# WUSM Video Visits

**Video Visits: Meet the Patient Where They Are**

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Video Visits: Meet the Patient Where They Are

Video visits are a great way to augment in-person visits, broaden access to care, and increase communication between clinicians and patients. This quick start guide will cover the steps to launch a video visit and best practices to ensure that your visits are a success.

Patients Eligible for a Video Visit

- These visits must be scheduled in advance.
- Patients must have an active MyChart account. They can only join a video visit while logged in to MyChart. They will also receive detailed instructions about how to connect to and participate in these visits.
  - If a patient does not have an active MyChart account, a warning appears during scheduling, advising the scheduler to send an activation email to the patient (if they’re 18+ years old).
  - Patients under 18 must use a special process to obtain a MyChart account.

Licensure

- The provider’s licensure must align with where the patient is located at the time of the video visit.
  - For example, if the provider is only licensed in the state of Missouri, they cannot conduct a video visit with a patient who is at their home in Illinois.
  - Schedulers see a reminder about this if the provider isn’t licensed in the state that’s part of the patient’s primary address.

Reviewing a Patient’s Storyboard

- By reviewing a patient’s Storyboard, you can quickly evaluate their MyChart account status along with their demographics.
  1. MyChart
     - Look to the right of the patient’s picture on their Storyboard. A green computer screen with a check mark means that the patient has an active MyChart account.
2. Demographics

- Reviewing the patient’s demographics can help identify if they are located in a state where the provider is licensed.
- To find the patient’s home address:
  1. Click on their name in the Storyboard.
  2. The demographics activity will open and their permanent address is listed.

The patient’s home address WILL NOT always indicate where the patient will be at the time of the scheduled video visit, but can be a good indicator.

The first person to speak with the patient during the video visit should ALWAYS confirm that the patient’s current location aligns with the provider’s licensure.

Visit Preparation

As a clinician, prepare for the visit like you would any other in person clinic visit. Prior to meeting with your patient, be sure to review information like:

- Clinical notes.
- Medical history.
- Patient messages.
- Vital signs and symptom survey responses.

Patients also need to prepare before a video visit. They receive information via email or MyChart so they are properly prepared for the visit, and are instructed to:

- Have an active MyChart account.
- Login in 15 minutes early to test their video connection.
- Download the Zoom app onto their PC, Mac, phone, or tablet. This is required for the patient to be able to connect to the video visit.
• Take the video visit in a private area.
  o Zoom is a HIPAA-compliant video solution and we are collecting consent from the patient for the video visit.
  o It is their responsibility to choose a secured place to conduct the visit.

Schedule
The patient’s visit appears on the Schedule and the Visit Type is identified as a Zoom visit. There are three different visit types:

• **WU ZOOM NEW** – use this visit type if the patient will be at a location other than a clinic (home, Starbucks, library, etc.) and it is a new patient visit.
• **WU ZOOM POST OP** – use this visit type if the patient’s visit should not be billed (Medicare, Research Study, etc.).
• **WU ZOOM RETURN** – use this visit type if the patient will be at a location other than a clinic (home, Starbucks, library, etc.) and it is an established patient visit.

The Video column, which shows the patient’s connection status, should be added to your schedule. If the icon is white, the patient is not connected. If the icon is green, the patient is connected to the video visit.

To add this column to your schedule:

1. Click the gears on the left side of the Schedule, under **Dept**.
2. On the General tab, type “video” in the search box and press Enter.
3. The Video column appears in the Available Columns section. Click **Add Column**.
4. Click **Accept**.
Starting a Video Visit

Depending on your clinic’s workflow, the following steps may be completed by a provider or MA/RNs.

Video visits can be completed with the assistance of a MA/RN rooming the patient, or providers can complete the visit entirely on their own. To start a video visit:

1. Double-click the patient’s visit on the schedule to start the encounter.
2. If the patient has not yet checked in, there will be a warning at the top of the screen saying that the patient has not arrived yet. You also won’t see the Video Visit tab. Click **Start the Visit** to make this tab appear.
3. Click the Video Visit tab. There are four sections in this activity.

   i. **Patient Location** – If a nurse/MA rooms the patient, they click **New Reading** and add a new comment of **Ready** to indicate that they are ready to be seen by the provider. This will be visible on the schedule and in the Patient Location section.

   ii. **Questionnaires** – Requires you to confirm the patient’s current location. **The patient’s current location must align with the provider’s licensure.** During the check-in process, patients will also be asked to provide a telephone number they can be reached at in case there are delays or technical issues.

   iii. **Video Visit** – Allows you to launch the video visit. Also shows who is currently connected.

   iv. **Instructions** – Explains what to do if the patient is in the wrong state or does not join the visit.
4. Launch the video visit by clicking on the Launch Zoom Video Visit button. You will be taken to the patient’s video feed, if they’re already connected.
   - If there are problems with the video connection, the provider can continue documenting in the encounter based on a phone call with the patient, but they need to notify their scheduling staff to update the visit type to the appropriate WU PHONE/VIDEO category prior to end of day processing.
   - If you use Haiku, you can also join the video visit from your mobile device. Click Handoff to Haiku and then tap on the Video Visit notification you receive to launch the video visit in Zoom. If Zoom doesn’t open immediately, tap the appropriate link on the new page to launch the meeting in Zoom.
     i. Make sure you have Zoom installed on your mobile device.
     ii. If prompted, choose to connect using internet audio instead of dialing in.
     iii. If Handoff to Haiku doesn’t appear:
         a. Make sure you have logged in to Haiku in the last 45 days.
         b. Make sure you have the Start Video Visit push notification type enabled.
             a. In Haiku, open the Notifications activity.
             b. Tap the gear or three-dot button to open your preferences.
             c. Find the Start Video Visit notification and enable it.
     iv. If the patient has not yet joined, you must confirm that you want to access the future encounter before Haiku will connect you to Zoom.
5. If you are the first person to talk to the patient during the video visit, always confirm that the patient’s current location aligns with the provider’s licensure. Since patients can complete eCheck-In and answer this question starting 1 week before the video visit, it is important to ask this question again because the patient’s location may have changed.
   - If a patient is NOT currently located in a state where the provider is licensed, you will have to end the visit and the patient will have to reschedule.
   - If the patient is currently in a state where the provider is licensed, the video visit can continue.
   If necessary, the provider/support staff will need to inform appropriate staff that the visit did not occur and must be cancelled.
6. Navigate to the Rooming activity and complete any pertinent rooming information for this encounter: Visit Info, Allergies, Medication Review, etc.
7. Once rooming is complete, you can document any information that the patient shares directly into Epic.
8. When the visit is complete, click the red End button at the bottom of the Zoom screen.
9. Two options appear: End Meeting for All and Leave Meeting.
   - End Meeting for All will end the video visit for everyone, so never click that unless everything is completely finished.
   - Leave Meeting will pause the visit. Support staff like MAs/RNs should click Leave Meeting when handing the visit off to the encounter provider.
10. Click End Meeting for All.
11. As with any standard office visit, you will need to complete a note, document a visit diagnosis, and select a Level of Service.
    - Video visits do not require a special Level of Service. You will continue to use the same Level of Service that you would for an in person visit.
12. Click Sign Visit.
Zoom Video Visit Screen
There are several tools available when using Zoom during a video visit.

1. Controls your microphone. Click to mute/unmute your microphone, or hover over it and click the arrow for a menu with more audio options.
2. Controls your video. Click to enable/disable your camera, or hover over it and click the arrow for a menu with more video options.
3. Controls security. Click for options like removing a participant and locking the visit so no one else can join.
4. Controls whether the Participants sidebar appears. Click to show/hide the sidebar.
5. Allows you to chat with your patient. When you receive a message, a red “1” appears on the Chat icon. Click to see what the patient sent. When you send a message to the patient, they see a brief pop-up containing your message.
   - If your audio gets disconnected, we recommend calling the patient at the number they provided during eCheck-In.
6. Controls screen sharing. If you want to share your screen with the patient, click Share Screen and pick the application you want to share. Remember to stop sharing when you’re done.
7. Controls reactions. We don’t expect reactions to be necessary for these video visits.
8. Allows you to end the video visit. Click to see a pop-up letting you choose between leaving the visit yourself and ending it for everyone, including the patient.
Screen Setup
There are several ways to set up your screens while using both Zoom and Epic at the same time.

1. Alternate between the two applications.
2. Utilize dual monitors and have Zoom and Epic pulled up on separate screens.
3. Split your screen with Zoom and Epic so you can document as you talk with the patient.
   a. By hitting the Windows button and the left or right arrow, you can send the video visit to one half of your screen.

   b. The above keyboard shortcut will NOT work with Epic. You will have to minimize and resize the screen. Once you have done this, Epic will remember the minimized size every time you click the minimize button.

Best Practices
For more information about WUSM video visit expectations, refer to our Virtual Visit Etiquette guide. For example, as with a standard office visit, it’s important to wear your identification badge, as well as maintain eye contact with the patient whenever possible.

Technical Issues
If you experience technical issues while using Zoom or Epic, reach out to the Washington University Help Desk at 314-933-3333.