HORIZON
Health Care, Inc.

Procedure Name:	**WebEx TeleHome Workflow**
Reporting:	
Applicable for:	Clinical Staff
Effective Date:	April 7th, 2020
Revised Date:	April 20th, 2020; June 2021; August 2021; October 2021

Background: Horizon Health Care offers TeleHome visits using Webex. The appointments will be scheduled using our TeleHome centralized scheduling team by contacting the number below:

- **TeleHome Schedulers – 20-500**

Clinical Support Staff:
- If the patient is a good candidate for a telehome visit the staff member on the telephone call will transfer the call to the repective scheduling team [BH or TeleHome].
  - Established Horizon Health Care (seen within the last two years with a Horizon PCP).
  - Patient has to have current patient registration paperwork in their chart.
- If you are unable to transfer the call, enter a **telephone encounter** using the **reason** '*Schedule TeleHome Visit'* to the appropriate party in eCW. Add the reason for the visit along with the time needed. Assign the open telephone encounter to *TeleHome Scheduler* in eCW.

TeleHome Scheduler:
- If the patient needs translation the scheduler will conference in the appropriate translator to assist in scheduling the appointment.
  - The scheduler will then reach out to the patient, schedule the visit in the EMR and Outlook respectively.
- Create the appointment on the provider's schedule in eCW.
- In the reason enter: WebEx TeleHome Visit, followed by the reason for the visit.
- Billing Note: WebEx TeleHome Visit
- Review the demographics with the patient when scheduling and update/enter the items into eCW.
  - *Name (First, Last, Middle Initial), DOB, Address, Phone Numbers (Home, Cell, Work), Responsible Party*
  - Verify insurance numbers
  - Co-pay amount: If the patient wants to pay the copay ahead of time, credit/debit payments can be taken over the phone. If the patient has paid the copayment over the phone within the appointment enter a $0.00 in the copay for this visit field to avoid causing issues on your co-pay report. If the patient is unable to pay their copayment over the phone, they will receive a billing statement with any patient responsibility.
  - *Email address*
    - An email address is mandatory when doing a TeleHome Visit
    - If the patient is a minor, the guardian's email address can be used to invite the patient to the visit.
  - Update the fee schedule
  - Review the below when setting up the appointment:

- Help the patient understand that this is a video appointment and not to come to the clinic appointment.
- Download the WebEx Meeting app
  - The patient is not required to create a Webex account to join the visit.
- Explain how to join the video call.
- Have a fully charged device
- A quiet space
- Headphone or earbuds if they have them
- How to use the unmute and share video (ask the patient to review the attachment in the invite that will explain how to connecting to the call)

Creating the Meeting Invite
- TeleHome appointments will be scheduled in Outlook to setup the WebEx meeting. TeleHome Appointments will be scheduled on the TeleHome Calendar.

   a. In Outlook select the calendar icon
   b. Double click on the time slot you'd like to schedule your WebEx Meeting.
   c. Select 'Add Webex Meeting'

- Fill in the following fields to schedule the WebEx meeting:
   1) **Title**: TeleHome Visit w/<u>Appointment Provider Name</u> – schedulers initials.
      a. *Ex. [**TeleHome Visit w/Dr. Lim – LF]***
   2) **Invite Attendees:** In the required field; enter the attendee's email addresses:
      - Patient's email address
      - Provider's email address
      - Be careful when entering the email address do not include any special characters such as (), "" around the address or the invitation will not send to that individual. It should look just like the example below:

         patientemail@yahoo.com;

   3) Ensure the start time and end time match the appointment length as chosen in the eCW.

Start time	Fri 3/27/2020		9:00 AM		Mountain Time (US & Ca		☐ All day	☑ 🌐 Time zones
End time	Fri 3/27/2020		9:30 AM		Mountain Time (US & Ca		🔄 Make Recurring	

   4) **Location**: Webex Meeting (you can delete the long URL from the location field and replace it with Webex Meeting.
   5) **Selecting the Host**: if you desire to select an alternative host you are able to, any of the selected individuals + the person scheduling the meeting are able to start the meeting:
      i. Select **'Webex Preferences'** from the top menu bar
      ii. The Cisco Webex Scheduler menu will appear on the right side of the screen. The scheduler will allow you to select the following: *a cohost(s), audio connection type, entry and exit tone, join before host option, enabling breakout sessions, and meeting password*
         1. *Meeting type* – Webex Meetings Pro Meeting

2. *Host Information* – This contains the host key for the meeting. This is only needed if a non-host/non-cohost starts the meeting without the host/cohost joining. The host would need to share this key information for this to happen.
3. *Co-hosts* - You will see three options for a cohost:
   a. Select → Let me choose cohosts for this meeting – this will allow you to individually select any invited attendee's and grant them cohost privileges to the meeting.
   b. Select the provider as the co-host of the meeting by checking the box next to their name.
4. *Audio connection type* – Select Webex Audio & check the box for 'Display global call-in numbers to attendees.'
5. *Entry and exit tone* – select from one of the following –
   a. Beep – this will prompt a beep every time an attendee enters and exits the meeting.
   b. Announce name – this will prompt a name announcement every time an attendee enters and exits the meeting.
   c. None (*Recommended)* – this will turn off any notifications of attendees entering or exiting a meeting.
6. *Join before host* – Adjust the time allowance for attendees to join the meeting before the host. You can select 5, 10, or 15 minutes → Select 15 minutes for Telehome appointments to allow the patient to work through any issues connecting.
7. *Enable breakout sessions* – Uncheck the box to disable breakout sessions within the meeting.
8. *Password* – Adjust the auto-generated password to Horizon1.
9. Select 'Update' to save your changes to the meeting preferences.

d. Copy and paste in the text and logo from the '*WebEx TeleHome Invitation_Clinicians'* document. [Keep a copy of this invitation located on your desktop for ease of access.]
e. Attach the TeleHome – Information FAQ Sheet to the calendar invite. This is a how to guide for the patient to get connected to their visit.
   o Do not delete or change any of the following text in the body of the invitation below the _~ line.

   _~_~_~_~_~_~_~_~_~_~_~_~_~_~_~_~_~_~_
   -- Do not delete or change any of the following text. --

f. Press '**Send'** to send the TeleHome invitation.

g. The calendar invite will be placed on the scheduler's outlook calendar. The calendar invite will contain the meeting information that both parties need to connect appointment.

h. Check the TeleHome Inbox to ensure there are no failed messages for the appointment you just booked. You will also be able to see in the inbox If the patient accepted the invitation.

Translation [*If Needed]*

- If Translation is needed the scheduler will place a block on the respective Interpreter's Resource Schedule [Karen Interpreter or Spanish Interpreter]. Name the block [TELEHOME VISIT]. Place the call in information from the Outlook invitation in the comments window of the block:
- o Be sure to include the following:
    - a. Join by phone call in number:

Join by phone
Tap to call in from a mobile device (attendees only)
+1-408-418-9388 United States Toll
Global call-in numbers

    - b. Meeting number and password

Join by meeting number
Meeting number (access code): 2498 132 3197
Meeting password: Horizon1

- o At the time of the call the Interpreter will open the block to obtain the call-in information and connect to the meeting via telephone.
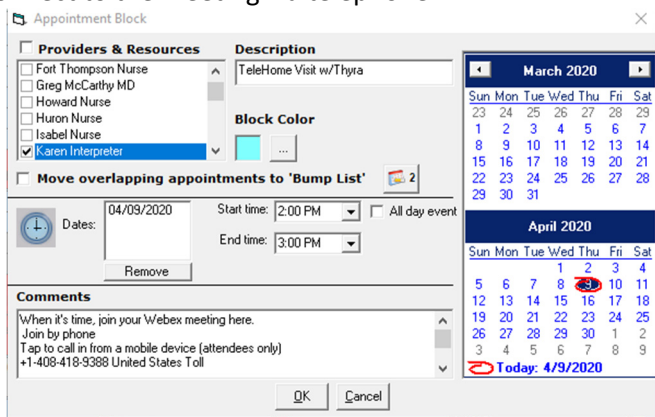
Provider:

The Provider can connect via their Webex app by selecting 'Start', if the provider was not selected as a host then they are able to select 'Join' to connect.

- Once the session is connected you should see yourself and patient in the video screen
- Icons to assist you to enjoy the full experience during the appointment.
    - o To share your screen or an application with other participants, select *Share Content*
    - o To see who else joined the meeting, select *Participants*
    - o If the host permits it, you can chat with other people in the meeting, select *Chat with All* to chat with everyone or just the host in the meeting.
    - o To view more options select *More options* .

o   Once the appointment is over, the provider will select ⊗ to end the meeting.

Note Completion:
- The Provider will complete visit documentation in the EMR.
 - o   In eCW, use the ***HORIZON: Patient Visit Location*** template to document the that this is a TeleHome visit.
    - ▪   Choose: by TeleVideo via the patient's home via the WebEx application. Patient consents to TeleVideo visit
    - ▪   Document time spent
- Review PMH, reconcile medications etc. as well as the Pop Health tab on the right hand panel to reivew the gaps in care.

Appointment Check-Out:
- Once the TeleHome Visit call has ended, the provider will go to the appointment on their schedule and update the status of the visit:
  - o   In eCW to 'CHK [Check Out]'
  - o   In the S Jellybean, from the bottom toolbar, selec the drop down arrow next to 'View Progress Notes'
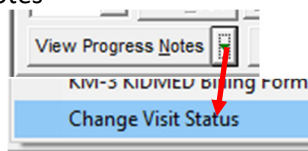
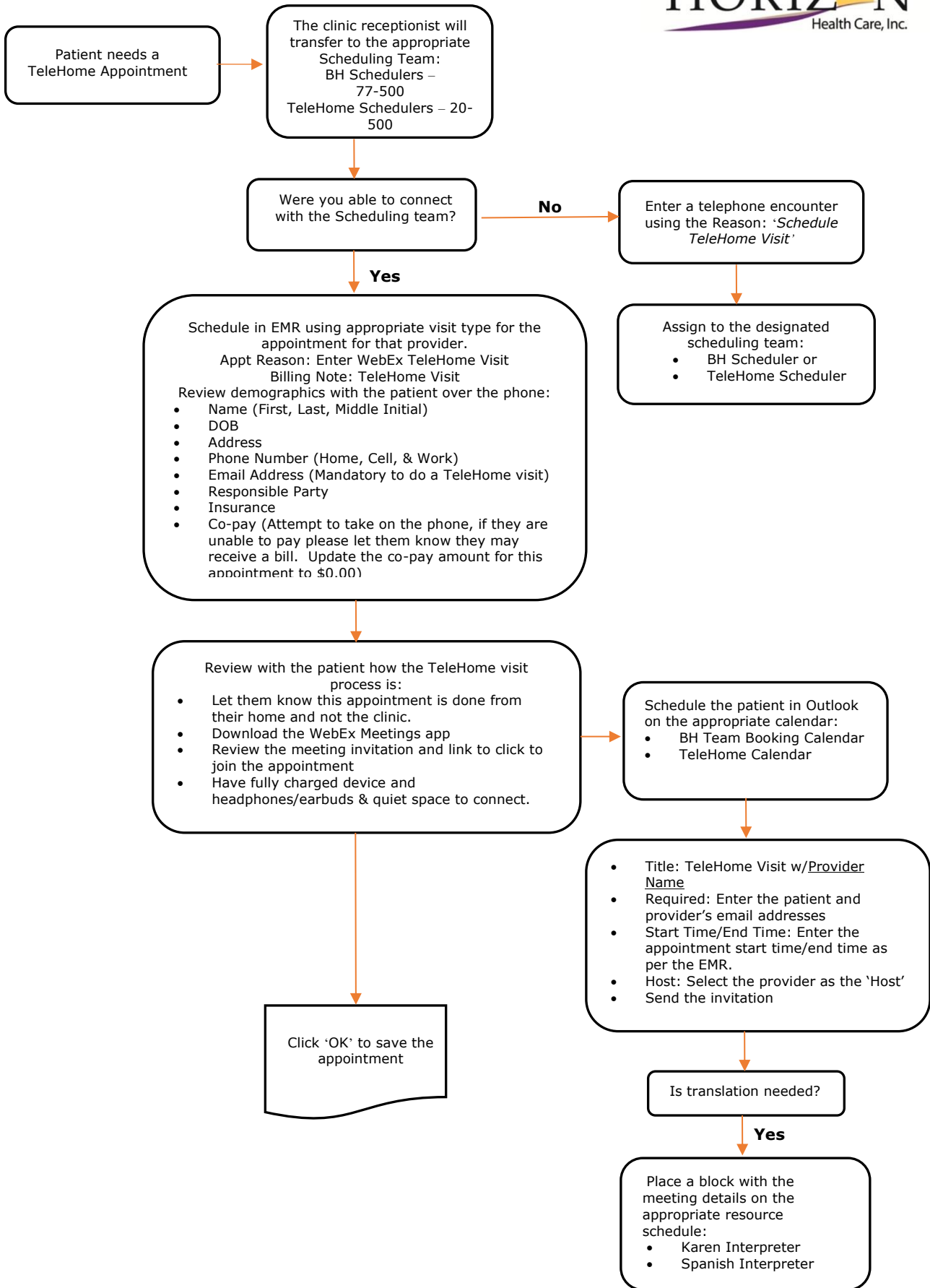Select 'CHK to mark them arrived to their appointment. Select 'OK' to continue.
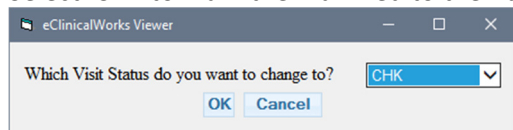
Troubleshooting Tips:
- The patient may be automatically muted and not share video depending on their video settings on their device. The patient may need to unmute themselves and select to share their video. The icons are the same as yours that they would select. Use the chat icon if the patient is having issues.
- If appointment stops from provider end for some reason the patient will remain in the meeting until the provider is able to rejoin.
- If the patient or provider presses the 'End Call' icon the patient will be asked if they are sure they want to end the TeleHome visit. They can hit 'Leave meeting' to disconnect from the call or 'Cancel' to resume the call.
- If the TeleHome visit stops from patient end, it will give the patient the option to 'Join Meeting' again. The provider will receive a message stating that the meeting is waiting for other participants to arrive.
- Check the respective inbox to ensure that you do not have any failed messages. A failed message will be located in the scheduling inbox. This could be from an incorrect email address, failed delivery, etc.
- The patient does not need a Webex account to join the meeting, they do however need the app. Once the app is downloaded, the patient can click on the link located in the email and it will open the Webex app and prompt them to connect to the meeting.

Appointment Cancellation/Rescheduled

- Cancelling the Appointment
Right clicking on the appointment and selecting 'Cancel Meeting'. The meeting will automatically disappear from the calendar.
- Modifying the Appointment Date/Time (Rescheduling the appointment).
Double click on the appointment to open the appointment window. Update the date and time of the calendar invite to match the new rescheduled appointment in eCW. Finally, click on 'Send Update' to save your changes.

WebEx TeleHome Visits – Scheduling the Appointment

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Patient needs a TeleHome Appointment

→

The clinic receptionist will transfer to the appropriate Scheduling Team:
BH Schedulers – 77-500
TeleHome Schedulers – 20-500

↓

Were you able to connect with the Scheduling team? — **No** → Enter a telephone encounter using the Reason: '*Schedule TeleHome Visit*'

↓

Assign to the designated scheduling team:
- BH Scheduler or
- TeleHome Scheduler

Yes

↓

Schedule in EMR using appropriate visit type for the appointment for that provider.
Appt Reason: Enter WebEx TeleHome Visit
Billing Note: TeleHome Visit
Review demographics with the patient over the phone:
- Name (First, Last, Middle Initial)
- DOB
- Address
- Phone Number (Home, Cell, & Work)
- Email Address (Mandatory to do a TeleHome visit)
- Responsible Party
- Insurance
- Co-pay (Attempt to take on the phone, if they are unable to pay please let them know they may receive a bill. Update the co-pay amount for this appointment to $0.00)

↓

Review with the patient how the TeleHome visit process is:
- Let them know this appointment is done from their home and not the clinic.
- Download the WebEx Meetings app
- Review the meeting invitation and link to click to join the appointment
- Have fully charged device and headphones/earbuds & quiet space to connect.

→

Schedule the patient in Outlook on the appropriate calendar:
- BH Team Booking Calendar
- TeleHome Calendar

↓

- Title: TeleHome Visit w/<u>Provider Name</u>
- Required: Enter the patient and provider's email addresses
- Start Time/End Time: Enter the appointment start time/end time as per the EMR.
- Host: Select the provider as the 'Host'
- Send the invitation

↓

Is translation needed?

Yes

↓

Place a block with the meeting details on the appropriate resource schedule:
- Karen Interpreter
- Spanish Interpreter

↓ (from Review with patient box)

Click 'OK' to save the appointment

WebEx TeleHome Visits – Provider Workflow

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At the time of the appointment the provider will start the appointment one of three ways
- WebEx app – click 'Start'
- (If applicable) Dx80 – click 'Join'

See the patient via the TeleHome Visit in WebEx

Once the appointment is over, the provider will select 'End Meeting' and end for all.

Review or Chart in the progress note during the visit

Open the Progress note and pull in the *HORIZON: Patient Visit location template to document the type of TeleHome visit performed

1) Select the following… by TeleVideo from the patient's home using the WebEx application. Patient consents to TeleHome visit
2) Document the time spent with the patient. For BH Visits utilize the start/stop for time documentation.

Review the following areas of the progress note:
- Update the chief complaint
- Reconcile current medications
- Past Medical History/Surgical History/Hospitalizations
- Social History
- Family History
- Review Pop Health tab to review gaps in care.

Update the visit status to CHK to check the patient out.

Procedure Name: Webex Meetings App Troubleshooting Tips

| Reporting:	
Applicable for:	All applicable staff
Effective Date:	April 28th, 2020
Revised Date:	5/14/21

Background: We want to share a few troubleshooting tips and tricks with you that we have found to be a hang-up for patients connecting to their appointments. At the time of scheduling the appointment, it may be useful to have you help the patient walk through the FAQ guide that you are sending in the invitation with the patient. Let them know that if they create a Webex account and login to the application, appointments in the future they should see an ease of access on their part.

Telehome Visits:

We have noticed when patients are trying to connect or login to their app, they are getting stuck at the Webex Meetings main screen. The below screenshots may help you to guide that patient to be able to get logged in. Once they are logged in on their Droid or Apple device, they should see their meetings list from the login period onwards.

Upon opening the app, the patient will be asked to join the meeting or sign up for an account. The patient does not need to sign up for Webex account. Continue to the next steps on how to join a meeting from both an IOS and Droid operating system.
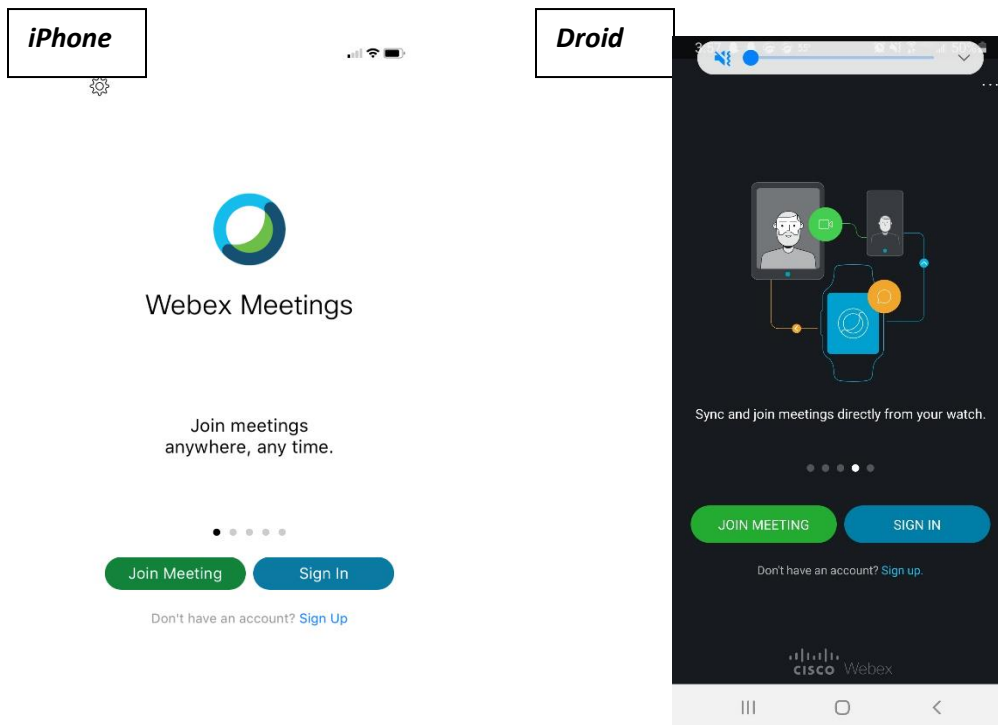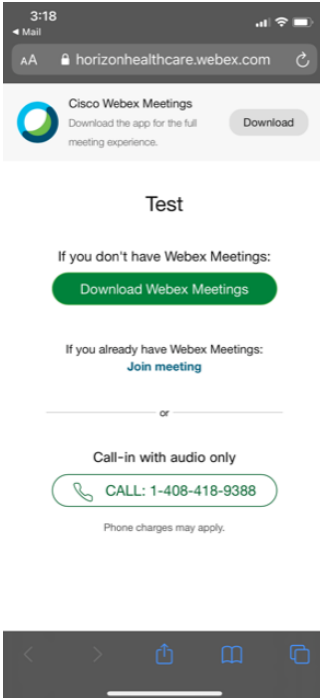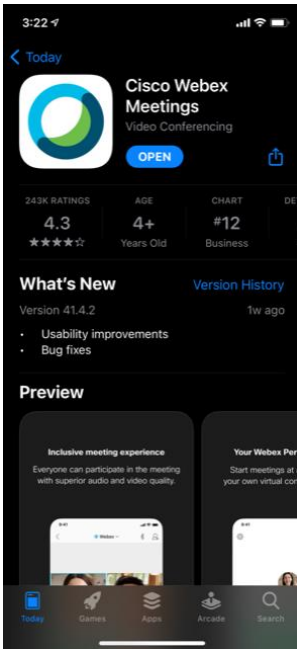
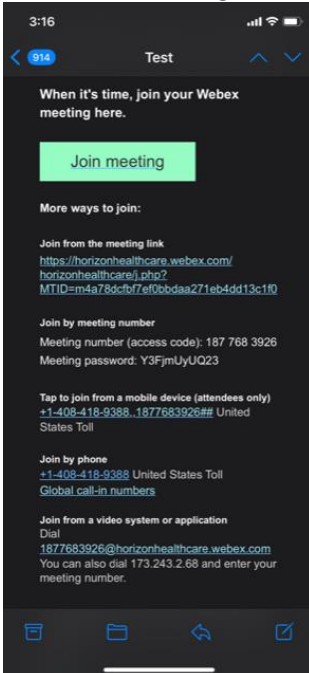**Joining without an account (iPhone):**

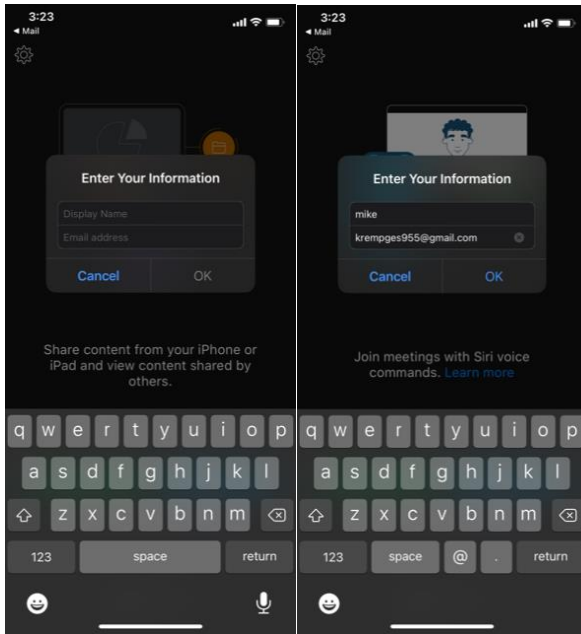1) Patient will get email
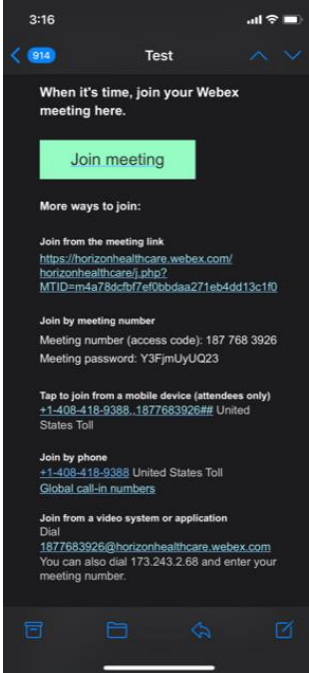
2) Hit Join meeting from email invite

3) If prompted to install the Webex Meetings app, the patient must do so from their App store. Once the app is installed they will be prompted to Open it, but they do not have to.
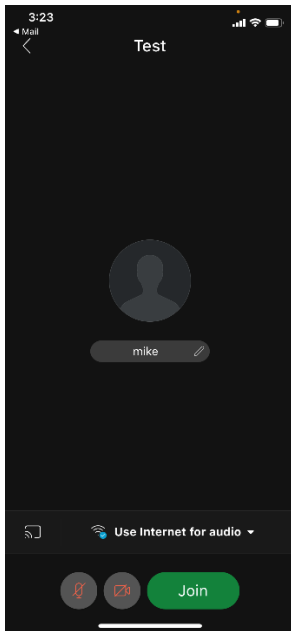
4) Go back to the original email invitation – click on Join meeting button

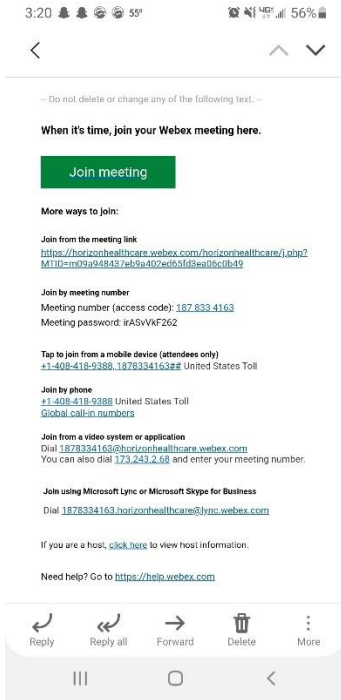5) The patient will be prompted to enter their name and email address then click 'OK'
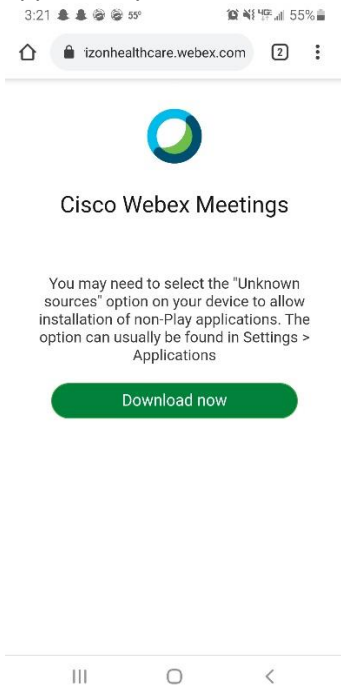
6) Select Join

7) Click on prompts to allow video and microphone on device to connect to the meeting and provider.
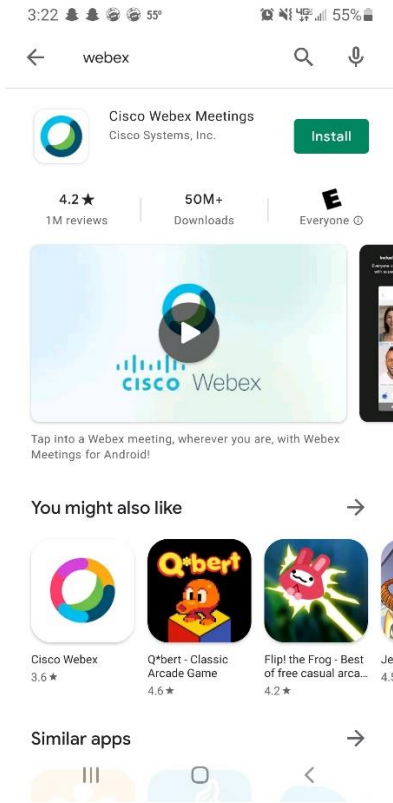
Joining without an account (Droid):

1) Patient will get email

2) Hit Join meeting from email invite if prompted to download the app. The download now button may not work. Direct the patient to go to their Play Store and download the Webex Meetings app directly.

3) Install Webex meetings app

4) Once the app is installed go back to the original email with the meeting details. Click on Join meeting button
5) The patient will be prompted to enter their name and email address and select OK
6) Click on prompts to allow video and microphone on device to connect to the meeting and provider.

 Signing up for an account – A patient is not required to sign up for an account unless they OPT to do so. If the patient is seeing the below screenshots – ask them to go back to the original email address containing the meeting information and click Join Meeting from there to access the Telehome visit.

Screenshots below are to help you identify what the patient is looking at, they should not be in this area of the app: