Saskatchewan Virtual Visit Provider User Guide



AGENCY

lumeca^{*}

Saskatchewan /



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1. SK Virtual Visit Application Overview

- A virtual visit system that allows scheduling of Video and Audio consultations and meetings between Healthcare Providers and their patients/colleagues.
- Healthcare Providers and their clinic care team access the system via a dedicated webapp. No new software needs to be installed.
- Patients access the system via a dedicated webapp, Android mobile app or iOS (Apple) mobile app.
- □ Role-based permissions allow the clinic care team to see and/or control as much of the workflow as needed.
- Patients are seen in a private virtual exam room where they can be communicated with, others (family members, caregivers or other healthcare providers) can be invited to join in (with permission), and all can come and go as needed.



User Guide Overview

The intent of this document is to support the training sessions; this document should be used to supplement the training you have already received and be utilized as a reference. This User Guide **should not** replace training being provided by your Health System Partner's designated Trainer.

Please ensure you have the most recent User Guide by visiting <u>https://skvirtualvisit.zendesk.com/hc/en-us/articles/7310475144347-Where-can-l-access-Training-Material-</u>

2. Create an Account



Becoming Part of a Virtual Clinic

*A 'virtual clinic' is a grouping of healthcare providers who are sharing a same patient set.

Once you have completed your training you will receive a Welcome email indicating that you have been invited to join a virtual clinic via the SK Virtual Visit App.

- If you have not received the email, please contact your HSP Lead
- Review your email, and click on "<u>click</u> <u>this link</u>" under 'Get Started'



You have been invited to join _____Clinic via the SK Virtual Visit App.



Please click this link to join Beajay UAT Test Clinic.

After you accept your invite, you will be able to provide services in SK Virtual Visit for _____ Clinic:

- Scheduling: Care provider schedules are set when they are accepting consultations virtually, physically, or both, as well as
 the time interval in which they wish to allocate for each patient. Patients can then book appointments in-line with a care
 provider's schedule. Note is configurable for each clinic and is set to "off" by default. Contact your SK Virtual Visit
 representative if you wish to turn this on.
- Patients: Invite patients by sending them a link through email and/or text message. If you don't have this information, you can give them a unique code. Patients use this link or code to be added to your clinic.
- · Connect: Chat with your patients via chat, audio, or video!

Need Assistance?

If you have any questions or concerns, feel free to contact your SK Virtual Visit representative or email virtualvisit@ehealthsask.ca for support.

Start Creating Your Account

Once you click the link in the email, it should navigate to the SK Virtual Visit Portal Welcome Page

Click 'I Don't Have an Account'

Note: You will only be required to complete this step once...you can belong to multiple clinics across the system using a single account



Create a Provider Account

In some rare instances you may be presented with a screen asking you what kind of account you want to create – Patient or Provider.

If you see this screen, the account creation has not directed you to the right place.

Click 'Provider' (do not click Patient) and you will be redirected.

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Account Type

Please choose the type of account you would like to create.

Patient
Provider

Create a Provider Account

Read the directions, then click 'Return'.

As directed, navigate back to your Welcome email and try 'click this link' under 'Get Started' again.

If that does not work, copy (Ctrl+c) the 'click this link' hyperlink from the email and paste (Ctrl+v) into your laptop/computer browser's address bar. You should be directed to the proper screen.

Click 'I Don't Have an Account'

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Provider Accounts

To setup a provider account please check your email for an invite.

If you are following a provider invite from your email. Please try to copy and paste the invite link directly into your address bar.

If there are still issues please contact support.

Return

Account Information

- **D** Enter **your** account information
- All fields are mandatory
- 'Display Name' is what your clinic care team and the patients see when they use the system
- Use your work email, as that is your approved email address. These must be unique as they are used as account login identifiers. Do not use a personal email address.
- Your mobile number must be a unique (not shared) cell number, not a landline, as it is used for mandatory two-factor authentication. Your cell number is never shared with or visible to patients.

| askatchewan 焰 | Combined Clin |
|---|-----------------------------------|
| Account Information | |
| Please provide the following information to | register your account. |
| First Name * | |
| Last Name * | |
| Display Name (what patients will see) | |
| Email * | |
| email@example.com | |
| Mobile Phone * (Mobile number is required for 2FA | and isn't displayed to patients.) |
| (XXX) XXX-XXXX | |
| Gender | |
| Male | • |

Choose a Password

- Follow the requirements for choosing a strong, secure password
- □ Read and agree to ✓ the 'Access and Use Policy' and 'Consent Form'

Click 'Continue'

| Channe a Deserved | |
|--|----------------------------------|
| Choose a Password | Password Requirements |
| Password | At least 8 characters |
| | At least 1 capital letter |
| Confirm Password | At least 1 lowercase letter |
| | At least 1 number |
| | At least 1 symbol (*. %, !, etc) |
| I have read and agree to the Access and Use Policy | Confirmation password matches |
| I have read and agree to the Consent Form | 0 |
| | |
| | |
| Continue | |
| | |

YOU ARE NOW READY TO ACCESS YOUR CLINIC !

Click on 'Go to Your Clinic'

3. Login & Logout



| Sask | atchewan 焰 | |
|----------|---------------------------------|--|
| | Log In | |
| Email | | |
| Dessured | | |
| Password | | |
| | Forgot Password? Help | |
| | Login | |
| | Need to register a new account? | |
| | Create Account | |
| | | |
| | Have a meeting invite? | |
| | Join Meeting Now | |
| | | |

Account Login

- Enter the email address and password you used to set up your SK Virtual Visit account.
- Click 'Login' Link to SK Virtual Visit System https://virtualvisit.saskatchewan.ca/



Account Logout

For security purposes, it is important to properly Logout, rather than simply closing your browser.

It is also advisable to clear your history at the end of each shift.

There are two areas you can Logout:

Under 'Account' > Logout
 Under 'More' (3 dots) > Logout



4.Home Screen



Home Screen



5.Select a Clinic



Select a Clinic

| <mark>//</mark> Saskatchewan | ETest Doctor Physician | Home |
|---------------------------------|--|--|
| | E Test Clinic Select Clinic E Test Clinic | 0 My Active Consultations |
| Schedule | Schedule Appointment Home Patients | 1 My Patients |
| Account | Appointment Reasons Clinic Settings Clinic Reports | Meet Now Start a Video or Phone Meeting - Meet with patients, participants and other care providers over video or phone. |
| | | Scheduled Appointments Feast Appointments Last 7 Days Today Tomorrow Last 7 Days |

□ If you are part of more than one clinic, use the 'Select Clinic' dropdown to choose your current clinic location.

6. Your Profile Information



Your Profile Information

| Select Clinic | ETest Doctor | |
|--------------------------|--|---|
|]0 | Change Profile Picture | Change Password |
| Now C> Logout | | |
| Profile Pre-Call Test | Account Information | |
| Practitioner Settings | Display Information | Address |
| | Display Name (Displayed to patients) | Province |
| | ETest Doctor | Saskatchewan |
| | Contact Information | Age and Gender |
| | Email | Gender |
| | er :a.com | Female 🗸 |
| | First Name | |
| | Test | |
| | Last Name | |
| | Doctor1 | All changes to your Account Information |
| | Mobile Phone (Used for Two-Factor authentication.) | must be requested - please see next page |
| | (306) | You can however: |
| Select ' Accou i | nt' in the Dashboard, then click 'Profile' | Change your Display Name Add or change a profile picture (optional Change Password |

Your Profile Information

□ Non-SHA users can request changes to their profile here:

https://www.ehealthsask.ca/services/Documents/SK%20Virtual%20Visit%20User%20Accou nt%20Request%20Form%20%281%29.pdf

□ SHA users can find more information about updating their profiles on the SHA intranet page located here:

https://www.saskhealthauthority.ca/intranet/departments-programs/infrastructureinformation-support/digital-health/virtual-care/saskatchewan-virtual-visit

Or can make a request by emailing virtualcare@saskhealthauthority.ca

7. Pre-Call Test



Pre-Call Test

| Saskatchewan | ETest Doctor Physician E Test Clinic Select Clinic E Test Clinic | Pre-Call Test Test your audio and video quality This test will evaluate your connectivity, camera, microphone, and quality. Note: This test will take approximately 30 seconds. | It is important to perform this test before starting virtual consultations or meetings, to allow time to get things working if required. | |
|---------------|--|--|--|--|
| Consultations | Pre-Call Test Practitioner Settings Notifications | Star | rt Test | |
| ACOUN | | Before it starts 1. Make sure that you are connected to the internet. 2. Make sure that you camera and microphone are connected. 3. Make sure that no other apps on your device are currently using the camera or microphone. | What to expect 1. Your browser may prompt you to allow us to access your microphone and camera. This is necessary to complete the test. Please click 'allow'. 2. Test the hardware & software setup (Camera, Microphone, Browser). 3. Test connectivity to our servers. 4. Collect bitrate statistics. | |

- It is recommended that you do a 'Pre-Call Test' each time you log into your account, to ensure that your technical equipment/ devices and connections are working properly.
 - □ Select 'Account' in the Dashboard, then 'Pre-Call Test'
 - Click 'Start Test' (the system may prompt for video and camera permission the first time you utilize this feature; press 'Allow' for both)

Pre-Call Test Results

| | | | serresures | The test will take |
|---------------------------------|---|---|---|--------------------|
| <mark>//</mark> Saskatchewan | ETest Doctor Physician E Test Clinic | Pre-Call Test | | approximately 30 |
| Clinic Clinic Mest Now | Select Clinic | The pre-call test is complete Your results are available. Please review them and run another test in | f you would like to check again. | out automatically |
| Schedule Consultations | Profile Pre-Call Test Practitioner Settions | Video results | Audio results | |
| Account | Notifications | Video Detected: les ⊘ Video Quality: Excellent ⊘ Video Bit Rate: 1106 kbps | Audio Detected: res 😌 Audio Guilty: Excellent 🛇 Audio Quilty: Excellent 🎯 Audio Bit Rate: 32 kbps | |
| | | Video preview | Audio level (volume) | |
| | | | 1% | |
| More | | | Restart Test | |

□ If the Pre-Call test results are good:

Proceed to conducting virtual consultations or meetings.

□ If the Pre-Call test fails or the results are bad:

- Make sure other applications on your computer are closed
- Double-check your internet connection
- If possible, use an ethernet or wired connection instead of wireless
- Make sure your microphone and camera are plugged in and set as a system default.

8.Updating Settings & Notifications



Practitioner Settings

| Saskatchewan | ETest Doctor Physician E Test Clinic | Practitioner Settings |
|---------------|--|---|
| Clinic | Select Clinic | "Appointment Booking" and "New Patient" settings are unavailable because "Patient Self Serve Scheduling" is disabled. To make these settings available, please talk to your Lumeca representative to enable "Patient Self Serve Scheduling." |
| L Meet Now | ⊖ Logout | |
| Schedule | Profile | |
| 同 | Pre-Call Test | |
| Consultations | Practitioner Settings | |
| Account | Notifications | |

There are two Practitioner Settings available and ONLY for clinics that have 'Patient Self-Booking' enabled. As patient self-booking is not enabled in your clinic, the above message will appear.

If enabled, however, the settings would be:

- Lead Time the minimum amount of time before a patient can book an appointment.
- Health Provider Selection a healthcare provider can select other healthcare providers within their clinic whom their patients can book appointments with.

□ Select 'Account' from the Dashboard, then click 'Practitioner Settings'.

Appointment Notifications

(Notifications to Clinic)

| <u>k</u> Saskatchewan | ETest Doctor Physician E Test Clinic | Notifications for E Test Clinic a per | cations are applied on |
|--------------------------|--|---|------------------------|
| | Select Clinic | ✓ Email notifications will be sent to emarshall+doctor1@lumeca.com. | av he set hy either |
| Clinic | E Test Clinic 👻 | SMS (text message) notifications will be sent to (306) 434-5335. | acare providers or the |
| | 🕞 Logout | You can change these settings by updating Your Profile . Office | ce administrator on |
| Schedule | Profile | Depointments | behalf of the |
| 昂 | Pre-Call Test | New appointment created | |
| Consultations | Practitioner Settings | When an appointment is created at E Test Clinic with one of your patients. | |
| Account | otifications | Email SMS (text message) | |
| | | Appointment cancelled When an appointment is cancelled at E Test Clinic with one of your patients. Email SMS (text message) | |
| | | Save | |

Your clinic has the option to receive patient appointment notifications – when created and/or when cancelled (recommended). These settings initially default to off, however, can easily be turned on. They can be received by email only, text only or both.

- □ Select 'Account' from the Dashboard, then click 'Notifications'.
- □ If you are an office administrator, click the drop-down to select the provider whose settings you are managing. If you are the healthcare provider, this drop-down will not appear.

Clinic Settings

(Notifications to Patients/Participants)

| iashinchewan | Ev Administrator Office Administrator | Clinic Se | ttings | | | | | These settings are set for |
|--------------|--|-----------|---|---------|--|------------|-------------------------|---|
| | Select Clinic | Appoint | tment Notifications and Re | minde | rs | | (| the entire clinic; not for individual users. Any |
| <u>_</u>]0 | 🗟 Invite Patients | (,,) | Send notifications to pati Appointment Created | ents an | d participants using either Appointment Cancellad | Email.or | SHS. | changes will impact all clinic users. |
| | Schedule Appointment | - | Email and SMS | • | Email and SMS | • | a their annointment | |
| utatore | Home | | Send Reminder | | Type of Reminder | 100.600550 | e sener aggest terment. | |
| 9 | Patients Care Team | | 5 Minutes Before | • | Email and SMS | ٠ | ×Remove | |
| | Appointment Reasons | | 15 Minutes Before | * | Email and SMS | * | × Remove | |
| | Clinic Settings | (| 1 Hour Before | | Email and SMS | | ×Remove | |
| | Reports | | 1 Day Before | • | Email and SMS | ٠ | ×Remove | |
| | | | | | | | | |
| \sim | | | | | | Sa | ive | |

Your clinic has the option to send patients/ participants appointment reminders (by email and/or text). These are beneficial and recommended.

- □ Select 'Clinic' in the dashboard, then 'Clinic Settings'
- □ 'Add Reminder' or 'x Remove'
- Choose 'Email and SMS (text)', 'Email only' or 'None'
- □ Select 'Save' to save your selections/changes

Clinic Settings (Quick Messages to Patients/Participants)

| ld, customize, and remove quick messages. You can create message templates using a Prov tomatically used in place of the macro. In addition, you can create a personal message for a | ider's Name variable. When a provider uses t provider. Each provider can have up to 10 pe | he message, their n rsonal messages. | ame will be | |
|---|--|---|-------------|-----|
| | Q. Search Quick Message | | | |
| Quick Message | Provider 🔻 | | | |
| Hello - I'm ahead of schedule. Can you talk now? | All | Edit | Remove | |
| Hello – Apologies but I'm running 15 minutes late. | All | Edit | Remove | |
| Hello – Apologies but I'm running 30 minutes late. | All | Edit | Remove | |
| Hello – Apologies but I'm running 45 minutes late. | All | Edit | Remove | |
| Hello – Apologies but I'm running an hour late. | All | Edit | Remove | |
| Hello – I'll be there shortly. Please make sure you are in a private setting. | All | Edit | Remove | |
| | | First Previous | 1 Next L | ast |

Although there are preset Quick Messages available, new ones can be created for the entire clinic OR individual healthcare providers. These may be created by either healthcare providers themselves or their office administrator on behalf of the healthcare provider

Options include:

- Add new
- Search existing
- Edit existing
- Remove existing

Quick Messages are viewed, added or removed here, however are used in the 'Active & Pending' screen.

These help the healthcare provider or office administrator manage appointments by communicating with patients before the consultation begins.

Patients receive these messages within the consultation itself as a chat message.

Add a New Quick Message

□ Select 'Clinic' in the dashboard, then 'Clinic Settings'.

□ Scroll down to 'Quick Messages' and click 'Add Message'.

- □ If you are an office administrator, Under 'Provider', select a particular healthcare provider or leave blank for all healthcare providers in the clinic. If you are the healthcare provider, this drop-down will not appear.
- ❑ When creating a new message for 'All' providers, you have an option to add a provider's name into the quick message. To do this, click 'Insert Provider Display Name Variable' in the spot where you want their name to appear. Type the new message.

Click 'Add Quick Message'



9.Inviting Patients



Inviting Patients

Patients do not have access to your virtual clinic without being invited. This helps protect your clinic and also ensures your virtual clinic does not have a flood of patients that were not expected.

There are 3 ways to invite patients:

- 1. Inviting one patient or a small batch
- 2. Inviting via an Invite Code
- 3. Importing a CSV file
- Select 'Clinic' in the dashboard, then click 'Invite Patients'.

| Ev Administrator Office Administrator E Test Clinic | Patients | | | | |
|---|---|---|--|------------------|--|
| Select Clinic | Invite Patients | | | | |
| | Inviting a patient will also generate an invite | ite code that you can give to a specific patient. You can v | iew this code by going to "Patients" and viewing your pending in | vite-list. | |
| Schedula Annointment | Select the Care Provider | | | | |
| S Invite Care Team Member | Doctor, Julie | • | | | |
| Mana | First Name * | Last Name * | Email | Mobile Number | |
| Patients | | | | | |
| Care Team | A lawite Acadhas Daviert | | | | |
| Appointment Reasons | Invite Another Patient | | | | |
| Clinic Settings | | | | | |
| Clinic Reports | | | | | |
| | | | Cancel | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | Invite Multiple Patients | | | | |
| | Upload a CSV using our template. If you are | re using your own CSV file, make sure the columns are in | n the same order as our template. | | |
| | Select the Care Provider | | | | |
| | Doctor, Julie | * | | | |
| | | | | | |
| | Click here to download CSV Template | | | | |
| | Import CSV | | | | |
| | | | | | |
| | | 055 | duction can invite matter | | |
| | | Office A | amins can invite patier | its on benalt of | |
| | | healthcar | e providers by followin | g the same steps | |
| | | | outlined on the next r | | |
| | | | outlined on the next p | Juges. | |
| | | They mus | t select the physician fr | om a dron-down | |
| | | meymus | t select the physician h | | |
| | | | onu that will be visible | to them. | |
| | | m | lenu that will be visible | | |
| | | Moalthcar | a providors will not so | the dren down | |
| | | m Healthcar | e providers will not see | e the drop-down. | |
| | | m Healthcar | e providers will not see | e the drop-down. | |
| | | m Healthcar | e providers will not see | e the drop-down. | |
| | | m Healthcar | e providers will not see | e the drop-down. | |

Patient Self Scheduling

There is a feature in SK Virtual Visit that allows for patients to self-schedule appointments based on a calendar that you set.
This feature is turned off for all SHA clinics but there are some items that you will see in the application that are oriented towards this feature.
For example:
Appointment Reasons – there are default reasons in the system and because patient self scheduling is turned off, there is less reason to modify these.
Notifications for appointments created by patients - because self scheduling is turned off, these are not available to change.

Even though self scheduling is turned off, your patients still need to be invited to join your virtual clinic.

Method 1: Inviting one Patient or a Small Batch

- Type in the patient's first and last name,
 and either their email address or mobile number (or both)
- If you have more than one patient to add during this time, click 'Invite Another Patient' and repeat the above step.
- Click 'Send # Invite'

| Invite Patients | | | | | |
|--|--|---|--|---|--|
| Inviting a patient will also generate | e an invite code that you can give to a | specific patient. You can view this | code by going to "Patients" and viewing your pending invite list | | Makila Musekar |
| Pirst reame - | | Last Name * | Email | | Mobile rumber |
| O Invite Another Patient | t | | | | |
| | | | | ר | |
| | | | Send 1 Invite | | |
| | | | Cancel | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| Invite Multiple Patients | If you are using your own CSV file, ma | ake sure the columns are in the sa | me order as our template. | | |
| Invite Multiple Patients Upload a CSV using our template. | If you are using your own CSV file, ma | ake sure the columns are in the sa | me order as our template. | | |
| Invite Multiple Patients Upload a CSV using our template. Click here to download CSV Temp | If you are using your own CSV file, ma | ake sure the columns are in the sa | me order as our template. | | |
| Invite Multiple Patients Upload a CSV using our template. Click here to download CSV Temp Import CSV | If you are using your own CSV file, ma | ake sure the columns are in the sa | me order as our template. | If the invitatio | n(s) sent |
| Invite Multiple Patients Upload a CSV using our template. Click here to download CSV Temp Import CSV | If you are using your own CSV file, ma plate | ake sure the columns are in the sar | me order as our template. | If the invitatio successfully, th | n(s) sent is pop-up |
| Invite Multiple Patients Upload a CSV using our template. Click here to download CSV Temp Import CSV | If you are using your own CSV file, ma plate | ake sure the columns are in the sa | me order as our template. | If the invitatio successfully, th screen will appea | n(s) sent is pop-up ar with your |
| Invite Multiple Patients Upload a CSV using our template. Click here to download CSV Temp Import CSV Search for a Patient | If you are using your own CSV file, ma | ake sure the columns are in the sa | me order as our template. | If the invitatio successfully, th screen will appea patient invite | n(s) sent is pop-up ar with your results. |
| Invite Multiple Patients Upload a CSV using our template. Click here to download CSV Temp Import CSV Search for a Patient Patient Name, ID or Healt | If you are using your own CSV file, ma plate Sent Successfully | ake sure the columns are in the sa | me order as our template. | If the invitatio successfully, th screen will appea patient invite | n(s) sent is pop-up ar with your results. |
| Invite Multiple Patients Upload a CSV using our template. Click here to download CSV Temp Import CSV Search for a Patient Patient Name, ID or Healt | If you are using your own CSV file, ma plate Sent Successfully First Name | ake sure the columns are in the sa 2 Pa Last Name | me order as our template. | If the invitatio successfully, th screen will appea patient invite | n(s) sent is pop-up ar with your results. |
| Invite Multiple Patients Upload a CSV using our template. Click here to download CSV Temp Import CSV Search for a Patient Patient Name, ID or Healt | If you are using your own CSV file, ma plate Sent Successfully First Name Phoebe | ake sure the columns are in the sar e Pa Last Name Buffet | me order as our template. Atient Invite Results | If the invitatio successfully, th screen will appea patient invite | n(s) sent is pop-up ar with your results. |
| Invite Multiple Patients Upload a CSV using our template. Click here to download CSV Temp Import CSV Search for a Patient Patient Name, ID or Healt | If you are using your own CSV file, ma plate Sent Successfully First Name Phoebe | ake sure the columns are in the sa e Pa Last Name Buffet | me order as our template. atient Invite Results Email p.buffet@mailinator.com | If the invitatio successfully, th screen will appea patient invite | n(s) sent is pop-up ar with your results. |

Method 2: Invite Code (when an email address or mobile number is not available

□ Follow Method 1

- □ Scroll down the page to 'Invited Patients'
- □ Locate the invited patient; note the 'Invite Code' and share this with the patient along with the SK Virtual Vis app information available from the Google Play/Apple Store and/or the web address

| invited Patients | | | | | | Invite Patients |
|------------------|-----------------------|-----------------------|--------------|--------------------------|-------------|-----------------|
| Name | Date Invited | Date Accepted | Phone Number | Email | Invite Code | |
| Lorelie Wyatt | November 9, 2022 | November 9, 2022 | | lmwyatt@me.com | XCRDCY | |
| Monica Bing | September 19, 2022 | September 20, 2022 | | mbing1998@mailinator.com | G9DTMX | |
| Patient Four | September 19, 2022 | | | | Y2GVKX | |
Method 3: Import a CSV File with a Large Group of Patients

- For PC and MAC Users if Excel is Used -

- □ Scroll down to 'Invite Multiple Patients'.
- If you are the office administrator with more than one healthcare provider, 'Select the Care Provider' from the drop-down.
- □ Select 'Click here to download CSV Template'.
- Leave Row 1 (headings) intact, and add patient information to the CSV file. If information is unknown, leave the field blank. The phone number should contain no dashes or parenthesis.
- □ Save the CSV template to a secure folder, by clicking 'Save As', give it a file name (ensure the extension remains as .CSV), then 'Save'.

| Doctor1, | Test | Ť | | | | | | | |
|--|--|--|---|---|---|---|---|---|--|
| Click here to | download CSV Tem | plate | | | | | | | |
| Impor | t CSV | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| A | В | C | D | E | F | G | Н | 1 | |
| A first_name | B last_name | email | D | E | F | G | н | 1 | |
| A first_name Dad | B last_name Patient | C email Dad@email.com | D phone 3065511234 | E | F | G | Н | | |
| A first_name Dad Mom | B last_name Patient Patient | C email Dad@email.com Mom@email.com | D phone 3065511234 | E | F | G | Н | | |
| A first_name Dad Mom John Jane | B last_name Patient Patient Patient | C email Dad@email.com Mom@email.com John@email.com | D phone 3065511234 | E | F | G | Н | | |
| A first_name Dad Mom John Jane Aunt | B last_name Patient Patient Patient Patient | C email Dad@email.com John@email.com Jane@email.com | D phone 3065511234 | E | F | G | Н | | |
| A first_name Dad Mom John Jane Aunt Uncle | B last_name Patient Patient Patient Patient Patient | C email Dad@email.com Mom@email.com John@email.com Jane@email.com | D phone 3065511234 3065515555 3065551111 | E | F | G | Н | | |
| A first_name Dad Mom John Jane Aunt Uncle | B last_name Patient Patient Patient Patient Patient Patient | C email Dad@email.com Mom@email.com John@email.com Jane@email.com | D phone 3065511234 | E | F | G | Н | | |
| A first_name Dad Mom John Jane Aunt Uncle | B last_name Patient Patient Patient Patient Patient Patient | C email Dad@email.com Mom@email.com John@email.com | D phone 3065511234 3065515555 3065551111 | E | F | G | Н | | |
| A first_name Dad Mom John Jane Aunt Uncle | B last_name Patient Patient Patient Patient Patient Patient | C email Dad@email.com Mom@email.com Jane@email.com | D phone 3065511234 3065515555 3065551111 | E | F | G | Н | | |
| A first_name Dad Mom John Jane Aunt Uncle | B last_name Patient Patient Patient Patient Patient | C enail Dad@email.com Mom@email.com Jane@email.com | D phone 3065511234 30655515555 3065551111 | E | F | G | H | | |
| A first_name Dad Mom John Jane Aunt Uncle | B last_name Patient Patient Patient Patient Patient Patient | C enail Dad@email.com Mom@email.com Jane@email.com | D phone 3065511234 3065515555 3065551111 | E | F | G | H | | |

□ Click 'Import CSV', locate the CSV file you saved and select it. The invitations to your patients will be sent and a pop-up screen will appear stating that your CSV upload sent successfully.

Note: Previously invited patients will not receive an additional invitation

Method 3: Import a CSV File with a Large Group of Patients

- For MAC Users Without Excel Installed -

- □ Scroll down to 'Invite Multiple Patients'.
- If you are the office administrator with more than one healthcare provider, 'Select the Care Provider' from the drop-down.
- □ Select 'Click here to download CSV Template'.
- Go to your 'Downloads' folder and select the CSV template and 'Save'. Leave Row 1 (headings) intact, and add patient information to the CSV file.
 If information is unknown, leave the field blank. The phone number should contain no dashes or parenthesis.
- Click 'Export To', choose 'CSV', then 'Next'. DO NOT click 'Include Table Names'.
- Give it a file name and choose the location to save it.
- □ Click 'Import CSV', locate the CSV file you saved and select it. The invitations to your patients will be sent and a pop-up screen will appear stating that your CSV upload sent successfully.

Note: Previously invited patients will not receive an additional invitation





Invited Patients

This is a list of patients who have been invited to your virtual clinic.

- □ Patient's name, phone number and email (if entered at time of invite)
- □ The date that the invitation was sent, as well as the date the invitation was accepted by them. Accepted invites do not immediately disappear from this list but remain for a period of time, if necessary for review.
- The 'Invite Code', which can be shared with patient(s) along with the SK Virtual Visit app information available from the Google Play/Apple Store and/or the web address
- □ If the information remains showing under this section, it means that the patient has not created an account and the invitation will either have to be **resent**, or you can **remove** it completely (in the event you have entered in the wrong details).

| Invited Patients | | | | | | Invite Patients |
|------------------|-----------------------|-----------------------|----------------|--------------------------|-------------|--------------------------------|
| Name | Date Invited | Date Accepted | Phone Number | Email | Invite Code | |
| Lorelie Wyatt | November 9, 2022 | November 9, 2022 | | lmwyatt@me.com | XCRDCY | |
| Monica Bing | September 19, 2022 | September 20, 2022 | | mbing1998@mailinator.com | G9DTMX | |
| Patient Four | September 19, 2022 | | | | Y2GVKX | |
| Patient One | September 19, 2022 | | | patient1@mailinator.com | НХС24Т | Resend Remove Invite Invite |
| Patient Three | September 19, 2022 | | (306) 555-0000 | | JHBTXT | |
| Patient Five | September 19, 2022 | | | patient5@mailinator.com | 6M4C9X | |

10.Searching for Patients



Patient Search

| U Saskatchewan | Dr. Deepti Yadawad Physician Deepti UAT Test Clinic | Patients | | | |
|--|---|---|--------------|------------------------|---------------------|
| Clinic Clinic Maet Now Schedule | Select Clinic Deepti UAT Test Clinic | Search for a Patient Patient Name, ID or Health Card Number Granger | Search | Reset Search | |
| 品 | Home | Search Results | | | |
| Consultations | Patients | Patient | Birthdate | Last Consultation Date | Consultation Status |
| Account | Appointment Reasons Clinic Settings Clinic Reports | Hermione Granger | Jan 21, 1979 | Jul 19th, 2022 | Archived 1 to 1 |
| | Consultation Feedback | | | | |

- □ Select 'Clinic' in the dashboard, then click 'Patients'.
- □ Type in the patient's first and/or last name or health card number.
- Click 'Search'
- □ Once you locate the correct patient, click on their name.

Patient Search

| l <mark>a</mark> chewan | Dr. Deepti Yadawad Physician Deepti UAT Test Clinic | Hermione Granger |
|----------------------------|---|---|
| | Select Clinic Deepti UAT Test Clinic | Patient ID: 85 Health Card Number: 123456789 |
|] | Invite Patients Schedule Appointment Home | Contact Information Age and Gender Location @gmail.com Born on January 21, 1979 43 years old Non Saskatoon, Saskatchewan S7K 0M7 701 Queen st |
|) D int | Patients Appointment Reasons Clinic Settings Clinic Reports | Deactivate Patient You will see the following • Patient Information • Upcoming Appointments |
| | Consultation Feedback | Upcoming Appointments No upcoming appointments. Consultations Requiring Follow-Up Past Medical/Surgical His Allergies* |
| | | Consultations Requiring Follow-Up Prescription History* No consultations requiring follow-up. Past Consultations |
| v | ou may: | *dependent on manual popul within the application |

- Uverify the patient is associated with your clinic. If you could not find a patient, they may not have been invited or have not accepted the clinic invite yet.
- □ View additional information about the patient
- □ Schedule a 'New Consultation'
- **Deactivate Patient**' (patients may also be reactivated)

11.Appointment Reasons



Adding & Removing Appointment Reasons

This feature is designed for patient self scheduling which is turned off for all SHA clinics, however, your clinic may choose to use these when scheduling virtual appointments.

| 1/2 Saskatchewan | Dr Kullar Singh Physician Neeru SHA Test Clinic | Clinic Settings | | the entire clinic; not for individual users. Any |
|---------------------|---|---|---|---|
| | Select Clinic Neeru SHA Test Clinic 🔹 | Appointment Reasons Add or remove the available reasons for your appointments. Patients select a reason when booking to help | care team members prepare for the consultation. | changes will impact all clinic users. |
| L_Q Meet Now | 🤐 Invite Patients | Reason | Duration | |
| Schedule | Chedule Appointment | Congested Cough & Fever | 15 minutes | Remove |
| | A Invite Care Team Member | Follow-Up | 10 minutes | Remove |
| 2 | Home Patients | Labs / Testing / Review | 10 minutes | Remove |
| Account | Care Team | Mental Health | 10 minutes | Remove |
| | Appointment Reasons | Other | 10 minutes | Remove |
| | Consultation Feedback | Prescription Refill | 10 minutes | Remove |
| | | Referral Requests | 10 minutes | Remove |
| | | Sick Notes | 10 minutes | Remove |
| | | Upper Respiratory Infection | 10 minutes | Remove |
| | | Add Reason | | |

- General Select 'Clinic' in the dashboard, then click 'Appointment Reasons'.
- Gelect 'Add Reason'.
- □ Type in the new appointment reason, a duration that is suitable, then click 'Add Reason'.

SK Virtual Visit Application: User Guide

- □ '**Remove**' will remove an appointment reason that is not applicable to your clinic.
- **General Editing is NOT an option.**

These settings are set for

12. Scheduling: Viewing & Updating Calendars



Select '**Schedule**' in the dashboard.

MONTHLY View:

- click on an individual day
- see how booked any day is, by the shade of green, by hovering over a date the number of appointments scheduled as well as the percentage of the day that is booked is displayed

WEEKLY View:

- 7-day view of the schedule
- appointments that are booked
- click on each appointment to see the availability type of the consultation, the patient's name, health card number, date of birth, and appointment time/length.

DAILY View:

- see each appointment type & time, their status, as well as the type of consultation that is scheduled (single or recurring)
- edit or delete a shift

Viewing Schedules



- □ Select '**Schedule**' in the dashboard.
- Click 'Add Shift'.
- Select the day you wish to add the shift.
- □ Select the from/to **time**.
- □ Select the **type of care** (virtual, in-person, or both)
- □ Choose the 'Occurrence'.
- □ Choose an **end date** (if recurring occurrence).
- Click 'Add Shift'.





This feature should be used for coffee and lunch breaks as well.

13. Scheduling Consultations





Type in the patient's Health Card Number or First / Last Name (a list will start to appear)

 Choose the patient, then click 'Select
 Patient'

| | Select Patient | |
|---------------------------|--|---|
| Searc | ch for and select a patient to schedule an appointment for them. | |
| Search by first name, las | st name, or health card number. | - |
| Monica Bing | DOB: (May 15, 1970) | |
| | Select Patient | |
| | Cancel | |

| Schedule Appointment for Monica Bing | Schedule Appointment for Monica Bing | Select Provider Doctor 1, Test |
|---|---|--------------------------------|
| Select Provider | Select Provider | Type of Care |
| Doctor1, Test | Doctor1, Test | Choose Type of Care |
| Type of Care | Type of Care | Select Appointment Reason |
| Choose Type of Care 👻 | Choose Type of Care | Appointment Reason |
| Select Appointment Reason | Virtual | Feeling III or Infection |
| Feeling III or Infection | In Person | Labs / Testing / Review |
| | | Mental Health |
| Next | Next | Other |
| Cancel | Cancel | Prescription Refill Rash |

- Office admins can schedule consultations on behalf of the healthcare providers within their clinic. They must select the healthcare provider's name from the 'Select Provider' drop-down. Healthcare providers will not see this drop-down.
- Select the '**Type of Care**' being scheduled (Virtual or In-Person)
- Select '**Appointment Reason**' from the drop-down menu
- Click 'Next'

When the Healthcare Provider's schedule IS NOT entered in the SK Virtual Visit calendar....

- **General Select 'Switch to Specific Time Input'**
- Select 'Date'
- □ Select a '**Start Time**' and enter a time based on availability shown in the clinic EMR system
- □ Select 'Appointment Length' based on how long is needed
- Click on 'Select Time'

Schedule Appointment for Monica Bing Pne Time Recurring Enter an excat date, starting time and appointment length. Switch to List of Available Times Carrent timecone Date Tuesday, October 25, 2022 Start Time Appointment Length 6:00 PM Select Time Carcel

When the Healthcare Provider's schedule IS entered in the SK Virtual Visit calendar...

- Select whether the appointment will be a 'One Time' or 'Recurring'
- □ 'Select Date' and 'Length' based on how long is needed
- Select a 'Time' from the available times that appear
- Click on 'Select Time'



Cancelling Consultations

- 1 Deepti Office Admin Office Administrator Saskatchewe Select Schedule Select Clinic Deepti Yadawad -Deepti UAT Test Clinic 🔹 Clinic D Meet Now PDT (-07:00) Current timezone + Add Shift Sook Time Off Availability Types Virtual Schedule Appointme 园 In-Person U Virtual × Consultati R July 2022 6 Both Virtual and In-Person Hermione Granger Account Ë 123456789 ∃ View Dav January 21, 1979 10 11 12 13 14 15 16 08:00 - 08:05 17 18 19 20 21 22 23 Sunday Monday Tuesday Wedn Saturday 24 25 26 27 28 29 30 Enter Consultation July 23 July 17 July 18 July 19 July 31 Join-in Information × Cancel Consultation **Cancel Virtual Consultation** 😐 Her... Cancelling this appointment for Monica Bing will remove it from the schedule. Monica Bing will receive a notification of the cancellation. **Cancel Consultation** Close
- □ Select 'Schedule' in the dashboard
- □ Find and click on the consultation you want to cancel
- □ Select 'x Cancel Consultation'
- A pop-up will appear asking you confirm cancelling the consultation. Select 'Cancel Consultation' again.

Note: Consultations cannot be revised; they must be cancelled and rescheduled.

14. Meet Now (Quick Meetings or Quick Phone Calls)



Meet Now – 3 Options for Conducting Quick Meetings



- 1. Start an Immediate Video Meeting
- 2. Start an Immediate Phone Meeting
- 3. Schedule a Video Meeting



- These meetings allow you to quickly consult with a patient, their family or caregivers, other healthcare providers, specialists or members of your clinic's care team by video or phone, without scheduling a consultation and without them requiring an account with SK Virtual Visit.
- **Q**uick meetings do not contain patient, medical history, or past consultation information.
- □ You may enter a short note once the meeting is complete for referencing in the future, however no personal health information should be added into the note.

Start an Immediate Video Meeting – Step 1

| l <mark>i</mark> Saskatchewan | ETest Doctor Physician | Meet Now | |
|---|---------------------------|--|---|
| Clinic | Select Clinic | Start a Video or Phone Meeting | |
| La | Schedule Video Meeting | Meet with patients, participants and other care providers over video or phone. | |
| Schedule | Start Video Meeting | Start Video Meeting | |
| | Meetings | | |
| | Past Meetings | | Enable microphone when the meeting starts Enable camera when the meeting starts |
| | | | Remember my preferences for future meetings |
| | elect 'Meet No | w' in the dashboard | |

- Click 'Start Video Meeting'
- Enable your microphone, camera and select whether you wish to save these preferences for future meetings
- □ You will be taken directly into the video meeting to invite and wait for participants to arrive.

Invite Guests to a Video Meeting – Step 2



- □ The 'Join-In Information' screen will appear. Click either 'Copy Invite Link' (meeting web link only) or 'Copy Invitation' (entire meeting invitation info) and email to the participant(s) you wish to invite to this meeting. Up to 50 may be invited and they do not require an account with SK Virtual Visit.
- □ As participants arrive, the meeting host must either 'Admit' or 'Decline' them.
- □ The meeting host is the only one who can completely end the meeting.

Start an Immediate Phone Meeting

| La Saskatchewan | ETest Doctor Physician | Meet Now | |
|--|---|--|--|
| Clinic Clinic Meet Now Schedule | E Test Clinic E Test Clinic E Test Clinic Schedule Video Meeting Start Video Meeting Start Video Meeting | Start a Video or Phone Meeting Meet with patients, participants and other care providers over video or phone. It Start Video Meeting Start Phone Meeting | Phone Meeting Meetings allow you to quickly consult with a patient, their participants and other care providers when needed without scheduling a consultation. Meetings do not have patient history, patient information, past consultations or the ability to take notes. You can enter a small note once the meeting is complete for referencing it in the future. |
| Account | Meetings Past Meetings Select 'Meet No | w' in the dashboard, then click ' Start Phone Meeting ' | Next Start Phone Meeting |
| | Click ' Next ' Enter the patier | nt or participant's phone number and your number (Note: | Our system will call the patient(s) and then call your phone. Your phone number will not be displayed to the patient(s). |
| | Click 'Start Pho the line, then th number back) | ne Call ' (The guest's phone will ring first, once they are on ne automatic calling system will call the meeting host's | Your Phone Number |
| | Pho | ne Meetings only happen between two people, the meeting host and one other person | Start Phone Call Cancel |

Schedule a Video Meeting – Step 1



Schedule a Video Meeting – Step 2

| | book |
|---|---|
| Schedule a Video Meeting Meeting Title Team Meeting | Office admins can schedule meetings on behalf of the healthcare providers within their clinic. They must select the healthcare provider's name from the 'Select Provider' drop-down. |
| Select Provider | Healthcare providers will not see this drop-down. |
| Doctor1, Test | Click 'Next' Select 'Switch to Specific Time Input' |
| Next | Select 'Date' |
| Cancel | Select a 'Start Time' and enter a time based on availability shown in the clinic EMR system |
| Participants may be invited at time of scheduling | Select 'Appointment Length' based on how long is needed |
| the meeting (while taking these steps), or just before the meeting, from | Click on 'Select Time' |
| the Active & Pending screen | Scheduled Meetings are accessed in the Active & Pending screen |

Past Meetings

| <u>J</u> Saskatchewan | Ev Administrator Office Administrator E Test Clínic | Past Meetings | | | | |
|--------------------------|--|-----------------------------|-----------------------------|-------------------------|---------------|----------------------------|
| | Select Clinic | Participant Name | Date Range Choose a date | Care Team Member | Type Video | ~ |
| Meet Now Schedule | Schedule Video Meeting Start Video Meeting Start Phone Meeting | Search Reset | t Search | | | First Previous 1 Next Last |
| Consultations | D: Join a Meeting | Type Participa | ants | Date 🔻 | | |
| | Past Meetings | Video ev, Elest | Doctor | Oct 21, 2022 - 12:12 pm | | |
| | | Video Dr Gellar Add Note | | Sep 14, 2022 - 03:10 pm | | |

Select 'Meet Now' in the dashboard, then click 'Past Meetings'. The most recent meetings will be listed.

Use the 'Search' criteria to find a specific meeting:

- Participant Name
- Date Range
- Care Team Member (only available to Office Administrators
- Type (video or phone)

15. Active & Pending Appointments



Starting a Patient Consultation

| Saskatchewan | ETest Doctor Physician E Test Clinic | | | | | | | | Current time |
|----------------------|--|--|-----------|-----------------------------|--------------------------|----------------------|-----|---|---|
| Clinic | Select Clinic | Active | | | | | | | |
| Meet Now Schedule | Active and Pending Waiting for Follow-Up Completed | Oct 21, 12:10 pm | 🗖 Virtual | Demo Patient | Feeling III or Infection | Waiting to Archive * | (j) | | 🔶 View Consultatio |
| Consultations | | Oct 25, 9:15 am | 🗖 Virtual | Demo Patient | Feeling Ill or Infection | Waiting to Archive - | 1 | | 🔶 View Consultati |
| | | | | | | | | | |
| | | Pending | | | | | | | |
| | | Pending Oct 25, 9:00 am | Meeting | TEAM MEETING | | | | | 〕 💠 Enter Meeti |
| | | Pending Oct 25, 9:00 am Oct 25, 6:00 pm Waiting for Patient | Meeting | TEAM MEETING Monica Bing | Feeling Ill or Infection | | () |) | 〕 💠 Enter Meeti. 🔶 Enter Consultatio |

- □ Select '**Consultations**' in the dashboard
- Click 'Active & Pending'
- □ If the healthcare provider works out of more than one clinic location, they must select the correct clinic from the 'Select Clinic' drop-down

Active & Pending Screen Headings & Color Schemes

Active:

Consultations you have entered and started communicating in:

- Completed and 'Archived'
- Active & not yet 'Archived'
- Active where a patient has not arrived or responded to you

Pending:

Consultations scheduled into your day:

- Patient is Ready'
- Waiting for Patient'
- Scheduled Video Meeting

| Active Oct 21, 12:10 pm | D Virtual | Demo Patient | RED – this indicates 'Waiting to Archive'; the provider has completed the consultation and has nothing further to add, so it can be closed out. There is a delay of 3 |
|---------------------------------------|--------------|--------------|--|
| Oct 25, 9:15 am | 🗖 Virtual | Demo Patient | hours in which this type of consultation will remain open, in the event there needs to be amendments made. It can also indicate 'Scheduled Quick Video Meeting' |
| Pending Oct 25, 9:00 am | Meeting | TEAM MEETING | PINK – this indicates a scheduled Meeting |
| Oct 25, 8:40 pm Patient Ready | Virtual | Demo Patient | GREEN – this indicates 'Patient Ready'; the patient is marked as ready and is available for their appointment. |
| Oct 25, 6:00 pm Waiting for Patier | nt 🗖 Virtual | Monica Bing | GOLD – this indicates 'Waiting for Patient' and is always showing this colour in the 'Waiting Room' section until a patient marks themself as ready: the patient has |
| Oct 25, 6:00 pm Waiting for Patier | nt 🖵 Virtual | Monica Bing | GOLD – this indicates 'Waiting for Patient' ar showing this colour in the 'Waiting Room' sec patient marks themself as ready; the patient an appointment booked for that specific day. |

Active & Pending Screen Features

| | Oct 25, 8:40 Patient Read | pm □ Virtual dy | Demo Patient | Feeling Ill or In | fection | | 👔 📋 🛄 🔶 Enter Cons | ultation |
|---|--|---|---|--|---|---|---|-----------------------------|
| | The 'Acti section. | ve & Pending' scr | een will show | patients that a | are scheduled for t | today and will be in | dicated in GOLD under the | 'Pending' |
| | Within 1 they dor the spee | 0 minutes prior to 't mark themselv ch bubble icon) | o their schedul es ready, you h | ed consultatic ave the optio | on, a patient will b n to message ther | e able to mark then n by using the 'Quio | nselves as 'READY'. If ck Message' drop-down (ind | licated by |
| | Note – v has the consulta | vhen the healthca option to enter the tion status will no | re provider or e consultation ot change to th | their office ad without clicki e green "Patie | min messages the ng the 'I'm Ready j ent is Ready' status | e patient before they for My Appointmen s but will remain as | y indicate they are ready, th t' button. If this happens, t gold "Waiting for Patient". | e patient he |
| | () | If you wish to shareable co | o send other pa insultation or n | articipants an neeting link, c | invitation to join t opy the link or inv | the consult PRIOR t <i>i</i> tation, and send it | o the appointment, you car via email. | າ click on the |
| Office Admins will be able to view and manag | le | 🔶 Enter Consultati | on You Con 'Ac | u may view th n, when you nsultation' frc tive'). | e consultation PRI are ready to begin om within the chat | OR to the appointm speaking with you t (the status in the " | nent by clicking ' Enter Cons r patient, you will click 'Ente Waiting Room' will now cha | ultation', er ange to |
| each healthcare provider's waiting room or their behalf. | n | | | Active 🕶 | When the c further eng 'Archive Con Waiting Room | consultation is comp agement with the p nsultation' from, ei om. | plete & the practitioner has patient, they can mark the s ther, within the consult or in | no itatus as n the |
| | | | | | | | | |

16. Starting a Patient Consultation



Starting a Consultation – Step 1

| Saskatchewan | ETest Doctor Physician E Test Clinic Select Clinic | Active | | | | CST (-06:00) Current timezone |
|----------------------|---|--|-----------|--------------|--------------------------|----------------------------------|
| Meet Now Schedule | Active and Pending Waiting for Follow-Up | Oct 21, 12:10 pm | 🗖 Virtual | Demo Patient | Feeling Ill or Infection | Waiting to Archive - |
| Consultations | Compreted | Oct 25, 9:15 am | 🗖 Virtual | Demo Patient | Feeling Ill or Infection | Waiting to Archive - |
| PALITY | | | | | | |
| | | Pending | | | | |
| | | Pending Oct 25, 9:00 am | Meeting | TEAM MEETING | | 👔 🗍 🔶 Enter Meeting |
| | | Pending Oct 25, 9:00 am Oct 25, 6:00 pm Waiting for Patient | • Meeting | TEAM MEETING | Feeling Ill or Infection | (i) |

- □ Select 'Consultations' in the dashboard
- Click 'Active & Pending'
- Click on 'Enter Consultation'

Starting a Consultation – Step 2

| Saskatchewan | ETest Doctor Physician E Test Clinic Select Clinic E Test Clinic | Consultation for Demo Patient Age: 22 years old Patient ID: 132 Assigned -Created October 25, 2022 | Active - Report Issue Report Issue | | |
|--------------|--|--|---|--|--|
| | Active and Pending Waiting for Follow-Up | Demo Patient View Participants | Patient Information V | | |
| Scheedule | Completed | In order to start chatting, you must enter the consultation. | Demo Patient Patient ID: 132 Health Card #: 123456789 | | |
| Account | | Enter Consultation | Contact Information emarshall+patient5@lumeca.com | | |
| | | ETest Doctor has been assigned to the consultation. Oct 25. @34pm | Mobile Phone: (306) 434-5335 Home Phone: | | |
| | | This consultation is for Demo Patient. Health Card: 123456789 DOB: Jan 01, 2000. | Age and Gender | | |
| | | Oct 25, 8:34pm | Born on January 1, 2000 | | |
| | | Appointment Reason: Feeling Ill or Infection | 22 years old Male | | |
| | | Oct 25, 8:34pm | Location | | |
| | | Demo Patient is now marked as ready. Oct 25. 8:34pm | Box 10, Regina, Saskatchewan, S4S 4P4 | | |
| | | • | | | |
| \odot | | | Preferred Pharmacy | | |

□ When you first enter the consultation, the patient is not yet aware you have arrived.

□ Once you are ready to begin, click 'Enter Consultation'

Starting a Consultation – Step 3

| Sediatheren Physician ETest Clinic Creations Creations Creations ETest Clinic | Consultation for Demo Patient Age: 22 years old Patient ID: 132 Active - Created October 25, 2022 | Consultation ID: 576 Active • Report Issue Consultation Report Issue Consultation Wew Consultation |
|--|--|---|
| Active and Pending Waiting for Follow-Up Completed | Demo Patient View Participants Image: Constraint of the | Patient Information Demo Patient Patient ID: 132 Patient ID: 132 Patient ID: 132 Patient Card #: 123456789 Contact Information emarshall+patient5@lumeca.com Mobile Phone: (306) 434-5335 Home Phone: Age and Gender Born on January 1. 2000 22 years old Male |
| | Deme Pictors - Oct 25, 9-43pm Delivered | Location Box 10, Regina, Saskatchewan, S4S 4P4 Preferred Pharmacy |

□ The consultation will begin, with the following options available:

- Chat Messaging i.e., introduce yourself to the patient, etc.
- Video Chat begin the video portion of the consultation
- Phone Call may be used if video chat does not work
- Once ready to proceed, click 'Video Chat'

Starting a Video Chat

- Check the boxes to enable your microphone, camera and remember your preferences for future video chats (optional)
 - Note: You may prevent certain participants from joining the video by clicking 'Prevent Other Consultation Participants From Joining', then unchecking their name. You can start as many videos during the active consultation as necessary, adding and preventing participants as desired.
- U When ready, click 'Start Video Chat'.

| Start Video Chat | |
|---|---|
| Please select who you would like to join the video chat for Bab Patient1 under Pt1 (dad). | у |
| Guardian | |
| 👰 Dad Patient1 🥥 |) |
| Prevent Other Consultation Participants From Joining 🗆 | |
| Enable microphone when the meeting starts | |
| Enable camera when the meeting starts 🗹 | |
| Remember my preferences for future meetings 🗹 | |
| Start Video Chat | |
| Cancel | |

Ability to 'Admit' or 'Decline' Users into the Video Chat



- All healthcare providers at the clinic in the video call can 'Admit' or 'Decline' participants from entering the video call. This can be done via the pop-up that appears over the video, or from the Participants button.
- □ If a user is 'Declined' from joining the call, they will be notified and unable to re-join.
- Note: the ability to 'Admit' users is also available for quick video calls (Meet Now).




Dial a Phone Guest Into the Video Chat

| * | | Ð | | | B |
|------------------|------|---------|--------------|--------|---------|
| Participants (1) | Chat | Zoom In | Share Screen | Record | Dial In |

| en the |
|--------|
| |
| |
| |
| |
| |
| |
| |

- Once in the video chat, click 'Dial In'
- □ Enter the 'Participant's Display Name' (how their name will appear in the video chat)
- □ Enter the 'Participant's Phone Number'
- Click 'Dial In Now'
 - All participants in the video chat will hear the dialed-in person's phone ring and once they answer, will be able to hear them speak.
 - If an answering machine is picked up, it will be up to the video call host to remove the participant from the call.
 - Multiple people can be dialed into a video call simply repeat the process for multiple participants.
 - The Dial-In feature is available for quick video calls as well (Meet Now).

Recording a Video Call

| Participants (1) | Chat | (t) Zoom In | Share Screen | Record Dial In | |
|------------------|------|----------------|--------------|----------------|--|

The 'Record a Video Call' feature is **turned off by default** and requires a request to your Organizational Approver to be turned on. *This button will not appear if the feature is disabled.*

□ Forward your request via email:

- SHA <u>virtualcare@saskhealthauthority.ca</u>
- SCA <u>virtual.care@saskcancer.ca</u>
- SMA <u>emr@sma.sk.ca</u>
- ISC <u>ehealthisc@canada.ca</u>
- Users other than the HSPs mentioned above, contact <u>servicedesk@ehealthsask.ca</u>

Recording a Video Call



□ To begin recording, click '**Record**'. A message will appear letting you know recording has begun.



□ To end recording, click ' **Stop Record**'. A message will appear letting you know recording has stopped.



Finding Recorded Videos

Up to approximately an hour after video recording has stopped, it will be available to view.

Participant Name

Type

Date Range

Reset Search

Guest G8RB_ETest Docto

Participants

'Meet Now' Meetings

Video Recordings can be found under:

- Meet Now > Past Meetings
- Select the meeting from the list or search for it.
- Click the Recording you wish to review.

Patient Consultations

Depending on whether they have been Archived or not, Video Recordings can be found under either:

- Consultations > Active & Pending
- Consultations > Completed
- Click 'View Recording'



Type

🗒 Video

Date •

First Previous 1 Next Last

Sharing a Screen Within a Video Chat



All participants within the video call can share their screens and annotate, if enabled by the video chat host.

□ The host would click 'Share Screen', then choose 'Providers Only' or 'Everyone'

Once the screen is shared and visible, new buttons appear along the bottom of your video screen:

Annotations - Click to highlight specific areas on your shared screen



Stop Sharing - Click to stop sharing your screen



Archive Completed Consultations

| Saskatthewan | ETest Doctor Physician E Test Clinic E Test Clinic E Test Clinic Active and Pending Waiting for Follow-Up | Consultation for Demo Patient Age: 22 years old Patient ID: 132 Active - Created October 25, 2022 Demo Patient View Participants Demo Patient View Participants View Participants | Consultation ID: 576 |
|--------------|---|--|---|
| | Completed | Oct 25, 8.34pm | Den Referred to Specialist Patie Pending Other : #: 123456789 |
| Account | | Demo Patient is now marked as ready. Oct 25.8.34pm | Cancel Consultation Archive Consultation emarsi all+patient5@lumeca.com |
| | | ETest Doctor has entered the consultation. | Mobile Phone: (306) 434-5335 |
| | | Oct 25. 938pm Hello Derno Patient, I am Dr ETest. Are you in a private and quiet area and ready to begin our video chat? ETest Doctor - Oct 25. 943pm Delven | Age and Gender Born on January 1, 2000 22 years old |
| | | Yes | Male |
| | | Demo Patient - Oct 25, 9:43pm Delivered | Location |
| | | • & Message | Box 10, Regina, Saskatchewan, S4S 4P4 |
| \odot | | Send | Preferred Pharmacy |

U When the consultation is complete, click the 'Active' drop-down and choose 'Archive Consultation'.

- Unarchived consultations remain Active to both the clinic and patient and can create backlog and confusion.
- Once 'Archived' consultations remain in the 'Active & Pending' screen for approximately 3 hours (in the event further action is needed by either the healthcare provider, the office admin or the patient) and then disappears from that screen.

17. Completed Consultations



Search for a Consultation

| V2 Saskatchewan | ETest Doctor Physician | Search | Search for Consultations | | | | | |
|--------------------------------|---|---|--|----------------------------------|---------------------|--|--|--|
| | E Test Clinic Select Clinic | Consult | Patient | Province Add Province | Consultation Status | Care Team Members | Date Range Add Date | |
| Clivic Meet Now Schedule | E Test Clinic | Search | Search Results | Int | Add Status | Selection crite all) of t | eria includes any (or he following: | |
| | Select 'Co Enter app Select 'Se | onsultatio licable ir arch' t Applicatio | ons' in the da nformation m: User Guide | ashboard, then click ' Co | mpleted′ | Patient Name, or Cons Care I | Consult ID t First Name, Last r SK Health Number Province sultation Status Team Members Date Range | |

18. Provider Support



19. Citizen Support

