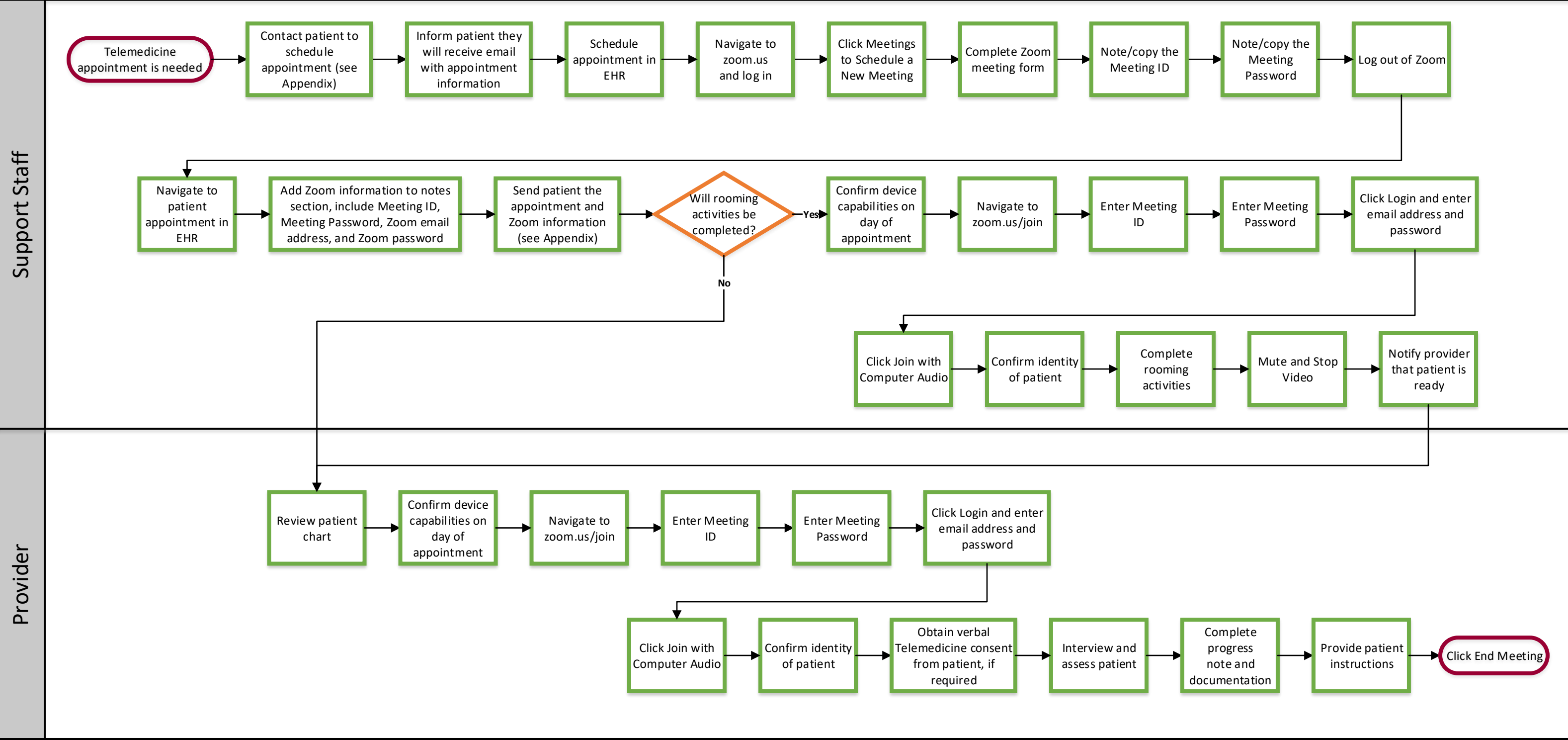# Clinic-to-Patient Non-Integrated Zoom Telemedicine – Agnostic

Workflow for a clinic to schedule and complete a stand-alone (non-integrated) Zoom telemedicine visit with a patient, who is not in the clinic.

April 3, 2020

Support Staff

Telemedicine appointment is needed → Contact patient to schedule appointment (see Appendix) → Inform patient they will receive email with appointment information → Schedule appointment in EHR → Navigate to zoom.us and log in → Click Meetings to Schedule a New Meeting → Complete Zoom meeting form → Note/copy the Meeting ID → Note/copy the Meeting Password → Log out of Zoom

Navigate to patient appointment in EHR → Add Zoom information to notes section, include Meeting ID, Meeting Password, Zoom email address, and Zoom password → Send patient the appointment and Zoom information (see Appendix) → Will rooming activities be completed?

- Yes → Confirm device capabilities on day of appointment → Navigate to zoom.us/join → Enter Meeting ID → Enter Meeting Password → Click Login and enter email address and password
- No → (to Provider: Review patient chart)

Click Join with Computer Audio → Confirm identity of patient → Complete rooming activities → Mute and Stop Video → Notify provider that patient is ready

Provider

Review patient chart → Confirm device capabilities on day of appointment → Navigate to zoom.us/join → Enter Meeting ID → Enter Meeting Password → Click Login and enter email address and password

Click Join with Computer Audio → Confirm identity of patient → Obtain verbal Telemedicine consent from patient, if required → Interview and assess patient → Complete progress note and documentation → Provide patient instructions → Click End Meeting

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Patient Scheduling:
Once the provider has determined a Telehealth visit is appropriate for the patient, we can contact the patient, parent, or guardian and confirm if they would be interested in scheduling a Telehealth visit with their provider. If so, we must determine if the patient meets the Telehealth visit criteria before scheduling.

1. Contact the patient using the below script:
   "Your provider would like to schedule you for an online or virtual appointment. If you would like to do this, I have a few questions for you to determine if you can join this type of visit."
2. If the patient would like to schedule a Telehealth visit, the patient must answer "Yes" to the following key questions determining the patient meets the Telehealth criteria before scheduling using a Telehealth Visit type.
   a. Do you have an email address?
   b. Do you have an iPhone, Android phone, iPad, tablet, laptop or computer with a camera?
   c. Do you have internet in your home?
   d. When you are using the internet in your home, does it work well or does not?
3. Schedule a new Telehealth visit or change existing visit in EHR
   Let the patient know they will be receiving an email with instructions for how to join the visit. They can test their video set up before to the appointment by going to *zoom.us/test*.

Notify the Patient:
1. Send the patient the appointment information from the confirmed email address provided by the patient, including:
   a. Provider's Name:
   b. Date @ Time:
   c. Patient-specific Zoom Meeting ID:
   d. Patient-specific Zoom Meeting Password:
   d. Clinic Name:
   e. Clinic Phone Number:
2. Add to the email the following information:
   What equipment do I need?
   - Internet access
   - Mobile device (iPhone, Android phone, iPad, tablet, laptop) or a computer that has a microphone, speaker, and video camera.
   How do I login?
   - Copy and past this link: www.zoom.us/join to your internet browser
      a. Use Google Chrome, if possible
      b. If you are using a mobile device, you may be prompted to download the Zoom app. Follow the instructions on your screen to download the app.
      c. To test your video capabilities, please visit https://zoom.us.test
   - Type this meeting ID:<Patient specific Zoom meeting ID>.
   - Type this meeting password:<Patient specific Zoom meeting password>.
   - Click Join