Initial Virtual Clinic Set Up

(!) Important: All virtual care appointment creation, rescheduling and cancellations must be completed in PHS first to maintain connections with all other downstream enterprise-wide systems (i.e., EPR, myUHN Patient Portal, whiteboards, Dictaphone, etc.).
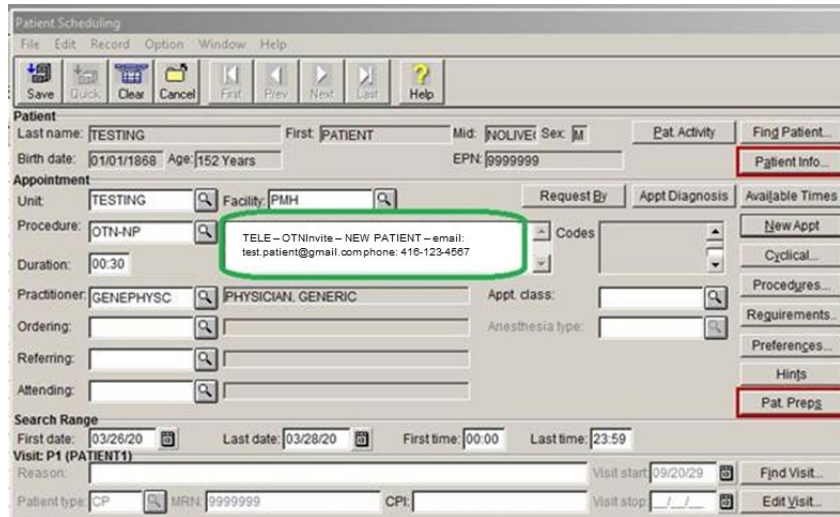
- If virtual visits are scheduled to occur in a shared space (e.g., clinic), ensure that the space allows for the maintenance of patient privacy. The space should be:
    - Dedicated to virtual care during the time of a patient videoconferencing visit
    - Quiet and private (e.g., a dictation room)
- Agree upon the length of each appointment type (e.g., phone or videoconference[1], new patient or follow-up, etc.)

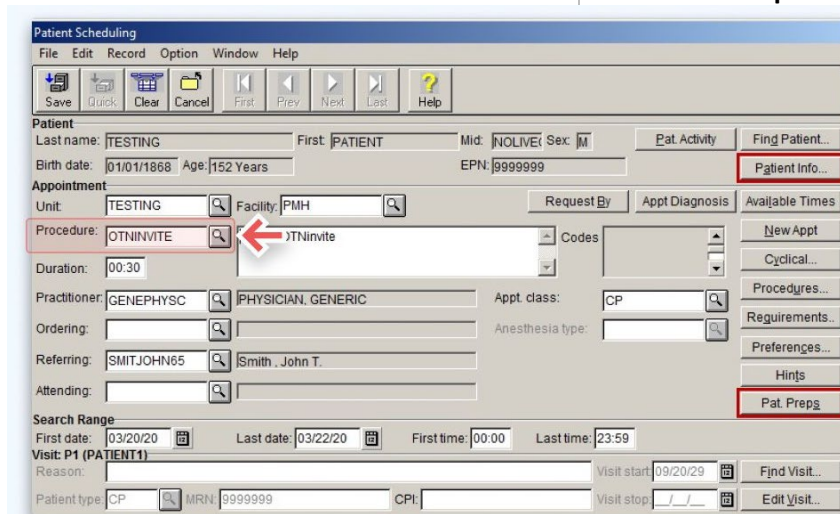## Creating a New Virtual Care Booking

Process Step	Additional Information
1 **Working remotely?** Login to https://mydigitalapps.uhn.ca using your UHN corporate email account	• Browser: Explorer is recommended • This should allow you to access EPR and PHS (and other apps you typically access through Citrix) • If experiencing issues, please call Help Desk at ext. 4357
2 Call patient to be scheduled for virtual appointment[1]	• Patient phone number as available in EPR
3 Check EPR to see if an email address is documented • **Yes, an email is documented:** proceed to step 6. The patient has already provided consent to use their email • **No, an email is not documented:** proceed to step 4	• If a patient has registered to myUHN Patient Portal they have already provided consent to use their email address
4 Follow the "Remote Visit Consent" script	• See script: Remote Visit Consent
5 If consent is received, document patient email in EPR	• See instructions: Entering Patients email address into EPR
6 Agree on date, time, and modality (phone or videoconference) for the virtual care appointment	

---

[1] UHN-approved virtual care platforms covered in these instructions include (1) telephone and (2) videoconference (i. OTNhub and ii. Microsoft Teams)
Last updated: July 17, 2020

Process Step	Additional Information
7	Request that the patient provide you with their preferred phone number for the day of the scheduled appointment: • This may differ from the phone number saved in their EPR profile • It is also important to capture the patient's preferred phone number for videoconference visits, in the event the videoconference visit gets disconnected	If the phone number in EPR is not the number that will be used on the day of appointment, document the *day of appointment* number in the PHS description box (pictured **below**)

| 9 | **Schedule the appointment in PHS**

⚠️ **Reminder:** *All virtual care patient appointment creation, rescheduling and cancellations must be completed in <u>PHS first</u> prior to any other systems.* | **Telephone Visit**
• PHONE- option

OTNhub Videoconference Visit
• OTN- option

MS Teams Videoconference Visit
• MSTEAMS- option |

Last updated: July 17, 2020

Process Step	Additional Information
10 ***For phone visits*** Communicate to the patient: • Care provider will call them within 3-hours of the appointment time; be prepared with phone ringer on • Calls may display as **'UNIV HLTH NTWK' or Unknown Caller or No Caller ID**	
11 ***For videoconference visits*** Schedule the appointment in the appropriate platform	**For OTNhub** Schedule the appointment in OTNhub *(See instructions: Scheduling in OTNhub)* • See video: here • An automated email will be sent to the patient providing them with instructions on how to prepare **For Microsoft Teams** Schedule the appointment in MS Teams *(See instructions: Scheduling in Microsoft Teams)*
12 Email the appropriate videoconference instructions for patients	• See: OTNhub Videoconference Instructions for Patients • See: the Microsoft Teams Videoconference Instructions for Patients
Congratulations: the virtual visit is now scheduled in PHS!	

Rescheduling a Virtual Care Booking

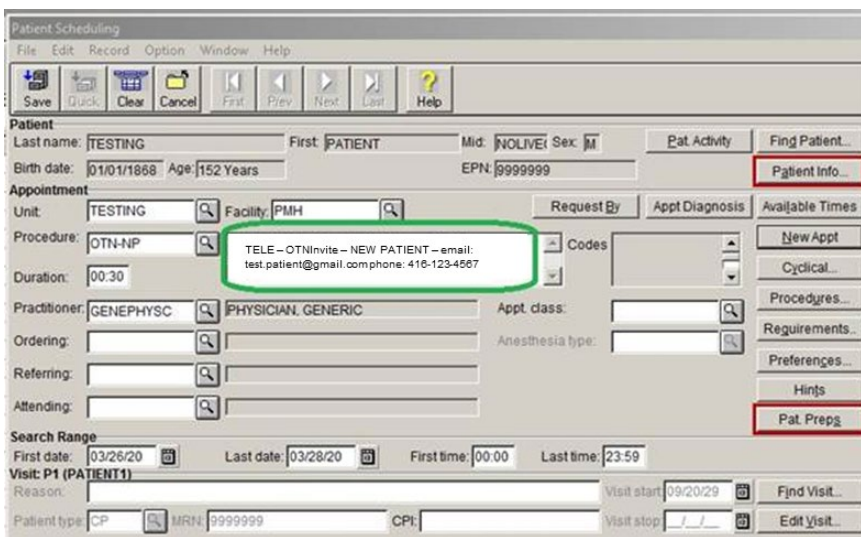| Process Step	Additional Information
1	⚠️ **Reminder:** *Reschedule the patient appointment in __PHS first__ to maintain link to all downstream systems (EPR, myUHN Patient Portal, etc.)* • Right Click or Drag Appointment from PHS Grid • Select new date / time • Drag appointment to new date / time • EPR visit will update	Rescheduling a PHS appointment will move the EPR visit to its new date and time and update myUHN Patient Portal
2	Note the date and time of appointment to make the corresponding change in the appropriate platform	
Congratulations: the virtual visit is now rescheduled in PHS!		

Cancellation of Virtual Care Booking

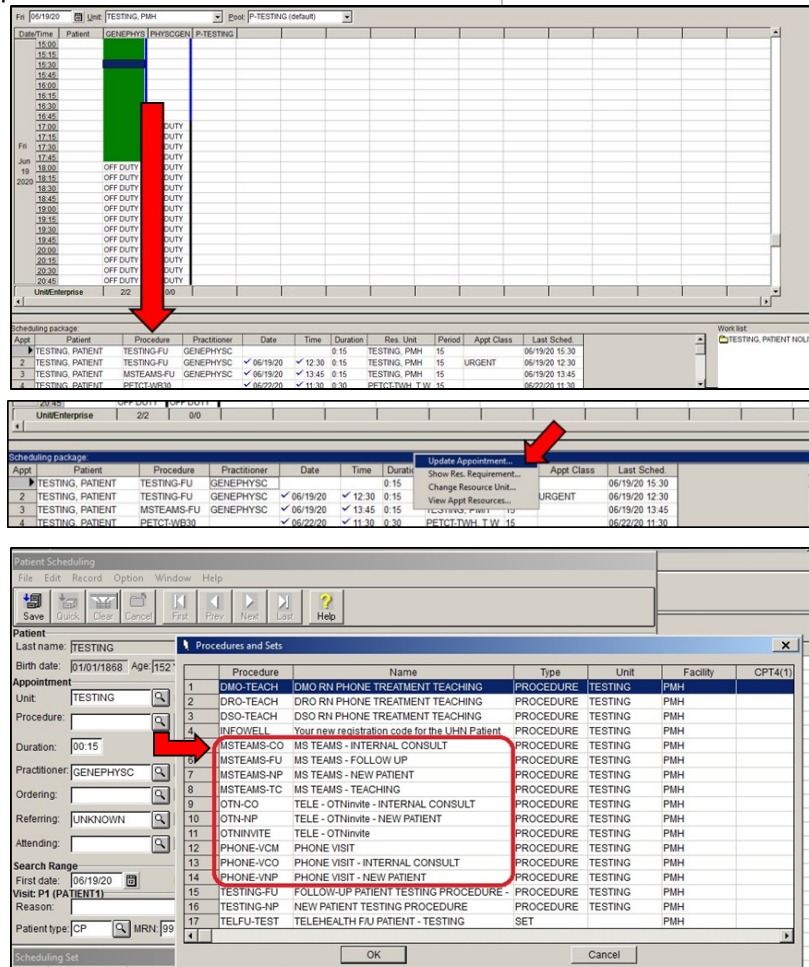| Process Step	Additional Information
1	⚠️ **Reminder:** *Cancel the patient appointment in __PHS first__ to maintain link to all downstream systems (EPR, myUHN Patient Portal, etc.)* • Right click or drag appointment from PHS Grid to Cancel Bin • EPR visit status will change from Pended to Canceled	Cancelling a PHS appointment will cancel the EPR visit and update myUHN Patient Portal
2	Note the date and time of appointment to make corresponding cancelation in the appropriate platform	
Congratulations: the virtual visit is now cancelled in PHS!		

Converting Existing Bookings to Virtual Care

Process Step	Additional Information
1	***Working remotely?*** Log-in to https://mydigitalapps.uhn.ca using your UHN corporate email account	• Browser: Explorer is recommended • This should allow you access to EPR and PHS (and other apps you typically access through Citrix) • If experiencing issues, please call Help Desk at ext. 4357

Last updated: July 17, 2020

	Process Step	Additional Information
2	Obtain list of patients from MRP that have been selected to be converted from face-to-face appointment to virtual care	• UHN is investigating mechanisms to automate this process. At this time, please develop a manual process for the MRP to provide this information.
3	Call patient to be converted to virtual appointment[1]	• Patient phone number as available in EPR
4	Check EPR to see if an email address is documented • **Yes, an email is documented:** proceed to step 7, the patient has already provided consent to use their email • **No, an email is not documented:** proceed to step 5	• If a patient has registered to myUHN Patient Portal they have already provided consent to use their email address
5	Follow the "Remote Visit Consent" script	• See script: Remote Visit Consent
6	If consent is received, document patient email in EPR	• See instructions: Entering Patients email address into EPR
7	Agree on date, time, and modality (phone or videoconference) for the virtual care appointment	
8	Request that the patient provide you with their preferred phone number for the day of the scheduled appointment: • This may differ from the phone number saved in their EPR profile • It is also important to capture the patient's preferred phone number for videoconference visits, in the event the videoconference visit gets disconnected	If the phone number in EPR is not the number that will be used on the day of appointment, document the *day of appointment* number in the PHS description box (pictured **below**)

![UHN logo] Toronto General / Toronto Western / Princess Margaret / Toronto Rehab

Process Step	Additional Information
Update the appointment in PHS ⚠️ **Reminder!** *Updating appointments from face-face to virtual procedures must occur in __PHS first__ prior to any other systems* Remove appointment from PHS grid to update to maintain link with EPR, myUHN Patient Portal a. Right Click or Drag Appointment from PHS Grid to the Scheduling package at the bottom of the screen b. Right Click to Update Appointment c. Backspace to delete existing procedure code d. Click the magnifying glass icon to display list of available procedures e. Select Procedure Type for the corresponding virtual care platform f. Click Save g. Drag Appointment back to PHS Grid	⚠️ Please be sure to update the procedure codes in PHS to accurately reflect the virtual visit **Telephone Visit** • PHONE- option **OTNhub Videoconference Visit** • OTN- option **MS Teams Videoconference Visit** • MSTEAMS- option

(Row number: 9)

Last updated: July 17, 2020

Process Step	Additional Information
10	*For phone visits* Communicate to the patient: • Their care provider will call them within 3-hours of the appointment time • Please be ready (e.g., phone ringer on, and near you) • Calls may display as **'UNIV HLTH NTWK' or Unknown Caller or No Caller ID**	
11	*For videoconference visits* Schedule the appointment in the appropriate platform	**For OTNhub** • Schedule the appointment in OTNhub *(See instructions: Scheduling in OTNhub)* • See video: here • An automated email will be sent to the patient providing them with instructions on how to prepare **For Microsoft Teams** • Schedule the appointment in MS Teams *(See instructions: Scheduling in Microsoft Teams)*
12	Email the appropriate videoconference instructions for patients	• See: OTNhub Videoconference Instructions for Patients • See: the Microsoft Teams Videoconference Instructions for Patients
Congratulations: the visit is now converted to a virtual visit in PHS!	