zoom Visit

A patient will be scheduled with the standard workflow with the exception of selecting a WU Zoom visit type with direction from your provider.

NOTE: If the patient or provider experiences technical difficulties and is unable to use Zoom during the visit, and the visit is performed via phone only, the visit will need to be changed to the standard WU phone/video.

1. From the Appt Desk, click Make Appt.

2. Enter the appropriate Appt notes.
3. Enter the Visit Type.
4. Single click to select the appropriate WU Zoom Visit Type.
5. Click Accept.
Description of WU Zoom Visit Types

- **WU ZOOM NEW** - use this visit type if the patient will be at a location other than a clinic (home, coffee shop, library, etc.) and it is a new patient visit.
- **WU ZOOM POST OP** – use this visit type if the patient is in a post op period.
- **WU ZOOM RETURN** - use this visit type if the patient will be at a location other than a clinic (home, coffee shop, library, etc.) and it is an established patient visit.

6. If multiple providers display as available for this visit type you will be required to select a provider. If only one provider defaults in no action is necessary.

7. Select the date of service.

8. Click **Search**.

9. Double click to select the time slot on the Provider’s schedule.

10. Click **Schedule**.
11. The Patient Instructions section in the Appointment Review window will be available to the patient in MyChart.

Instruct the patient to log in to MyChart to view the full video visit instructions.

12. Click Accept.

13. Follow the standard workflow to verify registration information, referral source and documents.
14. Click Finish.
Appt Status on the DAR

Front Desk staff will see the WU Zoom Visit appointment on the DAR but will not take any action. The patient will use MyChart to Check-In and Check-Out.

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<th>Time</th>
<th>Department</th>
<th>Name</th>
<th>Appt Status</th>
<th>Patient</th>
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<th>Acct Status</th>
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<th>Apt Message</th>
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