

## Provider FAQ

### Which patients are eligible for a virtual visit?

Initially, patients with acute symptoms, chronic condition follow-up needs, or concerns around visiting the practice in person will be the primary focus for virtual visits. Over time, additional services including transitions of care, Annual Wellness Visits (AWVs), and other service types will be evaluated for virtual visit opportunities.

### How are patients identified and scheduled for virtual visits?

Patients are identified and scheduled for virtual visits via several processes, including:

- Directly scheduled by the provider or nursing team. For example, eligible patients who call the practice or reach out via the portal will be directly scheduled by the provider or nursing team.
- Scheduled by the contact center in response to a patient-driven visit request.
- Proactively identified and scheduled by care management teams.

### How will scheduled patients be added to provider schedules?

Virtual visits will be added to provider schedules based on appointment availability. If availability exists, virtual visits will be added to open time slots. If availability does not exist, virtual visits should be double booked, with a maximum of one overbook per hour. While the goal is for all patients to be scheduled with their established provider, if availability is limited, patients will be scheduled with another provider within the group.

### What instructions will patients receive during scheduling?

During the scheduling process, patients will be informed that they will receive a text message asking them to join their virtual visit. Patients will also be reminded to be on a camera-enabled device and connected to a reliable internet connection. Additionally, patients will be notified that the same copays and deductibles that apply to an office visit apply to a virtual visit.

### What is the process for initiating a virtual visit?

When a provider is ready to initiate a virtual visit, they will login to their virtual waiting room. Before initiating a virtual visit, the provider should ensure the patient's chart is ready for exam in the EMR and that all check-in activities have been completed. Once the provider confirms the patient chart is ready for the visit, the provider will send a link to the patient via text message. The provider will be notified via email when the patient accesses the virtual waiting room and is ready for the visit.

### How should the visit be introduced to the patient?

Patients will be provided a brief overview of virtual-visit expectations while in the virtual waiting room. Once connected live with the patient, the provider must secure verbal consent from the patient and document patient consent in the EMR.

## How should the visit be documented?

Providers should document in the patient's chart as if the visit were in-person. Patient consent should be documented in the chart, typically as part of the HPI. At the close of the visit, the provider should add the virtual visit CPT code. Once this is completed, the provider should save and exit the encounter as usual.

## Can ancillary services be ordered during virtual visits?

Yes, providers can order follow-up ancillary services during a virtual health visit.

## Tips and tricks for providers, for a successful virtual visit:

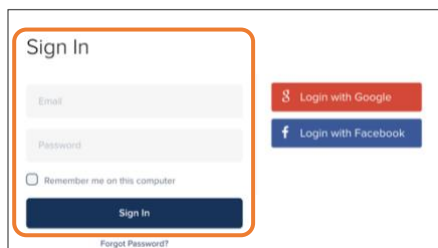
- The outgoing message from the virtual platform will show your name as the invitee. Patients may think this is spam. If a patient has not checked into the virtual waiting room within 30 minutes of your invite, reach out to the patient via phone and ask them to join the virtual visit.
- Start the visit by introducing yourself and thanking the patient for joining a virtual visit. Let the patient know we're happy to help them avoid any non-essential office visits. Patients typically are appreciative of and grateful for proactive outreach.
- Start the conversation by telling the patient you're going to review their chart. You should review and reconcile all medications, and ask the patient to outline their current issues/concerns. Having a longitudinal health record from a known provider is a unique benefit to virtual visits. This adds value and comfort to the patient.
- As a provider, you can toggle between the virtual video and the patient's chart. However, regardless of the screen you're looking at, the patient will continue to see you. If you're in the chart for an extended period of time, it's possible to move your image out of the video screen. If you do this for extended charting, make sure to inform the patient that you're documenting in the chart.
- Provide as much familiarity to a patient as possible. Remember to wear a lab coat during the visit; patients will expect the same professionalism you provide in person. Also, remember that patients will see what is behind you, so try to make it as clinical if possible – e.g., an exam room or a shelf of books.

Be in a private area – HIPAA still applies!

## System Training | The virtual visit platform

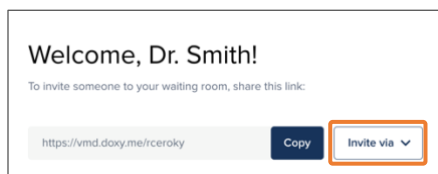
### Send a virtual visit invite

1. Go to [vmd.doxy.me/sign-in](https://vmd.doxy.me/sign-in) using Chrome. Enter your email address and password. Click **Sign In**. The **Provider Dashboard** displays.

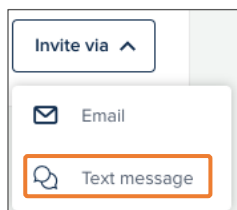


**NOTE:** The first time you log in, you may need to give your browser permission to access your camera and microphone.

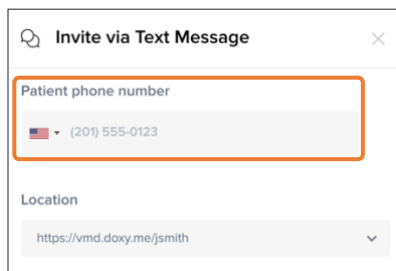
2. Click the **Invite via** dropdown.



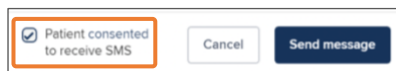
3. Select **Text message**.



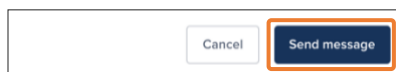
4. Enter the patient's phone number in the **Patient phone number** field.



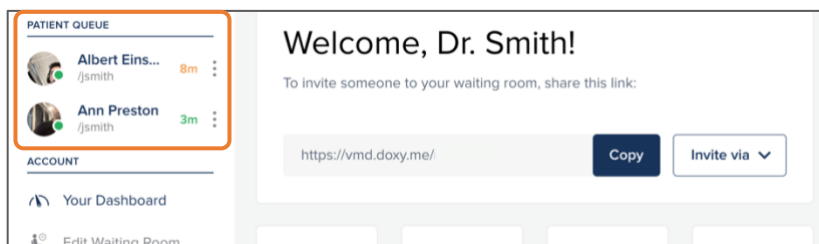
5. Ensure the checkbox for **Patient consented to receive SMS** is selected.



- Click **Send message**.

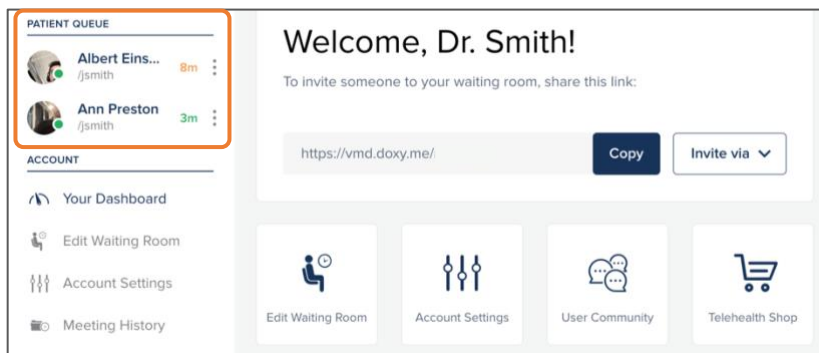


- At the time of the scheduled appointment, the patient will need to click the shared URL from their device, type in their own name, and join the waiting room.
- Once the patient has joined, the **Provider Dashboard** indicates a patient is in the **Patient Queue** on the left side of the page.

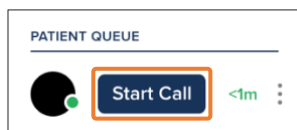


## Start a virtual visit

- Patients awaiting care are visible in the **Patient Queue** on the left side of the screen.



- Hover over a patient name and click **Start Call** to meet with a patient.

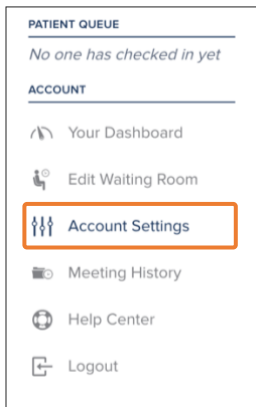


- To begin the visit, complete the following script:
  - Introduce yourself**
  - Confirm patient's identity** (two patient identifiers – first and last name and DOB)
  - Intro/Benefits:** You may be familiar with Virtual Care. In short, it is a convenient and timely alternative for you and me to communicate in real time even though we are in two different locations.
  - Do you have any questions about what we discussed with you earlier?
  - Verbal Consent:** Do you consent to receiving health care services virtually today?
- Start the exam.

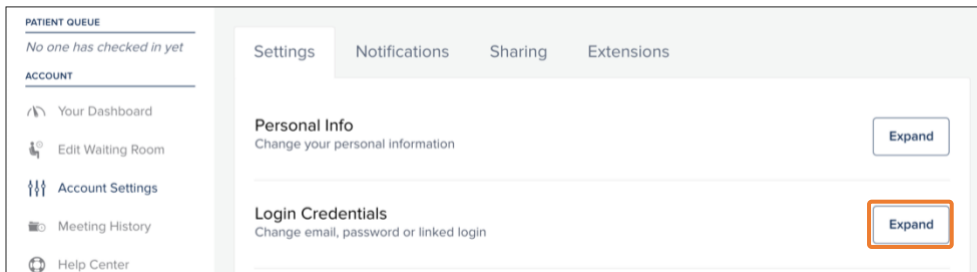
**NOTE:** If you need to pause the call at any time, the patient will return to the **Patient Queue**, where you would need to click on their name again to resume the visit.

## Change your password

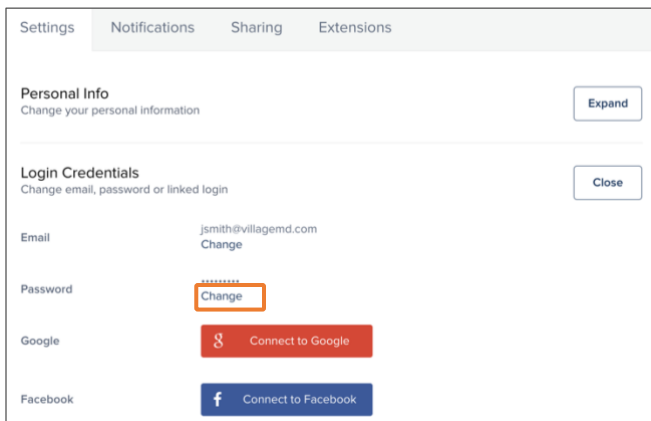
1. In the side navigation menu , click **Account Settings**.



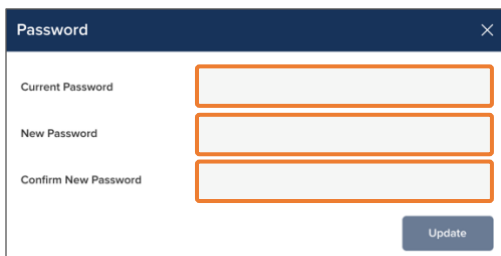
2. Under the **Settings** tab, in the **Login Credentials** section, click the **Expand** button.



3. In the password section, click the **Change** link.



4. In the **Password** popup, enter your *Current Password*, then enter your new password in the *New Password* text box and again in the *Confirm New Password* text box.



- When complete, click the **Update** button.




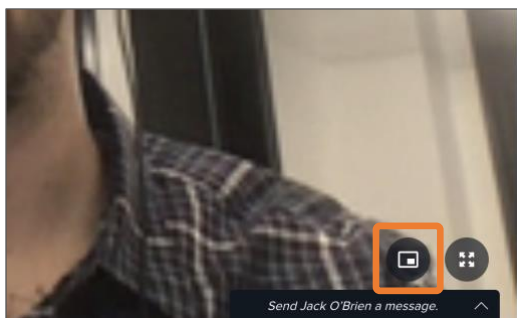
Confirm New Password .....  
Update


## Provider tips

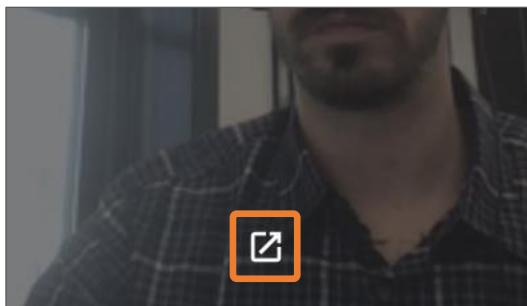
### Picture in picture mode

The platform supports **Picture in Picture** mode, while using *Chrome*. This allows you to lock the patient's video to the front of their screen while they use another browser window or program (e.g. the EMR to document the visit).

To use **Picture in Picture** mode, click the **Minimize**  icon in the lower right corner of the screen. The resulting window can be moved and resized to fit your workflow, while remaining at the front of your desktop.



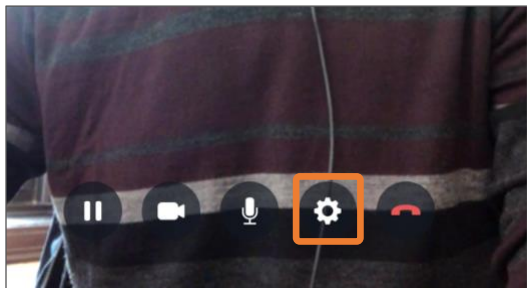
To return to the normal view, click the **Return to Screen**  icon



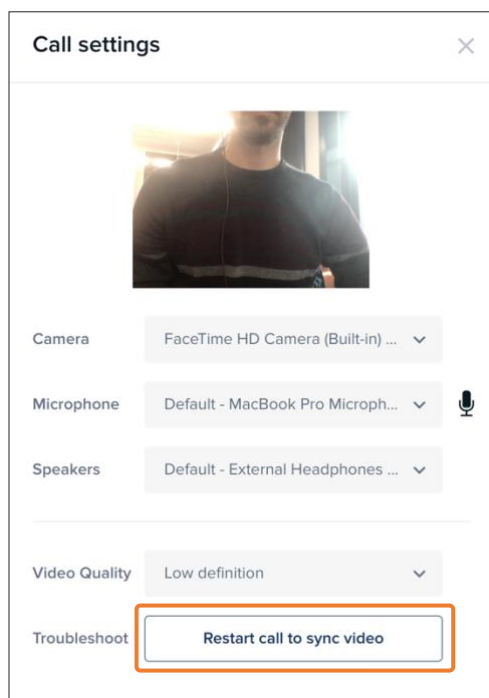
## Troubleshooting audio/video issues

During a virtual visit, you can initiate a "restart" that can solve most audio and video issues.

To restart a call, first hover over the patient's video with your mouse and click the **Gear**  icon.



In the **Call settings** window, click the **Restart call to resync video** button.



## Discourage multitasking

Audio and video quality can suffer if the patient uses other apps/browser windows while on their phone during a call. Ensure patients are focused only on the call.