Saskatchewan Virtual Visit Provider User Guide

October 2022

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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 https://skvirtualvisit.zendesk.com/hc/en-us/articles/7310475144347-Where-can-I-access-Training-Material-

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 “click this link” under '**Get Started**'

Saskatchewan

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

Get Started

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?

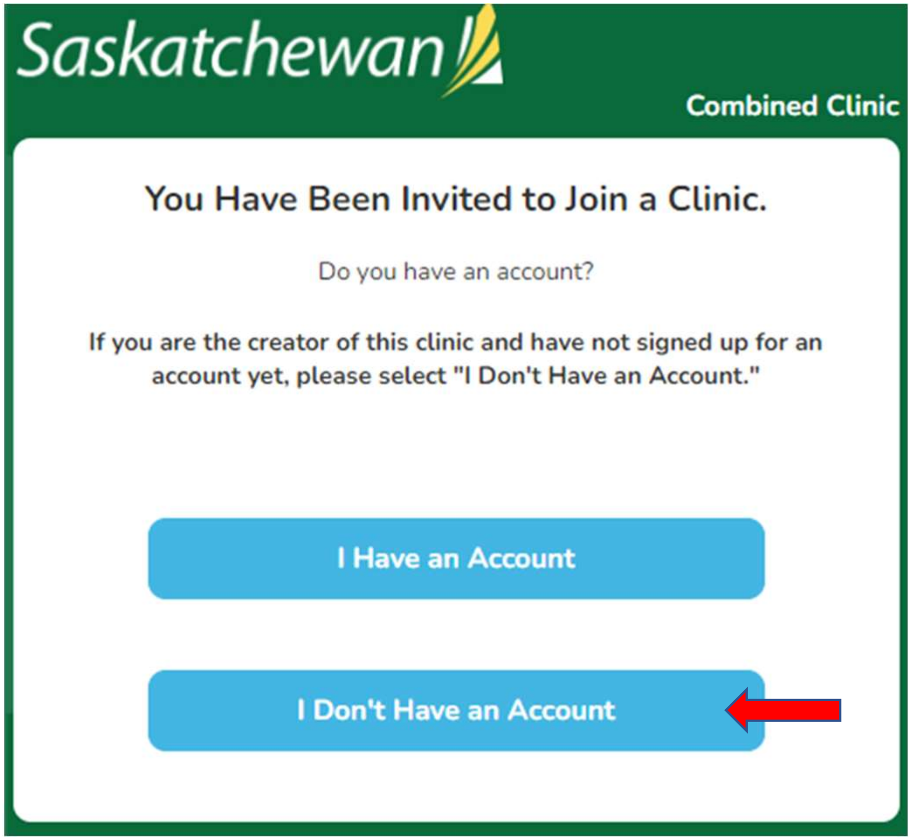
If you have any questions or concerns, feel free to contact your SK Virtual Visit representative or email virtualvisit@ehealthsask.ca for support.

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

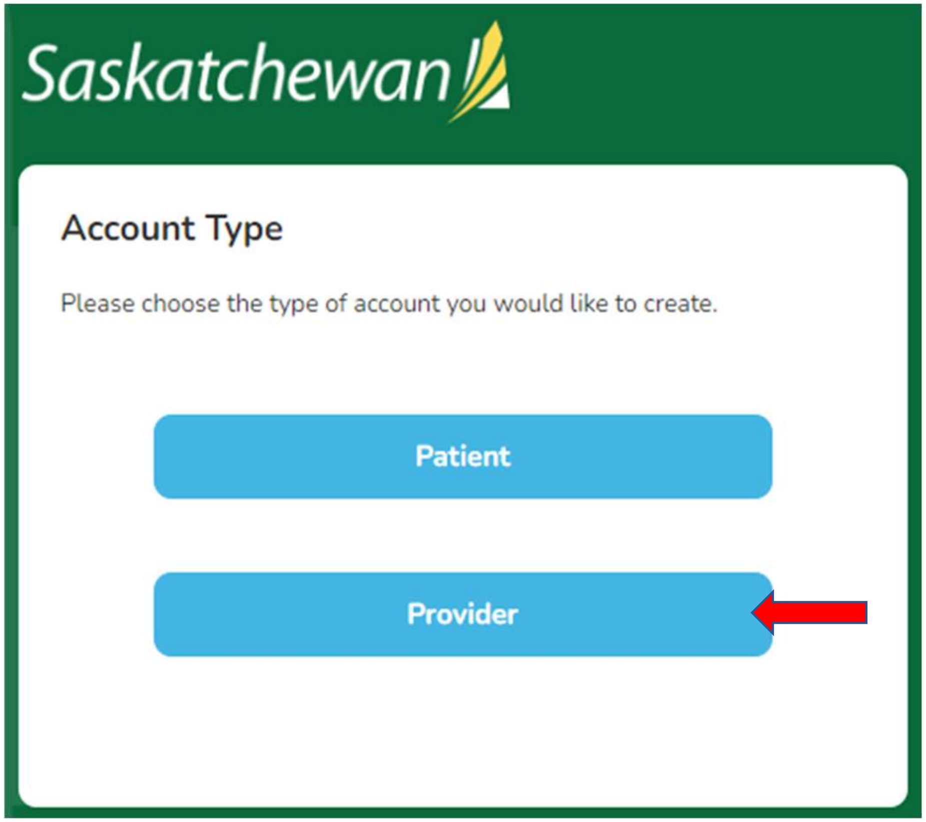


Create a Provider Account

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.



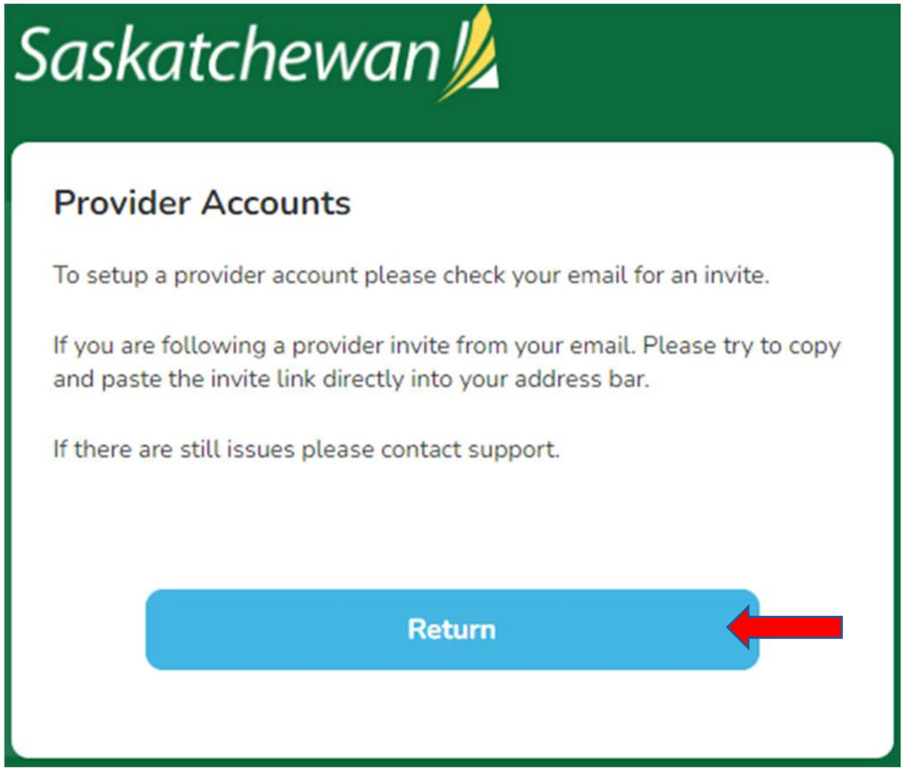
Create a Provider Account

Read the directions, then click '**Return**'.

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

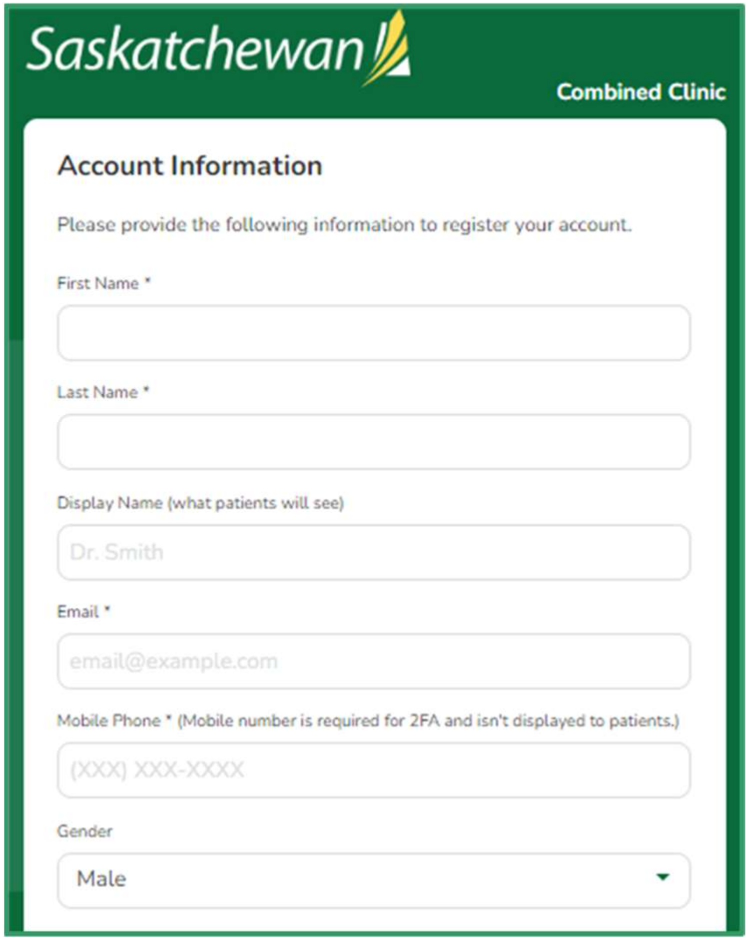
If that does not work, copy (Ctrl+c) the '**click this link**' hyperlink from the email and paste (Ctrl+v) into your laptop/computer browser's address bar. You should be directed to the proper screen.

- ❑ Click '**I Don't Have an Account**'



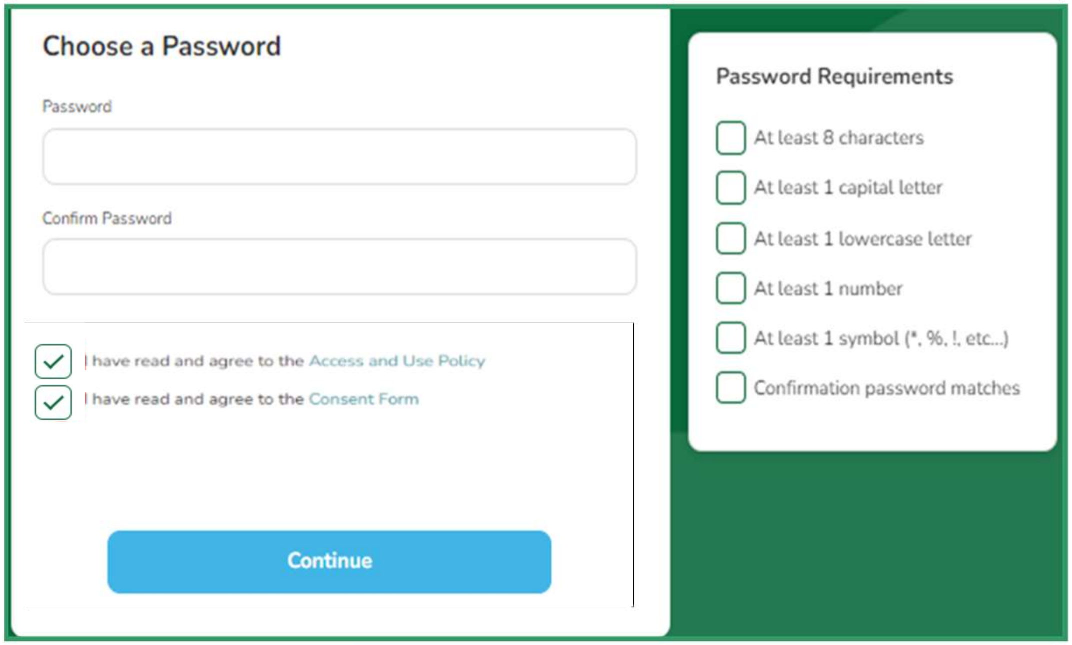
Account Information

- ❑ 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.



Choose a Password

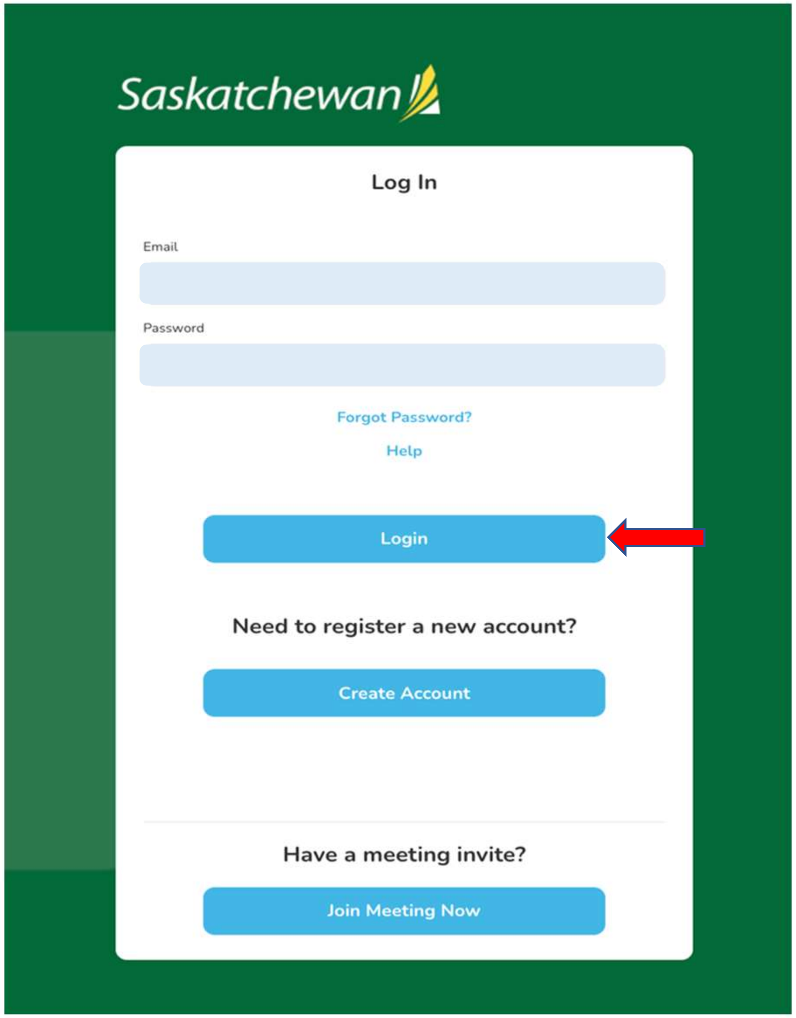
- Follow the requirements for choosing a strong, secure password
- Read and agree to the 'Access and Use Policy' and 'Consent Form'
- Click '**Continue**'



YOU ARE NOW READY TO ACCESS YOUR CLINIC !

- ❑ Click on '**Go to Your Clinic**'

3. Login & Logout



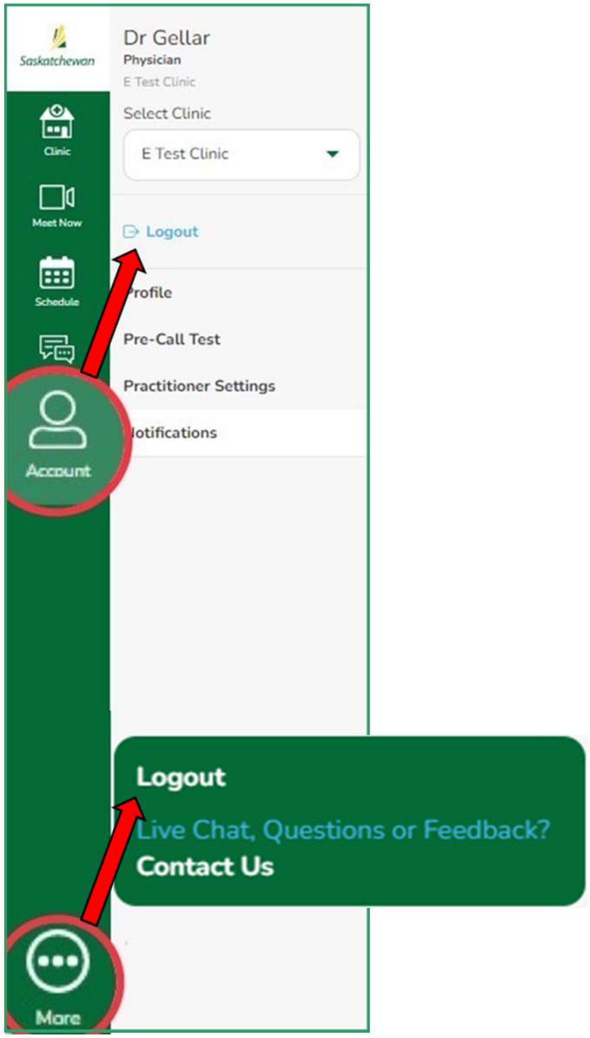
Account Login

- ❑ 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/

BOOKMARK THE LOGIN PAGE FOR EASY ACCESS



Account Logout

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

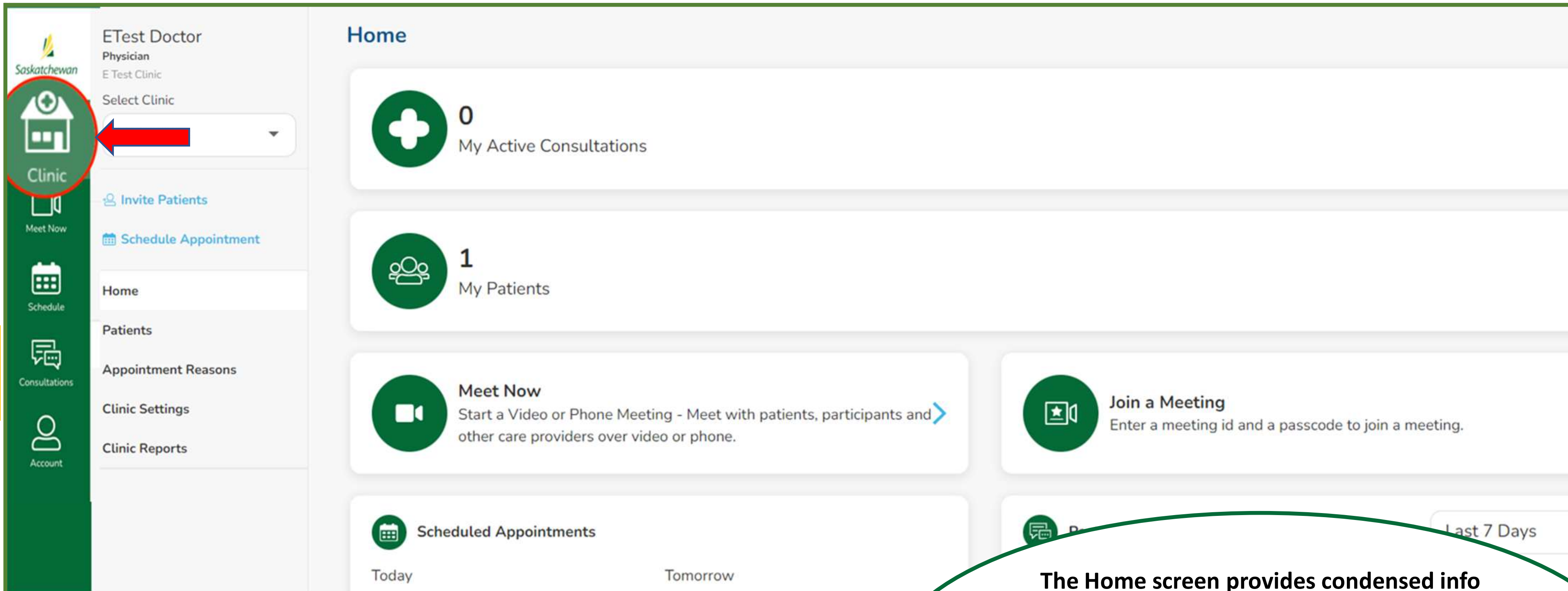
It is also advisable to clear your history at the end of each shift.

There are two areas you can Logout:

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

4.Home Screen

Home Screen



- ❑ To return to the Home screen, at any time click '**Clinic**' in the dashboard

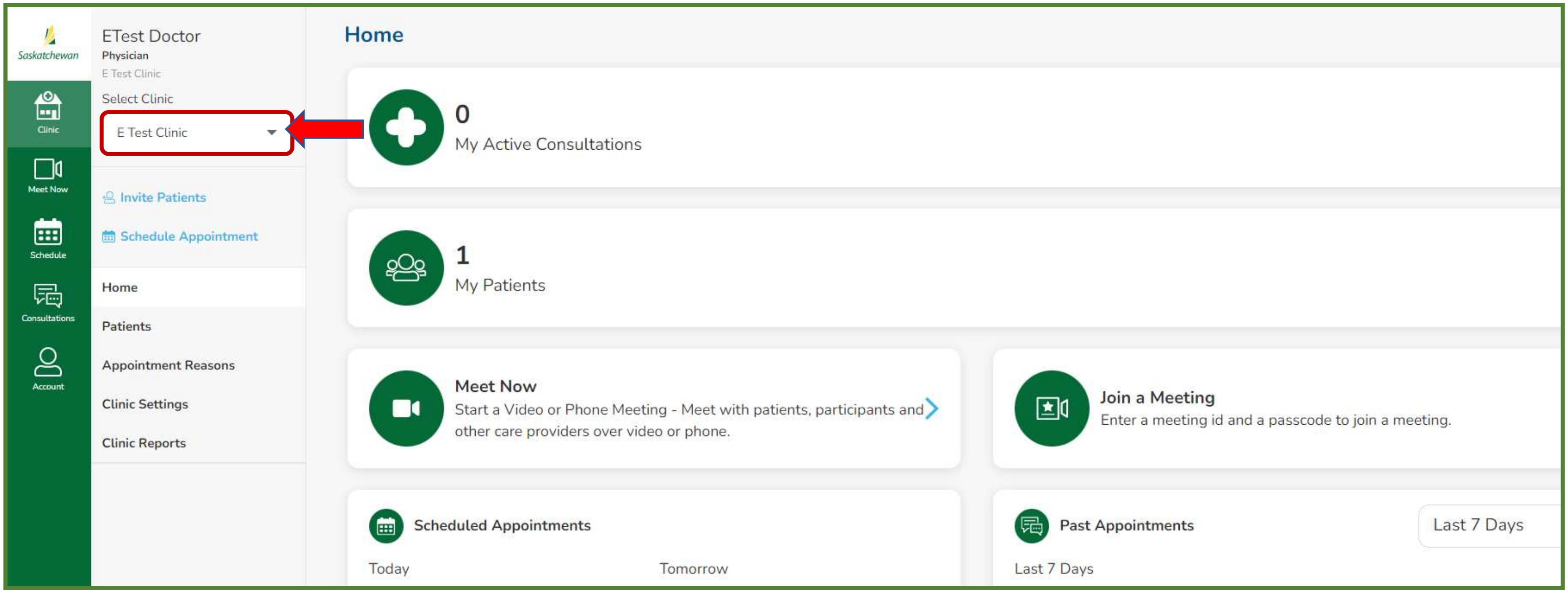
The Home screen provides condensed info about your clinic, which is populated from other areas in the platform.

You cannot change info here.

'Meet Now' and 'Join a Meeting' will take you directly to those features

5.Select a Clinic

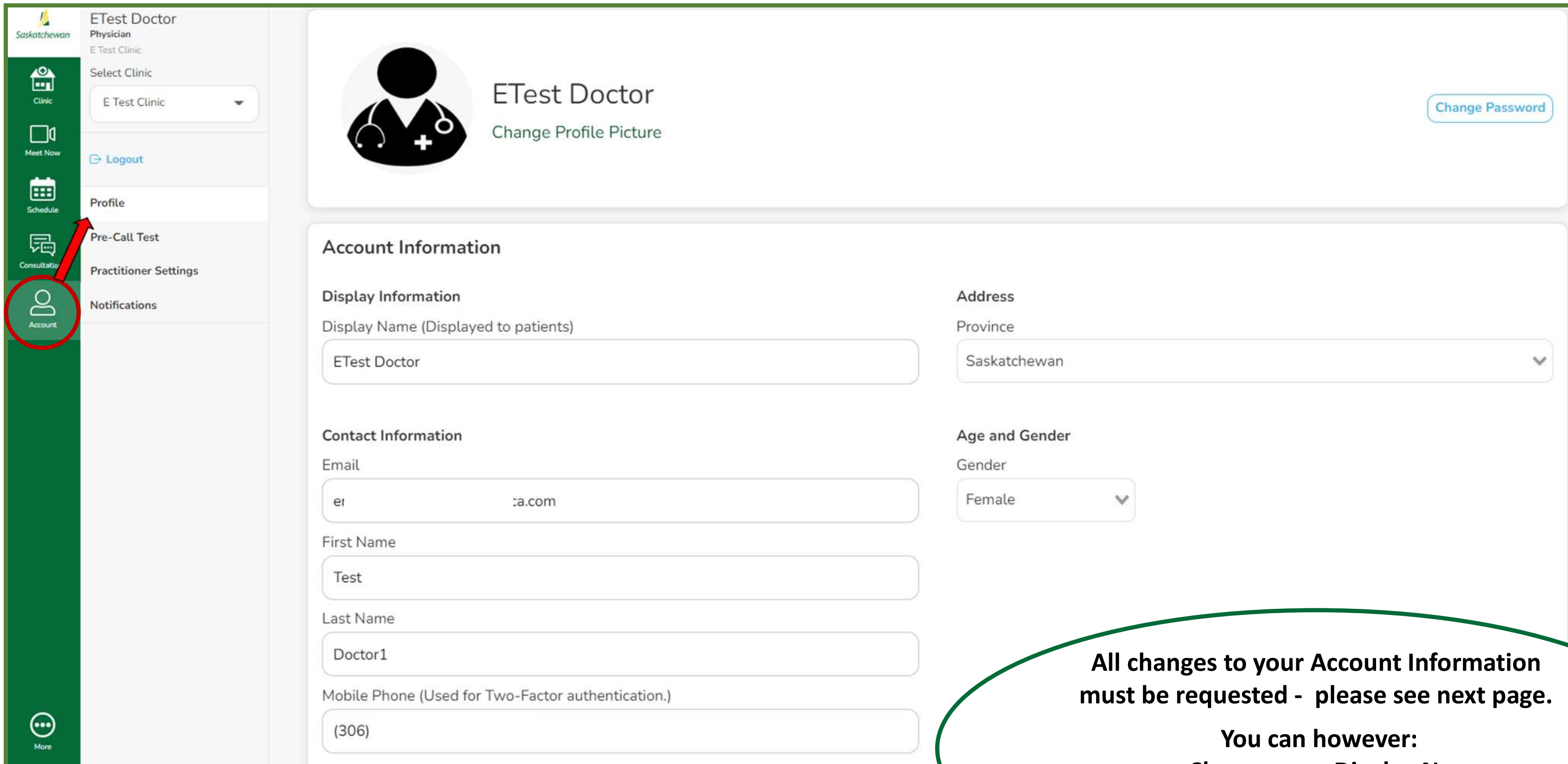
Select a Clinic



- ❑ 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 '**Account**' in the Dashboard, then click '**Profile**'

All changes to your Account Information must be requested - please see next page.

You can however:

- **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%20Account%20Request%20Form%20%281%29.pdf

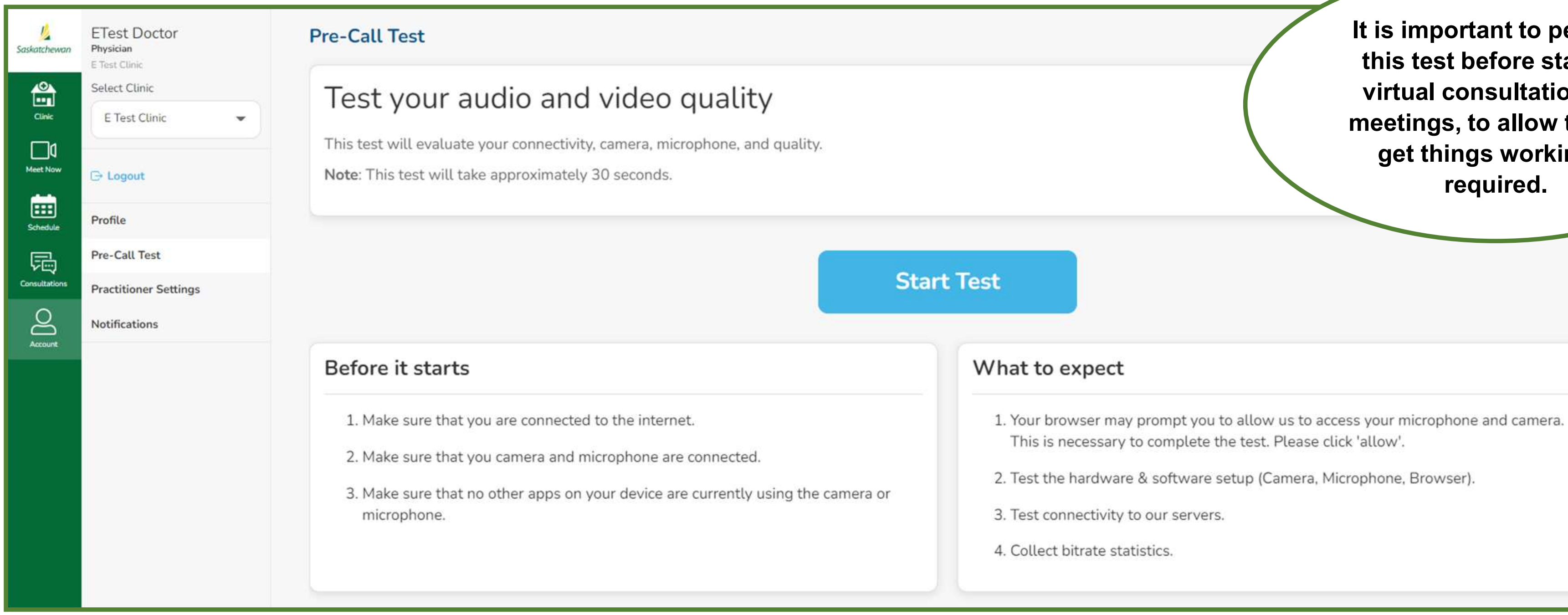
- ❑ SHA users can find more information about updating their profiles on the SHA intranet page located here:

https://www.saskhealthauthority.ca/intranet/departments-programs/infrastructure-information-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

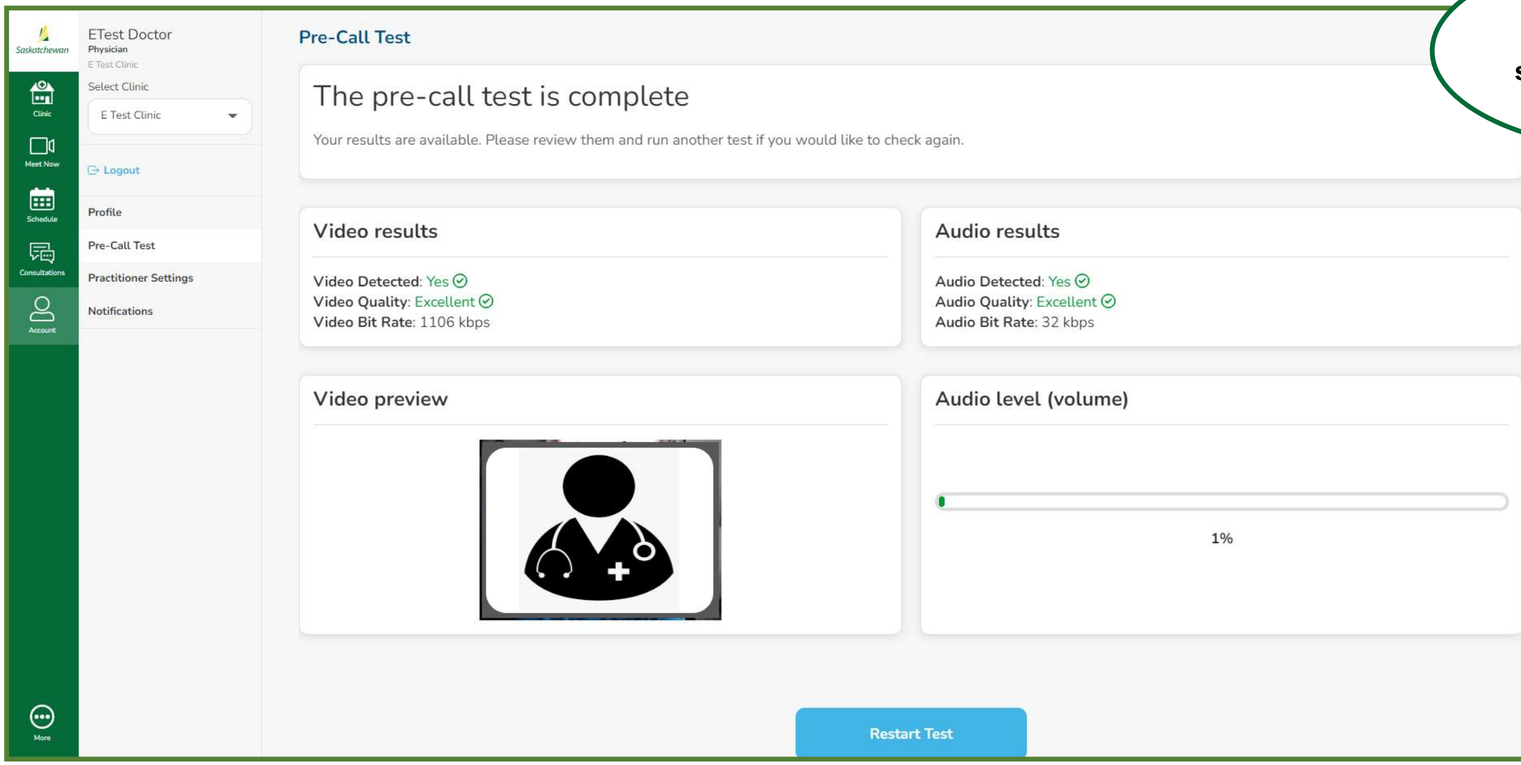


It is important to perform this test before starting virtual consultations or meetings, to allow time to get things working if required.

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



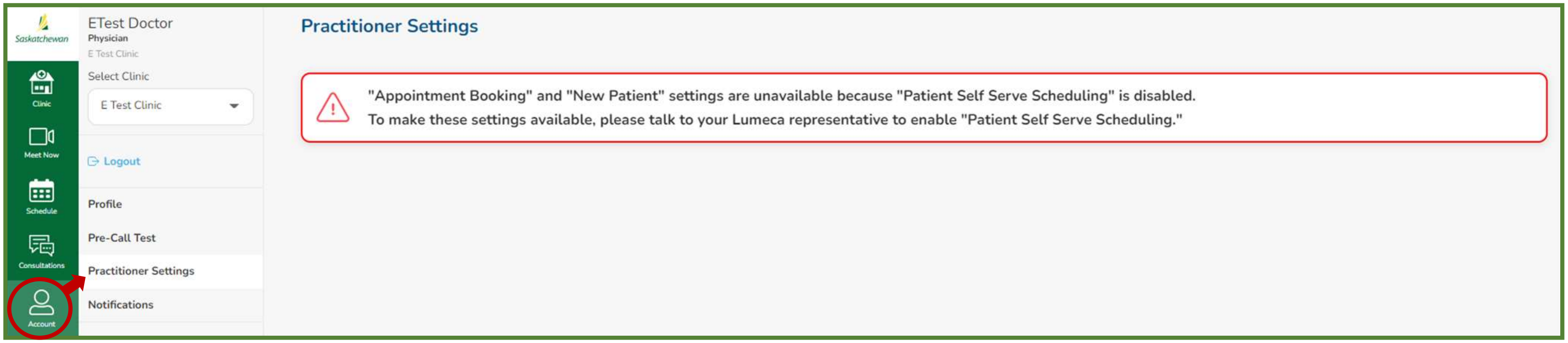
The test will take approximately 30 seconds, then will time out automatically

- ❑ **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



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.

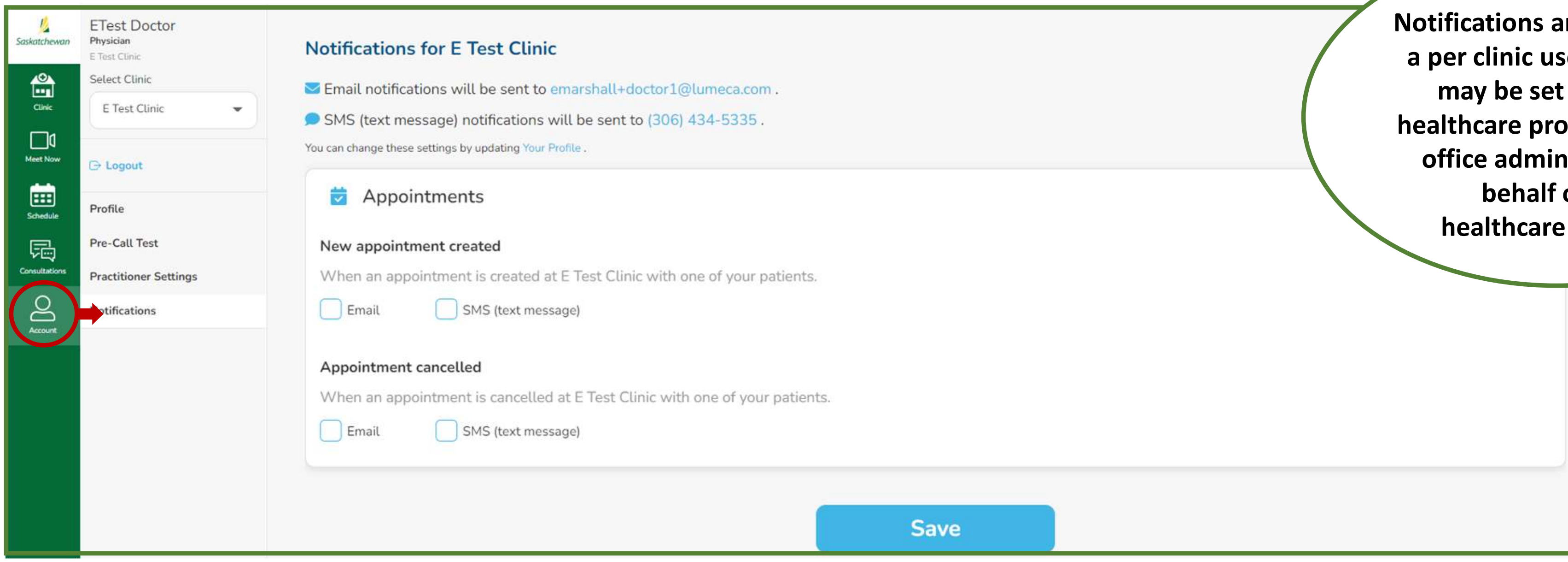
If enabled, however, the settings would be:

- **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)



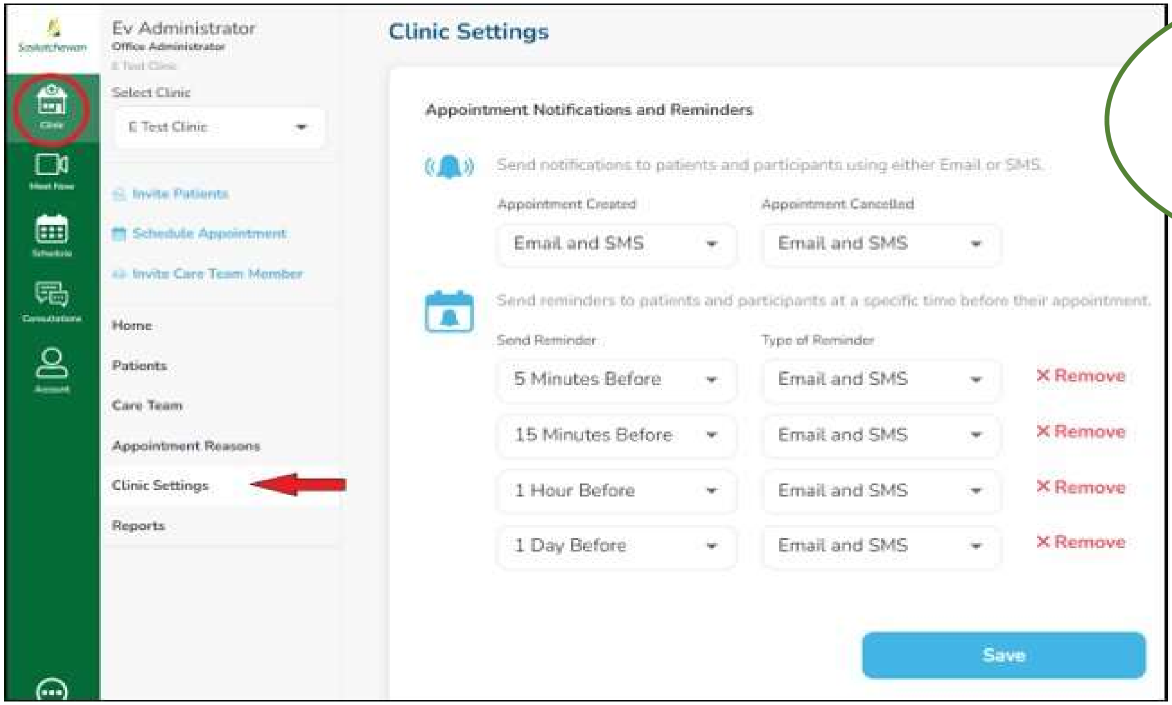
Notifications are applied on a per clinic user basis and may be set by either healthcare providers or the office administrator on behalf of the healthcare provider

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)



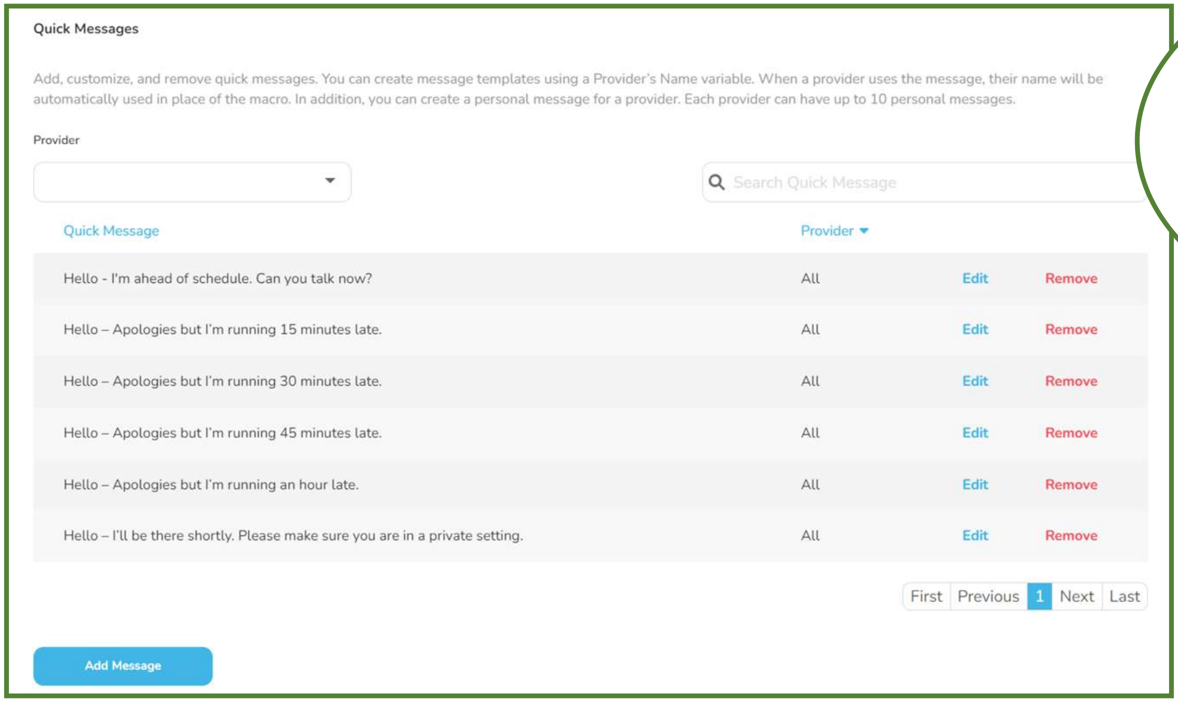
These settings are set for the entire clinic; not for individual users. Any changes will impact all clinic users.

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)



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**

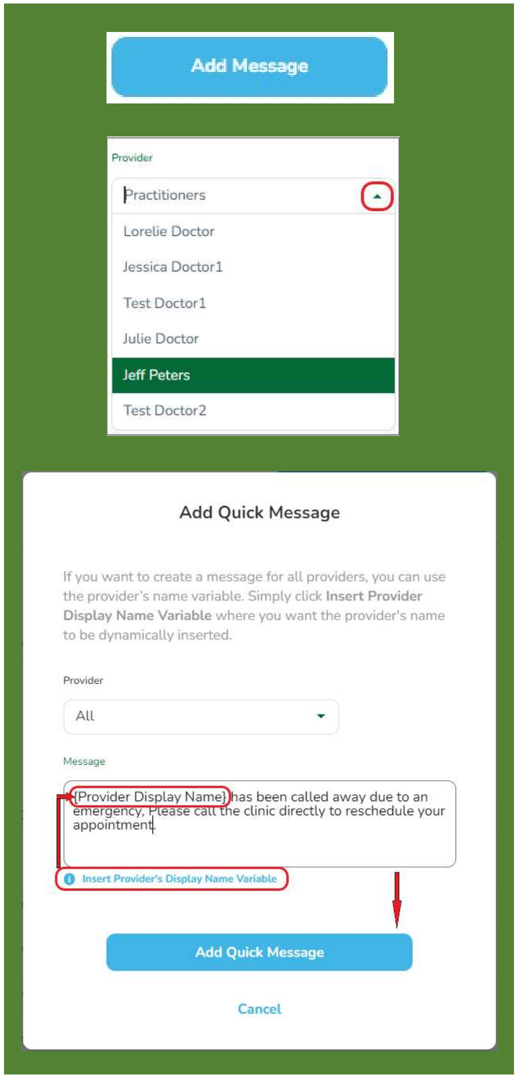
Quick Messages are viewed, added or removed here, however are used in the 'Active & Pending' screen.

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

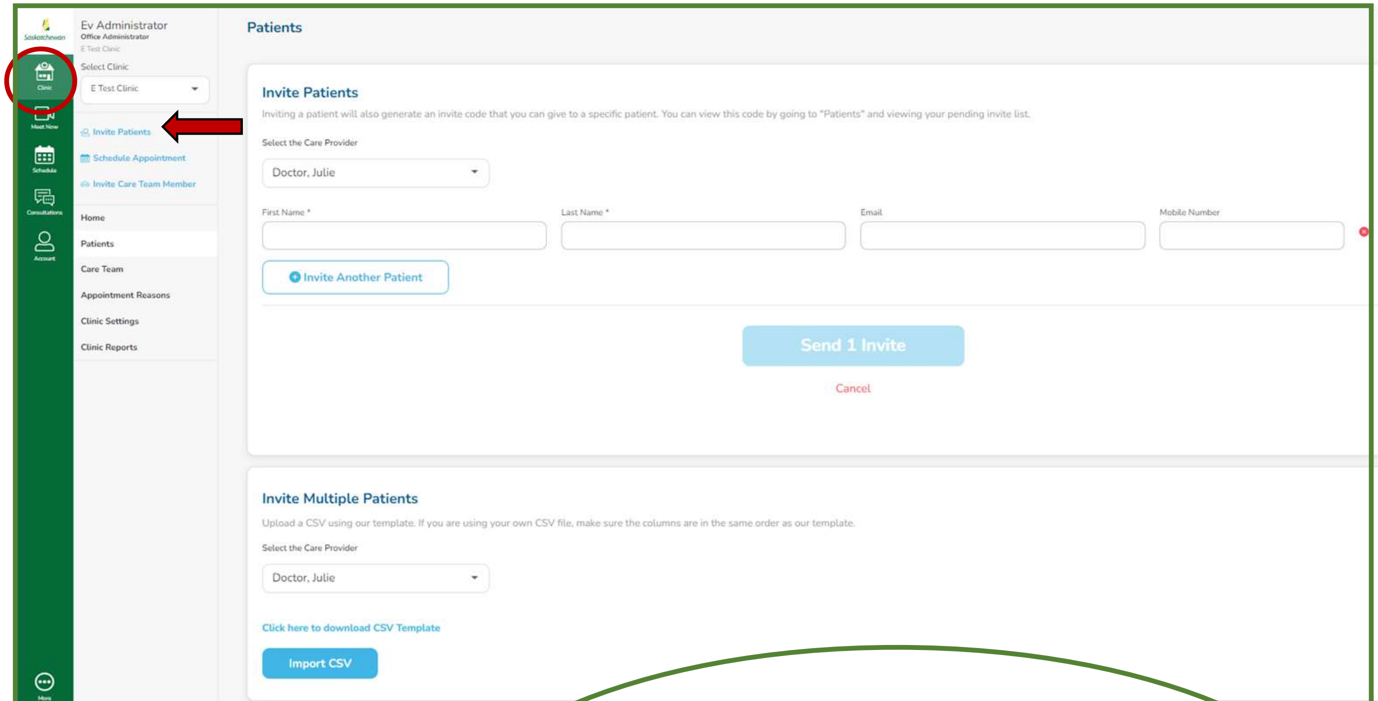
Inviting Patients

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**'.



Office Admins can invite patients on behalf of healthcare providers by following the same steps outlined on the next pages.

They must select the physician from a drop-down menu that will be visible to them.

Healthcare providers will not see 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.

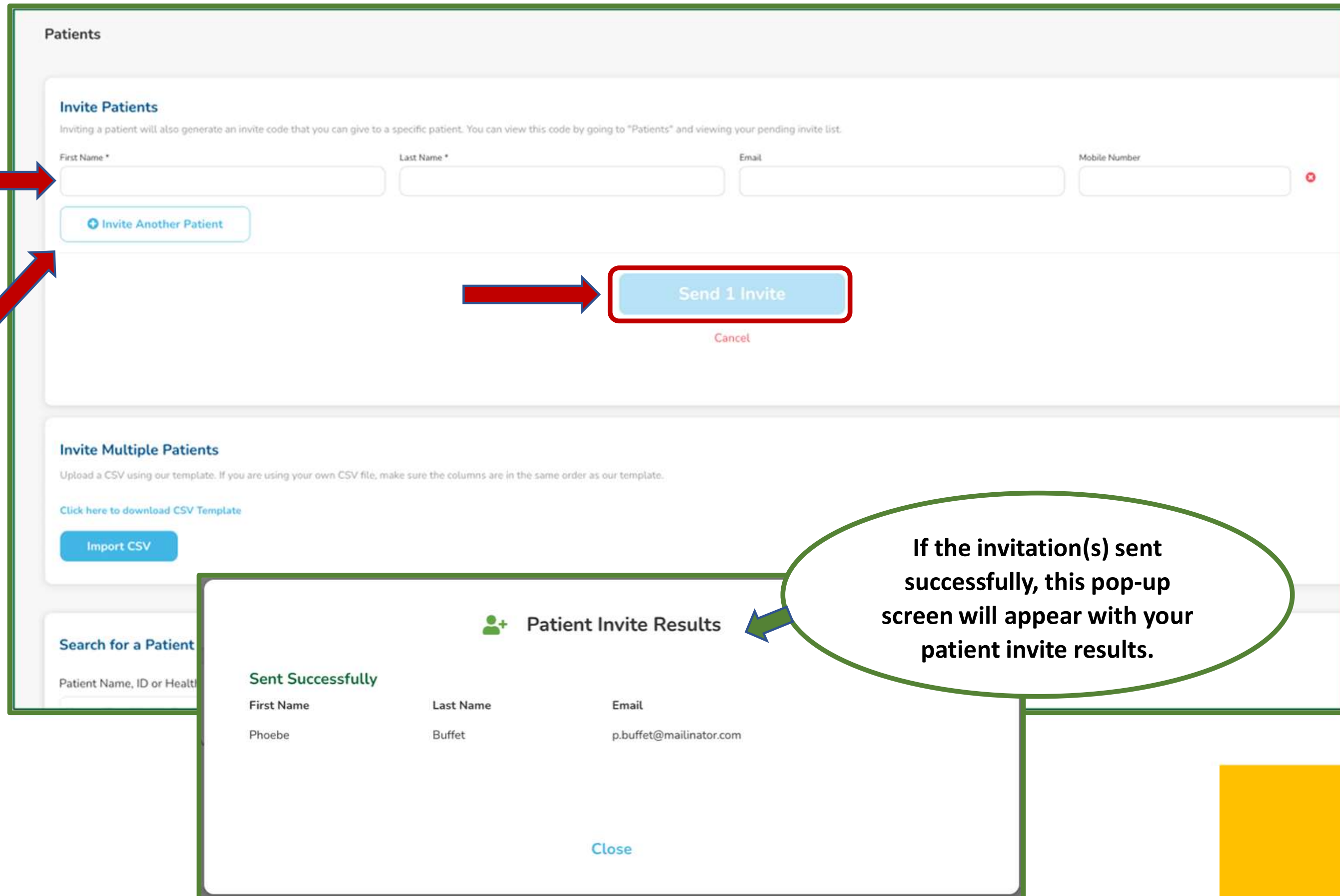
For example:

- **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**'



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

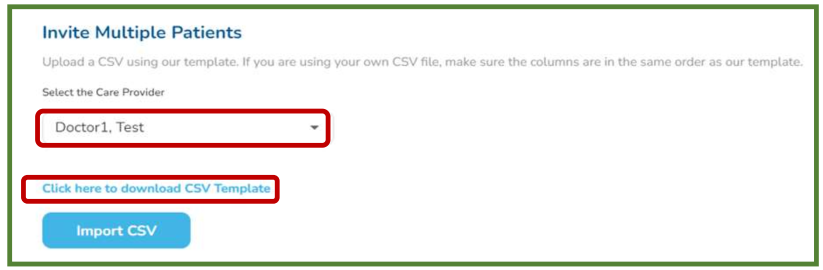
Invite Patients

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

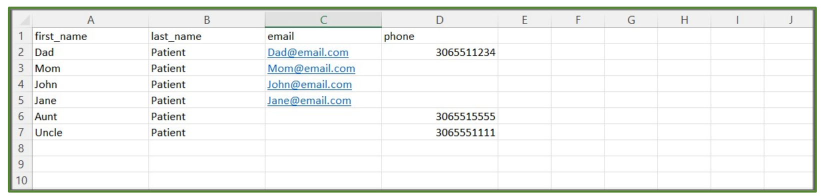
Method 3: Import a CSV File with a Large Group of Patients

- 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**'.

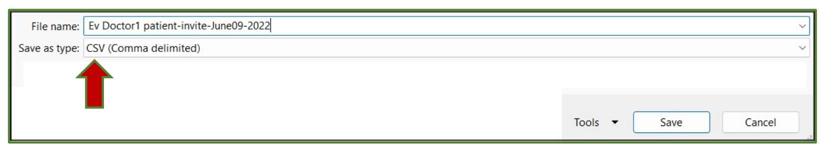


- ❑ **Leave Row 1 (headings) intact**, and add patient information to the CSV file. If information is unknown, leave the field blank. The phone number should contain no dashes or parenthesis.



	A	B	C	D
1	first_name	last_name	email	phone
2	Dad	Patient	Dad@email.com	3065511234
3	Mom	Patient	Mom@email.com	
4	John	Patient	John@email.com	
5	Jane	Patient	Jane@email.com	
6	Aunt	Patient		3065515555
7	Uncle	Patient		3065551111

- ❑ 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**'.



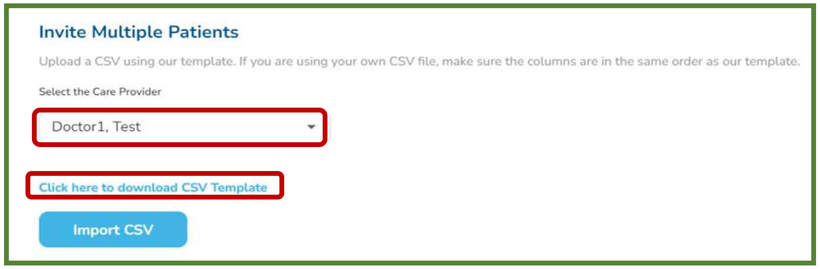
- ❑ Click '**Import CSV'**, locate the CSV file you saved and select it. The invitations to your patients will be sent and a pop-up screen will appear stating that your CSV upload sent successfully.

Note: Previously invited patients will not receive an additional invitation

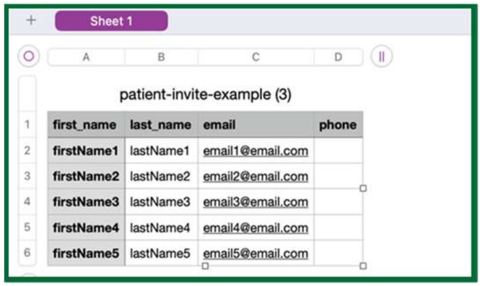
Method 3: Import a CSV File with a Large Group of Patients

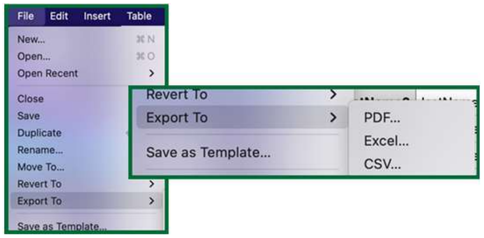
- For MAC Users Without Excel Installed -

- ❑ 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**'.

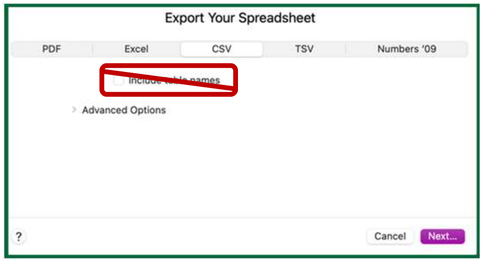


- ❑ Go to your '**Downloads**' folder and select the CSV template and '**Save**'. **Leave Row 1 (headings) intact**, and add patient information to the CSV file. If information is unknown, leave the field blank. The phone number should contain no dashes or parenthesis.





- ❑ Click '**Export To**', choose '**CSV'**, then '**Next**'.
  DO NOT click 'Include Table Names'.



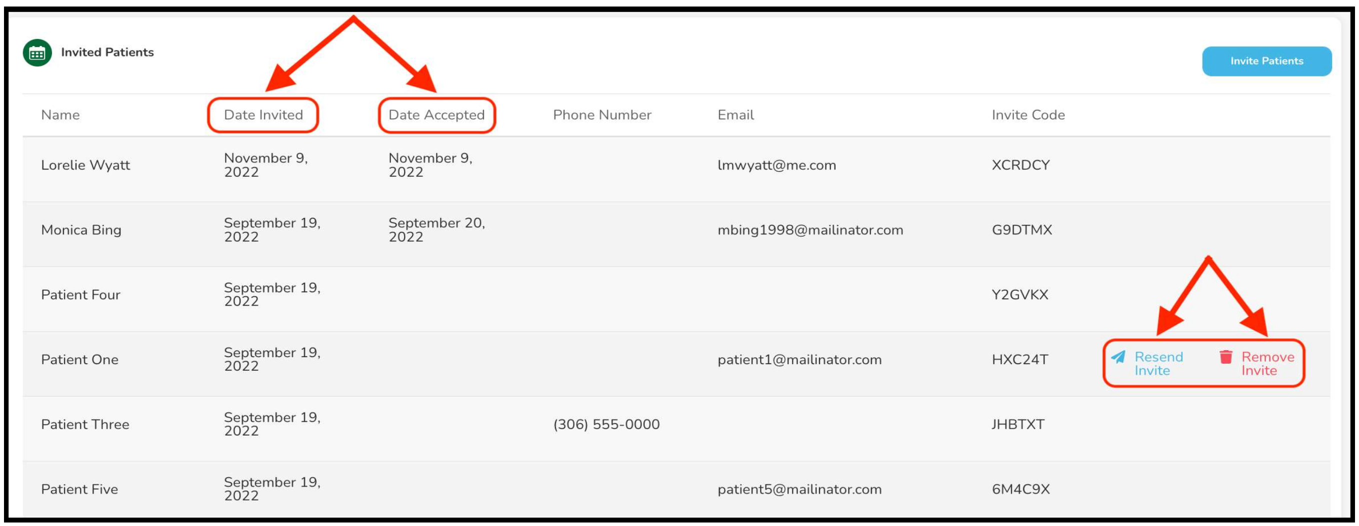
- ❑ Give it a file name and choose the location to save it.
- ❑ Click '**Import CSV'**, locate the CSV file you saved and select it. The invitations to your patients will be sent and a pop-up screen will appear stating that your CSV upload sent successfully.

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.

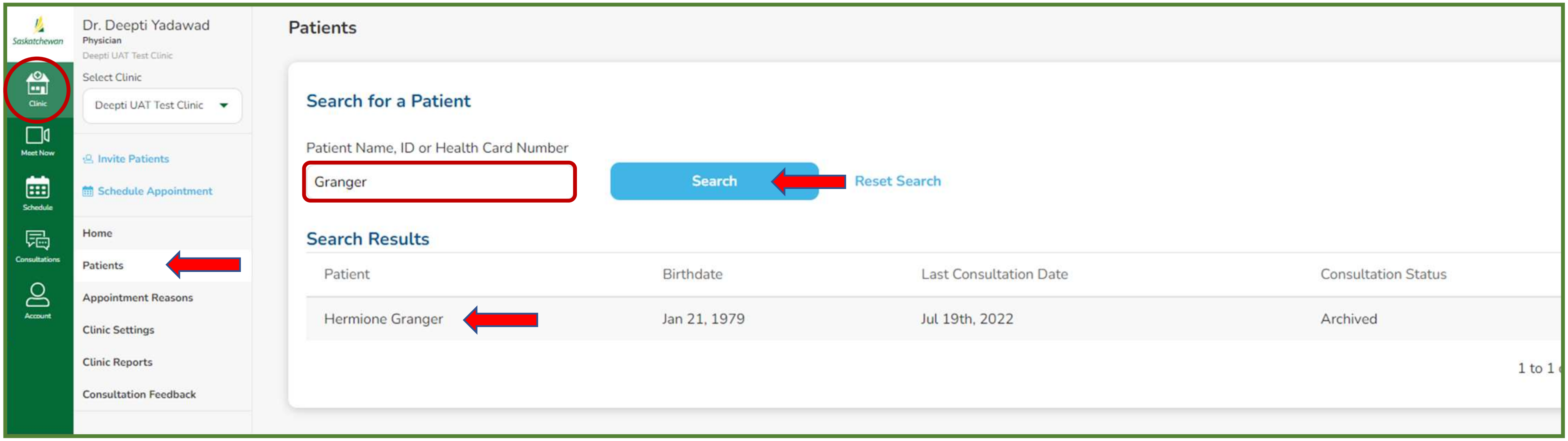
- ❑ Patient's name, phone number and email (if entered at time of invite)
- ❑ The date that the invitation was sent, as well as the date the invitation was accepted by them. Accepted invites do not immediately disappear from this list but remain for a period of time, if necessary for review.
- ❑ The '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).



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	HXC24T
Patient Three	September 19, 2022		(306) 555-0000		JHBTXT
Patient Five	September 19, 2022			patient5@mailinator.com	6M4C9X

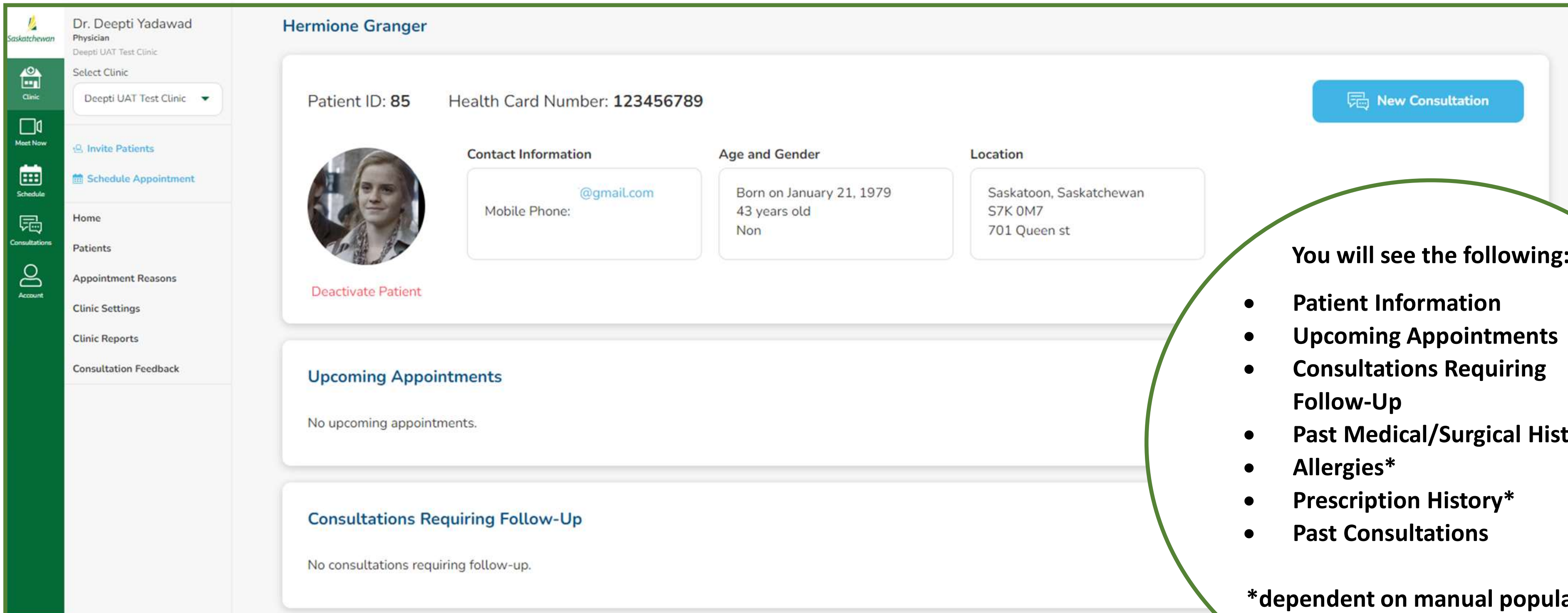
10.Searching for Patients

Patient Search



- ❑ 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



You will see the following:

- **Patient Information**
- **Upcoming Appointments**
- **Consultations Requiring Follow-Up**
- **Past Medical/Surgical History***
- **Allergies***
- **Prescription History***
- **Past Consultations**

***dependent on manual population within the application**

You may:

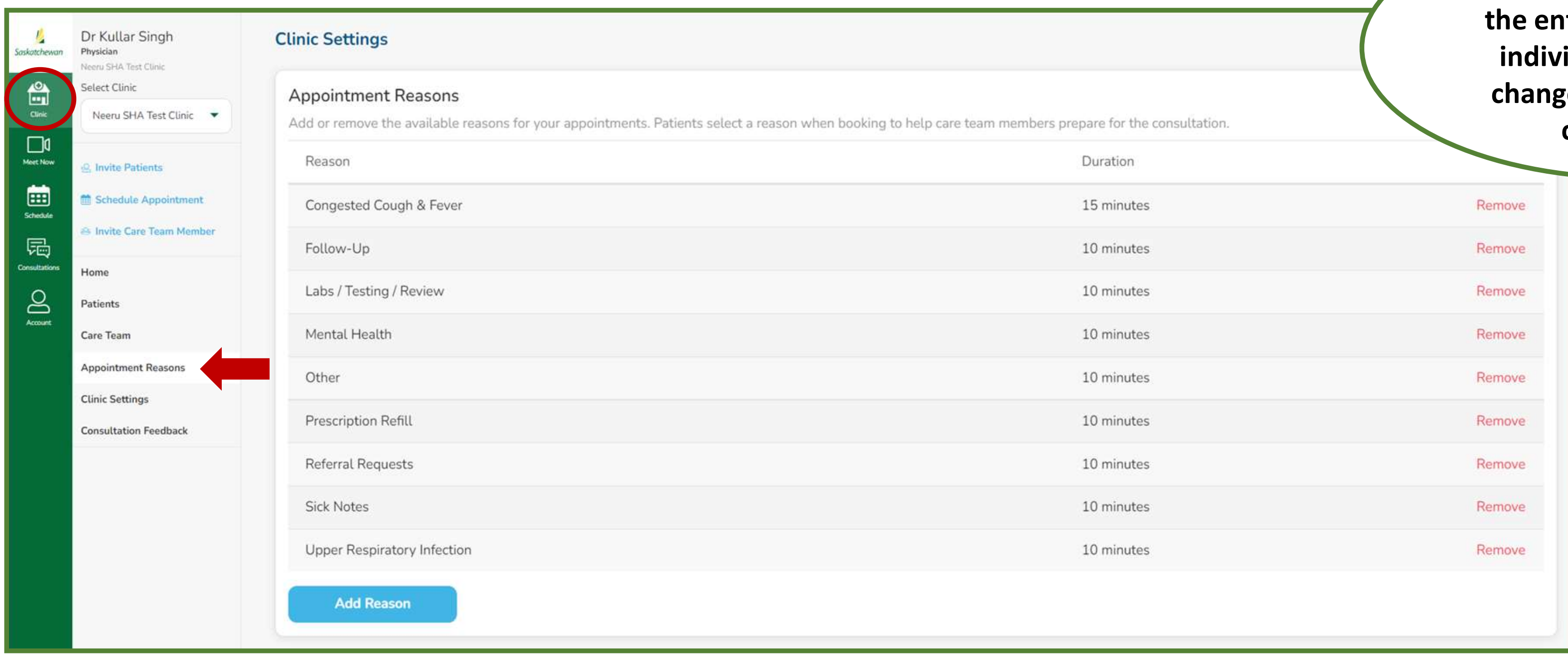
- ❑ Verify the patient is associated with your clinic. If you could not find a patient, they may not have been invited or have not accepted the clinic invite yet.
- ❑ View additional information about the patient
- ❑ Schedule a '**New Consultation**'
- ❑ '**Deactivate Patient**' (patients may also be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

These settings are set for the entire clinic; not for individual users. Any changes will impact all clinic users.



- ❑ Select '**Clinic**' in the dashboard, then click '**Appointment Reasons**'.
- ❑ Select '**Add Reason**'.
- ❑ Type in the new appointment reason, a duration that is suitable, then click '**Add Reason**'.
- ❑ '**Remove**' will remove an appointment reason that is not applicable to your clinic.
- ❑ Editing is NOT an option.

12. Scheduling: Viewing & Updating Calendars

Viewing Schedules

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

MONTHLY View:

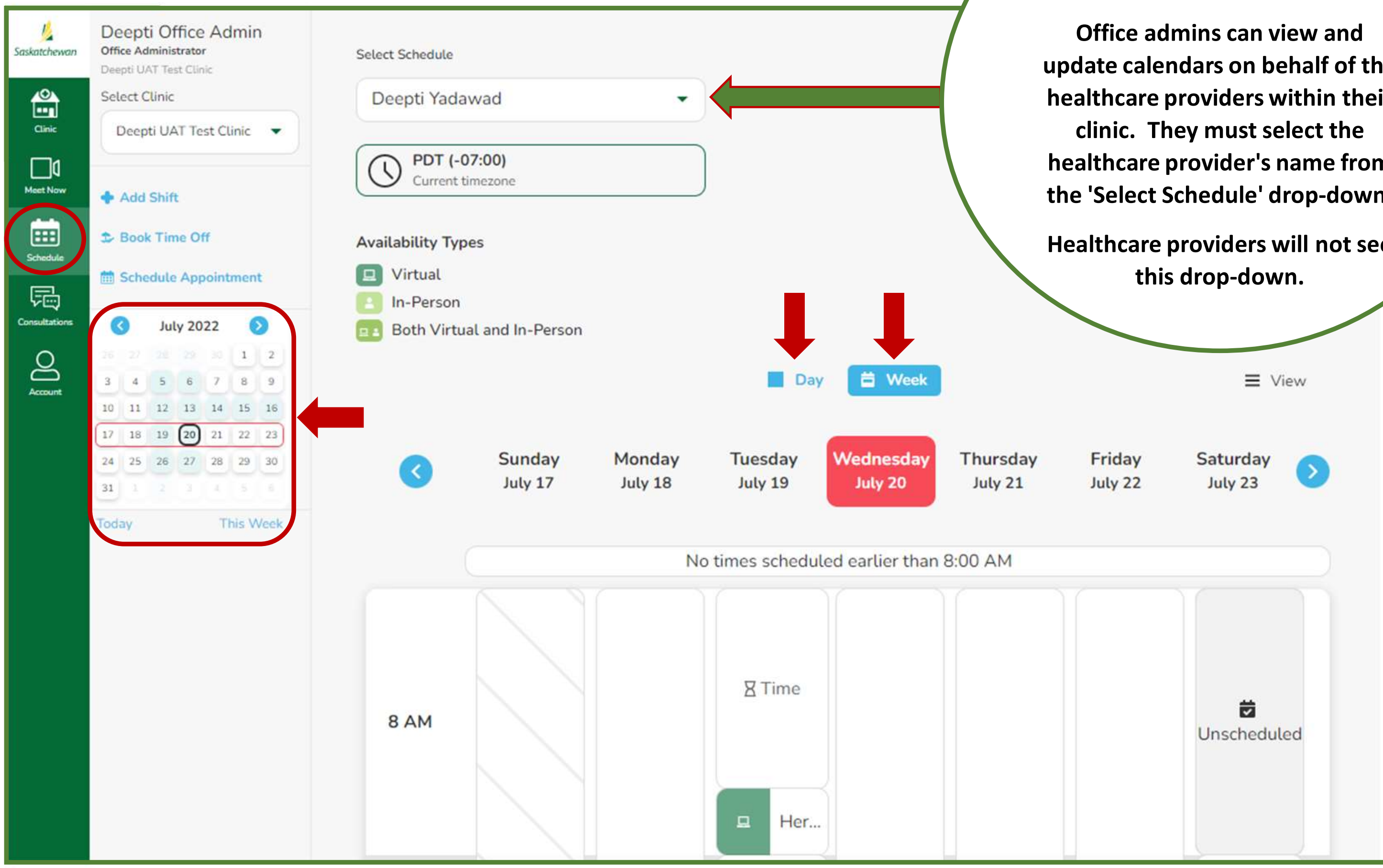
- click on an individual day
- see how booked any day is, by the shade of green, by hovering over a date the number of appointments scheduled as well as the percentage of the day that is booked is displayed

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



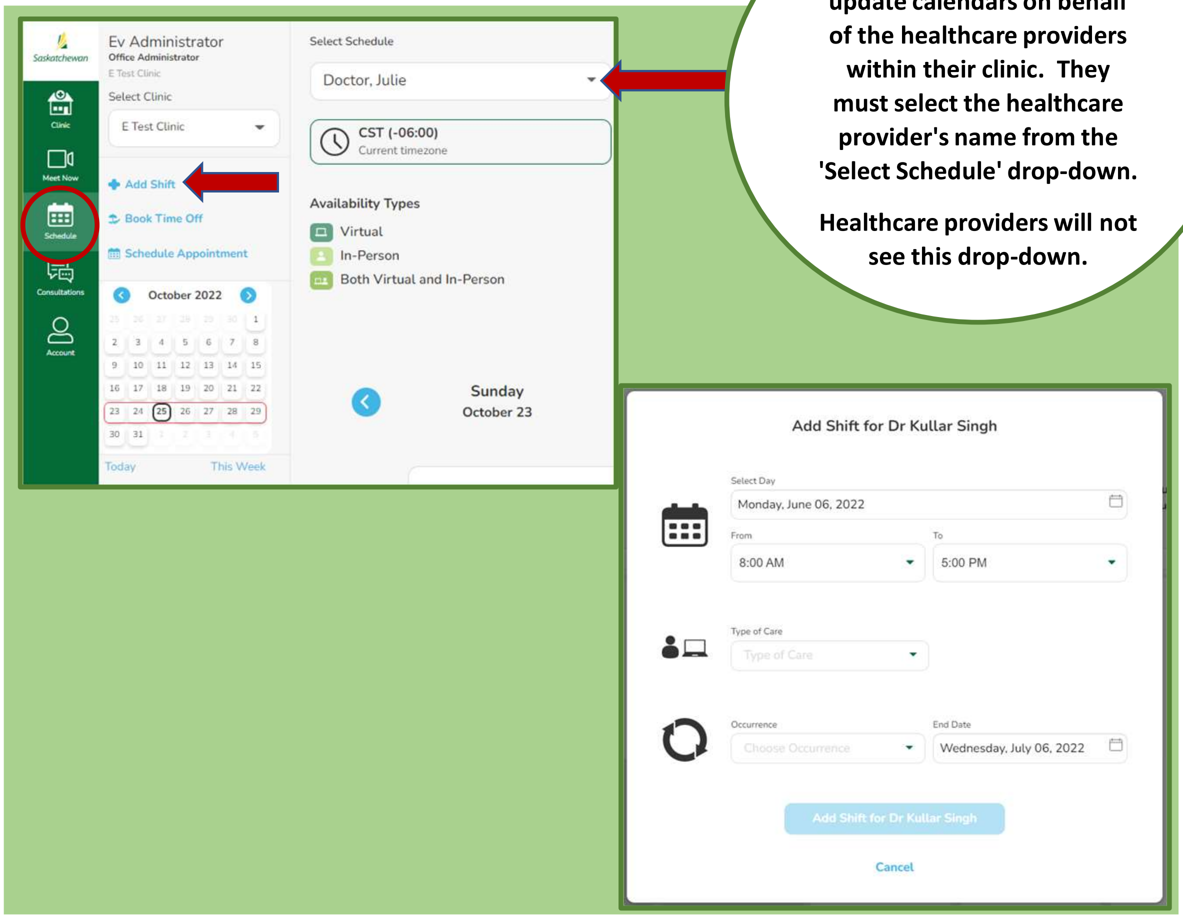
Your clinic's regular EMR system should be used.

Office admins can view and update calendars on behalf of the healthcare providers within their clinic. They must select the healthcare provider's name from the 'Select Schedule' drop-down.

Healthcare providers will not see this drop-down.

Add a Shift

- ❑ 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**'.

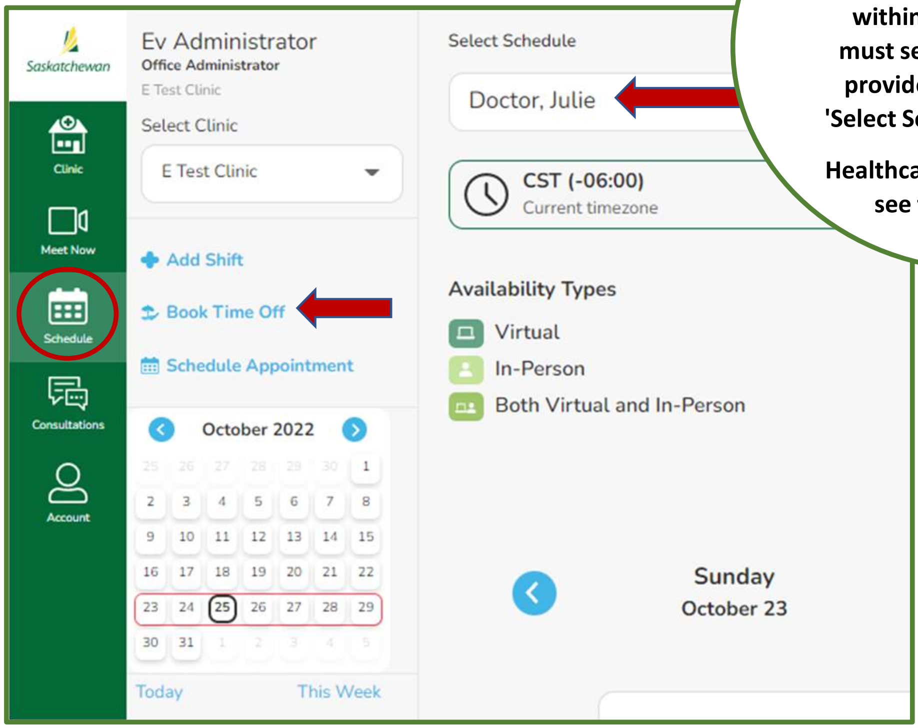


Office admins can view and update calendars on behalf of the healthcare providers within their clinic. They must select the healthcare provider's name from the 'Select Schedule' drop-down.

Healthcare providers will not see this drop-down.

Book Time Off

- ❑ Select '**Schedule**' in the dashboard.
- ❑ Click '**Book Time Off**'.
- ❑ Select the **day** you wish to add the time off.
- ❑ Select the from/to **time**.
- ❑ Choose the '**Occurrence**'.
- ❑ Choose an **end date** (if recurring occurrence).
- ❑ Click '**Book Time Off**'.



Office admins can view and update calendars on behalf of the healthcare providers within their clinic. They must select the healthcare provider's name from the 'Select Schedule' drop-down.

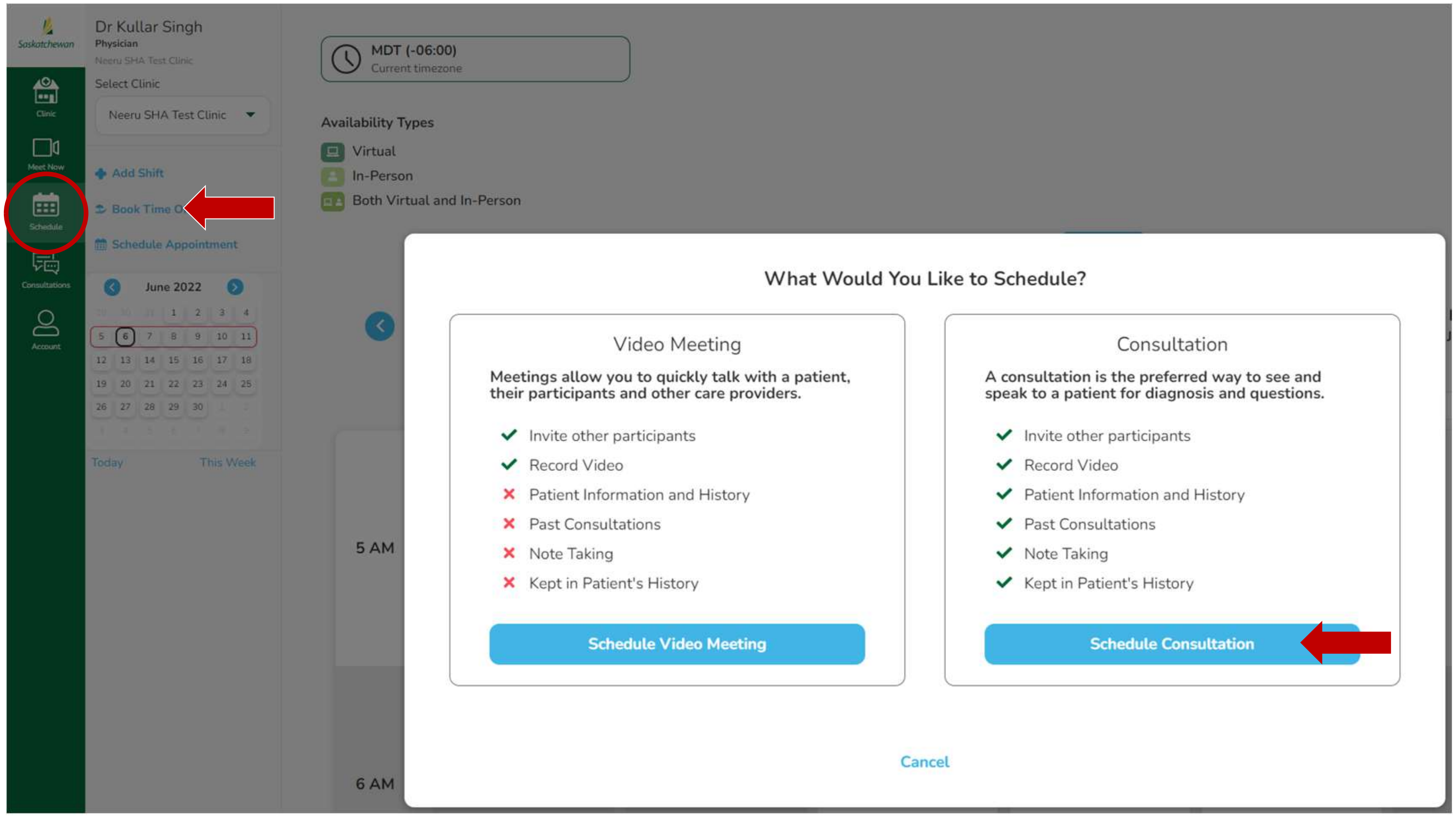
Healthcare providers will not see this drop-down.

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

13. Scheduling Consultations

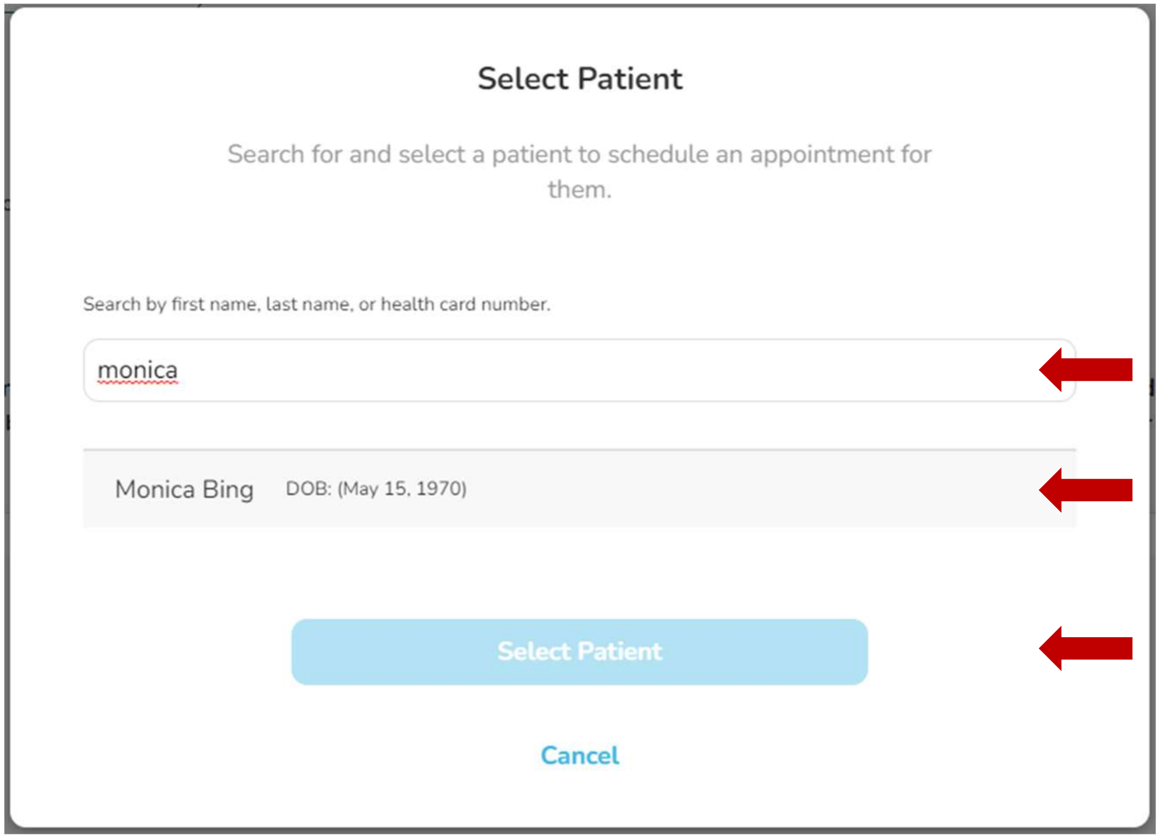
Schedule a Consultation (Appointment) Step 1

- ❑ Select '**Schedule**', in the dashboard.
- ❑ Click '**Schedule Appointment**'.
- ❑ Click '**Schedule Consultation**'.

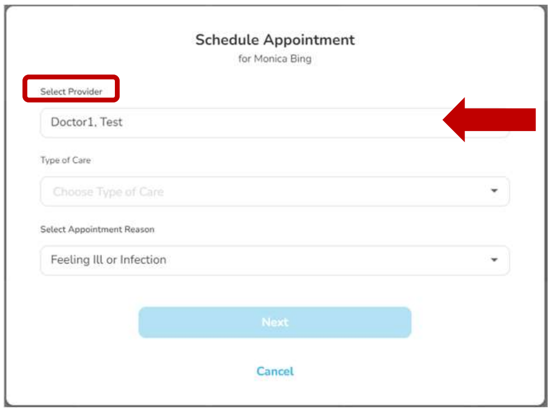


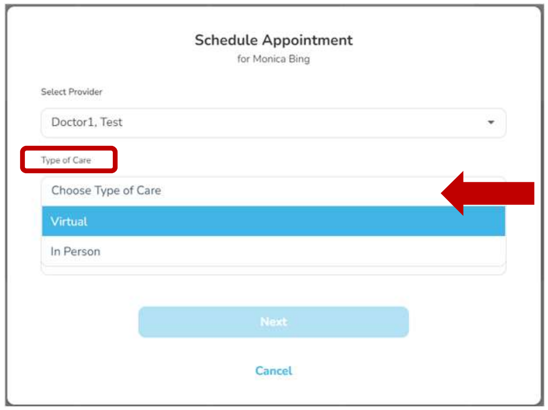
Schedule a Consultation (Appointment) Step 2

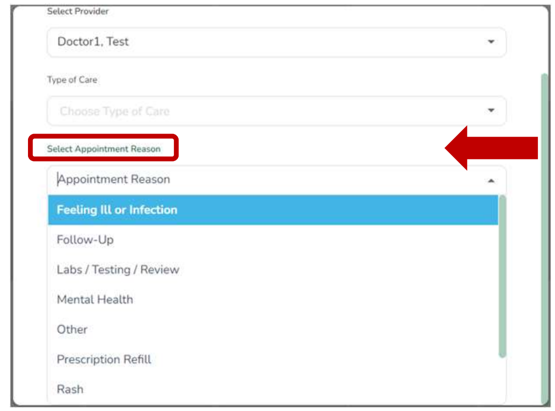
- ❑ Type in the patient's Health Card Number or First / Last Name (a list will start to appear)
- ❑ Choose the patient, then click ‘**Select Patient**’



Schedule a Consultation (Appointment) Step 3





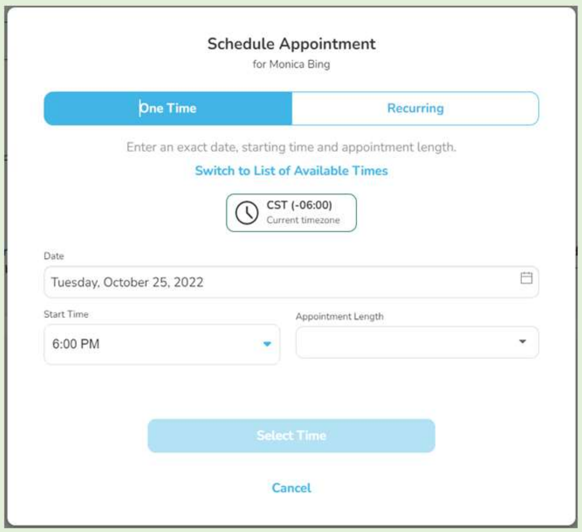


- ❑ Office admins can schedule consultations on behalf of the healthcare providers within their clinic. They must select the healthcare provider's name from the '**Select Provider**' drop-down. Healthcare providers will not see this drop-down.
- ❑ Select the '**Type of Care**' being scheduled (Virtual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

Schedule a Consultation (Appointment) Step 4

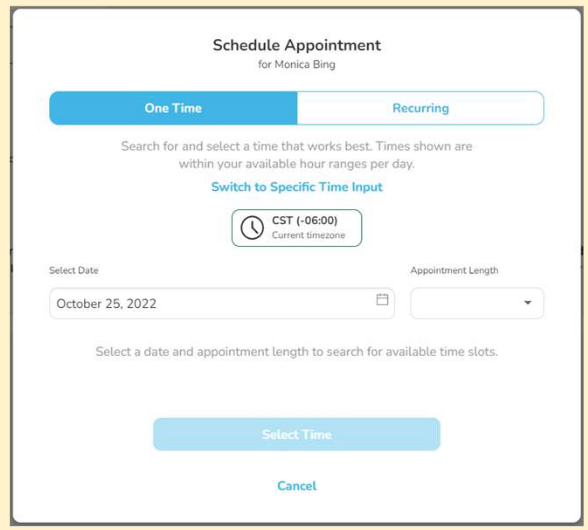
When the Healthcare Provider's schedule IS NOT entered in the SK Virtual Visit calendar....

- ❑ 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**'



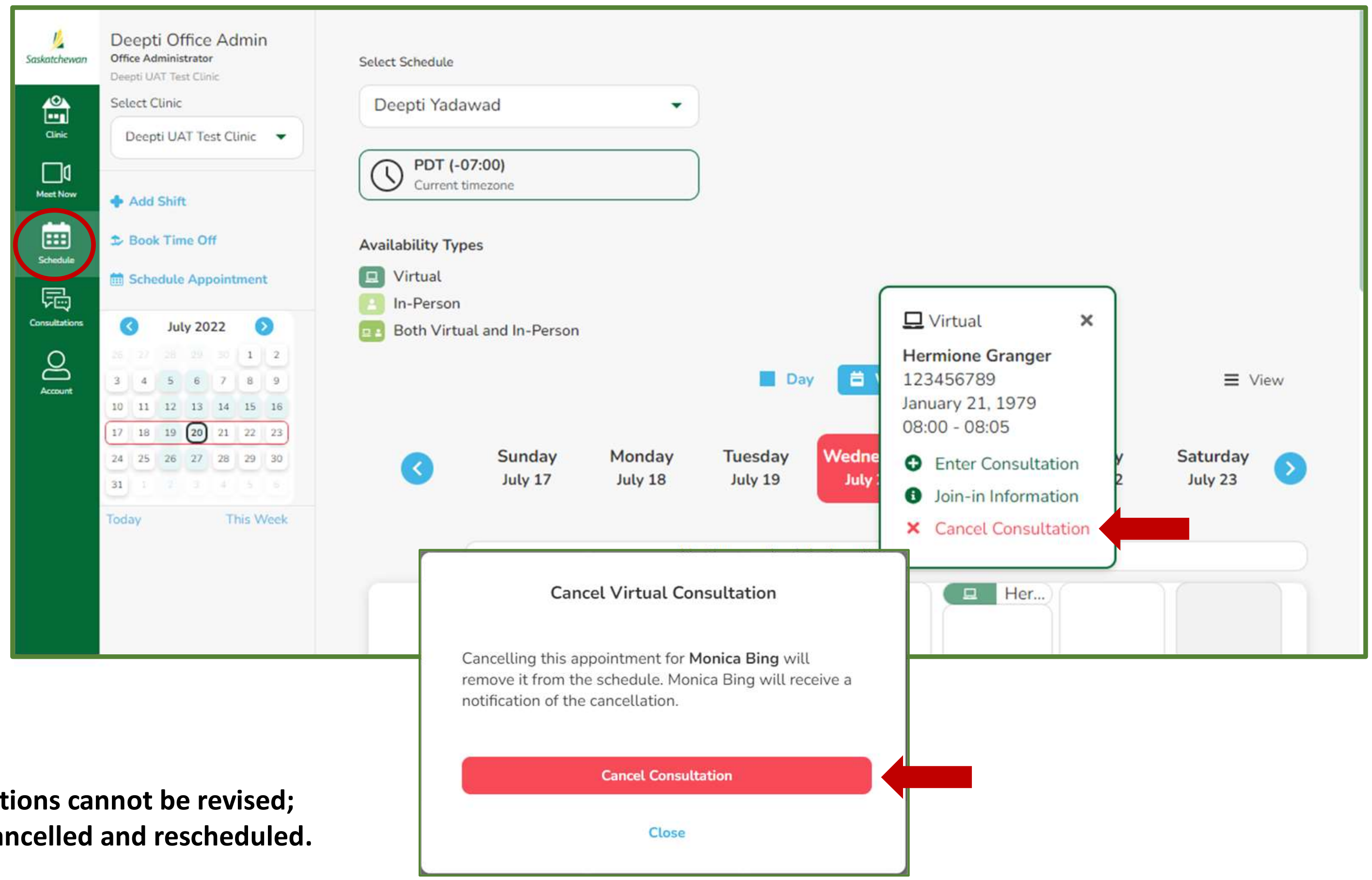
When the Healthcare Provider's schedule IS entered in the SK Virtual Visit calendar...

- ❑ 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

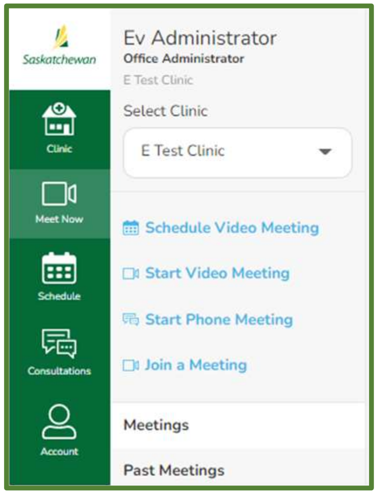
- ❑ Select '**Schedule**' in the dashboard
- ❑ Find and click on the consultation you want to cancel
- ❑ Select '**x Cancel Consultation**'
- ❑ A pop-up will appear asking you confirm cancelling the consultation. Select '**Cancel Consultation**' again.



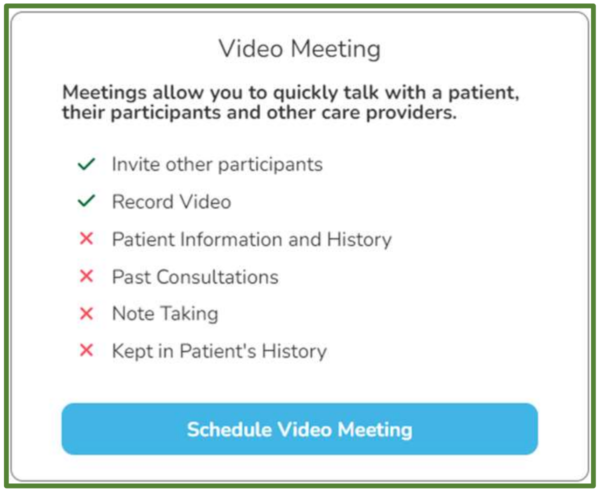
Note: Consultations cannot be revised; they must be cancelled and rescheduled.

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

Meet Now – 3 Options for Conducting Quick Meetings

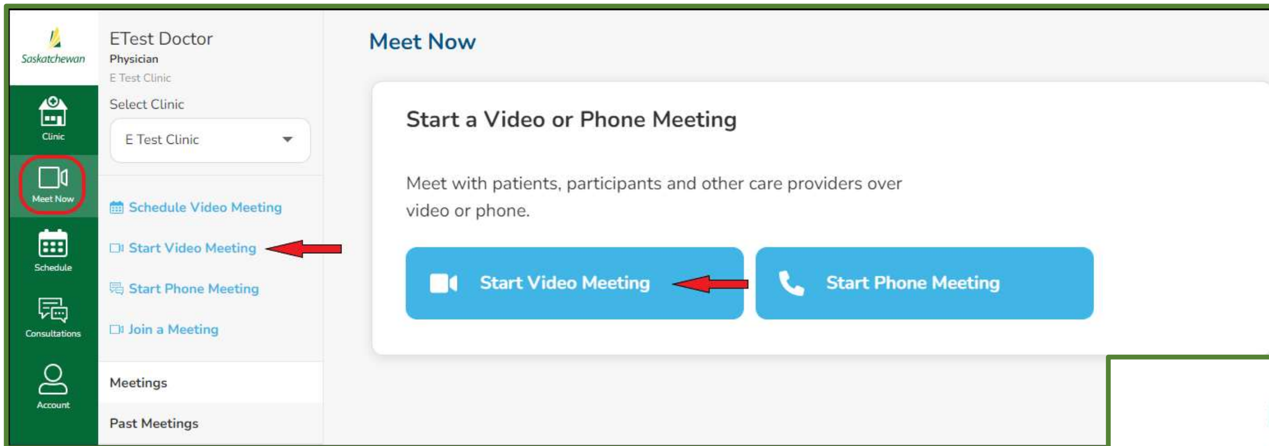


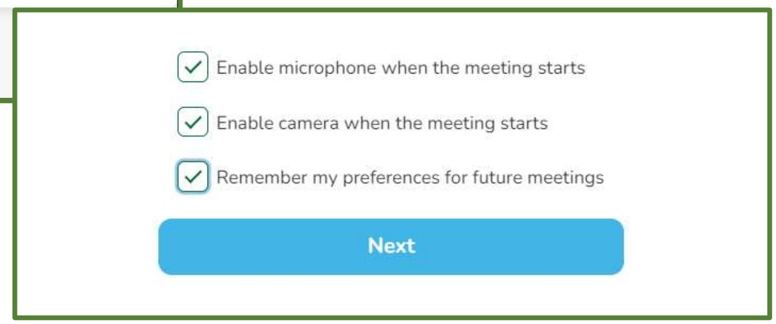
1. Start an Immediate Video Meeting
2. Start an Immediate Phone Meeting
3. Schedule a Video Meeting



- ❑ 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.
- ❑ Quick 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.

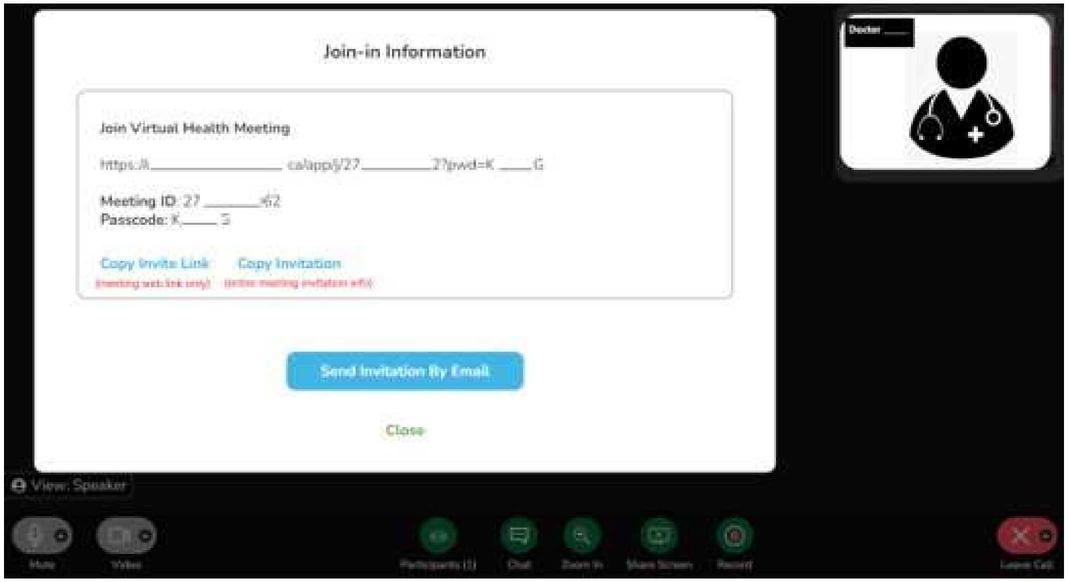
Start an Immediate Video Meeting – Step 1

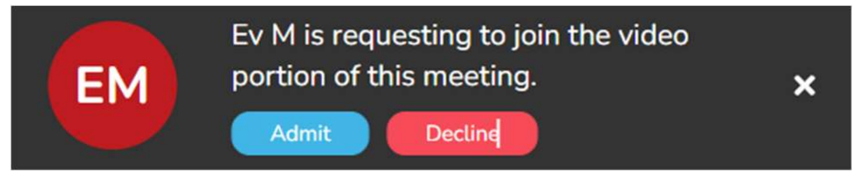


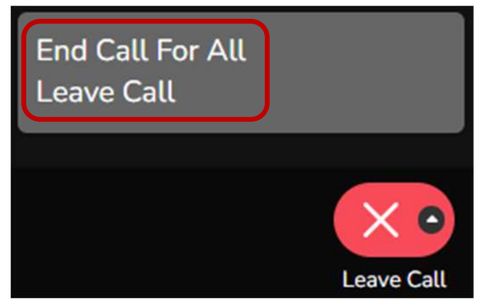


- ❑ Select ‘**Meet Now**’ in the dashboard
- ❑ Click '**Start Video Meeting**'
- ❑ Enable your microphone, camera and select whether you wish to save these preferences for future meetings
- ❑ You will be taken directly into the video meeting to invite and wait for participants to arrive.

Invite Guests to a Video Meeting – Step 2

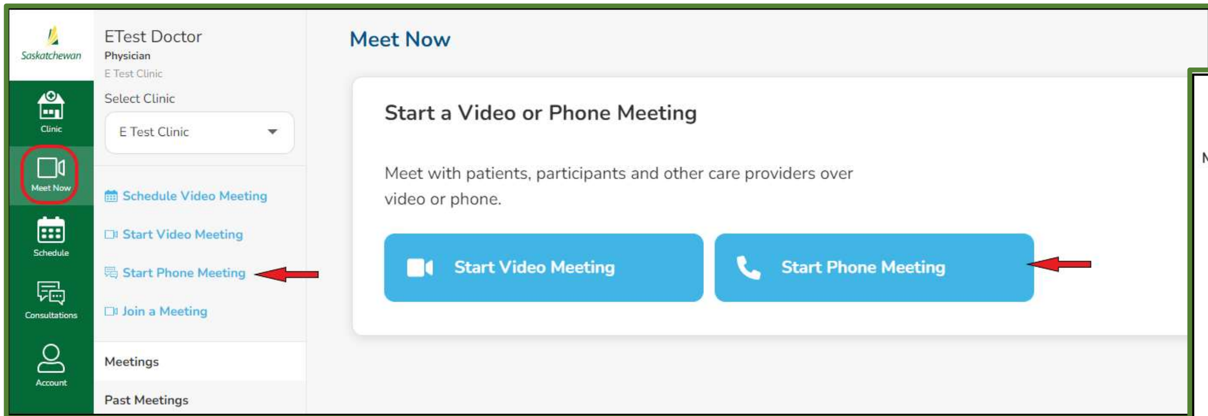


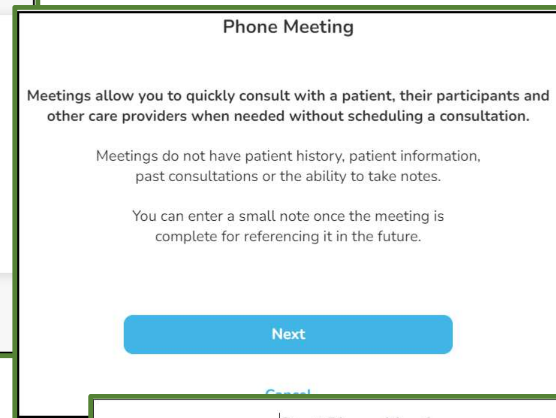


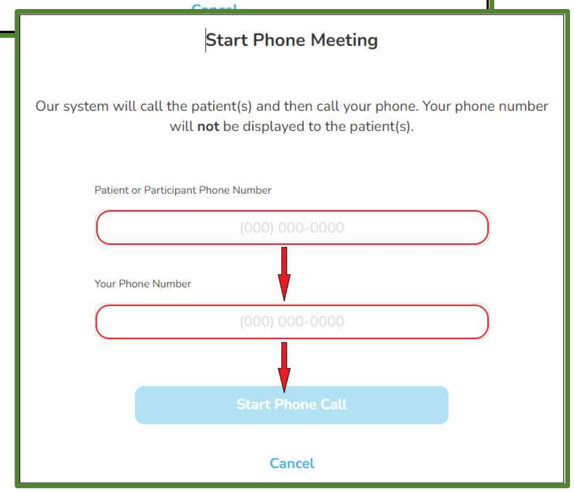


- The '**Join-In Information**' screen will appear. Click either '**Copy Invite Link**' (meeting web link only) or '**Copy Invitation**' (entire meeting invitation info) and email to the participant(s) you wish to invite to this meeting. Up to 50 may be invited and they do not require an account with 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





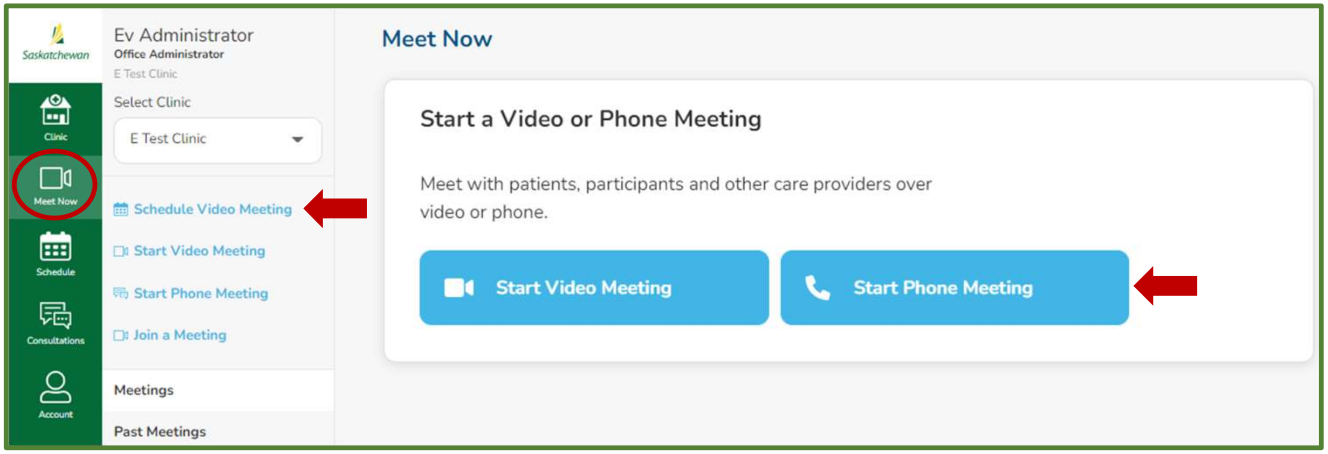


- ❑ Select '**Meet Now**' in the dashboard, then click '**Start Phone Meeting**'
- ❑ Click '**Next**'
- ❑ Enter the patient or participant's phone number and your number (Note: your number is never displayed and remains completely anonymous)
- ❑ Click **'Start Phone Call'** (The guest's phone will ring first, once they are on the line, then the automatic calling system will call the meeting host's number back)

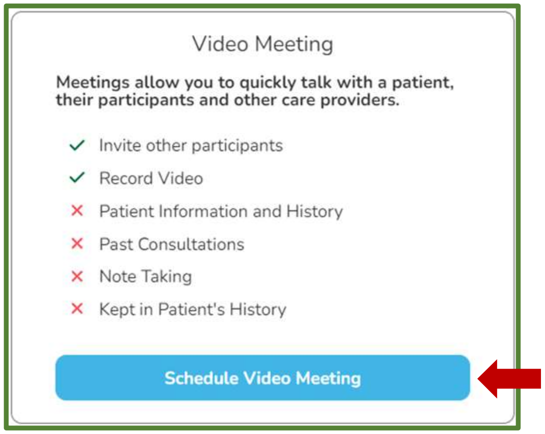
Phone Meetings only happen between two people, the meeting host and one other person

Schedule a Video Meeting – Step 1

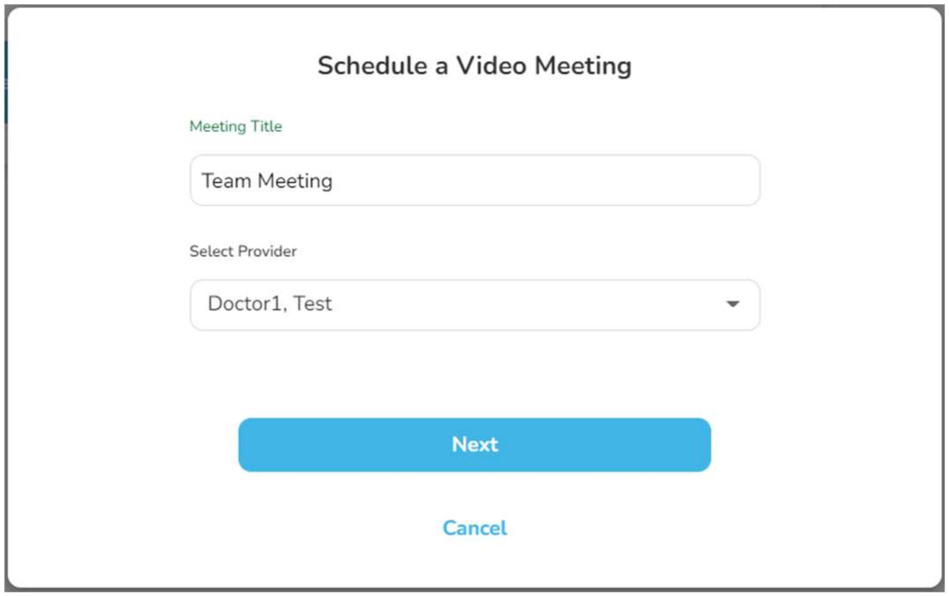
- ❑ Select '**Meet Now**' in the dashboard
- ❑ Click '**Schedule Video Meeting**'



- ❑ Click '**Schedule Video Meeting**'



Schedule a Video Meeting – Step 2



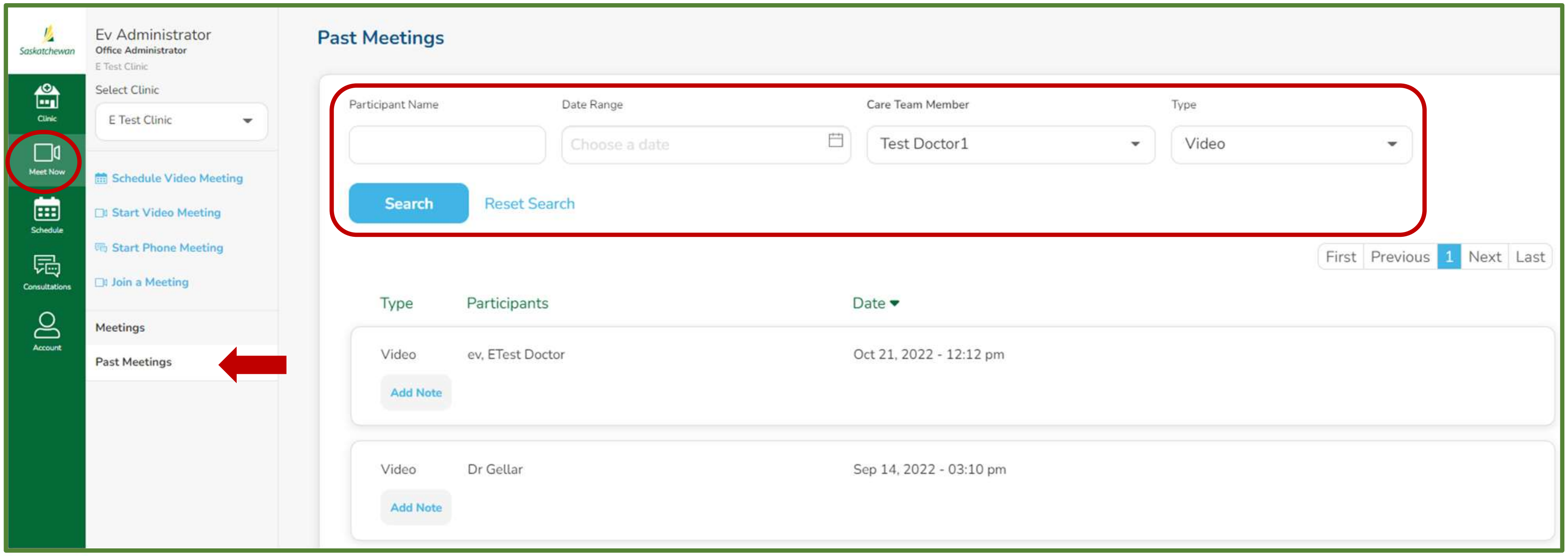
Participants may be invited at time of scheduling the meeting (while taking these steps), or just before the meeting, from the Active & Pending screen

- ❑ Type in a '**Meeting Title**' for the meeting you wish to book
- ❑ 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.

  Healthcare providers will not see this drop-down.
- ❑ Click '**Next**'
- ❑ 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**'

Scheduled Meetings are accessed in the Active & Pending screen

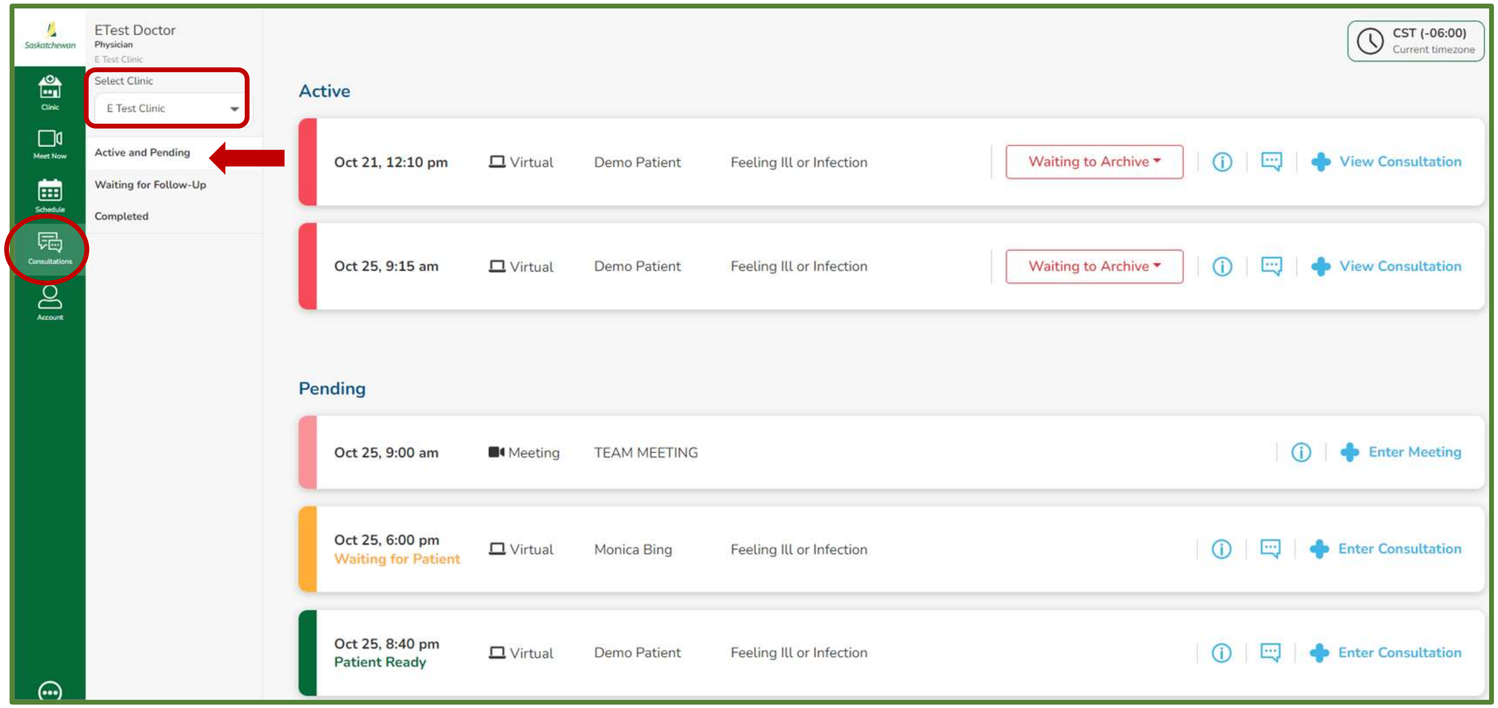
Past Meetings



- ❑ 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



- ❑ 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

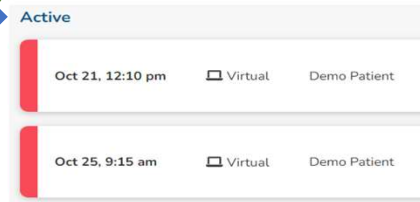
Active & Pending Screen Headings & Color Schemes

Active:
Consultations you have entered and started communicating in:

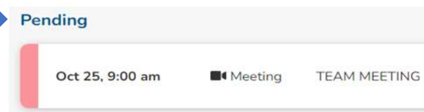
- Completed and 'Archived'
- Active & not yet 'Archived'
- Active where a patient has not arrived or responded to you

Pending:
Consultations scheduled into your day:

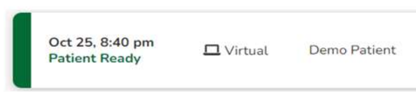
- 'Patient is Ready'
- 'Waiting for Patient'
- Scheduled Video Meeting



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 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'



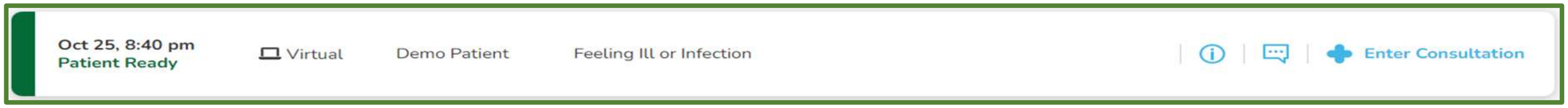
PINK – this indicates a scheduled Meeting



GREEN – this indicates 'Patient Ready'; the patient is marked as ready and is available for their appointment.

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 an appointment booked for that specific day.

Active & Pending Screen Features



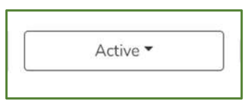
- The 'Active & Pending' screen will show patients that are scheduled for today and will be indicated in GOLD under the 'Pending' section.
- Within 10 minutes prior to their scheduled consultation, a patient will be able to mark themselves as 'READY'. If they don't mark themselves ready, you have the option to message them by using the 'Quick Message' drop-down (indicated by the speech bubble icon)

  Note *– when the healthcare provider or their office admin messages the patient before they indicate they are ready, the patient has the option to enter the consultation without clicking the 'I'm Ready for My Appointment' button. If this happens, the consultation status will not change to the green "Patient is Ready' status but will remain as gold "Waiting for Patient".*

- If you wish to send other participants an invitation to join the consult PRIOR to the appointment, you can click on the shareable consultation or meeting link, copy the link or invitation, and send it via email.

Office Admins will be able to view and manage each healthcare provider's waiting room on their behalf.

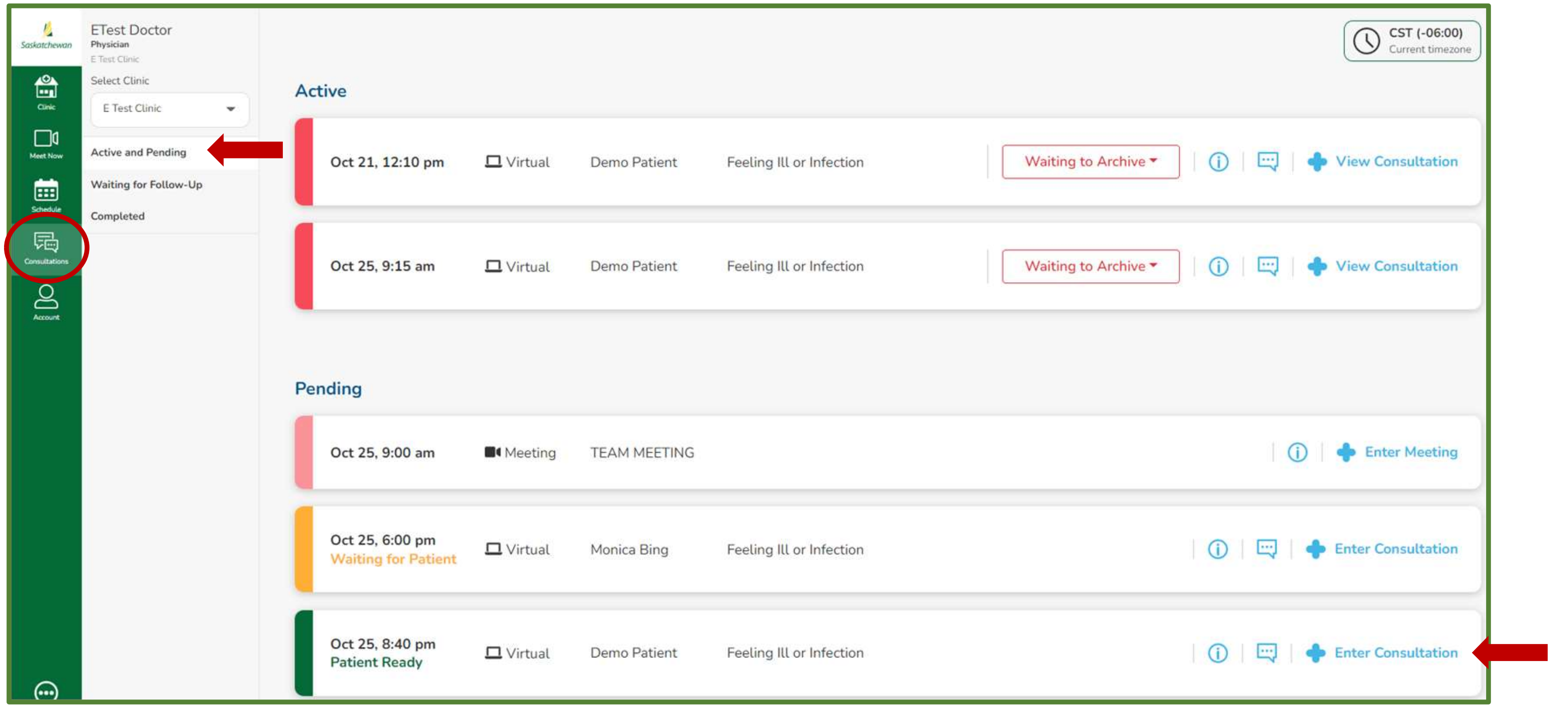
- You may view the consultation PRIOR to the appointment by clicking '**Enter Consultation**', then, when you are ready to begin speaking with your patient, you will click 'Enter Consultation' from within the chat (the status in the 'Waiting Room' will now change to 'Active').



- When the consultation is complete & the practitioner has no further engagement with the patient, they can mark the status as 'Archive Consultation' from, either, within the consult or in the Waiting Room.

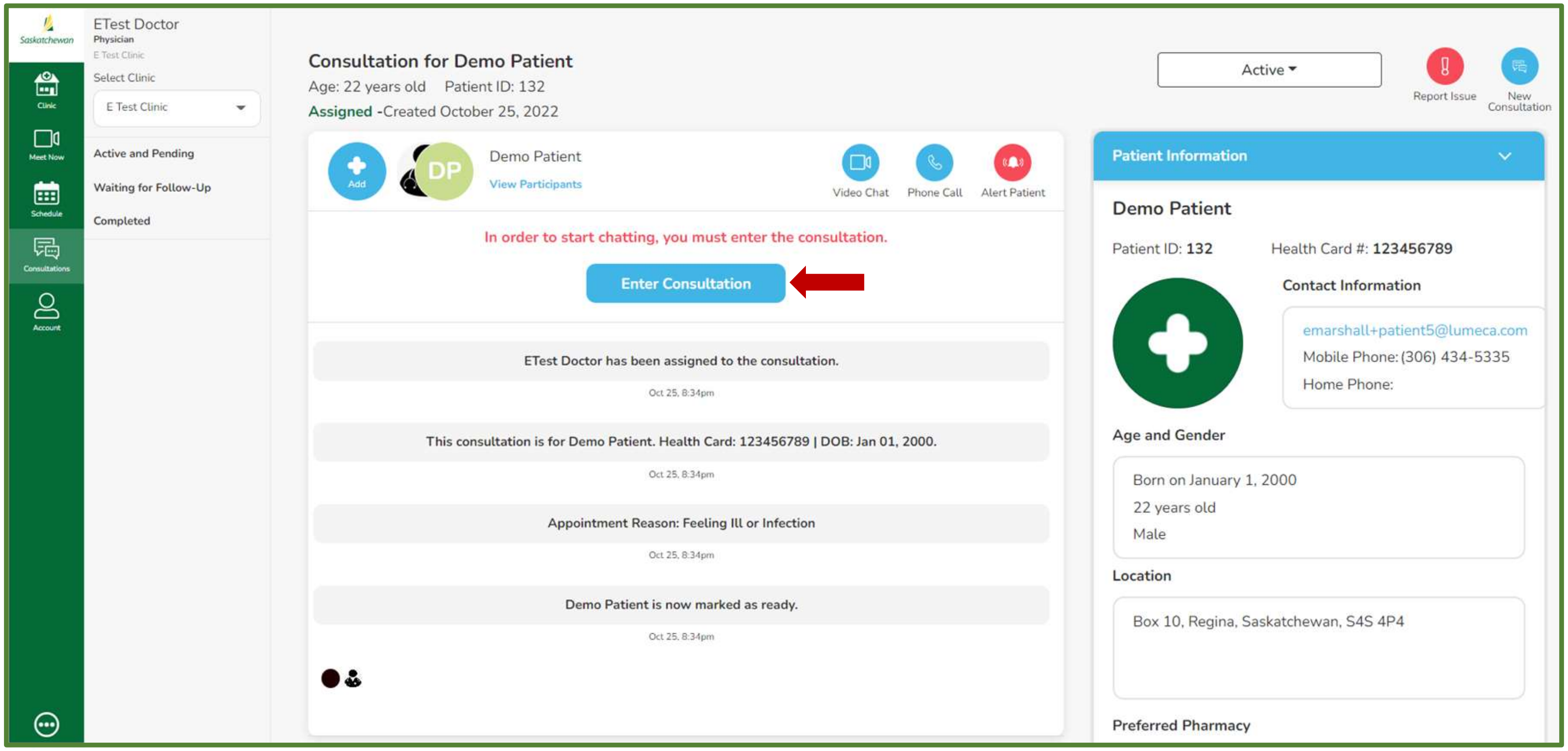
16. Starting a Patient Consultation

Starting a Consultation – Step 1



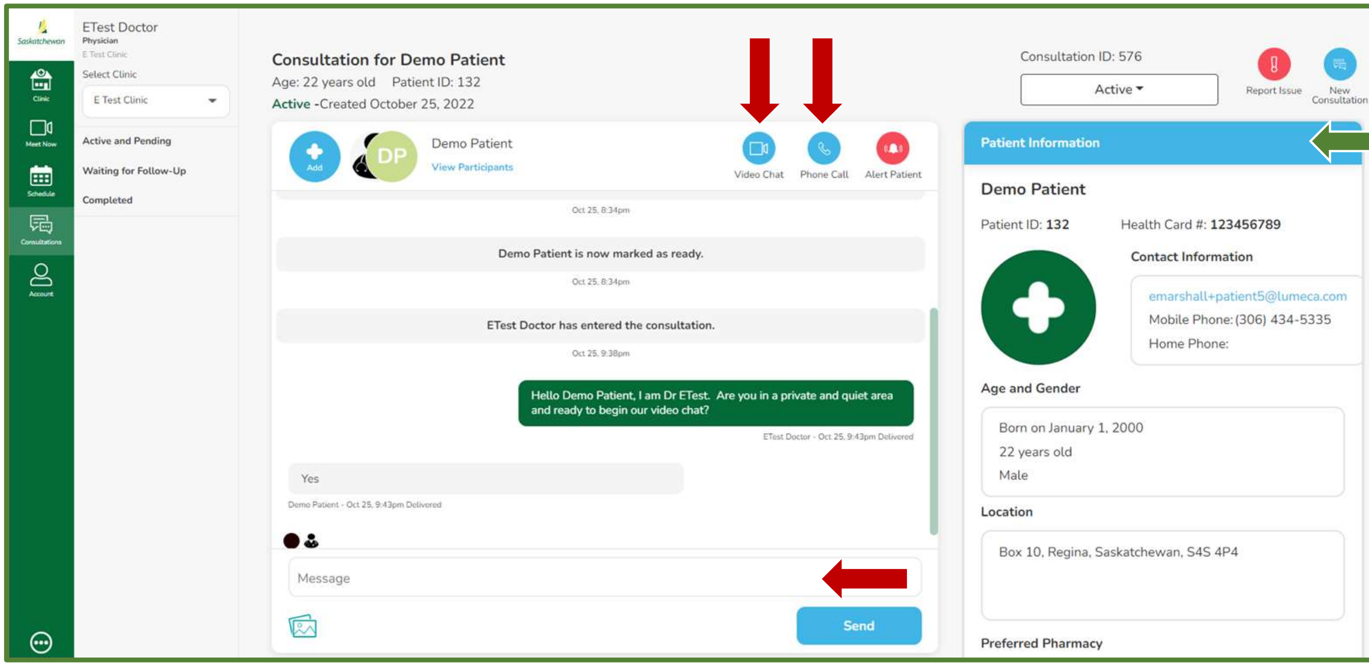
- ❑ Select ‘**Consultations**’ in the dashboard
- ❑ Click ‘**Active & Pending**’
- ❑ Click on ‘**Enter Consultation**’

Starting a Consultation – Step 2



- ❑ 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

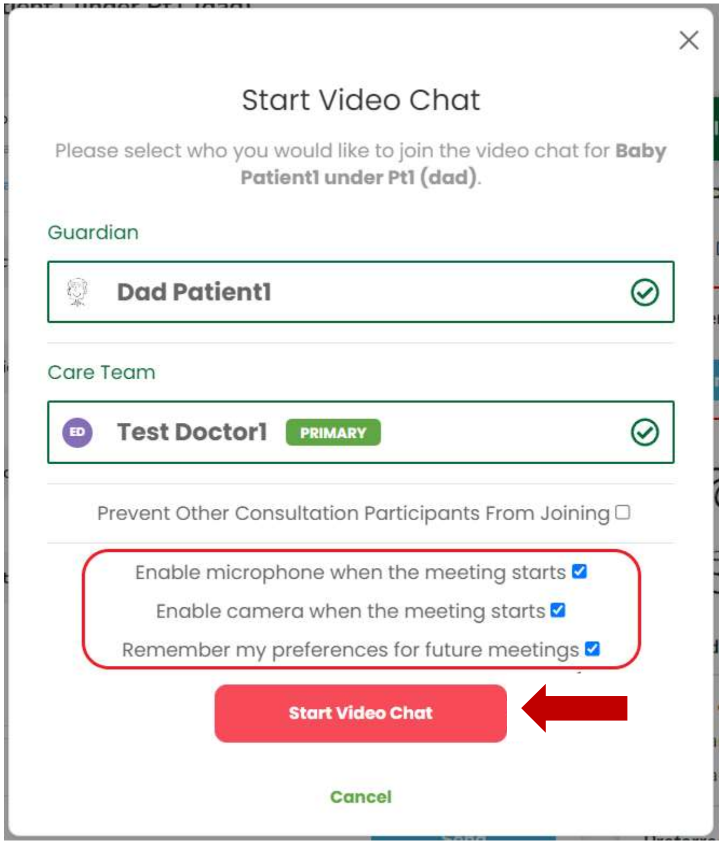


'Patient Information' was entered by the patient when they set up their account and can only be changed by the patient.

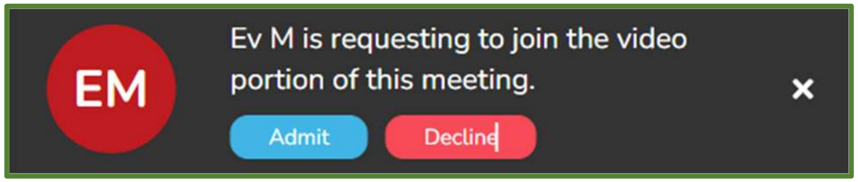
- ❑ The consultation will begin, with the following options available:
  - Chat Messaging – i.e., introduce yourself to the patient, etc.
  - Video Chat – begin the video portion of the consultation
  - Phone Call – may be used if video chat does not work
- ❑ Once ready to proceed, click '**Video Chat**'

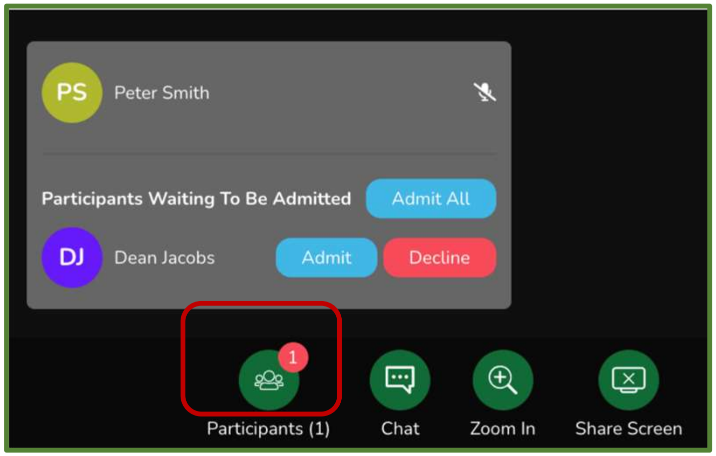
Starting a Video Chat

- ❑ 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.
- ❑ When ready, click '**Start Video Chat**'.



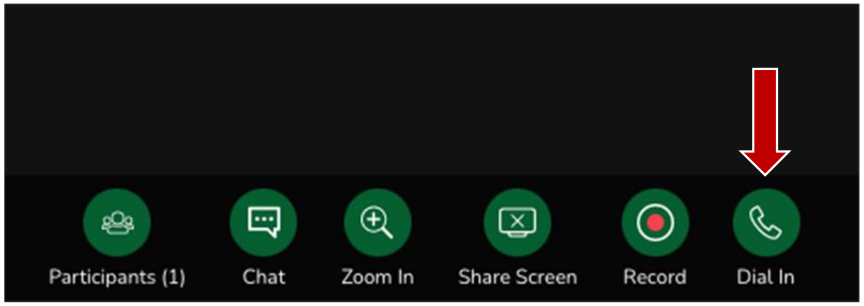
Ability to 'Admit' or 'Decline' Users into the Video Chat

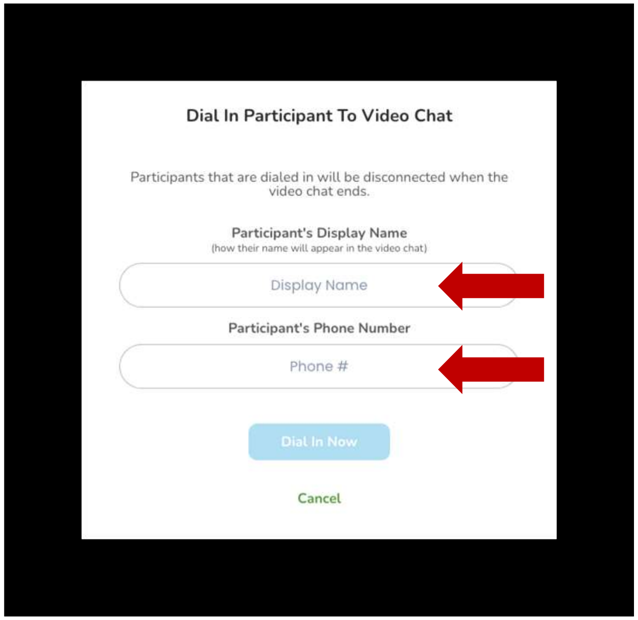




- All healthcare providers at the clinic in the video call can 'Admit' or 'Decline' participants from entering the video call. This can be done via the pop-up that appears over the video, or from the Participants button.
- If a user is 'Declined' from joining the call, they will be notified and unable 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

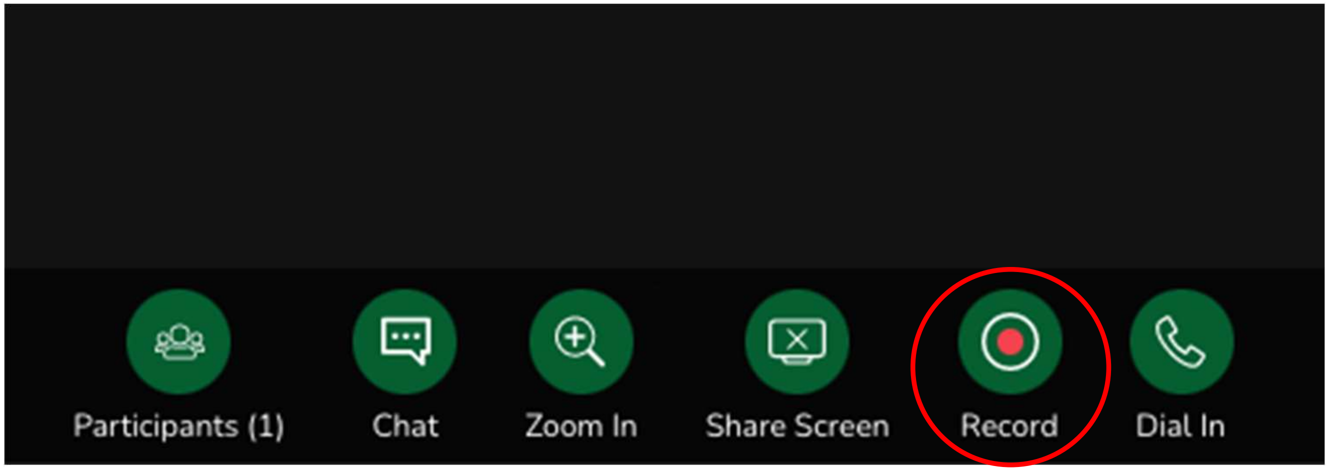




- ❑ Once in the video chat, click '**Dial In**'
- ❑ Enter the '**Participant's Display Name**' (*how their name will appear in the video chat)*
- ❑ Enter the '**Participant's Phone Number**'
- ❑ Click '**Dial In Now**'

  - 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).

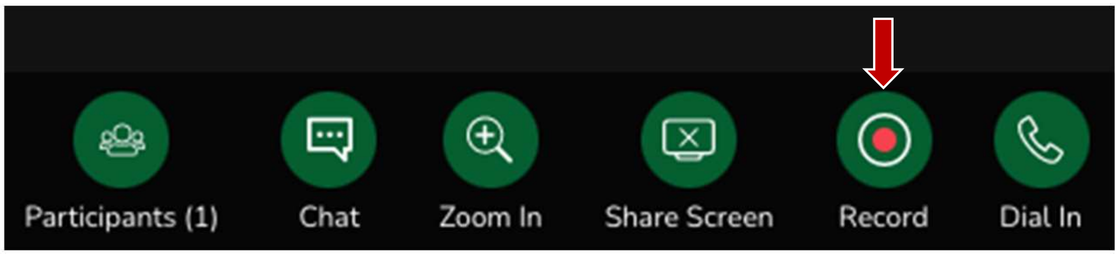
Recording a Video Call



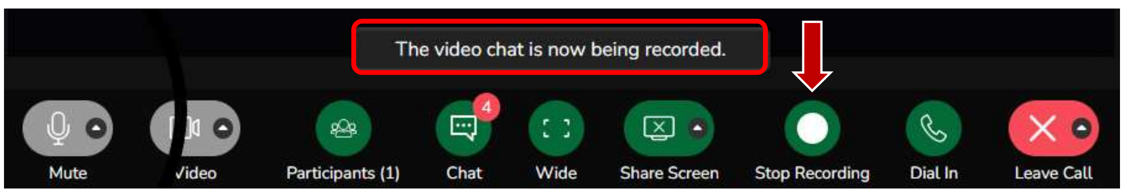
The 'Record a Video Call' feature is **turned off by default** and requires a request to your Organizational Approver to be turned on. *This button will not appear if the feature is disabled.*

- ❑ Forward your request via email:
  - SHA – virtualcare@saskhealthauthority.ca
  - SCA – virtual.care@saskcancer.ca
  - SMA – emr@sma.sk.ca
  - ISC – ehealthisc@canada.ca
  - Users other than the HSPs mentioned above, contact servicedesk@ehealthsask.ca

Recording a Video Call



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

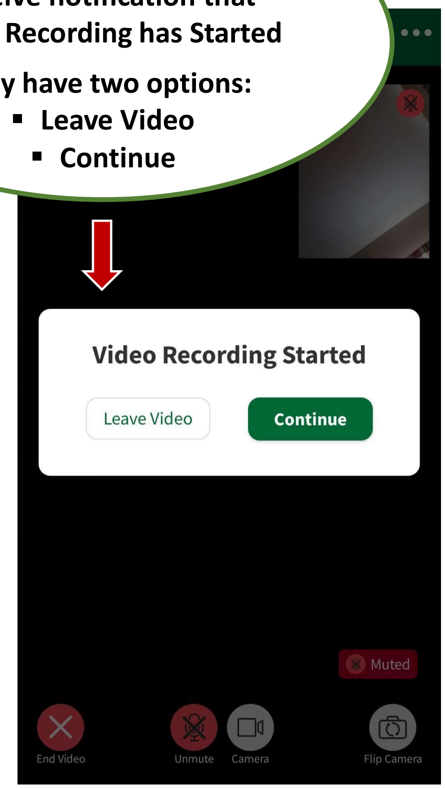


- ❑ To end recording, click ' **Stop Record**'. A message will appear letting you know recording has stopped.

Video participants will receive notification that Video Recording has Started

They have two options:

- **Leave Video**
- **Continue**



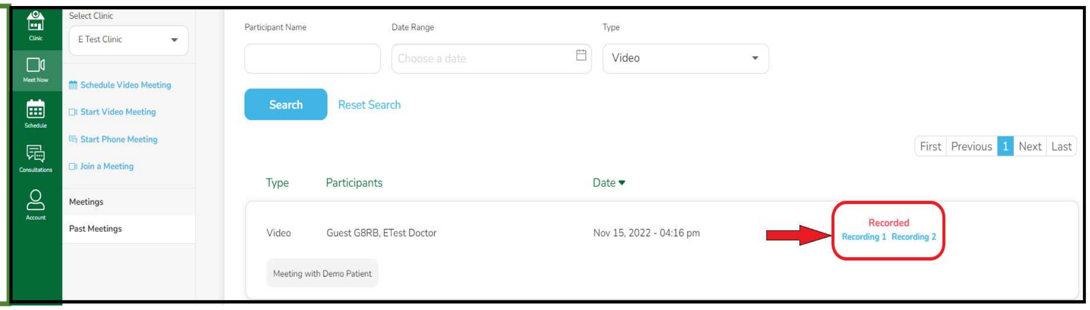
Finding Recorded Videos

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

'Meet Now' Meetings

Video Recordings can be found under:

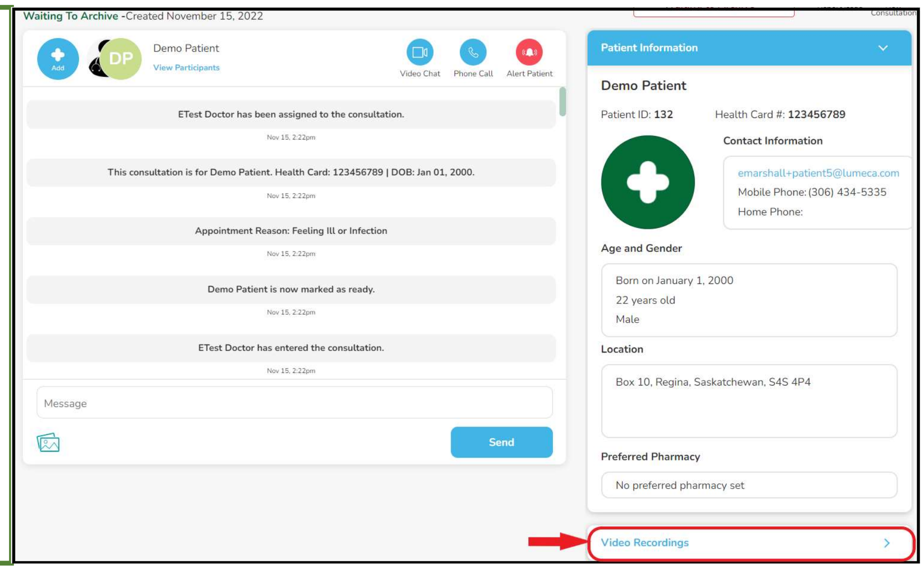
- Meet Now > Past Meetings
- Select the meeting from the list or search for it.
- Click the Recording you wish to review.



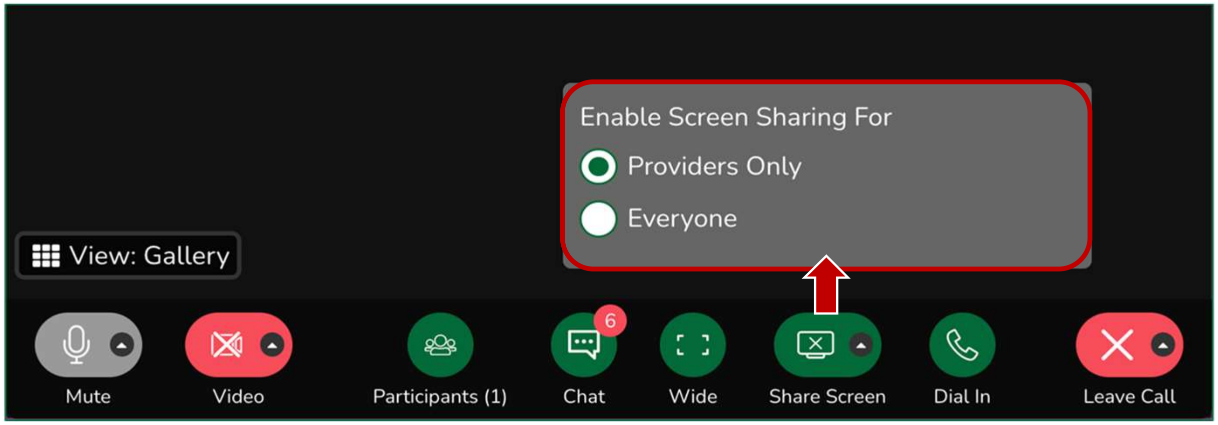
Patient Consultations

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

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



Sharing a Screen Within a Video Chat

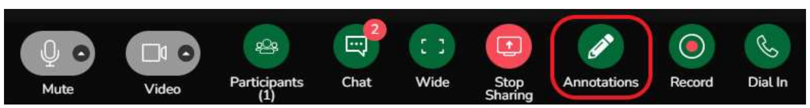


All participants within the video call can share their screens and annotate, if enabled by the video chat host.

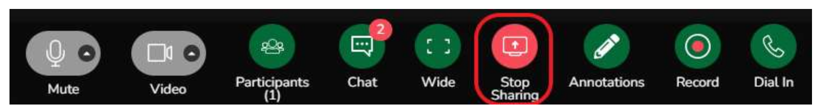
- ❑ The host would click '**Share Screen**', then choose '**Providers Only**' or '**Everyone**'

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

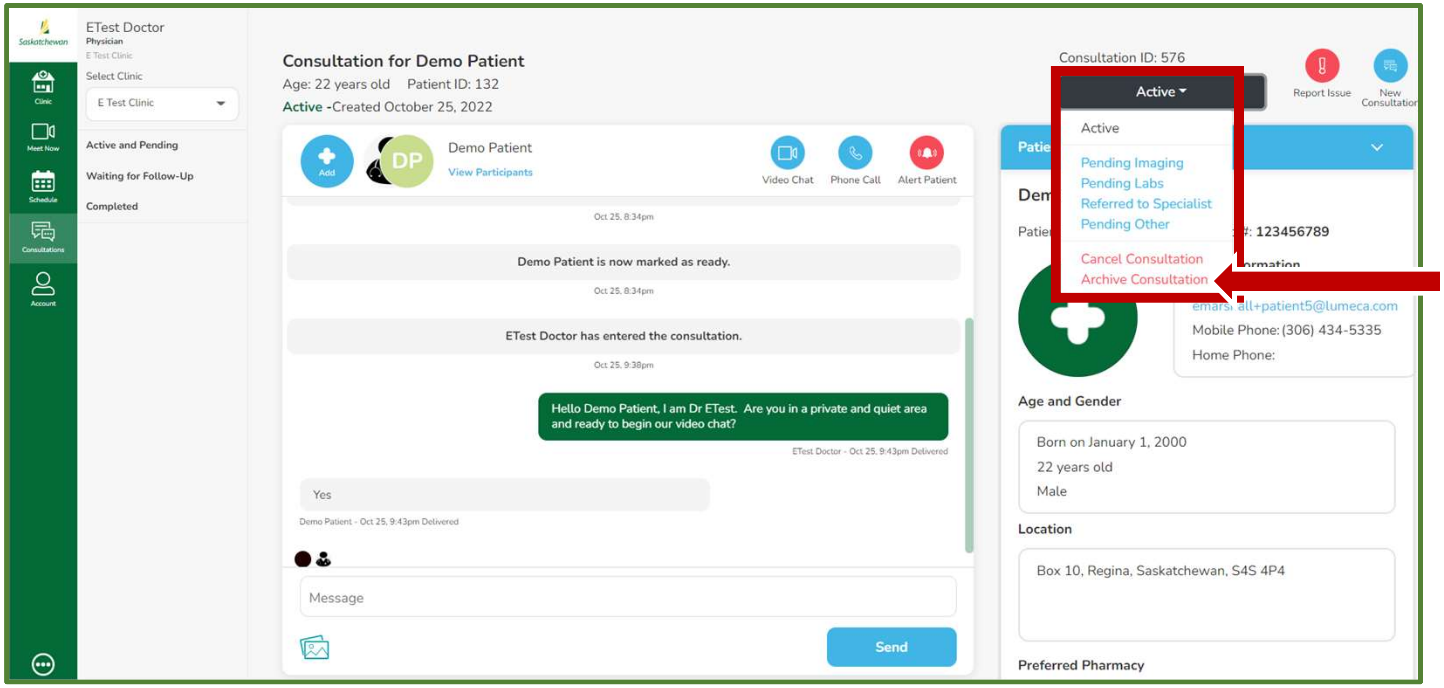
- ❑ **Annotations** - Click to highlight specific areas on your shared screen



- ❑ **Stop Sharing** - Click to stop sharing your screen



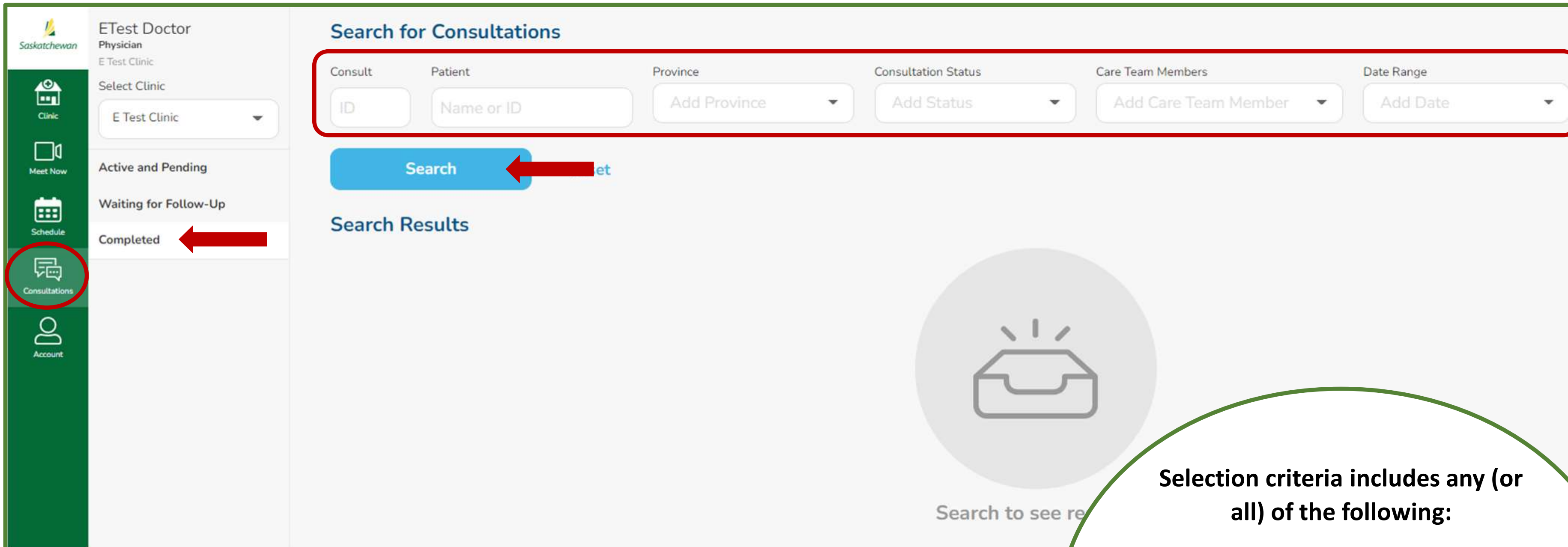
Archive Completed Consultations



- ❑ 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



Selection criteria includes any (or all) of the following:

- **Consult ID**
- **Patient First Name, Last Name, or SK Health Number**
- **Province**
- **Consultation Status**
- **Care Team Members**
- **Date Range**

❑ Select ‘**Consultations**’ in the dashboard, then click ‘**Completed**’

❑ Enter applicable information

❑ Select ‘**Search**’

18. Provider Support

PHONE:

1-888-316-7446

EMAIL:

virtualvisit@ehealthsask.ca

WEBSITE: HTTPS://SKVIRTUALVISIT.ZENDESK.COM/HC/EN-US

19. Citizen Support

PHONE:

1-844-767-8259 OPTION 4

EMAIL:

virtualvisit@ehealthsask.ca

WEBSITE: [HTTPS://SKVIRTUALVISIT.ZENDESK.COM/HC/EN-US](https://skvirtualvisit.zendesk.com/hc/en-us)