

# Epic-Integrated Virtual Visits Administrative Training

June 11<sup>th</sup>, 2020



MASSACHUSETTS  
GENERAL HOSPITAL

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TELEHEALTH



# Background: Epic-Integrated Zoom

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## Why Epic-integrated?

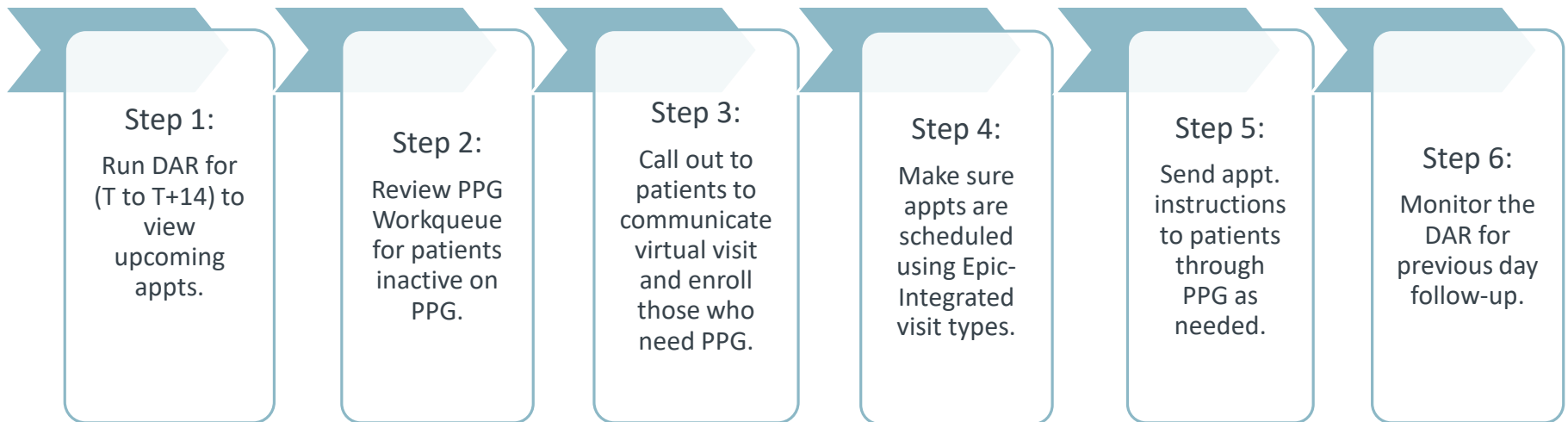
- Maximizes patient safety, security and privacy
- Reduces administrative burden on physicians and schedulers

## Program highlights?

- Single video platform for all synchronous virtual visits across the system
- Preserves prior user experience for providers and patients
  - **Patients launch from Partners Patient Gateway**
  - **Providers launch directly from Epic Hyperspace, Haiku or Canto**
- Solves many security, privacy, scheduling and reporting challenges
- Reduces administrative burden of virtual visits
- Enables scale and significant growth



# Epic-Integrated Zoom *Administrative Workflow*





# Epic-Integrated Zoom *Patient Gateway Enrollment Workqueues*

| Workqueue Name/ID   | Description   | Workqueue Parameters  | Priority Level  |
|---|---|---|---|
| <b>1) MGH Patients not Active PPG Users Upcoming Visits [26981]</b> | Patients with a visit scheduled in the next 30 days who are inactive in PPG | <ul style="list-style-type: none"> <li>• Patient 18 years or older</li> <li>• No duplicates, patient only appears once even if scheduled for multiple appts in same or other MGH DEPs</li> <li>• PPG status of blank, inactive, pending, or declined</li> </ul> | <b>1<sup>st</sup> Priority, use in combination with your T+14 day DAR</b> |
| <b>2) MGH Patients not Active PPG Users Past Visits [27024]</b>     | Patients who had a visit in the last 30 days and are inactive in PPG        |   | 2 <sup>nd</sup> priority, as time permits                                 |

A new [PPG Enrollment WQ](#) tip sheet has been created detailing process and work steps.



# Available Virtual Visit Types

| Visit Type                             | Default Duration | Description  |
|--|------------------|--|
| Virtual Annual Wellness Visit [555068] | 30 min           | Annual Well Visit  |
| Virtual Established [555035]           | 30 min           | Established patient to the provider/practice. Does not need to have had a prior virtual visit.     |
| Virtual Established Complex [555072]   | 60 min           | Established patient that may require additional medical review relating to complex medical issues. |
| Virtual International [555036]*        | 30 min           | International patients.  |
| Virtual New [555034]                   | 60 min           | A brand new patient to the provider/practice.  |
| Virtual Nurse [555070]                 | 15 min           | Nurse visit  |
| Virtual Patient In Clinic [555071]     | 30 min           | Patient in clinic and provider will be in another physical location (remote or onsite)             |
| Virtual Physical [555069]              | 45 min           | Physical   |

\* Visit types that begin with “STDA” should be used with provider and patient will be connecting on a video platform outside of Epic



# Virtual Visit Scheduling Questionnaire

Decision Tree for VIRTUAL NEW

Does the patient have a computer or a smartphone?

**Results - Continue Scheduling**

Visit: **TELEMEDICINE PHONE**

Replace the original visit type.

[Schedule Instructions](#)

Proceed with scheduling.

[Show Path](#) Apply Discard Tree

Decision Tree for VIRTUAL ESTABLISHED

Does the patient have a computer or a smartphone?

Will patient enroll in Partners Patient Gateway?

**Results - Follow Instructions**

Instructions

Proceed with scheduling.

**Scheduling Message:** Please be sure to update visit type to a stand alone (STDA) virtual visit type.

[Show Path](#) Apply Discard Tree



# Virtual Visit Scheduling Questionnaire

Decision Tree for VIRTUAL NEW

Does the patient have a computer or a smartphone?

Will patient enroll in Partners Patient Gateway?

**Results - Follow Instructions**

Instructions  
Proceed with scheduling.

**Scheduling Message:** Text patient PPG link and ask patient to enroll.

Show Path  Discard Tree



# Epic-Integrated Zoom *Patient Information*

## Key Facts:

- Patients must have an active Patient Gateway account
- Patients will be prompted to download Zoom upon launching their first visit if they haven't already done so
- Accessible on desktops, laptops, tablets and mobile devices

## Trainings and Resources:

- Appointment reminder automatically sent via PPG 24-hours prior and 3 days prior to visit with instructions, including FAQ's \*
- Self-Test for Audio/Visual capabilities
- Epic-integrated patient video (*within the next week*)

## Support Available:

- Patient Gateway at **1-800-745-9683**

\*If the visit is scheduled within the 24 hour window, reminders will be sent every hour

The screenshot displays the 'Appointments' screen in the MGH Patient Gateway app. At the top, the time is 7:18. The appointment is titled 'VIRTUAL ESTABLISHED' and is scheduled for Monday, April 13, 2020. A dark blue banner indicates 'This is a video visit'. Below this, the join time is 7:00 PM, starting at 7:05 PM. There are buttons for 'Cancel Appt' and 'Add to Calendar'. The physician is listed as 'Physician Family Medicine, MD'. A 'GET READY' section contains 'Review Instructions' with text about starting the visit, using the app on mobile devices, and technical support. At the bottom, there is a prominent orange button labeled 'BEGIN VISIT'.





# Epic-Integrated Zoom *Patient Information - PPG*

One Health Visits Messaging Billing Resources Profile

Appointments & Visits  
Upcoming Tests and Procedures

### Appointment Details

**VIRTUAL ESTABLISHED** with Lee H Schwamm, MD

🕒 Wednesday April 29, 2020  
Arrive by 1:15 PM EDT  
Starts at 1:30 PM EDT  
[Add to Calendar](#)

**It's time to start your video visit!**

**CONFIRM**  
Let staff know you don't need a reminder call.

**BEGIN VIRTUAL VISIT**  
When you are ready to talk to your provider, click the button above

#### Visit Instructions

**STARTING A VISIT NOW?** Click the orange "Begin Virtual Visit" button to enter the virtual waiting room up to 15 minutes before your appointment. Your provider will be notified and will join when available.

**USING AN IPHONE OR IPAD?** You must use the Partners Patient Gateway App to conduct a Virtual Visit. Click [here](#) to download the IOS app.

If you require technical support, call 800-745-9683.

For additional information please review our [FAQ & Best Practices](#).

This visit cannot be canceled online. To cancel, please call your doctor or coordinator.

### Upcoming Visits

Next 7 Days

**APR 29**  
Wed

**VIRTUAL ESTABLISHED** with Niall Mercer  
Heney, MB, MD  
🕒 **Arrive by 9:55 AM EDT**  
Starts at 10:00 AM EDT

**ECHECK-IN**

**DETAILS**

# Epic-Integrated Zoom *Patient Information - PPG*

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 **Please wait for the host to start this meeting.**

**Start: 1:19 PM**

Zoom Video Visit

[Test Computer Audio](#)

If you are the host, please [login](#) to start this meeting.

Welcome to Virtual Visits!



MGH TeleHealth's Personal Meeting Room

Your provider will be with you as soon as they are available. If your provider does not join within 10 minutes of your scheduled appointment, please call their office directly.

If you are experiencing technical difficulties, please call 1.800.745.9683



# Epic-Integrated Zoom *Final Review*

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## Key Reminders:

- **Scheduling:** Leverages 3 prior Virtual Visit scheduling types (*Virtual New, Virtual Established, Virtual International*)
- **Arriving:** Visits will be auto-arrived in Epic once the patient connects to the Zoom video platform from within Gateway
- **Equipment:** Each department will receive a questionnaire in the week ahead to assess equipment needs and will be prioritized according to availability

## Training and Resources Available:

- Weekly trainings for administrative practice staff
- [Epic Integrated Virtual Visit Toolkit](#)
  - Refer to toolkit for support resources available
- [Patient Gateway Enrollment Toolkit](#)



# Epic-Integrated Zoom *Action Items*



## Providers

- Complete Healthstream training
- Review Tip Sheets and Resources
- Ensure Zoom application is on device
- Attend live training session or watch recording week prior to go-live\*
- Assess any equipment needs



## Patients with upcoming visits

- Ensure active Gateway account
- Download Zoom application onto device
- Complete self-test



## Dept Admin staff

- Review Epic Integrated Virtual Visit User Guide
- Review upcoming scheduled appointments to determine which to convert to Epic-integrated
- Proactively enroll patients on Gateway using PPG WQ
- Attend live training session week prior to go-live\*

*\*Center for TeleHealth will host live training sessions each week for departments going live in the following week*

# Epic-Integrated Zoom *Support Resources*

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- **MGH Virtual Care Apollo Page:**  
<https://apollo.massgeneral.org/coronavirus/virtual-care/>
- **Epic-Integrated Virtual Visits Toolkit:**  
<https://apollo.massgeneral.org/ambulatoryblueprint/epic-integrated-virtual-visits-toolkit/>
- **Patient Support** - For Patient support, please contact Patient Gateway at **1-800-745-9683**
- **Provider Support** – For provider support, please contact the 24hr MGPO Hotline at **1-866-266-3240**
- **MGH TeleHealth** – [MGHTeleHealth@partners.org](mailto:MGHTeleHealth@partners.org)

# Epic-Integrated Zoom *Questions?*

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