

A Resource for Schedulers

Scheduling Virtual Appointments in Epic

This tip sheet is for schedulers who book virtual appointments in Epic.

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1.0 Virtual Appointment Platforms

The platform for the virtual appointment should be agreed upon by the patient and care provider. When selecting a virtual appointment platform:

- Health care teams can refer to the [Clinical Guiding Principles for Virtual Care](#)
- Patients can refer to the [Is a Virtual Visit Right for Me?](#) brochure

Virtual Appointment Platform	Required Scheduling Systems
Phone Appointment	1. Epic (<i>Cadence</i>)
Microsoft Teams Video Appointment	1. Epic (<i>Cadence</i>) Microsoft Bookings and / or Outlook are no longer required!
Ontario Telemedicine Network (OTN) Video Appointment	1. Epic (<i>Cadence</i>) 2. OTNhub

2.0 Scheduling a Virtual Appointment from Epic

You can schedule a virtual appointment from Epic using Hyperspace (Epic desktop application).

1. Login to Epic Hyperspace

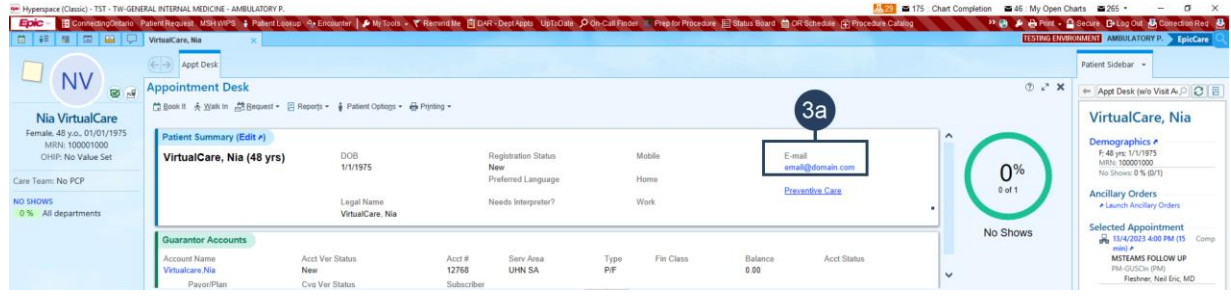
- Launch Epic *Hyperspace*
- Login with your UHN credentials
- Select the appropriate *Department*

2. Open the patient in Appointment Desk

- Navigate to *Appointment Desk* using your preferred method:
 - From anywhere by selecting *Appts* from the top toolbar in Epic
 - From a workqueue by selecting *Appt Desk* from the order / request that requires scheduling

3. Check for an email address documented in Epic

- Review the *Patient Summary* for an email address
 - No, an email is not documented** continue to step 4
 - Yes, an email is documented** continue to step 5



4. Collect verbal consent for use of email

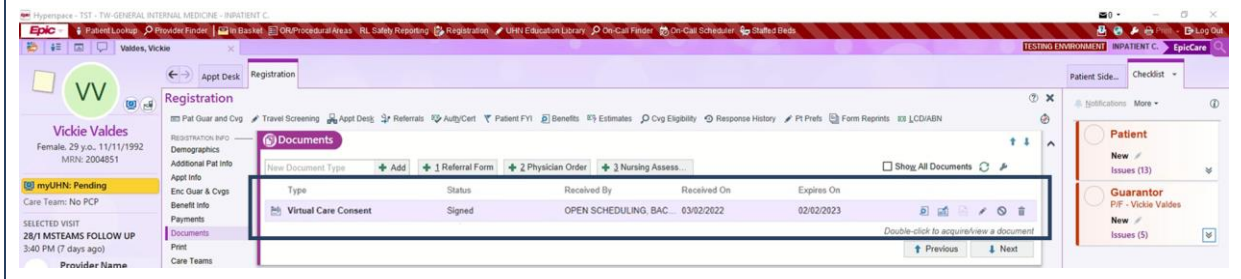
- Contact the patient as per your usual process
- Follow the [email consent script](#)

If consent is received

- Document the patient's email in Epic by selecting *Edit* from the *Patient Summary*
 - Consent for the virtual care appointment will be collected during *eCheck In* and can be viewed in the patient's *Documents*

If consent is not received

- If appropriate, proceed with scheduling the patient for a phone appointment
 - Patient cannot participate in a video appointment or *eCheck In* without an email address



5. Schedule the appointment in Epic	
<p>a. Complete scheduling as per your usual workflow</p> <ul style="list-style-type: none"> Ensure you select an appropriate <i>Visit Type</i> for the virtual visit. The examples listed below are not exhaustive; some departments may have specific virtual visit types. <p>b. Share patient instructions / education materials as needed</p> <ul style="list-style-type: none"> Resources are available at https://www.uhn.ca/PatientsFamilies/Virtual_Care Patients with myUHN Patient Portal can access resources in their Appointment Details in myUHN 	
<p>Phone Appointments</p> <p>Visit Type: PHONE VISIT</p>	<p>Scheduling is complete!</p>
<p>Microsoft Teams Video Appointment</p> <p>Visit Type: MSTEAMS NEW PATIENT, MSTEAMS FOLLOW UP</p>	<p>Scheduling is complete!</p> <ul style="list-style-type: none"> 2 days before the appointment, the patient will automatically receive an eCheck In notification that contains the link to the video appointment Patients enrolled in myUHN Patient Portal can join the appointment from the email link or myUHN
<p>OTN Home Video Visit</p> <p>Visit Type: OTN INVITE</p>	<p>Appointment must still be scheduled in OTNhub</p> <ul style="list-style-type: none"> Instructions on Scheduling in OTNhub are available
<p>OTN Site Hosted Visit (Telehealth Site)</p> <p>Visit Type: OTN SITE HOSTED</p>	<p>Appointment must still be scheduled with the OTN Site</p> <ul style="list-style-type: none"> Quick tips on Scheduling OTN Site Hosted Visits through Epic are available

Need help? Call the UHN Service Desk at 416-340-4800 ext. 4357 (H.E.L.P.) or email the Virtual Care Team directly at virtualcare@uhn.ca

2.1 Scheduling a Virtual Group Appointment from Epic

You can schedule virtual **group appointments** from Epic using Hyperspace (Epic desktop application).

1. Login to Epic Hyperspace

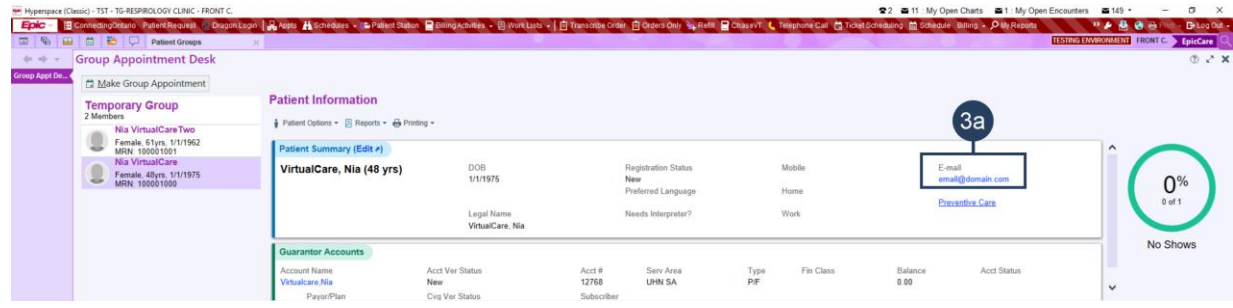
- Launch Epic *Hyperspace*
- Login with your UHN credentials
- Select the appropriate *Department*

2. Open the patient in Group Appointment Desk

- Navigate to *Group Appointment Desk* using your preferred method:
 - From anywhere by selecting Appts from the top toolbar in Epic
 - From a workqueue by selecting Appt Desk from the order / request that requires scheduling

3. Check for an email address documented in Epic for each patient

- Review the *Patient Summary* for each patient for an email address
 - No, an email is not documented** continue to step 4
 - Yes, an email is documented** continue to step 5



4. Collect verbal consent for use of email

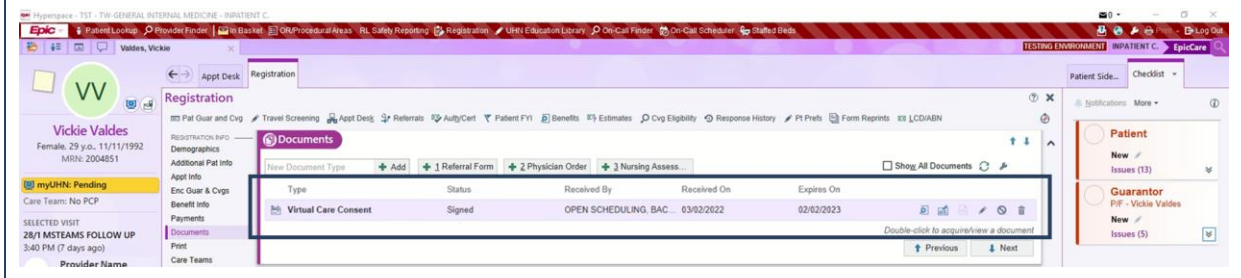
- Contact the patient as per your usual process
- Follow the [email consent script](#)

If consent is received

- Document the patient's email in Epic by selecting *Edit* from the *Patient Summary*
 - Consent for the virtual care appointment will be collected during *eCheck In* and can be viewed in the patient's *Documents*

If consent is not received

- If appropriate, proceed with scheduling the patient for a phone appointment
 - Patient cannot participate in a video appointment or *eCheck In* without an email address



5. Schedule the appointment in Epic

- a. Complete scheduling as per your usual workflow. Review the [Schedule Group Appointments](#) resource for more information.
 - Ensure you select an appropriate *Visit Type* for the virtual visit. **The examples listed below are not exhaustive**; some departments may have specific group virtual visit types.
- b. Share patient instructions / education materials as needed
 - Resources are available at https://www.uhn.ca/PatientsFamilies/Virtual_Care
 - Patients with myUHN Patient Portal can access resources in their Appointment Details in myUHN

<p>Microsoft Teams Video Appointment</p> <p>Visit Type: MSTEAMS GROUP SESSION</p>	<p>Scheduling is complete!</p> <ul style="list-style-type: none"> • 2 days before the appointment, the patient will automatically receive an eCheck-In notification that contains the link to the video appointment • Patients enrolled in myUHN Patient Portal can join the appointment from the email link or myUHN
<p>OTNhub Home Video Visit</p> <p>Visit Type: OTN INVITE</p>	<p>Appointment must still be scheduled in OTNhub</p> <ul style="list-style-type: none"> • Review Scheduling in OTNhub instructions

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