

*A Resource for Health Care Providers*

## Video Appointments using Epic / Microsoft Teams

This is a resource to support care providers delivering video appointments using Epic / Microsoft Teams.

**For a higher level summary, please see the [Video Appointment Provider Tip Sheet](#).**

**Additional resources and tip sheets to support care teams delivering virtual care via Microsoft Teams, Ontario Telemedicine Network (OTN), and phone are available [online here](#).**

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## 1.0 Hyperspace: Connect to Video Appointments from a Computer

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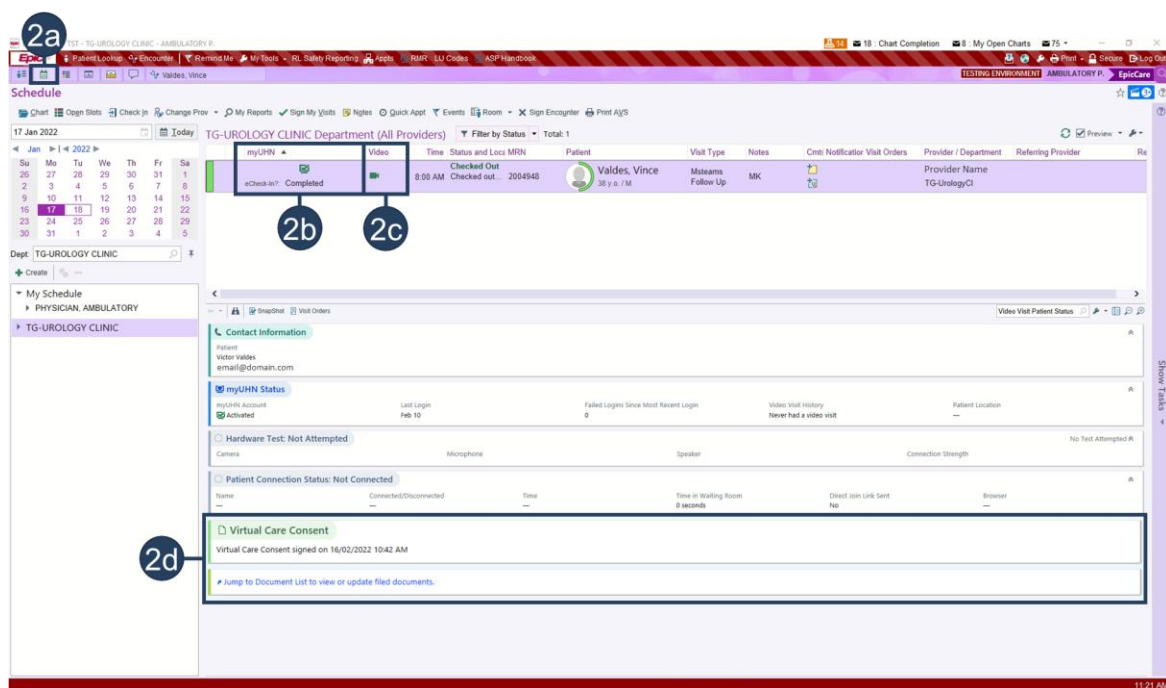
### 1. Login to Epic Hyperspace

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

### 2. Review your Schedule

- Select the *Schedule* icon from the top left ribbon
- myUHN* column displays patient activity in myUHN
  - eCheck-in?* will indicate eCheck-in as *Not Started*, *In Progress*, or *Completed*
  - myUHN Status* icon will indicate if the myUHN account is *Activated*, or *Inactivated*
- Video* column identifies video appointments
  - Grey** indicates no one has joined the video appointment
  - Green** icon indicates someone has joined the video appointment
  - Note.** You can hover over the green icon to see who has joined (i.e., patient, an essential care partner, another care team member, interpreter, etc.)
- If this is your first virtual care appointment with the patient, review *Virtual Care Consent* in the *Virtual Care Patient Status* display of the appointment *Preview* (details in [6.0 Consent for Virtual Care](#))

**Not seeing these options?** See details on modifying your view of Epic to improve the virtual care workflow in section [1.3 Hyperspace: Customizing your View for Virtual Care](#)



### 3. Launch the video appointment (2 options)

#### 3.1 Launch from your Schedule

- Double click the camera icon (see 2c above) – this will launch your web browser (continue to 4)

### 3.2 Launch from the Patient Encounter

- Click the *Connect to Video* tab in the patient encounter
- Click the *Connect to Video* button – this will launch your web browser (continue to 4)

#### What if your patient has not yet joined the video appointment?

- Click the *Send Direct Link* button to send a notification including the appointment link to the patient by email or SMS / text message

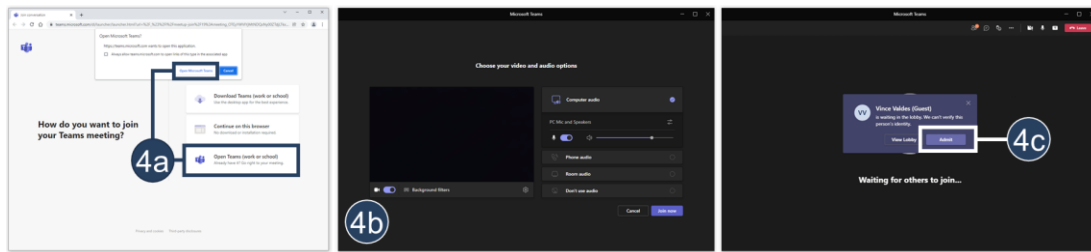
**Note.** If needed, you can copy the link to the video appointment by clicking *Copy to Clipboard*



## 4. Connect to the video appointment

### 4.1 Using the Microsoft Teams Desktop Application (Recommended)

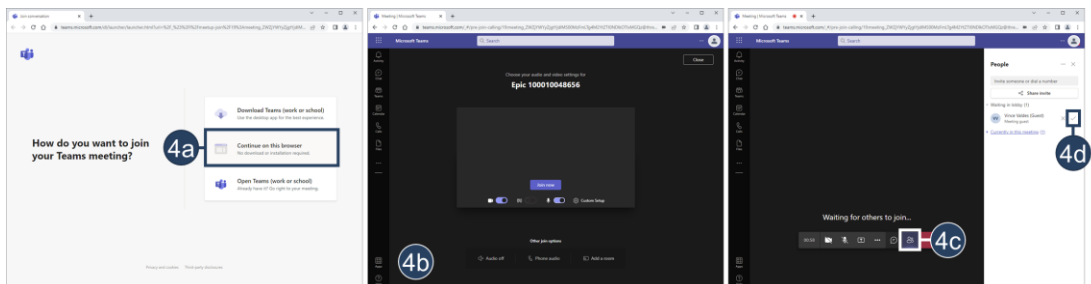
- Select *Open Microsoft Teams* from the web browser
- Preview your camera and check audio input, then select *Join Now*
- Select *Admit* on the pop-up notifying you that your patient is waiting in the lobby



### 4.2 Using the Microsoft Teams Web Application

- Select *Continue on this browser* from the web browser
- Preview your camera and check audio input, then select *Join Now*
- Select the *Participants* menu
- Admit your patient selecting ✓

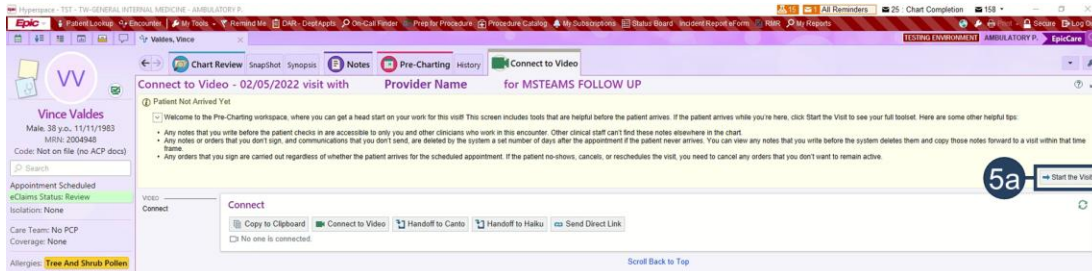
**Note.** Do not use Internet Explorer



## 5. Conduct the video appointment

- a. Click *Start the Visit* on the yellow banner on any tab (only required if *Patient Not Arrived Yet*)
- b. Conduct and complete the video appointment as per your usual clinical practices

**Patients must be *Checked In* for virtual visits** to prevent patients from being misidentified as “no shows” during the *end of day batch run*. See the [Check In for Virtual Appointments tip sheet](#) for details.



**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](mailto:virtualcare@uhn.ca)

## 1.1 Hyperspace: Connect to Group Video Appointments from a Computer

You can connect to an Epic / Microsoft Teams group appointment using a computer from Hyperspace.

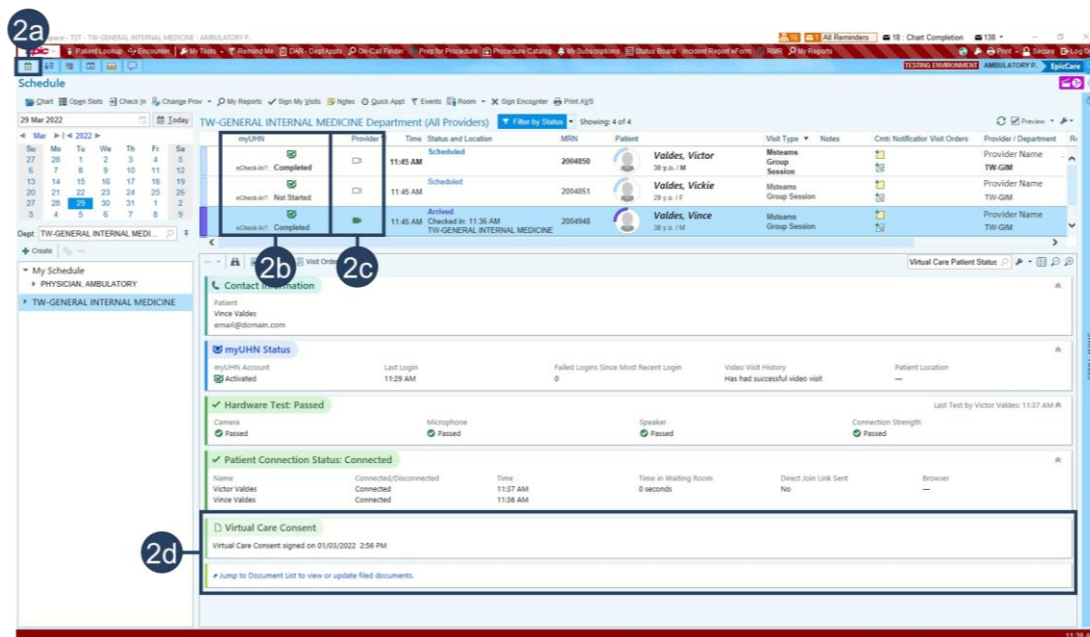
### 1. Login to Epic Hyperspace

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

### 2. Review your Schedule

- Select the *Schedule* icon from the top left ribbon
  - Each patient in the group video appointment will be represented on a unique row \*
- myUHN* column displays patient activity in myUHN
  - eCheck-in?* will indicate eCheck-in as *Not Started*, *In Progress*, or *Completed*
  - myUHN Status* icon will indicate if the myUHN account is *Activated*, or *Inactivated*
- Video* column identifies video appointments
  - Grey** indicates no one has joined the video appointment
  - Green** icon indicates someone has joined the video appointment (hover to see who)
  - Note.** The icon will only turn green for the **first patient** to join the group appointment \*
- If this is your first virtual care appointment with the patient, review *Virtual Care Consent* in the *Virtual Care Patient Status* display of the appointment *Preview* for each patient in the group (details in section [6.0 Consent for Virtual Care](#))

**Not seeing these options?** See details on modifying your view of Epic to improve the virtual care workflow in section [1.3 Hyperspace: Customizing your View for Virtual Care](#)



### 3. Launch the video appointment (2 options)

Launch the video appointment using any patient participating in the group video appointment

#### 3.1 Launch from your Schedule

- Double click the camera icon (see 2c above) – this will launch your web browser (continue to 4)

### 3.2 Launch from the Patient Encounter

- Click the *Connect to Video* tab in the patient encounter
- Click the *Connect to Video* button – this will launch your web browser (continue to 4)

#### What if a patient has not yet joined the group video appointment?

- From the *Connect to Video* tab in the patient encounter for the patient who has not yet joined, click the *Send Direct Link* button to send a notification including the appointment link to the patient by email or SMS / text message

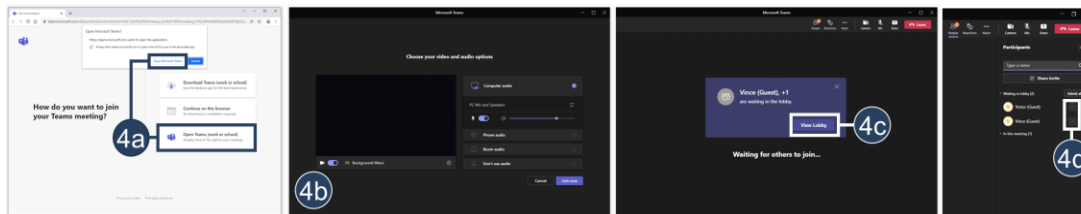
**Note.** If needed, you can copy the link to the video appointment by clicking *Copy to Clipboard*



## 4. Connect to the video appointment

### 4.1 Using the Microsoft Teams Desktop Application (Recommended)

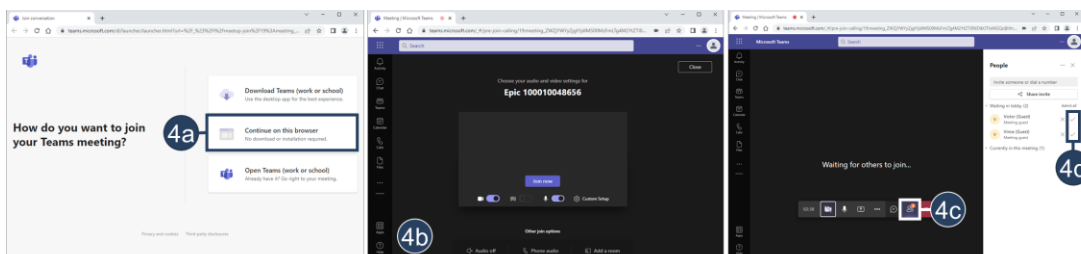
- Select *Open Microsoft Teams* from the web browser
- Preview your camera and check audio input, then select *Join Now*
- Select *View Lobby* on the pop-up notifying you that your patient is waiting in the lobby
- Admit patients expected in your group by selecting ✓



### 4.2 Using the Microsoft Teams Web Application

- Select *Continue on this browser* from the web browser
- Preview your camera and check audio input, then select *Join Now*
- Select the *Participants* menu
- Admit patients expected in your group by selecting ✓

**Note.** Do not use Internet Explorer



## 5. Conduct the video appointment

- a. Click *Start the Visit* on the yellow banner on any tab (only required if *Patient Not Arrived Yet*)
- b. Conduct and complete the group video appointment as per your usual clinical practices

**Each patient who attended must be *Checked In*** to prevent patients from being misidentified as “no shows” during the *end of day batch run*. See the [Check In for Virtual Appointments tip sheet](#) for details.



*\* Improvements to these functions will be available upon upgrade to Epic version February 2022*

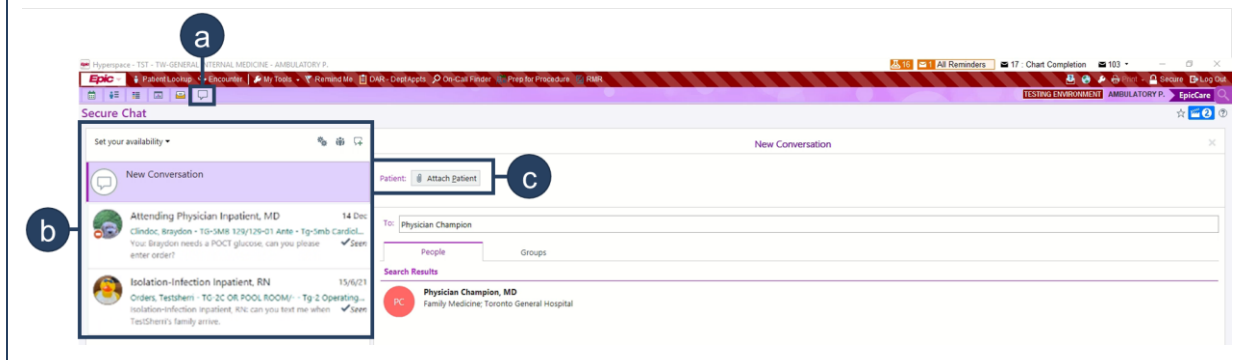
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## 1.2 Hyperspace: Coordinating Multidisciplinary Video Appointments from a Computer

You can coordinate multidisciplinary Epic / Microsoft Teams video appointments using the Secure Chat feature on a computer from Hyperspace.

### Coordinate care via Secure Chat

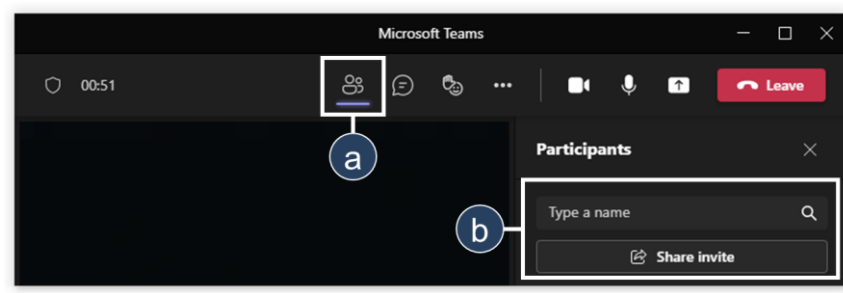
- a. Select the *Secure Chat* icon from the top left ribbon
- b. Select who you would like to chat with, or create a *New Conversation*
  - *Secure Chats* can be sent to individuals or groups
  - If creating a *New Conversation*, you can search for individuals or groups from the *To* field
- c. Select *Attach Patient* to link a patient record to the *Secure Chat*
  - When a patient is attached, the *Secure Chat* becomes a part of the patient's medical record
- e. Discuss with the care team as required for care coordination
  - Read receipts will indicate when the message was seen by the recipient
  - Recipients can open the patient chart directly from *Secure Chat* and join the video appointment using the steps above



**During the video appointment**, you can coordinate a multidisciplinary visit using Microsoft Teams.

### Invite a participant from Microsoft Teams during the video appointment

- a. Select the *Participants* icon in the Microsoft Teams while the video appointment is in progress
- b. To add a participant you can either:
  - Search their name, or
  - Select *Share Invite* to copy the link to the video appointment
- c. Document the inclusion of an additional care provider in the patient chart



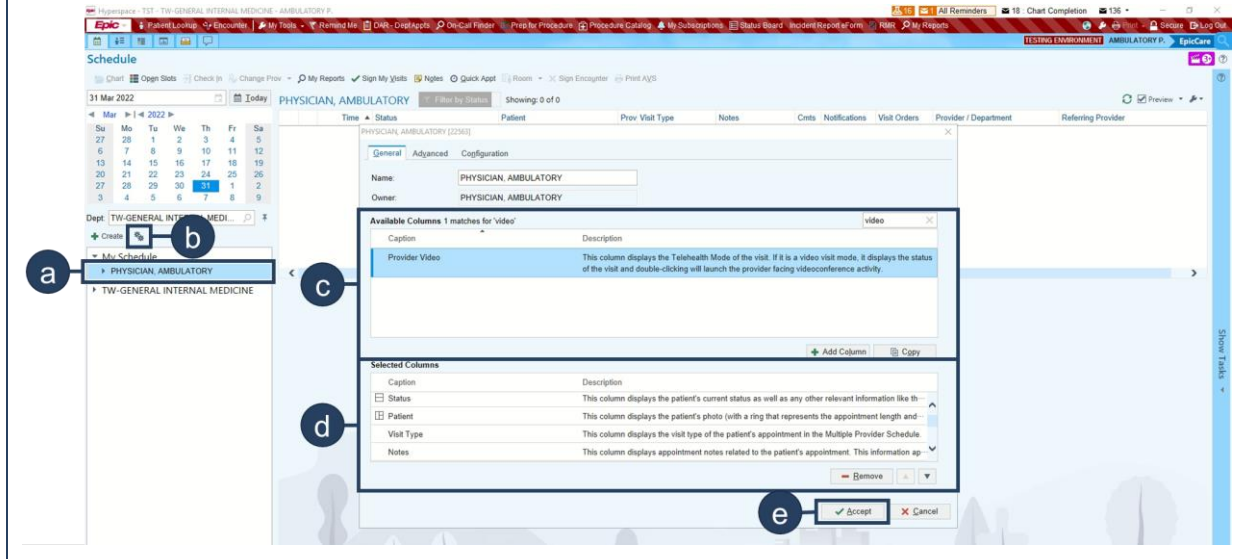


## 1.3 Hyperspace: Customizing your View for Virtual Care

You can customize your view in Epic to improve the virtual care workflow from Hyperspace.

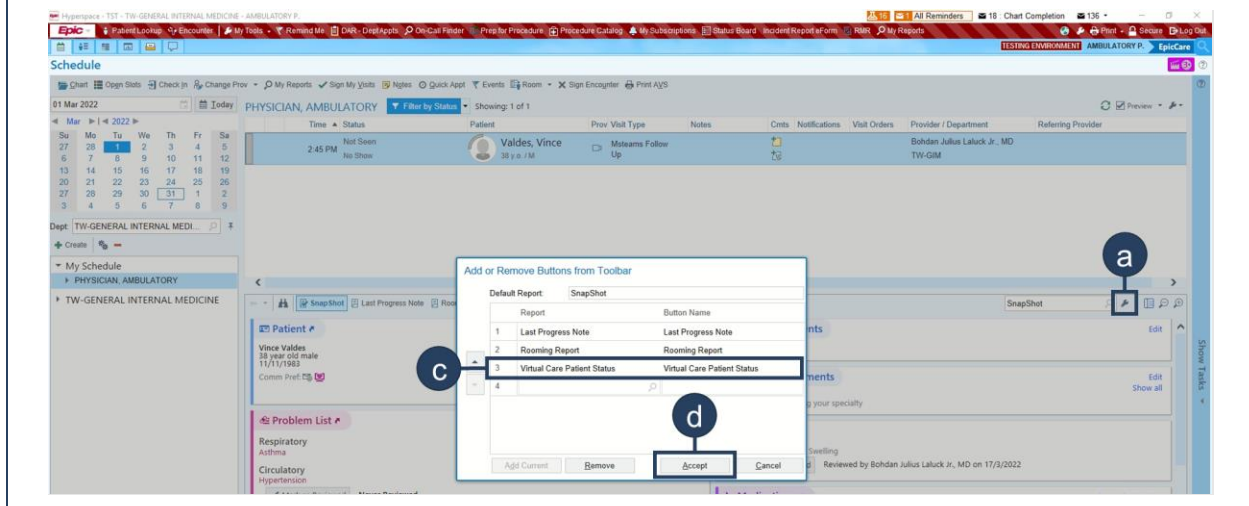
### Add the *Video* column to your *Schedule*

- Select your name under the calendar
- Select (*gear icon*) under the calendar
- Search for *Provider Video* in the *Available Columns* section, then select **+ Add Column**
- Place the *Provider Video* column where you would like to see it in the *Selected Columns* section,
- Select  **Accept**



### Add the *Virtual Care Patient Status* View to your *Preview* toolbar

- Select (*wrench icon*) from the appointment *Preview*
- Select **Add or remove buttons from toolbar**
- Search for *Virtual Care Patient Status* in the
- Select  **Accept**



## 2.0 Haiku: Connect to Video Appointments from a Smartphone

You can connect to an Epic / Microsoft Teams video appointment using a smartphone from Haiku.

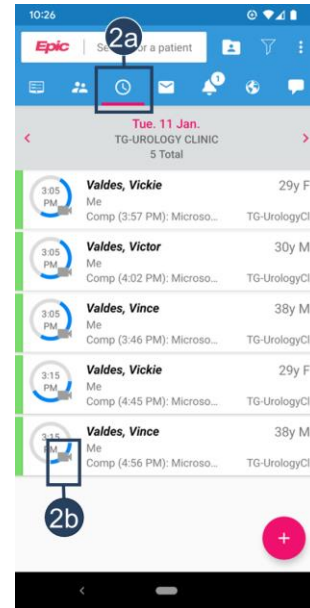
### 1. Login to Epic Haiku

- a. Launch Epic *Haiku*
- b. Login with your UHN credentials
- c. Select the appropriate *Department*

### 2. Review your Schedule

- a. Select the *Schedule* icon from the top ribbon
- b. *Video* icon identifies video appointments
- c. Select a patient to open the patient encounter

**Note.** You cannot view the signing status of *Virtual Care Consent* form from Haiku. If you have not otherwise confirmed consent in advance of the appointment, please collect and document consent verbally (details in section [6.0 Consent for Virtual Care](#)).

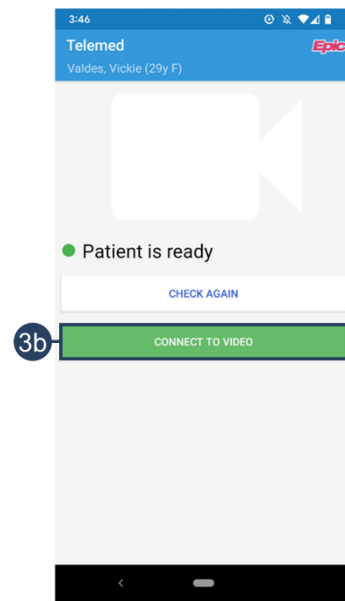
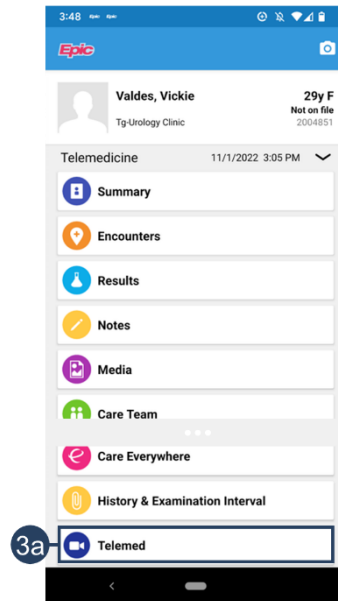


### 3. Launch the video appointment

- a. Select the *Telemed* tab (last option)

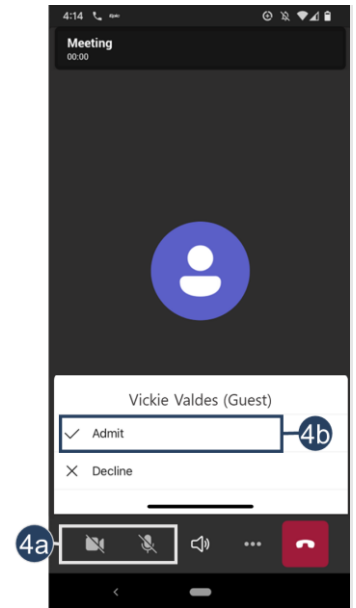
You can see if your patient has joined the video on the *Telemed* page

- b. Select *Connect to Video* – this will launch Microsoft Teams



#### 4. Connect to the video appointment

- a. Turn on your camera and microphone
- b. Select *Admit* on the pop-up notifying you that your patient is waiting in the lobby



#### 5. Conduct the video appointment

Conduct and complete the video appointment as per your usual clinical practices.

**Patients must be *Checked In* for virtual visits** to prevent patients from being misidentified as “no shows” during the *end of day batch run*. See the [Check In for Virtual Appointments tip sheet](#) for details.

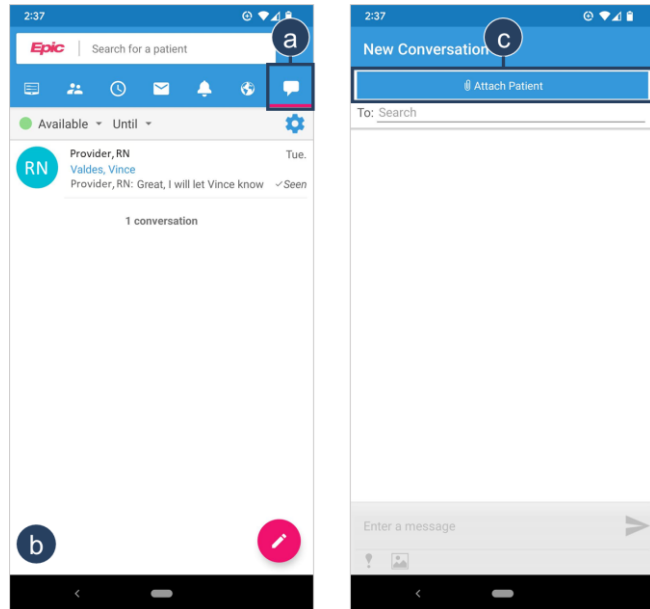
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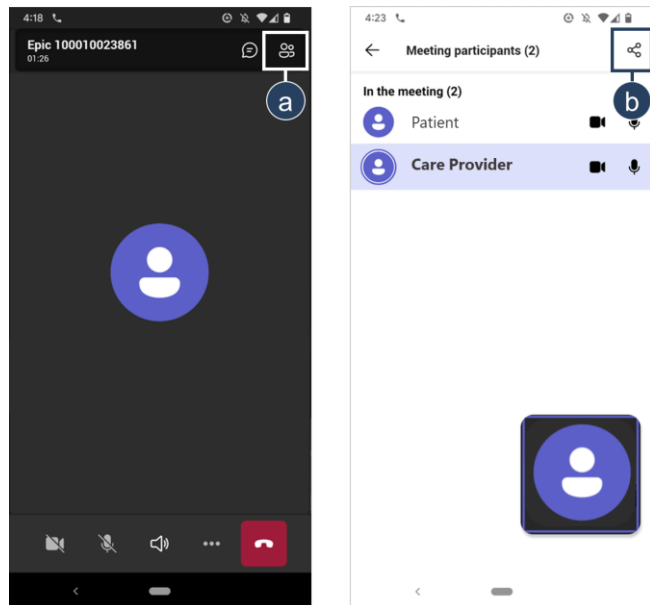
- Select the *Secure Chat* icon from the top right ribbon
- Select who you would like to chat with, or create a *New Conversation*
  - Secure Chats* can be sent to individuals or groups
  - If creating a *New Conversation*, you can search for individuals or groups from the *To* field
- Select *Attach Patient* to link a patient record to the *Secure Chat*
  - When a patient is attached, the *Secure Chat* becomes a part of the patient's medical record
- Discuss with the care team as required for care coordination
  - Read receipts will indicate when the message was seen by the recipient
- Recipients can open the patient chart directly from *Secure Chat* and join the video appointment using the steps above



**During the video appointment**, you can coordinate a multidisciplinary visit using Microsoft Teams.

### Invite a participant from Microsoft Teams during the video appointment

- Select the *Participants* icon in the Microsoft Teams while the video appointment is in progress
- Select the *Share* icon to add a participant by either:
  - Searching their name, or
  - Selecting *Share Invite* to copy the link to the video appointment
- Document the inclusion of an additional care provider in the patient chart



## 3.0 Canto: Connect to Video Appointments from an iPad

You can connect to an Epic / Microsoft Teams video appointment using an iPad from Canto.

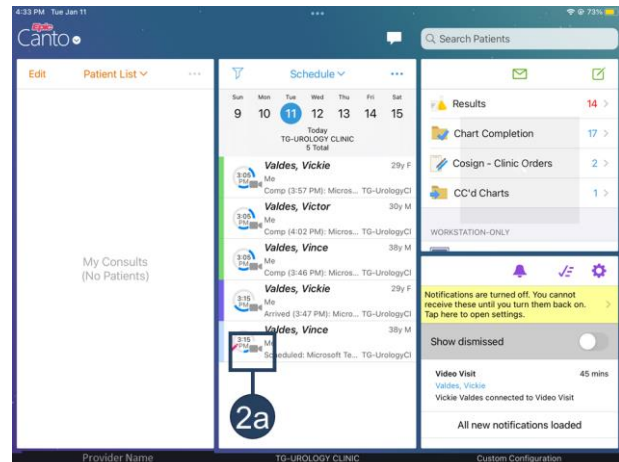
### 1. Login to Epic Canto

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

### 2. Review your Schedule

- Video* icon identifies video appointments
- Select a patient to open the patient encounter

**Note.** You cannot view the signing status of *Virtual Care Consent* form from Canto. If you have not otherwise confirmed consent in advance of the appointment, please collect and document consent verbally (details in section [6.0 Consent for Virtual Care](#)).

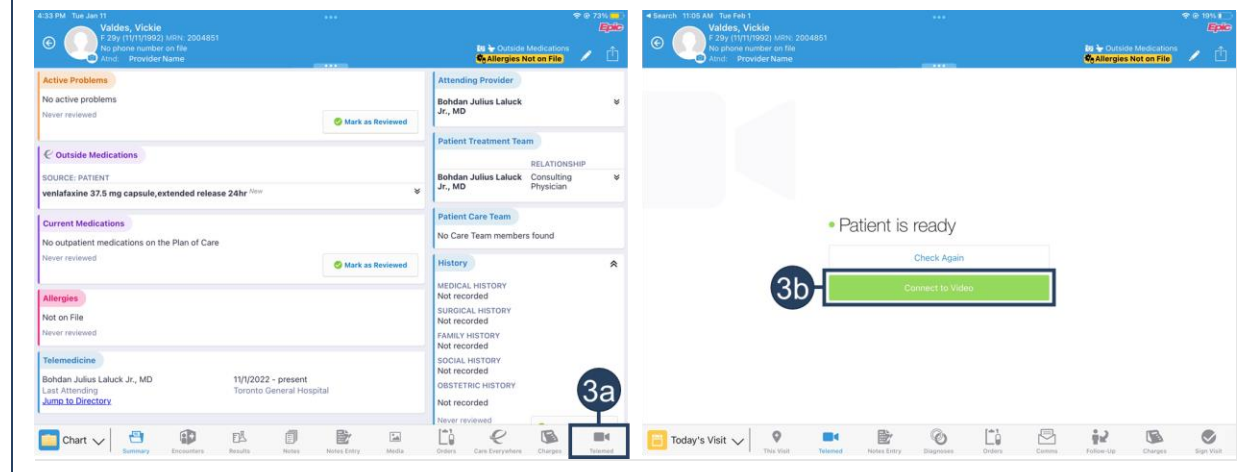


### 3. Launch to the video appointment

- Select the *Telemed* icon from the bottom ribbon (last option)

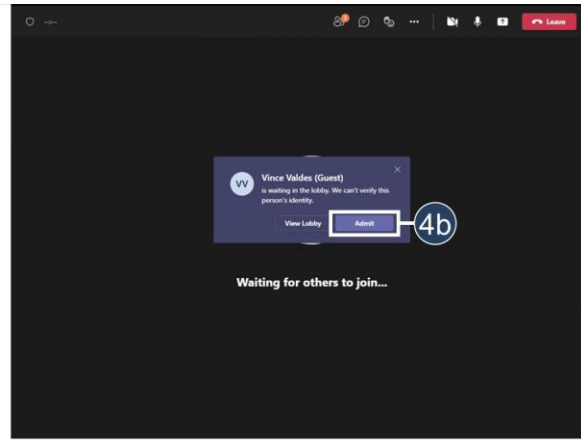
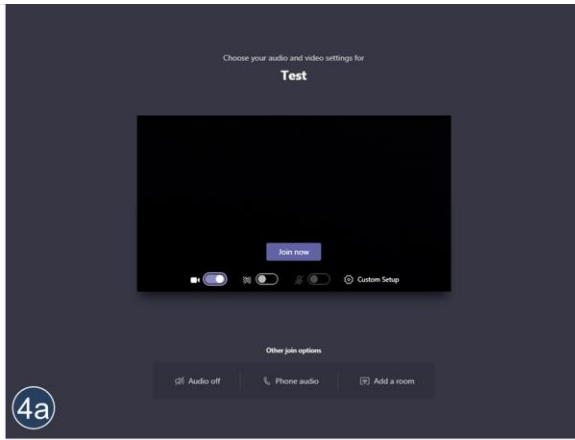
You can see if your patient has joined the video on the Telemed page

- Select *Connect to Video* – this will launch Microsoft Teams



## 4. Connect to the video appointment

- a. Preview your camera and check audio input, then select *Join Now*
- b. Select *Admit* on the pop-up notifying you that your patient is waiting in the lobby



## 5. Conduct the video appointment

Conduct and complete the video appointment as per your usual clinical practices.

**Patients must be *Checked In* for virtual visits** to prevent patients from being misidentified as “no shows” during the *end of day batch run*. See the [Check In for Virtual Appointments tip sheet](#) for details.

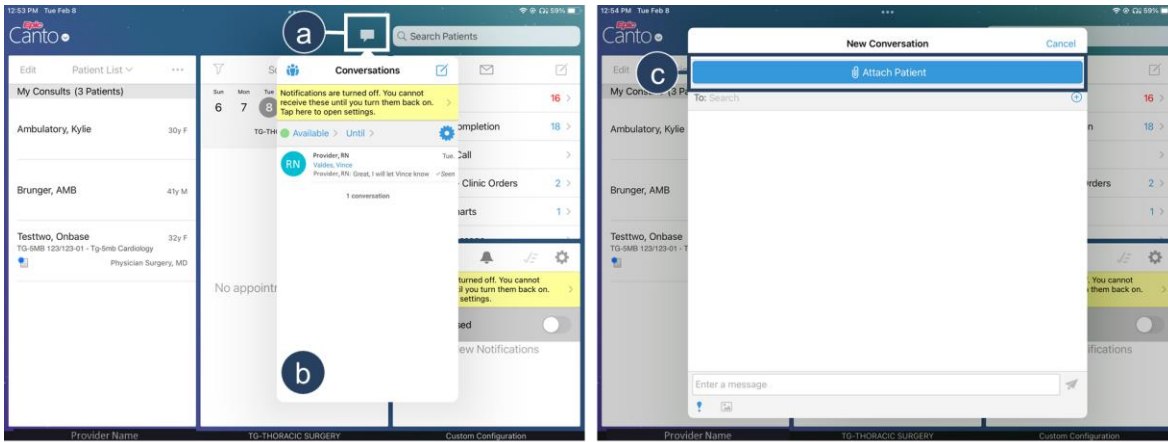
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  - When a patient is attached, the *Secure Chat* becomes a part of the patient's medical record
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**During the video appointment,** you can coordinate a multidisciplinary visit using Microsoft Teams.

### Invite a participant from Microsoft Teams during the video appointment

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- To add a participant:
  - Search their name, or
  - Select *Share Invite* to copy the link to the video appointment
- Document the inclusion of an additional care provider in the patient chart



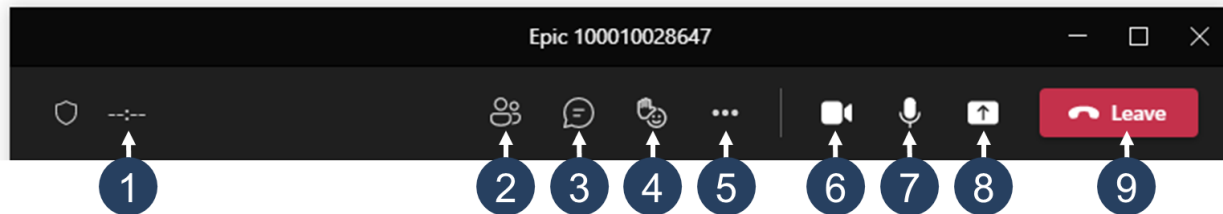
## 4.0 Microsoft Teams: Troubleshooting with Your Patients

If your patient is having difficulty connecting to the appointment, try the following troubleshooting tips:

<b>Audiovisual Issues</b>	Ask your patient to check their audiovisual settings: <ul style="list-style-type: none"> <li>Microphone and camera are turned on in MS Teams.</li> <li>Volume on the device is turned on (not on mute) and loud enough.</li> <li>If your audio visual settings are correct but not working properly, try to reconnect by leaving the meeting, closing MS Teams, and then reconnecting.</li> </ul>
<b>Connectivity Issues</b>	Ensure the best connection: <ul style="list-style-type: none"> <li>Ask other people using the same internet network to avoid activities such as streaming videos (e.g. watching Netflix or YouTube), or playing online videogames during a virtual visit.</li> <li>If you are using wireless internet (Wi-Fi), stay close to your Wi-Fi router.</li> </ul>

## 4.1 Microsoft Teams: Features and Controls

Features and controls for care teams are consistent with those available in Microsoft Teams meetings.



1. **Call Time:** shows the length of time the video appointment has been running
2. **People:** Select this button to open the Participants panel
  - View all participants in the call, including participants waiting in the lobby
  - To remove a participant hover your cursor on a participant's name and the ... icon will appear; click on the ... icon and select Remove participant
  - Invite Someone allows you to call another UHN participant into the call
  - Share Invite allows you to copy the video appointment link
3. **Chat:** Select this button to send text comments and links to other participants
  - Patients will not have access to the chat after leaving the video appointment
  - Patients are not able to open or download attachments sent through the chat
  - UHN records of the chat will be managed according to UHN's Office 365 retention policy
4. **Reactions:** Hover over the react button to react (e.g., raise hand, thumbs up, etc.)
5. **More Actions:** Select this button for additional actions (e.g., apply a virtual background)
6. **Video Camera:** Select this button to turn your camera on or off
7. **Microphone:** Select this button to turn your microphone on or off
8. **Share Screen:** Select this button to share your screen
  - Reminder to please ensure no PHI for other patients is visible before sharing your screen
9. **Leave:** Select this button to leave the video appointment

Patients join Epic-integrated Microsoft Teams video appointments using a simplified version of the application: Microsoft Teams WebRTC (web real-time communications). Please see the [Microsoft Teams WebRTC Features and Workarounds tip sheet](#) for details.



## 5.0 Privacy Protection during Virtual Care

For privacy protection during a virtual care visit, please consider the following:

- **Confirm identity.** Ask for patient’s name, date of birth and OHIP# (Note: If OHIP number is not readily available or patient is not comfortable providing, ask the patient for the name of primary care doctor, date of last visit to the hospital or clinic).
- **Be aware of your location and surroundings** when providing virtual care. Ensure that only staff necessary to support the call are present. Alternatively, identify anyone else who is present and explain why.
- **Advise the patient that personal health information will be discussed.** Recommend the patient be in a quiet and private place for the visit.
- **Advise the patient that the visit will not be recorded** and ask that they also not record the visit.
- Ask the patient if they are comfortable having this virtual visit.
- For further tips please see [Privacy and Working Remotely](#).

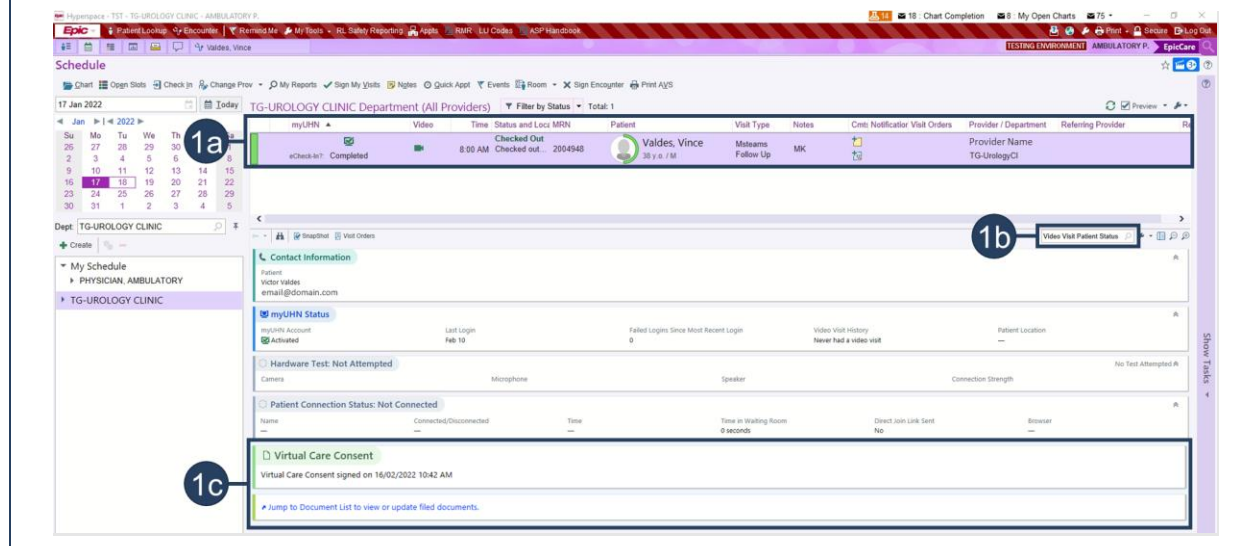
## 6.0 Consent for Virtual Care

Consent for virtual care must be obtained and documented in Epic before a patient participates in virtual care. Consent should be collected and stored using the *Virtual Care Consent* document type from the *Document List* in the patient’s chart.

- The *Virtual Care Consent* document will be automatically sent to a patient via *eCheck In* the first time they participate in a virtual care appointment
- If the *Virtual Care Consent* document is not completed at the time of the appointment, informed consent should be collected verbally and updated in the patient chart (see detailed instructions below)
- Consent is valid for one year; a patient will not be required to complete the *Virtual Care Consent* document again until the one year expiry has been exceeded

### 1. Check for virtual care consent

- Select an appointment on your *Schedule* to view the appointment *Preview*
- Change the view of the appointment *Preview* to display *Virtual Care Patient Status*
- Review the *Virtual Care Consent* section
  - **Green Header** indicates consent has been signed and displays the date and time of signing
  - **If consent has been signed**, proceed with the virtual care appointment
  - **Yellow Header** indicates consent has not yet been provided and displays *Virtual Care Consent not on file* message
  - **If consent has not been signed**, continue to step 2



## 2. Collect informed consent verbally

When obtaining verbal informed consent for virtual care, please consider the following:

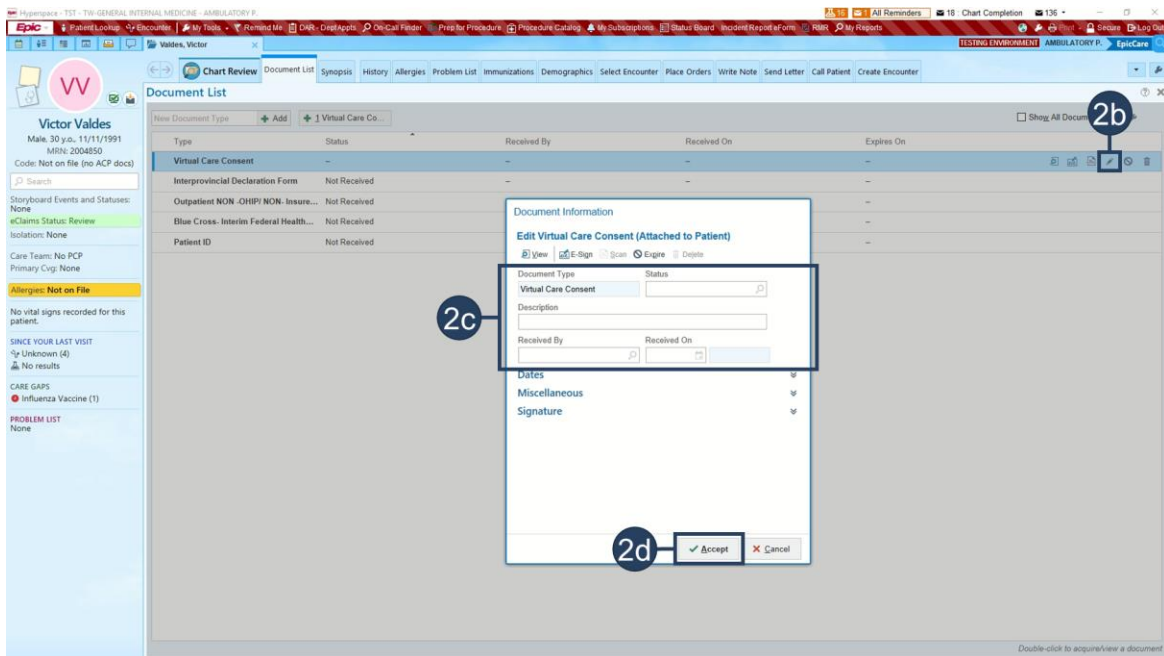
- Acknowledge inherent risk of virtual care
- Recommend precautions the patient can take
- Advise where additional information can be found
- Confirm readiness for virtual care
- Obtain informed consent: “Are you OK to continue?”

A sample script was provided by the Ontario Medical Association ([below](#)), please feel free to adapt to your own clinical practice style

**If the patient refuses a virtual appointment**, document the refusal in the patient’s chart and as appropriate, that a telephone visit, in-person visit or delayed appointment was offered

## 3. Update the *Virtual Care Consent* document

- a. Select *Jump to Document List* from the *Virtual Care Patient Status* (see 1c above)
- b. Select the (pencil icon) from the *Virtual Care Consent* document row
  - If *Virtual Care Consent* is not on the list, add the document by selecting + (plus icon)
- c. Complete the fields on the *Document Information* pop-up:
  - *Status*: Select *Received*
  - *Description*: You may include a free text note (optional)
  - *Received By*: Select your name
  - *Received On*: Select the date and time that verbal consent was obtained
- d. Select  *Accept*



**Sample Ontario Medical Association Consent for Virtual Care Script****1. Acknowledge inherent risk of virtual care.**

*“Just like online shopping or email, Virtual Care has some inherent privacy and security risks that your health information may be intercepted or unintentionally disclosed. We want to make sure you understand this before we proceed.”*

**2. Recommend precautions the patient can take.**

*“In order to improve privacy and confidentiality, you should also take steps to participate in this virtual care encounter in a private setting and should not use an employer’s or someone else’s computer/device as they may be able to access your information.”*

**3. Advise where additional information can be found.**

*“If you want more information, please check [[https://www.uhn.ca/PatientsFamilies/Virtual\\_Care](https://www.uhn.ca/PatientsFamilies/Virtual_Care)].”*

**4. Confirm readiness for virtual care.**

*“If it is determined you require a physical exam you may still need to be assessed in person. You should also understand that virtual care is not a substitute for attending the Emergency Department if urgent care is needed.”*

**5. Obtain informed consent.**

*“Are you ok to continue?”*

**6. Document informed consent.**

*“Informed verbal consent was obtained from this patient to communicate and provide care using virtual and other telecommunications tools. This patient has been explained the risks related to unauthorized disclosure or interception of personal health information and steps they can take to help protect their information. We have discussed that care provided through video or audio communication cannot replace the need for physical examination or an in person visit for some disorders or urgent problems and patient understands the need to seek urgent care in an Emergency Department as necessary.”*