

SCHEDULING A TELEHEALTH APPOINTMENT IN PHS

QUICK REFERENCE GUIDE

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READ FIRST

- The Telehealth scheduling set will create **2 appointments** one for the Telehealth unit and one for the practitioner.
- Use the **Tab button** to quickly navigate from question to question.
- Refer to the Cancelling/Rescheduling Telehealth Appointment tip sheet for any appt. changes.

Quick Steps for Scheduling a Telehealth Appointment Set

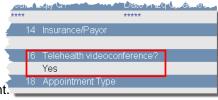
- 1. Click the [New] button double clicking on the appointment time/quick booking does not work.
- 2. In the PATIENT SEARCH window, enter the MRN in the Enterprise Person Number field. Click Search and then OK.
- 3. Select a **Resource unit** (this is your unit).
- 4. Select the Telehealth procedure set (TELNP or TELFU).
- 5. Click [Yes] when prompted to expand the scheduling set.

A dialogue box opens allowing you to create a new visit for EPR.

- 6. Click [New].
- 7. Choose the **Patient Type**, click **OK** and then click [Save], not **OK**.
- 8. Enter Insurance information Choose OHIP as Carrier and Plan. Click [OK].
- 9. Enter Attending & Referring Practitioners (2 fields).
- 10. Click [Save] button. A dialogue box opens indicating that you must enter in Practitioner. Click [OK].
- 11. Enter the **Practitioner** when prompted (same as Attending).
- 12. Adjust duration if required.
- 13. Select the [Save] button and fill out all the Telehealth Questions (1-6 are mandatory) and click [OK].
 - 1. Which UHN site? Choose site where appointment will take place.
 - Location of the appointment PCVC or indicate room number if using the Telehealth system - If the clinician is using Personal Videoconferencing (i.e. using a desktop computer), indicate PCVC here. If the clinician uses standard video conferencing equipment (which is already in a clinic room or a portable Telehealth system), indicate the room number.
 - 3. Consultation date, time and duration- enter date, time and duration of appointment.
 - 4. UNH clinician name and specialty enter the name of the clinician seeing the patient.
 - 5. Diagnosis enter the patient's diagnosis.
 - **6. UHN Contact (first and last name) and phone extension –** enter the full name (first and last) and phone number of the <u>actual</u> scheduler of the appointments. This is important for any further questions.
 - 7. **If an inpatient, specify hospital location, unit and contact info** this is important because the Telehealth team books the appointment at that specific site & coordinates with the nursing unit.
 - 8. **Clinical Requirements** Indicate <u>only</u> the necessary requirements/devices as this impacts the location of the site.
 - 9. **Comments or Special Requirements** (e.g. wheelchair, O₂) Indicate any special instructions or requirements, as this impacts the location of the site.
- 12. In the Scheduling package, drag the 1st appointment with the resource unit TELELHEALTH to the **Inbox**.
- 13. Select [OK] to "Inbox this selected appointment only".
- 14. Click **[OK]** to *Edit Inbox Information box* dialogue box.
- 15. Drag the **practitioner** (2nd) appointment to the appropriate clinic grid on the requested date and time.

EPR Activation – in EPR

- 16. Launch the patient's visit in EPR.
- 17. Ensure that **Telehealth is flagged (displays 'yes')** in EPR.
- 18. Ensure that the patient **insurance** and **visit type** is accurate.
- 19. Ensure that the **EPR visit is activated** on the day of appointment.

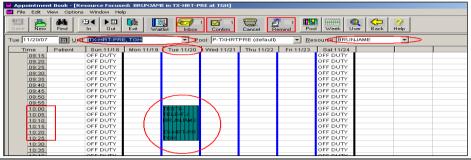




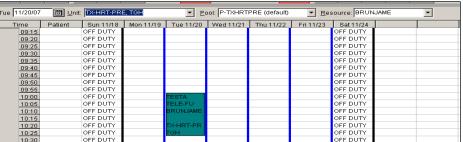
Determining the Status of the Telehealth Appointment

Status: The Appointment is Being Processed

Black vertical lines will show up on practitioner's appointment to indicate that Telehealth is **processing** the request.



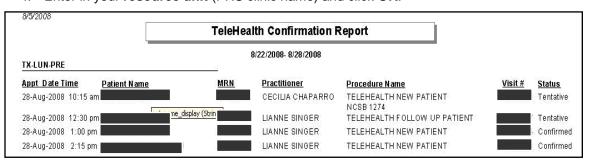
Status: The Appointment is Confirmed Once the Telehealth Department confirms the appointment, they will remove the black vertical bars.



The PHS Telehealth Confirmation Report

What report can you run in PHS to check the status of your Telehealth appointment? Open **Standard Reports:**

- 1. {Type} in TE to narrow your search and select the Telehealth Confirmation Report.
- Select View.
- 3. Enter in the correct date range.
- 4. Enter in your resource unit (PHS clinic name) and click OK.



The Telehealth Scheduling Checklist

- Did you drag the Telehealth appointment to the Inbox and schedule the practitioner appointment?
- Is the duration of both of the appointments correct?
- Have all the Telehealth questions on the Telehealth form been filled out?
- Did you complete all of the visit information in PHS: the patient type and insurance info?
- In EPR, did you answer "Yes" for the Telehealth Conference field? Did you check all EPR fields?

TIP: Use the PHS FIND button to view the appointment details that you have entered:

- Check that the practitioner appointment has the correct date, time and duration.
- ✓ Click View/Edit Answers to view the Telehealth Questions *
 - *Changes made here are not received by the Telehealth team email the Telehealth team for question changes!
- ✓ Click Visit Information to view the patient type & insurance info entered.**
 - **You may edit the visit info from this screen. You may also edit the visit directly in the EPR. Remember: Inaccurate info impacts funding!

Ensure you **activate** the visit in EPR on the day of the appointment
(Please note that the patient will not be arriving in clinic since it is being done over video).

Please email <u>Telehealth@uhn.ca</u> for any changes to the Telehealth questions.