



SCHEDULING A TELEHEALTH APPOINTMENT IN PHS

QUICK REFERENCE GUIDE

! 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.
2. **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 actual 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 only 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.

14	Insurance/Payor
16	Telehealth videoconference? Yes
18	Appointment Type



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.

Time	Patient	Sun 11/18	Mon 11/19	Tue 11/20	Wed 11/21	Thu 11/22	Fri 11/23	Sat 11/24
09:15		OFF DUTY						OFF DUTY
09:20		OFF DUTY						OFF DUTY
09:25		OFF DUTY						OFF DUTY
09:30		OFF DUTY						OFF DUTY
09:35		OFF DUTY						OFF DUTY
09:40		OFF DUTY						OFF DUTY
09:45		OFF DUTY						OFF DUTY
09:50		OFF DUTY						OFF DUTY
09:55		OFF DUTY						OFF DUTY
10:00		OFF DUTY						OFF DUTY
10:05		OFF DUTY						OFF DUTY
10:10		OFF DUTY						OFF DUTY
10:15		OFF DUTY						OFF DUTY
10:20		OFF DUTY						OFF DUTY
10:25		OFF DUTY						OFF DUTY
10:30		OFF DUTY						OFF DUTY
10:35		OFF DUTY						OFF DUTY

Status: The Appointment is Confirmed

Once the Telehealth Department **confirms** the appointment, they will **remove the black vertical bars**.

Time	Patient	Sun 11/18	Mon 11/19	Tue 11/20	Wed 11/21	Thu 11/22	Fri 11/23	Sat 11/24
09:15		OFF DUTY						OFF DUTY
09:20		OFF DUTY						OFF DUTY
09:25		OFF DUTY						OFF DUTY
09:30		OFF DUTY						OFF DUTY
09:35		OFF DUTY						OFF DUTY
09:40		OFF DUTY						OFF DUTY
09:45		OFF DUTY						OFF DUTY
09:50		OFF DUTY						OFF DUTY
09:55		OFF DUTY						OFF DUTY
10:00		OFF DUTY						OFF DUTY
10:05		OFF DUTY						OFF DUTY
10:10		OFF DUTY						OFF DUTY
10:15		OFF DUTY						OFF DUTY
10:20		OFF DUTY						OFF DUTY
10:25		OFF DUTY						OFF DUTY
10:30		OFF DUTY						OFF DUTY

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**.
2. Select **View**.
3. Enter in the correct **date range**.
4. Enter in your **resource unit** (PHS clinic name) and click **OK**.

8/5/2008

TeleHealth Confirmation Report

8/22/2008- 8/28/2008

TX-LUN-PRE

Appt Date Time	Patient Name	MRN	Practitioner	Procedure Name	Visit #	Status
28-Aug-2008 10:15 am			CECILIA CHAPARRO	TELEHEALTH NEW PATIENT		Tentative
28-Aug-2008 12:30 pm			LIANNE SINGER	TELEHEALTH FOLLOW UP PATIENT		Tentative
28-Aug-2008 1:00 pm			LIANNE SINGER	TELEHEALTH NEW PATIENT		Confirmed
28-Aug-2008 2:15 pm			LIANNE SINGER	TELEHEALTH NEW PATIENT		Confirmed

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 Telehealth@uhn.ca for any changes to the Telehealth questions.