

# Provider Video Visit Tips and Tricks

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# Epic Telehealth - Video Visits – Provider

Epic can connect providers and patients remotely via MyChart. To conduct a video visit:

- **Providers** may use a PC Desktop, Laptop, Mac, iPhone, iPad, or Android smartphone
- **Patients** may use the preferred devices of iPhone, iPad or Android tablet or smartphone, but can also use PC Desktop, Laptop, or Mac if equipped with a camera, speakers and microphone.

## Before You Begin

In order to conduct video visits as the provider, you must have the appropriate software and hardware installed.

**PC Desktop, Laptop, Mac:** Provider must have Epic and VidyoConnect installed on the workstation. In addition, there must be a camera and speakers installed to conduct the video visit.

**Apple iPad:** Provider must have the Epic Canto\* and VidyoConnect applications installed on the iPad and accessed to conduct the video portion of the visit.

**Apple iPhone or Android smartphone:** Provider must have the Epic Haiku\* and VidyoConnect applications installed on the smartphone and accessed to conduct the video portion of the visit.

\* To download and configure your device with Epic Haiku or Canto go to <https://mychart.ynhhs.org/EpicMobile>. Android users please contact the help desk for assistance with the set up of your phone.

To be eligible for Video Visits:

- The patient must be located in the state of CT at the time of the visit, or a state in which you are licensed. Discuss with your practice administrator how to obtain necessary licensure outside of CT.
- The patient or patient’s proxy must have an active MyChart account.
- The patient or patient’s proxy must have access to MyChart via web or the mobile app

All of these requirements are confirmed during the scheduling process.

## Scheduling the Visit

Before a video visit can be conducted, a MyChart Video Visit must be scheduled for the patient. Here is an example of how the MyChart Video Visit will appear in the provider schedule:

Time	Patient Name/Age/Sex	Txp Date	Type	Notes
12:45 PM	[REDACTED] C (44...	10/14/2016	MYCHART VIDEO...	video visit

(Refer to Epic Telehealth – Video Visits - Scheduler document for more information.)

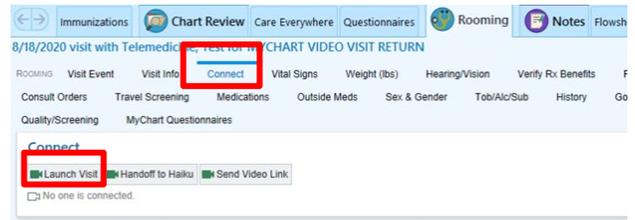
## Telehealth Consent – Patient eCheck-in Process

When the patient joins the video visit, they will be prompted to complete the eCheck-in process. The patient will be required to sign any outstanding documents, including the telehealth consent.

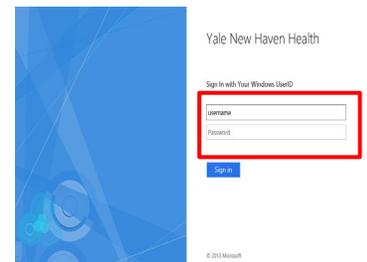
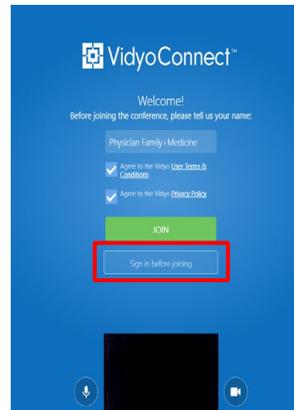
## Conducting The Visit – PC Desktop, Laptop and Mac

If you will be conducting the video portion of the visit using a hospital or university PC desktop or laptop, a one-time installation of VidyoConnect is needed. If VidyoConnect is not already installed, see the **Provider Tips and Tricks VidyoConnect Installation** document.

1. Sign into Epic and begin the appropriate scheduled video visit. Launch the video by clicking **Launch Visit or Connect** within the **Rooming navigator**.

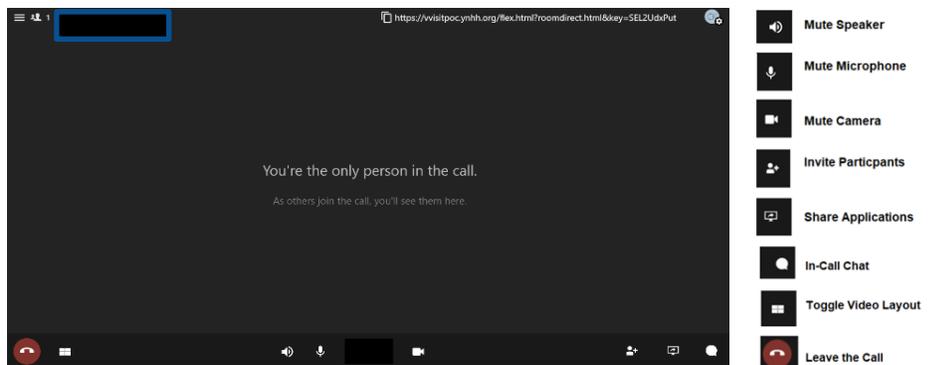


2. Select **Sign in before joining**. When the sign-in page launches, enter your Epic username and password. The VidyoConnect web page will open, if prompted select “Open VidyoConnect”.

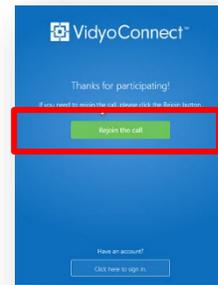


3. Begin visit when both you and the patient are present.

4. Onscreen Features:  
VidyoConnect allows you to mute your speaker, microphone and camera. You are also able to share applications and chat from these devices.



- When you are ready to leave the call, simply hit the red phone icon. If the meeting is ended prematurely, click **Rejoin the call** to get back into the video visit.



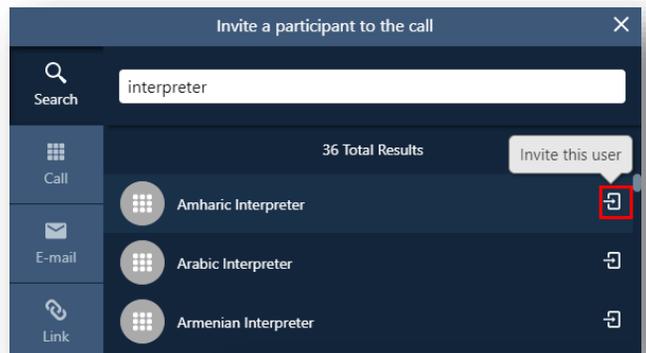
## Adding An Interpreter

How to include Interpreter Services in a video visit:

**NOTE: This can only be done using a PC desktop, laptop or Mac.**

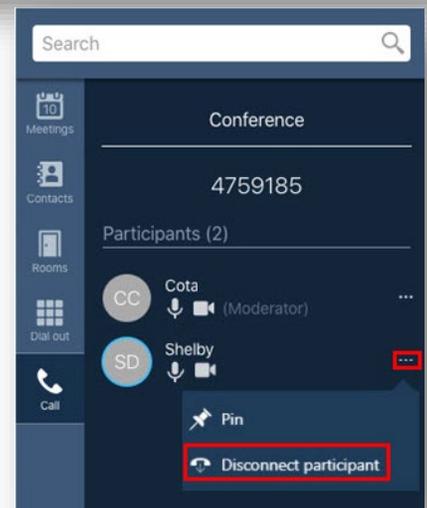
- After joining the video visit in Epic, the VidyoConnect screen appears.
- Click the invite participants icon. 

- In the search box type **interpreter** or **the preferred language**.
- When you find the patient's preferred language click the **Invite this user icon**.
- The interpreter will join the video visit.



- Once you're finished with the interpreter disconnect with them by hitting the 3 lines in the top left corner of the VidyoConnect screen. 

- This will bring you to the participants screen. Click the three dots next to the participant's name and click **Disconnect participant**.



## Inviting Family Members to the Visit

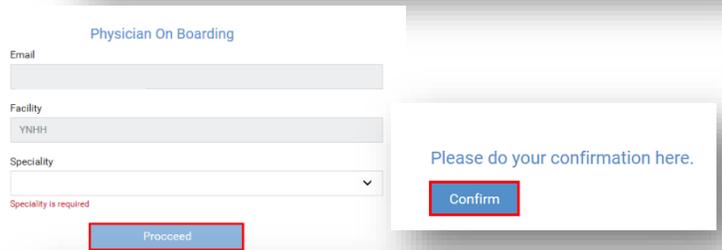
**NOTE: This can only be done using a PC desktop, laptop or Mac.**

1. Sign into Epic Production and double click the patient's name on the schedule.
2. In the **Rooming Navigator**, hover over Connect and click the **arrow** (you can also scroll until you reach the Connect section).
3. Click **Send Video Link**.

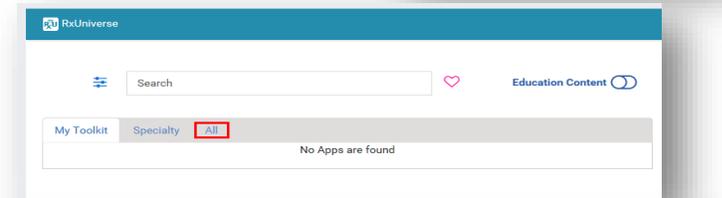


The following steps only appear the first time you use this feature:

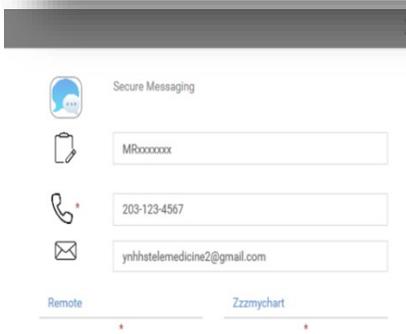
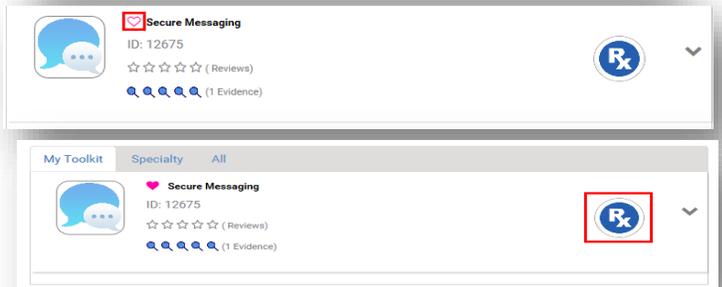
4. Your e-mail address and facility will appear, select your **Specialty** from the drop down.
5. Next click **Proceed**, **Confirm**, then **All**.



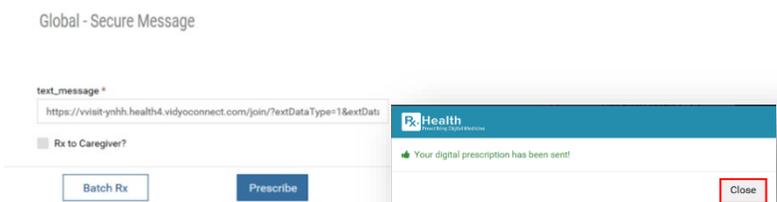
6. Scroll down until you see Secure Messaging. Click the heart to mark the Secure Messaging as a favorite. Then click **Rx**.



7. When the secure messaging screen appears, add the family member's phone number.  
Note: You may need to remove the patient's name and phone number to add the family member's.
8. Click **Prescribe** then **Close**.



\*The link will come from a secure address and not a personal email or cell phone number. The family does not need to have a MyChart account but will be prompted to download VidyoConnect on the device which receives the link.



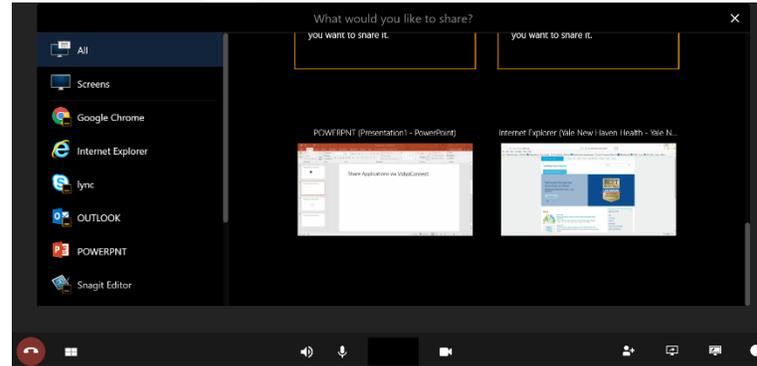
## Share Screen Functionality

**NOTE: This can only be done using a PC desktop, laptop or Mac**

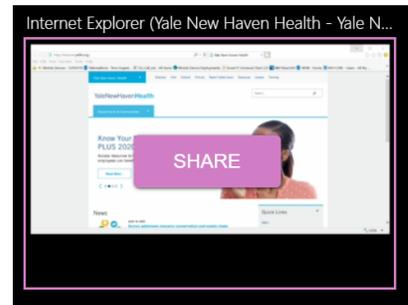
1. After joining the video visit in Epic, the VidyoConnect screen appears
2. Click on the **Share applications** icon.
3. The left side of your screen will show your open applications that are available to share. **Click on the screen** you would like to share.



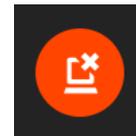
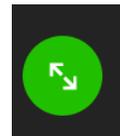
Share Applications



4. Click on the **share button**.



5. You can expand the view by using the **expand icon**.
6. When finished, click on the **stop sharing icon**.



**Note:** If screen goes black, click your video off and on using your **mute camera** icon.

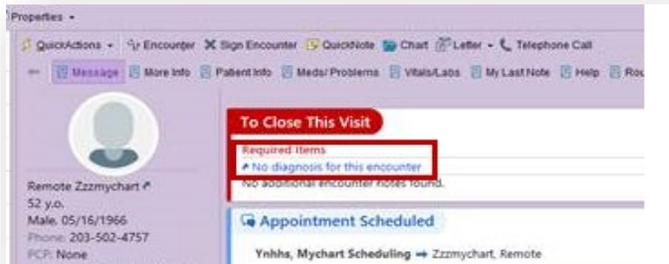
\*Important Note: Before sharing do not have any other patient PHI open or personal content open that can be accidentally shared.

## Documenting

Documenting a note is required to close the encounter, and is done in the **Notes section** of the navigator. To start the note, use the smart phrase **.videovisitoutpatient**. The patient must be asked what state they are in at that time. This is documented using the smart list in the note. If the patient is not in CT, or a state in which you are licensed, document this and end the video visit.

1. A visit **diagnosis** is also required for the video visit encounter. This is documented in the **Planning tab**.
2. **LOS** is required for the video visit encounter, this is documented in the **Wrap Up tab**.

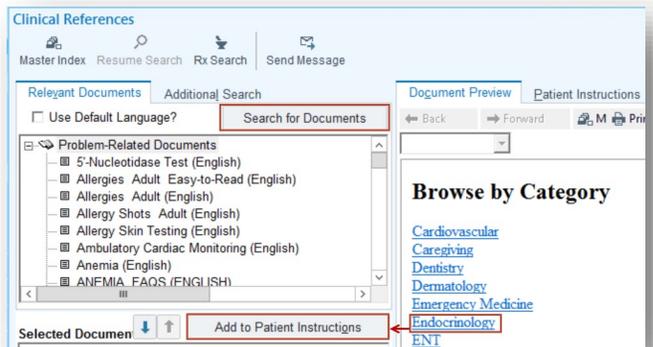
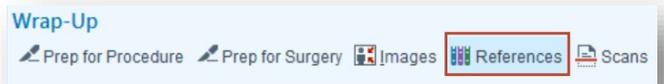
3. Click **Sign Visit** to close the encounter
4. All open encounters will fall into the My Open Encounters In basket folder. Click on the message to show required items to close the encounter.



## Educational materials

If you would like to send the patient educational documents:

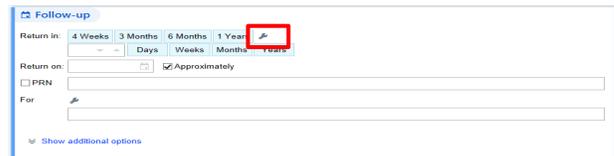
1. Click **References** in the **Wrap-Up** section.
2. Search for the documents by using the **Additional Search** tab.
3. Double click on the items that you would like to provide to the patient.
4. Click **Add to Patient Instructions**. The patient education, including images, appears within the patient's AVS in MyChart.



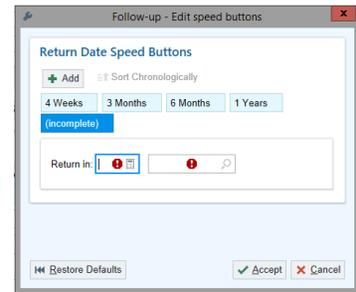
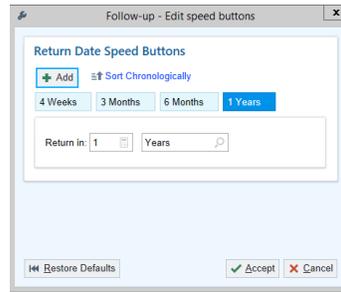
## Customizing Your Follow Up Buttons

We recommend that you take the time to customize your follow up buttons to include a speed button for video visits. Taking the time to do this once will save you time in the long run and ensure that your scheduler knows how to properly schedule the follow up for your patient.

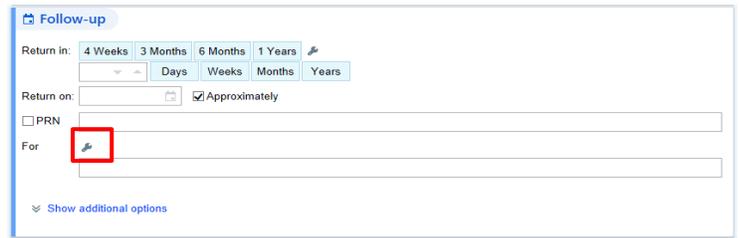
1. Click the wrench button near your current return-in date



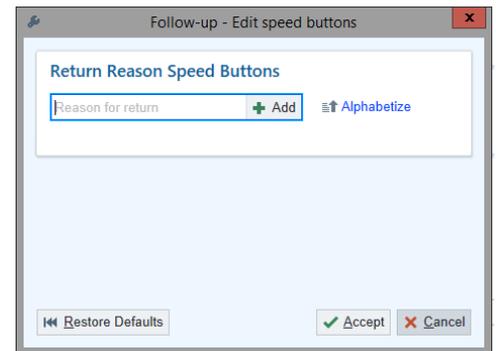
2. Click the **add** button, and edit for the appropriate intervals.



3. Click the wrench button near the “For”.



4. Click the **add** button, and edit the return reason as a **video visit**.



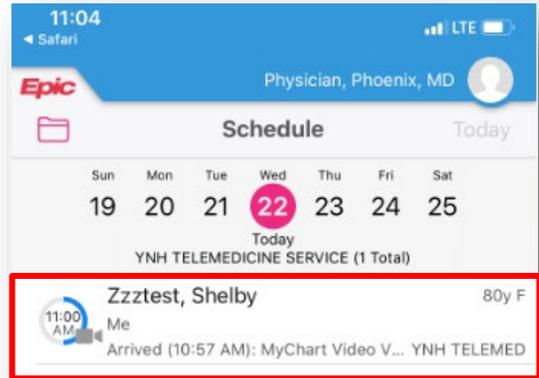
## Conducting The Visit – iPhone

To conduct the video portion of the visit using Epic Haiku via an iPhone, a one time installation of the Haiku and VidyoConnect applications is needed. If VidyoConnect is not already installed, see the **Provider Tips and Tricks VidyoConnect Installation** document.

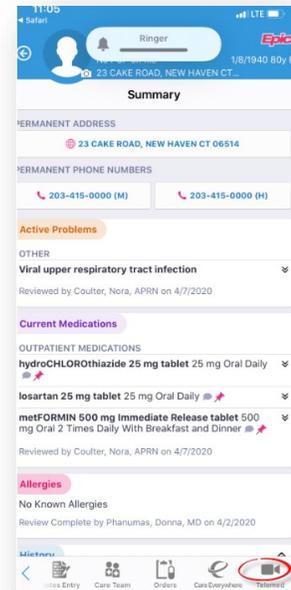
1. Sign into **Epic Haiku**.



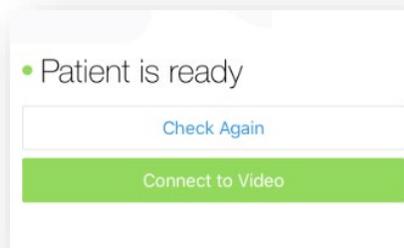
- Go to your schedule and click on the patient's name. **Note:** If you see the status as Arrived, the patient has joined the video visit. A camera icon indicates that this is appointment is a video visit. \*If you need to change your department, use the folder in upper left corner.



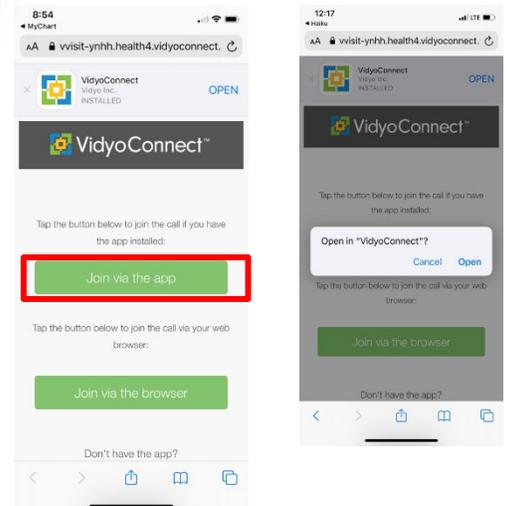
- On the bottom toolbar, swipe left until you see the camera Telemed icon, click the **Telemed** icon.



- Click **Connect to Video**.



- From the VidyoConnect screen, select **join via the app**.

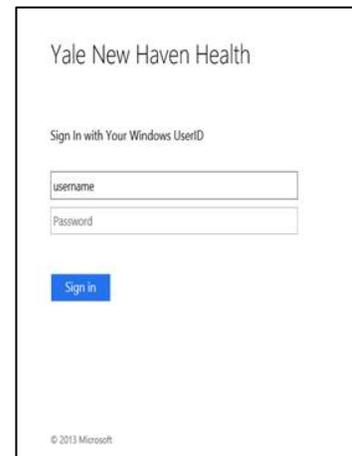


- Click **Open**.

7. From the VidyoConnect screen, click on the **sign in before joining**

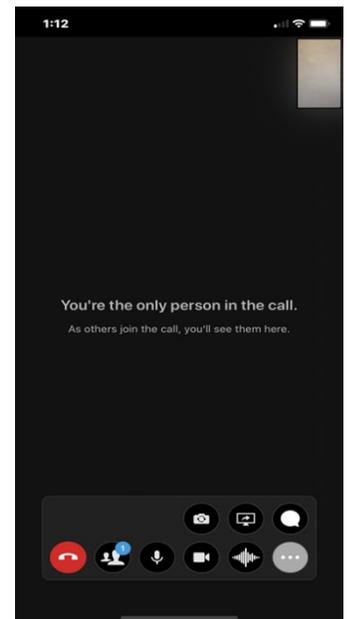
8. Enter your **Epic username and password**. Click **Sign in**.

\*If you are using a personal device, you can use the keep me signed in toggle, however if you are using a shared device, do not use



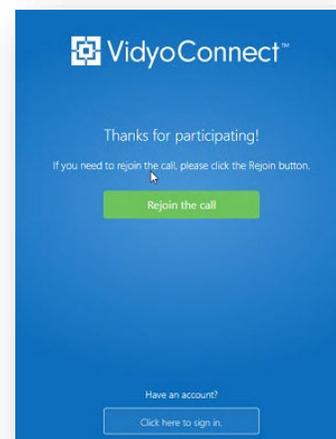
9. The visit will begin when both you and the patient are present. Onscreen Features: VidyoConnect allows you to mute your speaker, microphone and camera. You are also able to chat and reverse screen.

-  = Leave the call
-  = Shows you how many people are on the video
-  = Click to mute the microphone
-  = Click to mute the video
-  = Clicking this makes your camera and video disabled
-  = In-call chat: You can send an instant message to the provider and vice versa
-  = Screen recording: Everything on your screen will be recorded
-  = Reverses your screen



10. If the meeting is ended prematurely, click **Rejoin the call** to get back into the video visit.

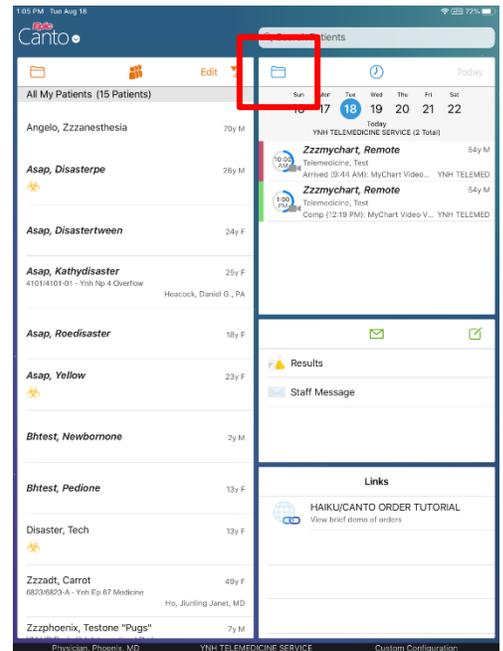
11. The video visit workflow **documentation** will be done on a desktop computer, laptop, or Mac. **Follow steps 1-4** in the **Documenting Section** above to complete the encounter in Epic.



## Conducting The Visit - iPad

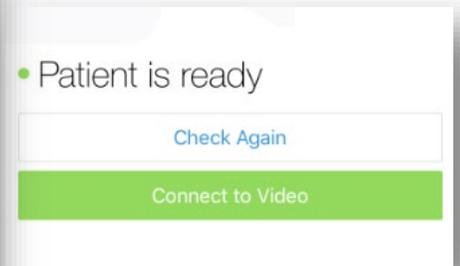
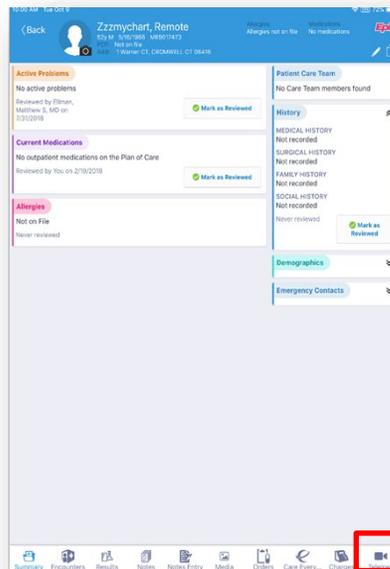
To conduct the video portion of the visit using Epic Canto via an iPad, a one time installation of the VidyoConnect application is needed. If VidyoConnect is not already installed, see the **Provider Tips and Tricks VidyoConnect Installation** document.

1. Sign into **Epic Canto**.
2. Go to your schedule and click on the patient's name. **Note:** If you see the status as Arrived, the patient has joined the video visit. A camera icon indicates that this is appointment is a video visit.  
\*If you need to change the department, click the blue folder at the top.



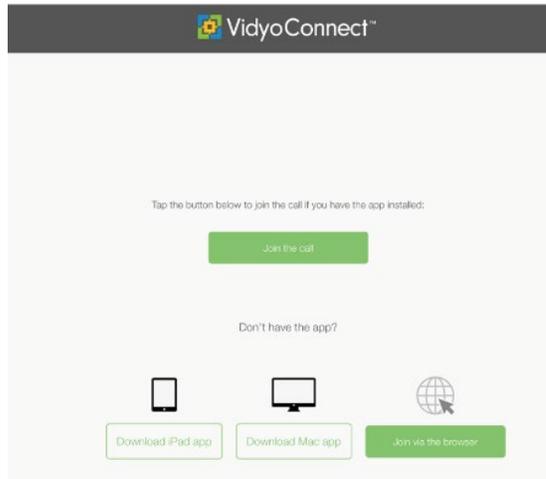
3. On the bottom toolbar, swipe left until you see the camera Telemed icon, click the **Telemed** icon.

4. Click **Connect to Video**.



5. Click **Join the call**

6. If prompted, click **Open**.

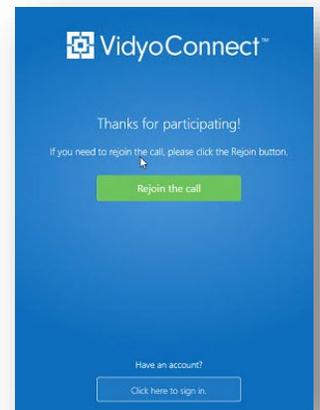


7. From the VidyoConnect screen, click **Sign in before joining**.

8. Enter your Epic username and password. Click **Sign in**.



9. If the meeting is ended prematurely, click **Rejoin the call** to get back into the video visit.

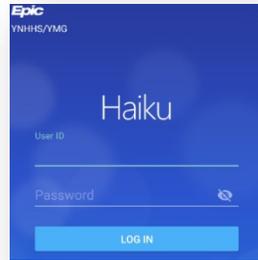


10. The video visit workflow **documentation** will be done on a desktop computer, laptop, or Mac. **Follow steps 1-4** in the **Documenting Section** above to complete the encounter.

## Conducting The Visit – Android Smartphone

To conduct the video portion of the visit using Epic Haiku via an Android smartphone, a one-time installation of VidyoConnect is needed. If VidyoConnect is not already installed, see the **Provider Tips and Tricks VidyoConnect Installation** document.

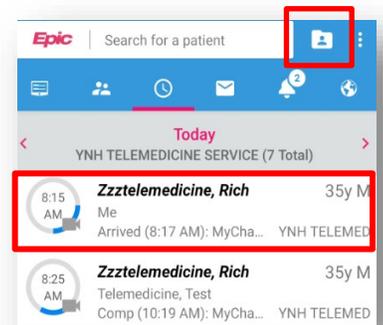
1. Sign into **Epic Haiku**.



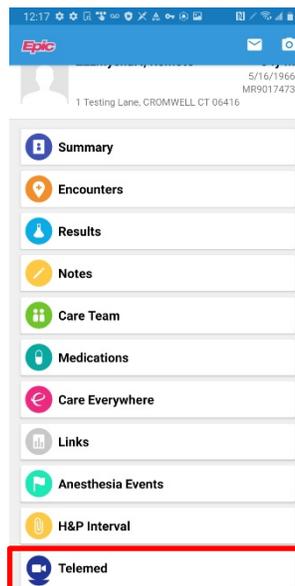
2. Go to your schedule and click on the patient's name.

**Note:** If you see the status as Arrived, the patient has joined the video visit. A camera icon indicates that this appointment is a video visit.

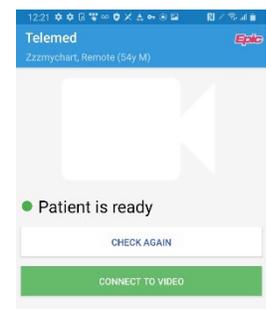
\*If you need to change your department, tap on the folder in upper right corner and enter or tap on the department you would like to search for.



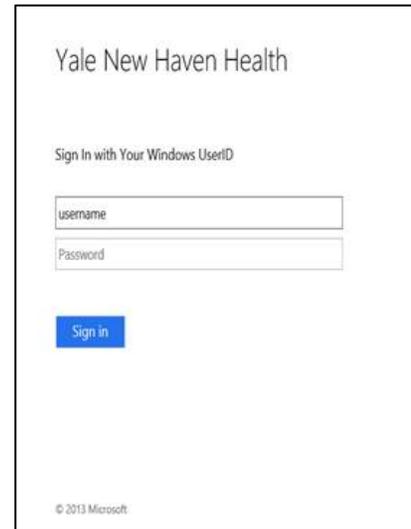
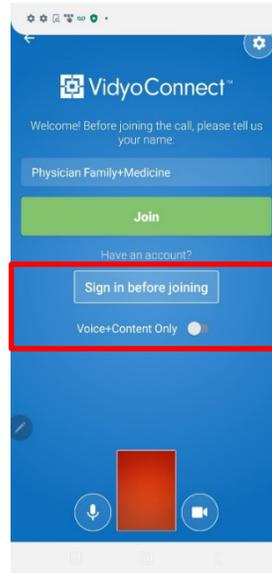
3. Click on the patient's appointment, click the **Telemed** icon.



4. Click **Connect to Video**.



- From the VidoConnect screen, click **Sign in before joining**.
- Enter your Epic username and password. Click **Sign in**.



- If the meeting is ended prematurely, click **Rejoin the call** to get back into the video visit.
- The video visit workflow **documentation** will be done on a desktop computer, laptop, or Mac. **Follow steps 1-4** in the **Documenting Section** above to complete the encounter.

