

A Resource for Schedulers

Scheduling Virtual Appointments in Epic

This tip sheet is to support schedulers with booking 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

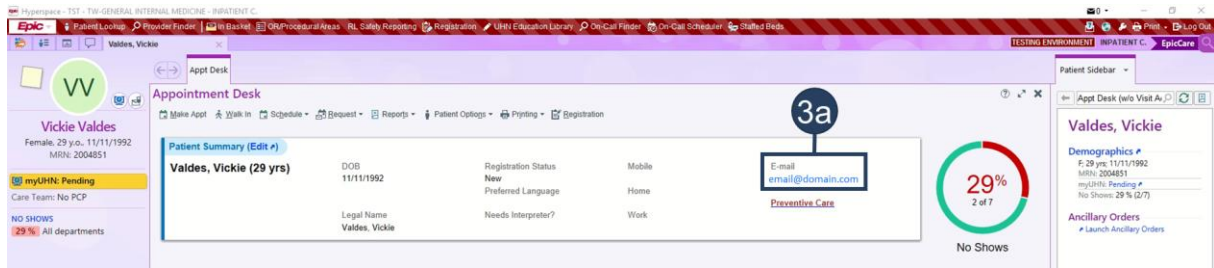
- Launch Epic *Hyperspace*
- Login with your UHN credentials
- Select the appropriate *Department*

2. Open the patient in Appointment Desk

- Navigate to *Appointment Desk* using your preferred method:
 - From anywhere by selecting *Appts* from the top ribbon in Epic and searching the patient
 - 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

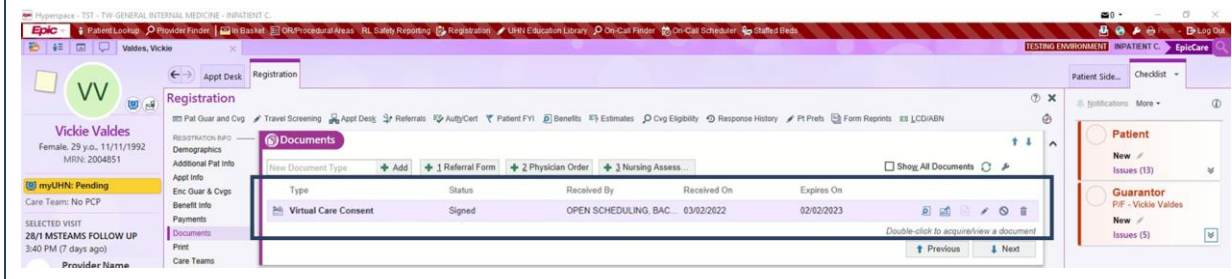
- Contact the patient as per your usual process
- Follow the [email consent script](#)

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 processes</p> <ul style="list-style-type: none"> Select the appropriate <i>Visit Type</i> as listed below <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 enrolled in myUHN Patient Portal can access these resources from the visit instructions for the appointment 	
<p>Phone Appointments PHONE VISIT (option)</p>	<p>Scheduling is complete!</p>
<p>Microsoft Teams Video Appointment MSTEAMS (option)</p>	<p>Scheduling is complete!</p> <ul style="list-style-type: none"> An email / SMS with the link to the video appointment will be sent to the patient <i>automatically 2 days</i> before the appointment in the eCheck In patient notification Patients enrolled in myUHN Patient Portal can join the appointment from the email link or myUHN
<p>OTNhub Home Video Visit 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 Hosted Site Visit (Telehealth Site) OTN SITE HOSTED (option)</p>	<p>Appointment must still be scheduled with the OTN Site</p> <ul style="list-style-type: none"> Instructions on Scheduling OTN Hosted Site Visits (Telehealth Site) are available

Need help? Please contact UHN Service Desk by calling 416-340-4800 ext. 4357 (H.E.L.P.) or connect to the Virtual Care Team directly via email 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

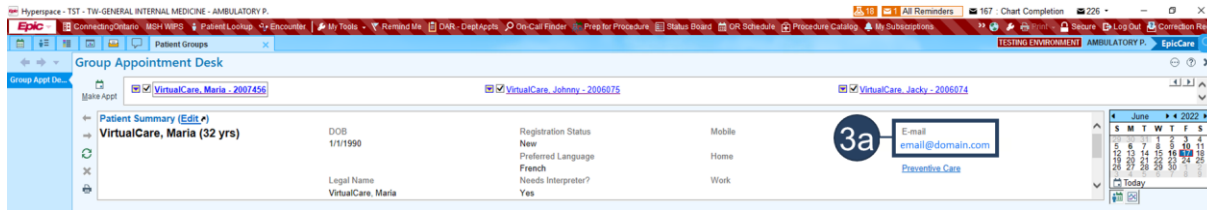
- Launch Epic *Hyperspace*
- Login with your UHN credentials
- Select the appropriate *Department*

2. Open the patient in Appointment Desk

- Navigate to *Group Appointment Desk* using your preferred method:
 - From anywhere by selecting Appts from the top ribbon in Epic and searching the patient
 - 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 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

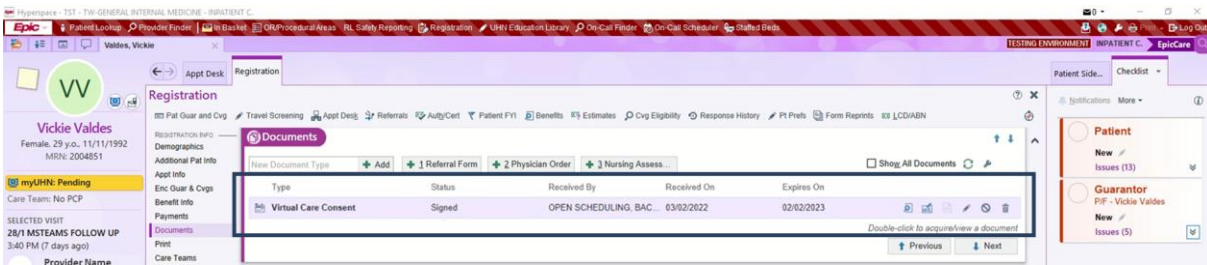
- Contact the patient as per your usual process
- Follow the [email consent script](#)

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	
<ul style="list-style-type: none"> a. Complete scheduling as per your usual processes <ul style="list-style-type: none"> • Select the appropriate <i>Visit Type</i> as listed below • Instructions on Scheduling Group Appointments are available • Instructions on Creating and Editing Patient Groups are available b. Share patient instructions / education materials as needed <ul style="list-style-type: none"> • Resources are available at https://www.uhn.ca/PatientsFamilies/Virtual_Care • Patients enrolled in myUHN Patient Portal can access these resources from the visit instructions for the appointment 	
Microsoft Teams Video Appointment MSTEAMS GROUP (option)	Scheduling is complete! <ul style="list-style-type: none"> • An email with the link to the video appointment will be sent to each patient <i>automatically 2 days</i> before the appointment in the eCheck In patient notification • Patients enrolled in myUHN Patient Portal can join the appointment from the email link or myUHN
OTNhub Home Video Visit OTN INVITE	Appointment must still be scheduled in OTNhub <ul style="list-style-type: none"> • Instructions on Scheduling in OTNhub are available

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