Saskatchewan Virtual Visit Provider User Guide

February 22, 2024

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1. SK Virtual Visit Application Overview

- A virtual visit system that allows scheduling of video and audio sessions between healthcare providers and their patients/colleagues:
  - ‘Video Meetings’ - (scheduled or on-demand) invited patients/participants do not require a SK Virtual Visit account but join a meeting via a unique quick link
  - 'Phone Meetings' - (on-demand) between two participants
  - ‘Consultations’ - (scheduled) patients must be invited to join the provider’s virtual clinic and create a SK Virtual Visit account
- 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 viewed and 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

This document should be used to supplement the training you have already received and be utilized as a reference.

It 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:

Clinic User Training Guide

2. Access 'SK Virtual Visit' as a Clinic Care Team Member

Request a SK Virtual Visit Account

Note: Clinic user accounts with 18 months of inactivity will be deactivated

- ❑ Complete the applicable online Account Request Form

*You will need to identify your virtual clinic(s). A **virtual clinic** is a set group of individual user accounts with a common patient set and specialty.*

Virtual clinics are identified using existing clinic, department, or program structures.

SHA Users:

SHA 'SK Virtual Visit' Account Request Form

SCA, SMA, ISC/FN or Other Users:

SCA, SMA, ISC/FN or Other 'SK Virtual Visit' Account Request Form

Create Your Account and Become Part of a Virtual Clinic

Once access has been approved and granted, you will receive an email invitation to create your SK Virtual Visit account.

- ❑ If you have not received the email, please contact your HSP Lead
- ❑ Review your email, paying special attention to the 'Note', then tap on "**click this link**" under '**Get Started**'

HealthBuddy: Invitation to join our clinic on the SK Virtual Visit Portal

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

Get Started

Please click this link to join HealthBuddy.

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

- **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 on-line with a care provider's schedule. Note: this 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!

Note

The link above is a one time registration link and will not work after you complete registration. If you'd like to get back to the website, go to the login page. We recommend bookmarking this page for future reference.

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.

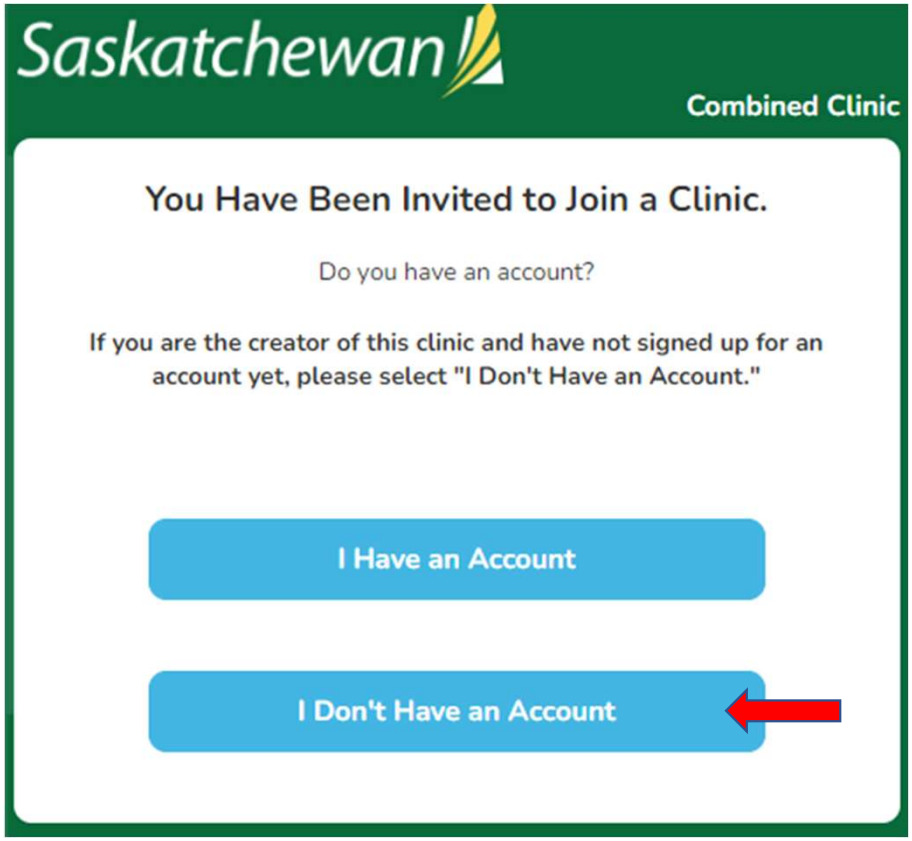
Create Your Account

You should navigate to the 'SK Virtual Visit' Portal Welcome Page

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

<u>Note</u>: Only one account is required, however you may join multiple virtual clinics. You will receive a separate invitation email for each clinic you are associated with and invited to join.

After creating your account from the link within the first invitation email, tap '**click this link**' in each subsequent email, then '**I Have and Account**'. Log in with the username and password you used to create your account. You will then be joined with the additional clinic(s). Complete this step for each clinic you are invited to.



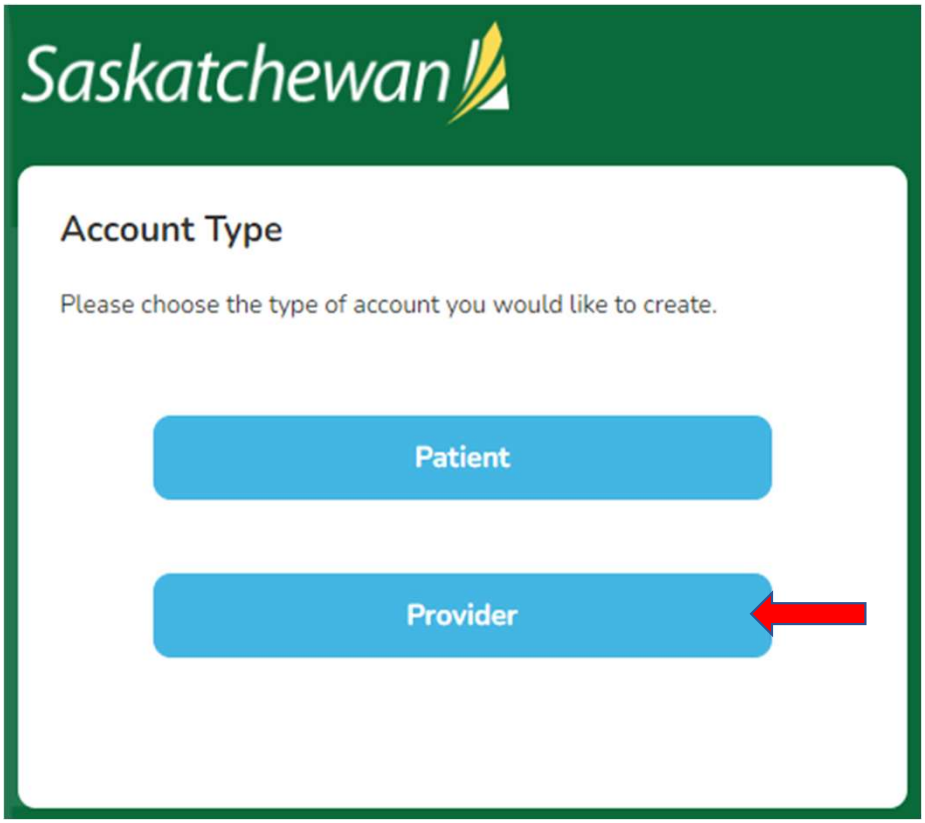
Create a 'Provider' Account

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...

- ❑ Click '**Provider**' and you will be redirected.

  (DO NOT click 'Patient')



Create a 'Provider' Account

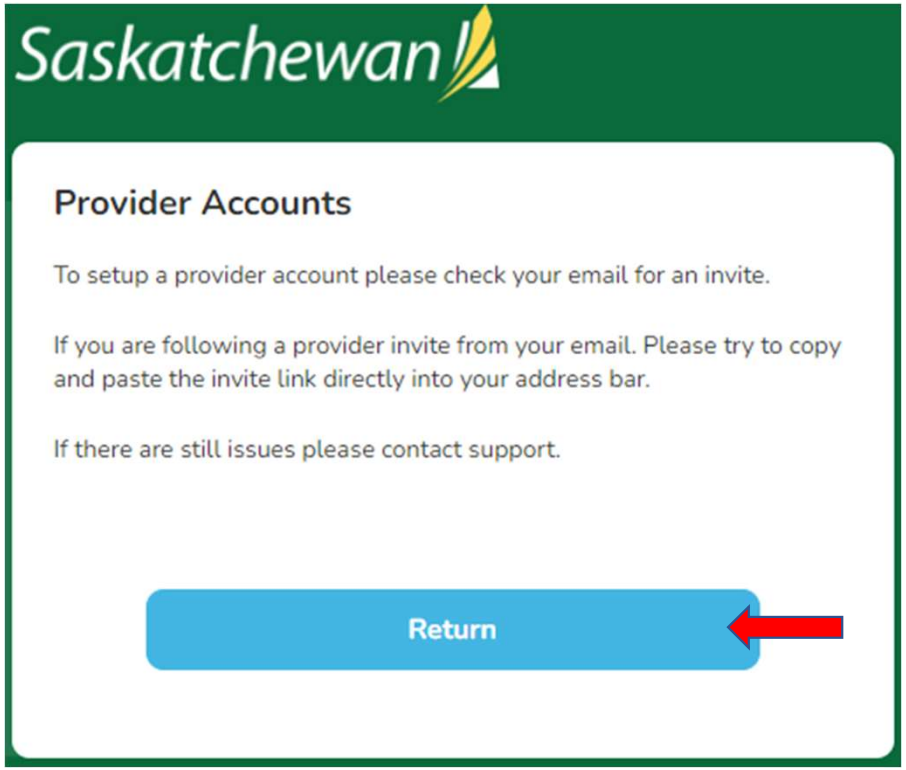
Read the directions, then click '**Return**'.

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

If that does not work...

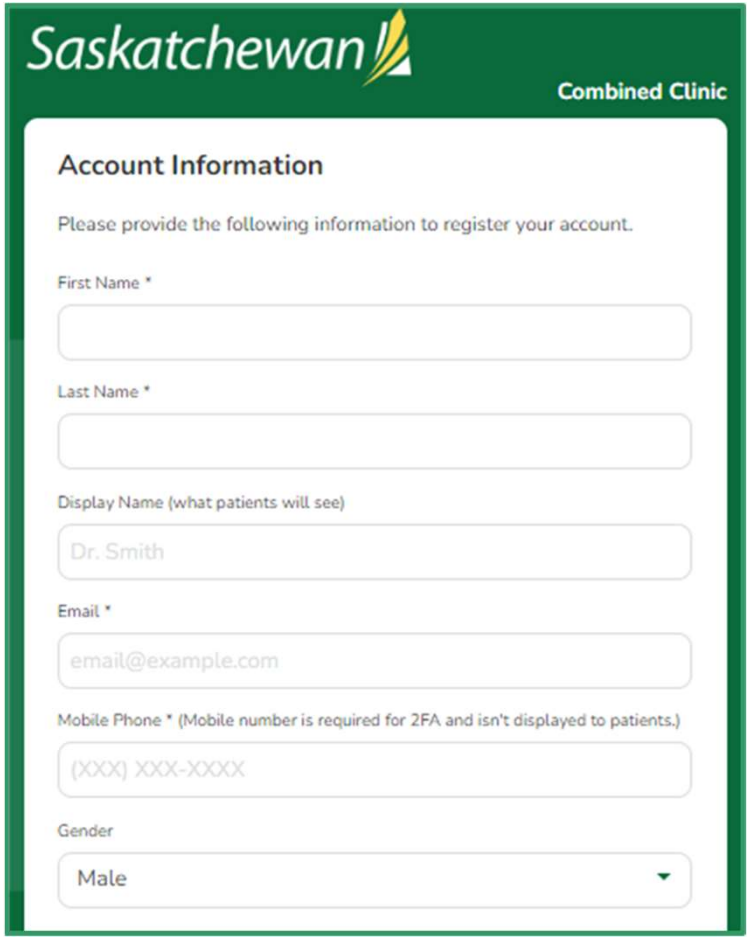
Copy (Ctrl+c) the '**click this link**' hyperlink from the email and paste (Ctrl+v) into your laptop/ computer browser's address bar. You should be directed to the proper screen.

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



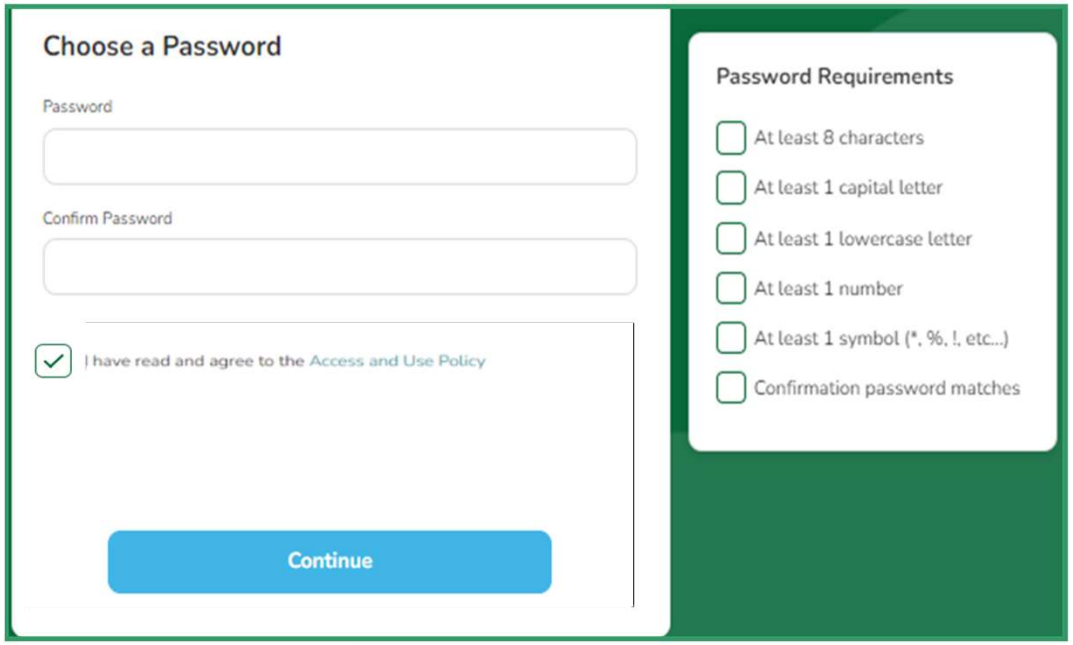
Account Information

- ❑ 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 which you will receive by text. *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'
- ❑ Click '**Continue**'



YOU ARE NOW READY TO ACCESS YOUR CLINIC !

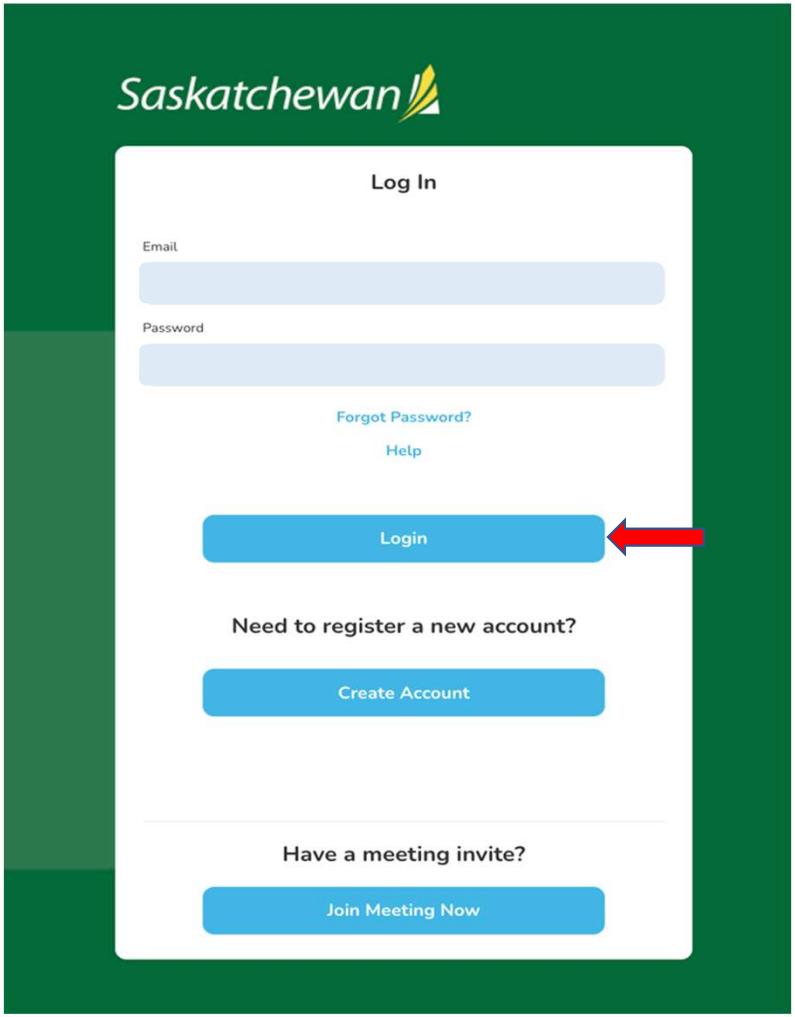
- ❑ Click 

Note: Once you create your 'SK Virtual Visit' account, the link in the invitation email you received will no longer work. To access the Login screen, go to...

https://virtualvisit.saskatchewan.ca/

We suggest you bookmark this Login screen for easy access to the platform.

3. Account Login & Logout

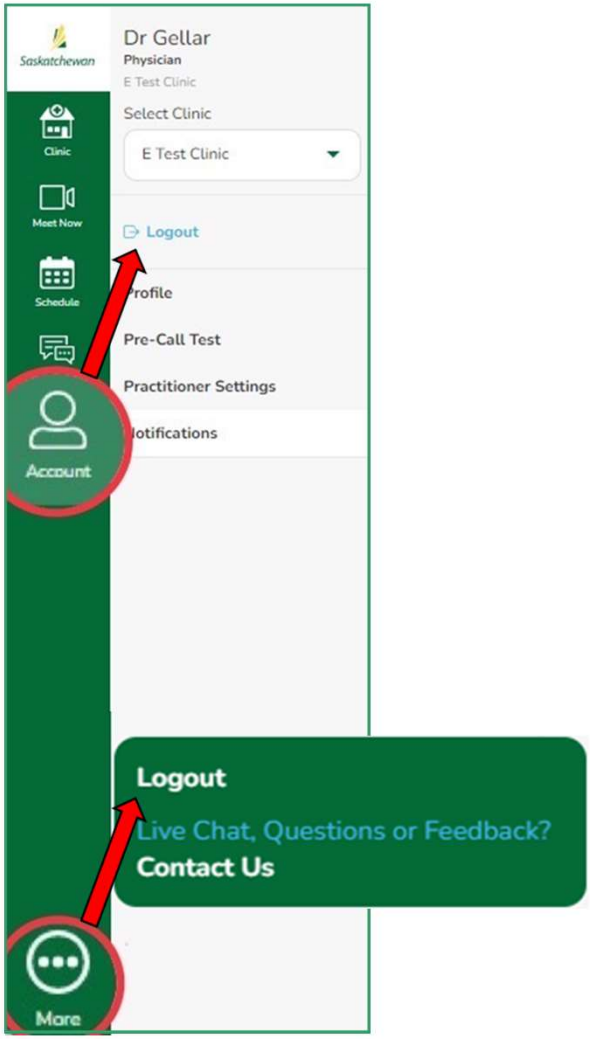


Account Login

- ❑ Enter the email address and password you used to set up your SK Virtual Visit account.
- ❑ Click '**Login**'

REMEMBER TO BOOKMARK THIS LOGIN PAGE FOR EASY ACCESS

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.

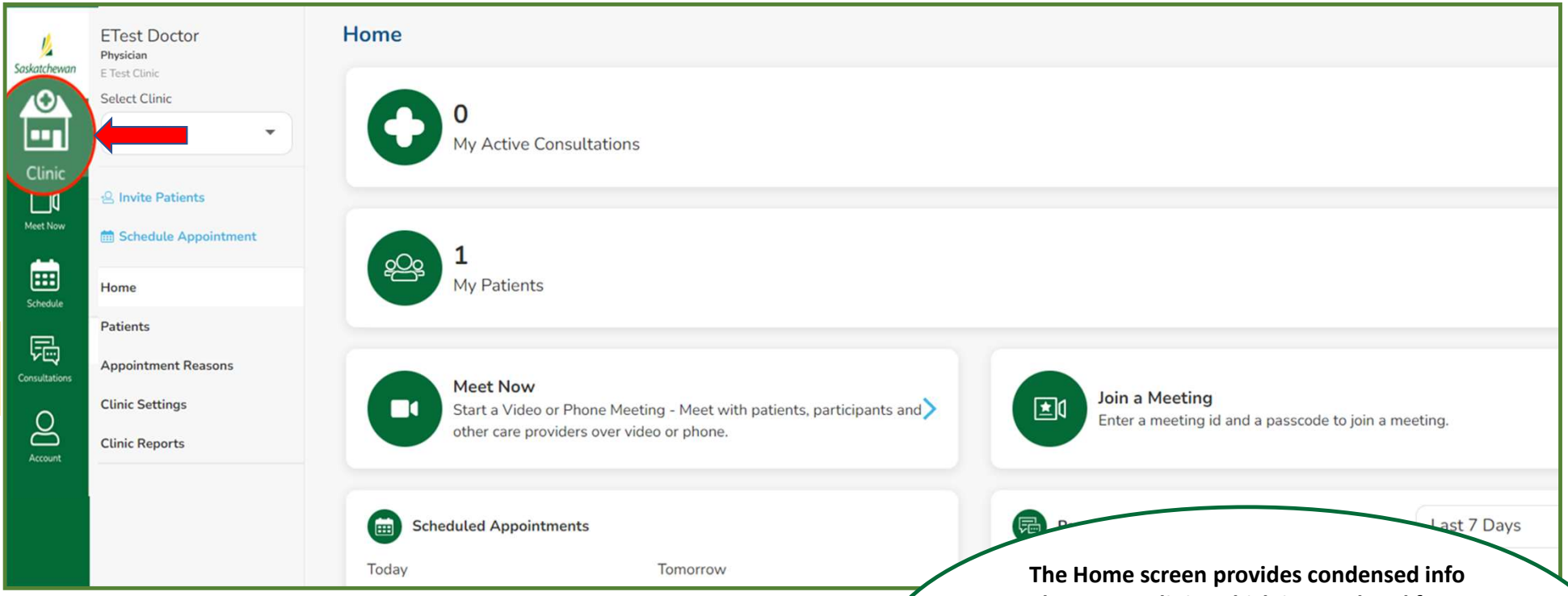
There are two areas you can Logout:

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

Note: there is an automatic 1-hour timeout of your account when you close or exit the browser without logging out. You will remain logged in as long as your browser is open.

4. The 'Home' Screen

Home Screen



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

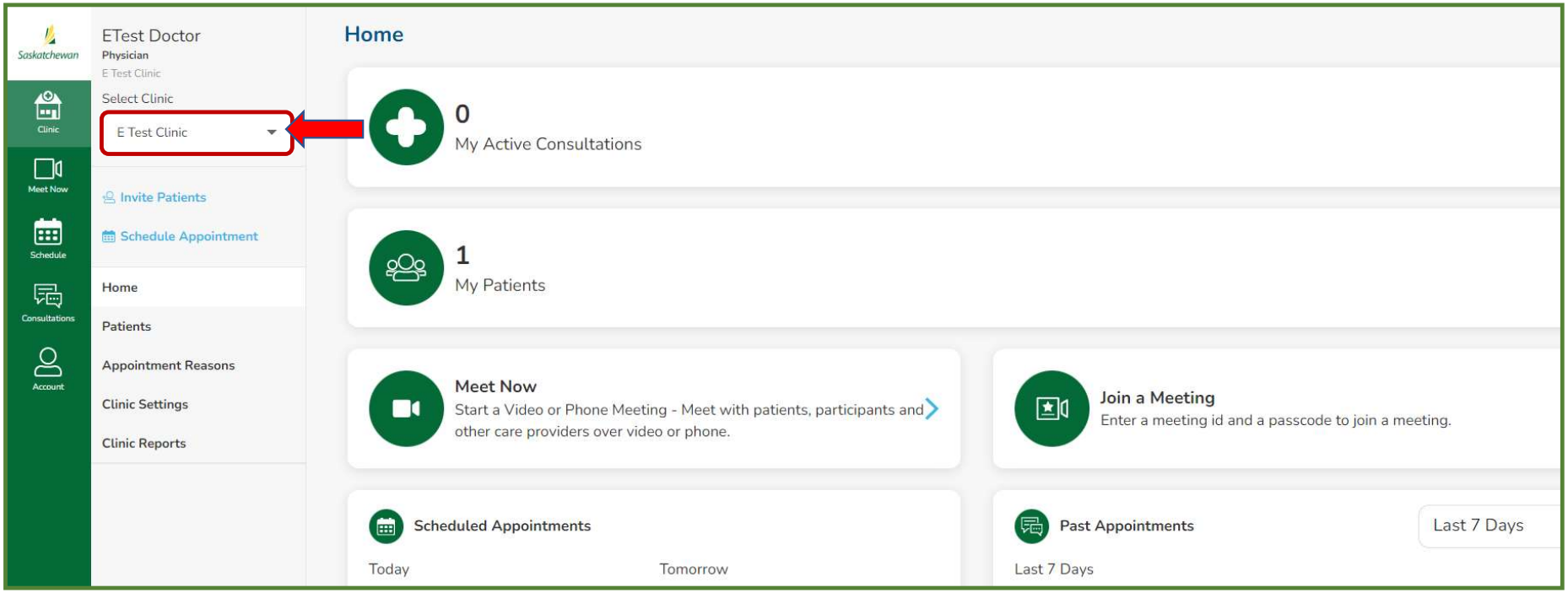
The Home screen provides condensed info about your clinic, which is populated from other areas in the platform.

You cannot change info here.

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

5. Select a Clinic

Select a Clinic



- If you are part of more than one clinic, use the '**Select Clinic**' drop-down to choose the clinic you are currently working in.

6. Your Profile Information

Your Profile Information

Saskatchewan
ETest Doctor
Physician
E Test Clinic
Select Clinic
E Test Clinic
Clinic
Meet Now
Schedule
Consultation
Account
More
Logout
Profile
Pre-Call Test
Practitioner Settings
Notifications

ETest Doctor
Change Profile Picture
Change Password

Account Information

Display Information
Display Name (Displayed to patients)
ETest Doctor

Address
Province
Saskatchewan

Contact Information
Email
er :a.com
First Name
Test
Last Name
Doctor1
Mobile Phone (Used for Two-Factor authentication.)
(306)

Age and Gender
Gender
Female

You are able to:

- **Change your Display Name**
- **Add or change a profile picture (optional)**
- **Change Password**

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

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

Your Profile Information

To request changes to your information besides your display name, profile picture or password, complete the applicable online form...

❑ **SCA, SMA, ISC/FN or Other Users:**

SCA, SMA, ISC/FN or Other 'SK Virtual Visit' Account Request Form

❑ **SHA Users:**

SHA 'SK Virtual Visit' Account Request Form

If having difficulty accessing the form, email:

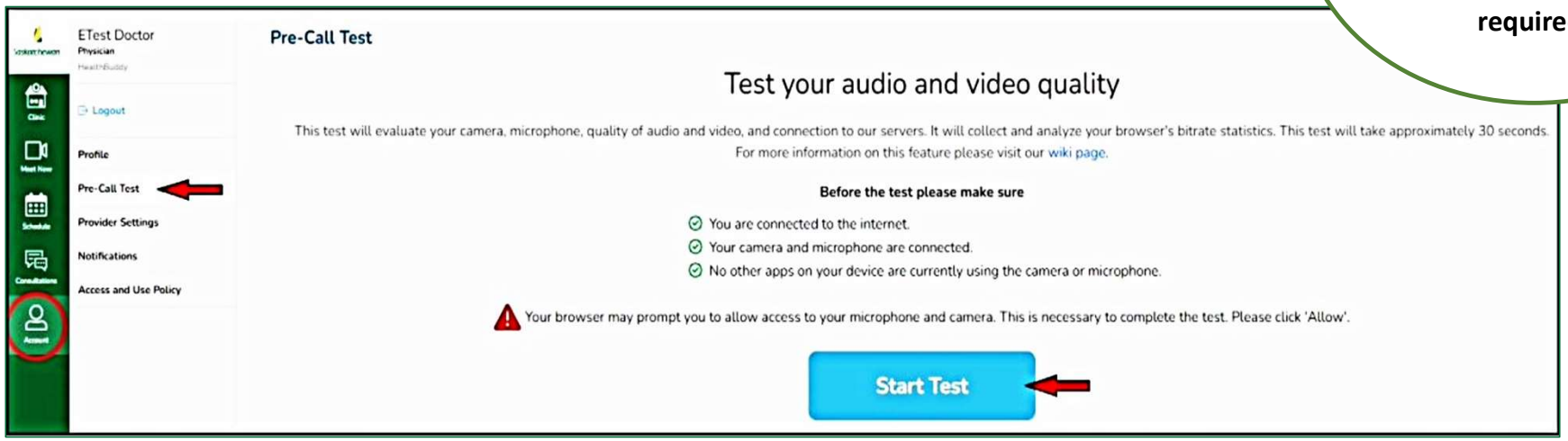
SHA: virtualcare@saskhealthauthority.ca
SCA: virtual.care@saskcancer.ca
SMA: emr@sma.sk.ca
ISC: ehealthisc@canada.ca
Others: servicedesk@ehealthsask.ca

7. The 'Pre-Call Test'

Pre-Call Test

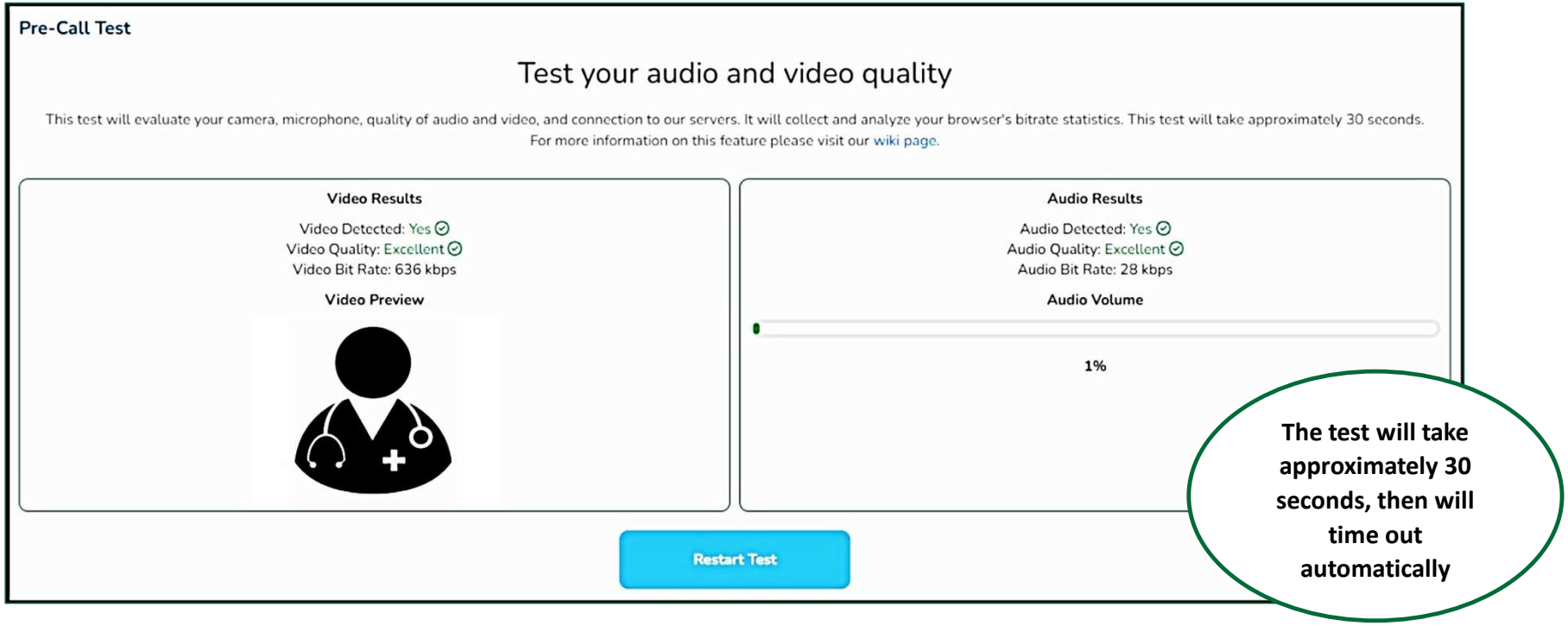
It is recommended that you run a 'Pre-Call Test' each time you log into your account, to ensure that your technical equipment/ devices and connections are working properly.

Run this test before starting virtual consultations or meetings, to allow time to get things working ahead of time, if required.



- ❑ Select '**Account**' in the Dashboard, then '**Pre-Call Test**'
- ❑ Click '**Start Test**'
  - The system may prompt you for video and camera permission. If so, press 'Allow' for both
  - Set your device on a stable surface and speak during the test, to ensure proper camera and microphone testing

Pre-Call Test Results

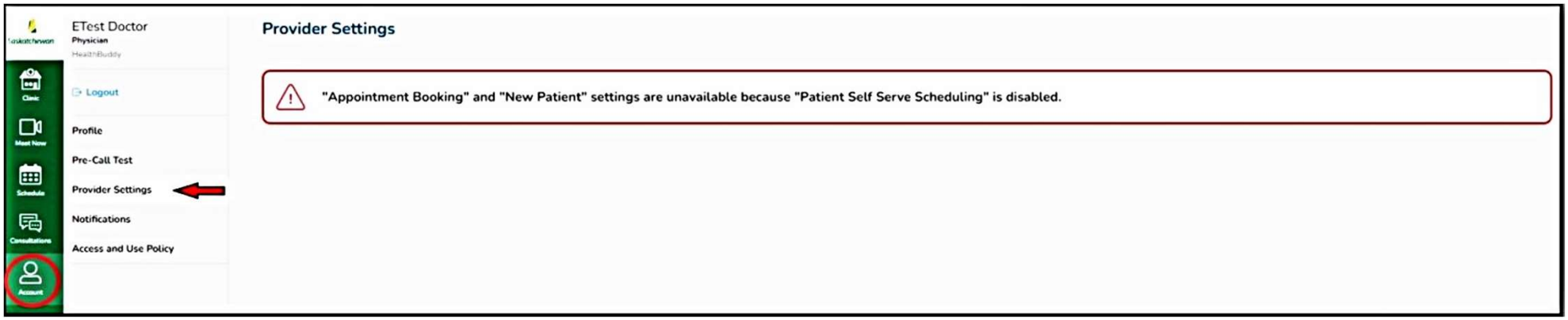


The test will take approximately 30 seconds, then will time out automatically

- **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 laptop/computer are not using your camera or microphone or 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

Provider Settings



- ❑ Select '**Account'** from the Dashboard, then click '**Provider Settings**'.

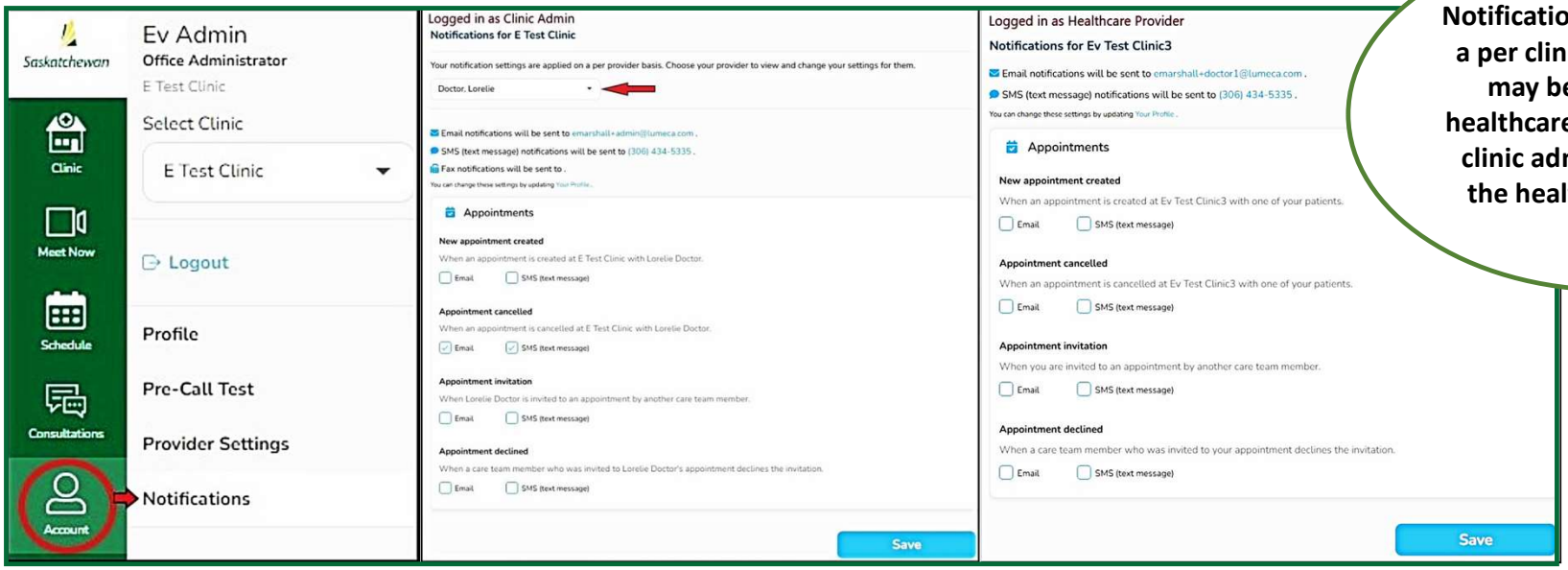
There are two Provider Settings that are ONLY available for clinics that have the 'Patient Self-Serve Scheduling' feature enabled. As patient self-booking is not enabled in your clinic, those settings are not available and the above message will appear.

If enabled, however, the settings would be:

- **Lead Time** - the minimum amount of time before a patient can book an appointment.
- **Health Provider Selection** – allows a healthcare provider to permit their patients to consult with other healthcare providers from within their virtual clinic.

Appointment Notifications

(Notifications to Clinic)



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

Healthcare providers and clinic admin have the option to receive patient appointment notifications when appointments are created or cancelled, when a provider is invited to an appointment by another care team member or when that invited provider declines the invitation.

These settings initially default to off, however can easily be turned on.

They can be received by email only, SMS text message only or both.

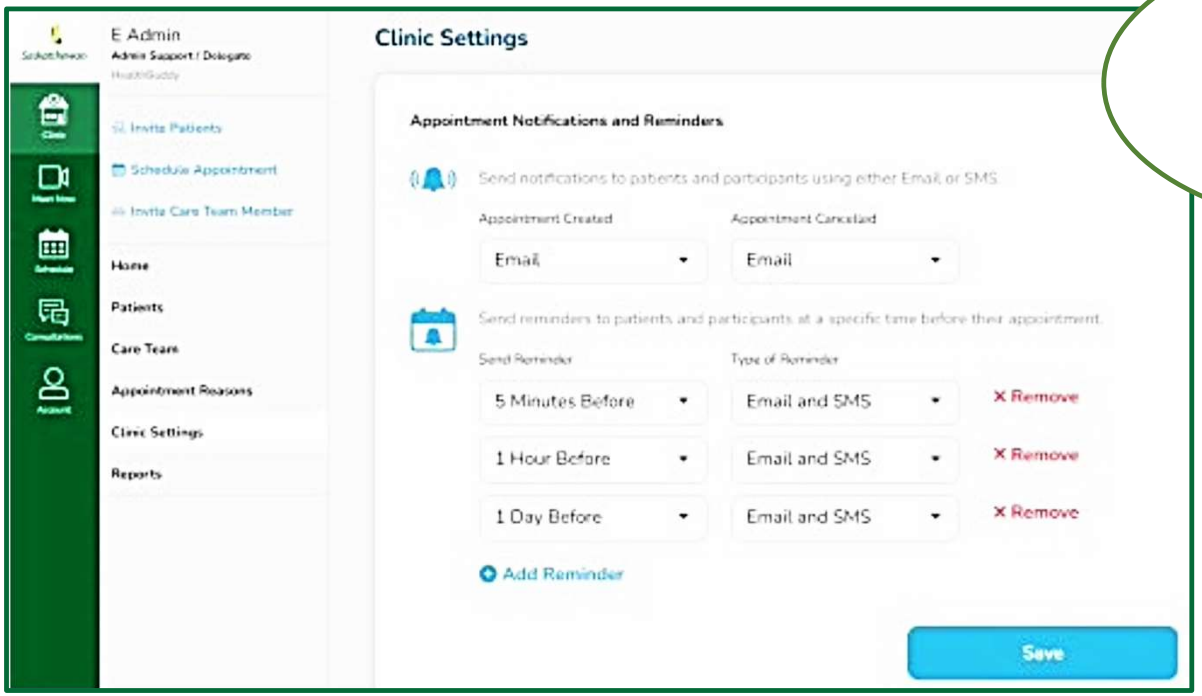
- ❑ Select '**Account**' from the Dashboard, then click '**Notifications**'.
- ❑ The clinic admin must select the healthcare provider from the drop-down menu. Healthcare providers will not see this drop-down.
- ❑ Check the desired notifications, then '**Save**'.

Clinic Settings

(Notifications to Patients/Participants)

Your clinic has the option to send patients/ participants appointment reminders (by email and/or SMS text message).

These are beneficial and highly recommended.



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 '**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)

Quick Messages

Add, customize, and remove quick messages. You can create message templates using a Provider's Name variable. When a provider uses the message, their name will be automatically used in place of the macro. In addition, you can create a personal message for a provider. Each provider can have up to 10 personal messages.

Provider

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 Last

Add Message

Although there are preset 'Quick Messages' available, new ones can be created for the entire clinic OR customized for individual healthcare providers.

These may be created by either healthcare providers themselves or their clinic admin on behalf of the healthcare provider

Options include:

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

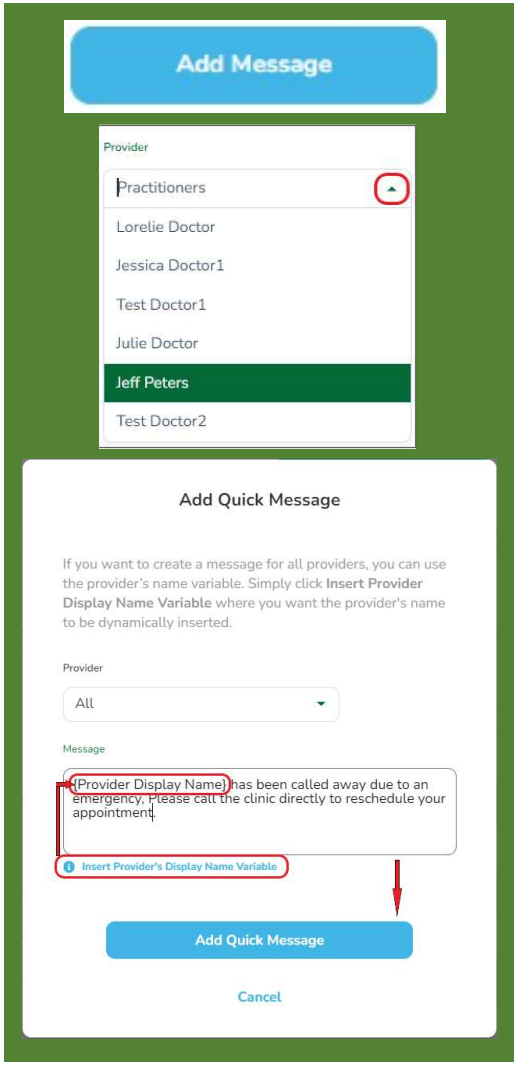
Quick Messages are viewed, added or removed here, however are used on the 'Active & Pending' screen (under the 'Consultations' tab.

These help the healthcare provider or clinic admin manage patient consultations 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 the clinic admin, Under **'Provider'**, select a particular healthcare provider **or leave blank for all** healthcare providers in the clinic.
- When creating a new message for 'All' providers, you have an option to add the 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**'

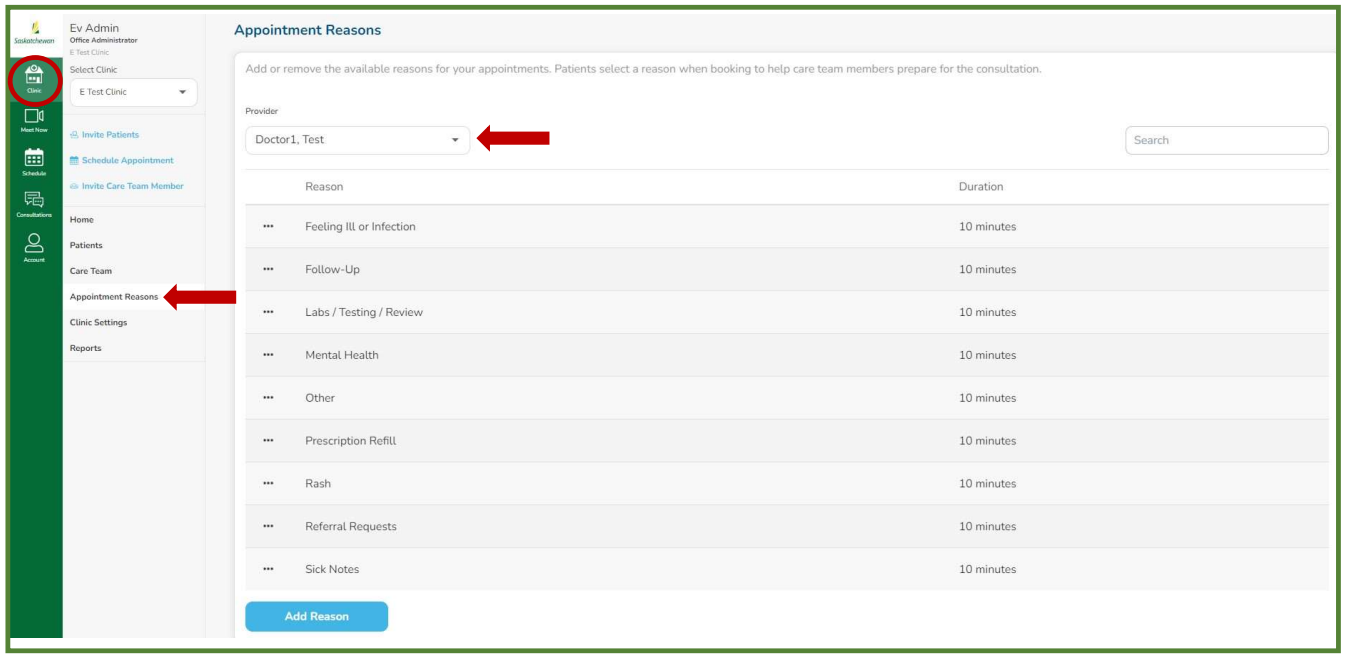


9. Appointment Reasons

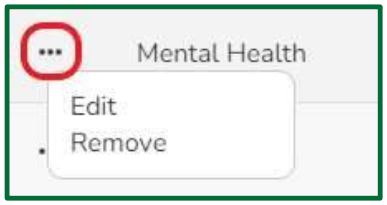
Adding, Editing & Removing Appointment Reasons

This feature can be helpful when scheduling for multiple healthcare providers.

Note: the appointment duration may be overridden at time of booking.



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



- ❑ Click the 3 dots to '**Edit**' or '**Remove**' an appointment reason

- ❑ Select '**Clinic**' in the dashboard, then click '**Appointment Reasons**'.
- ❑ Clinic admins must select the correct healthcare provider from the 'Provider' drop-down menu.
- ❑ Select '**Add Reason**'.
- ❑ Type in the new appointment reason, a duration that is suitable, then click '**Add Reason**'.

10. Scheduling: Viewing & Updating Calendars

Viewing Schedules

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

MONTHLY View:

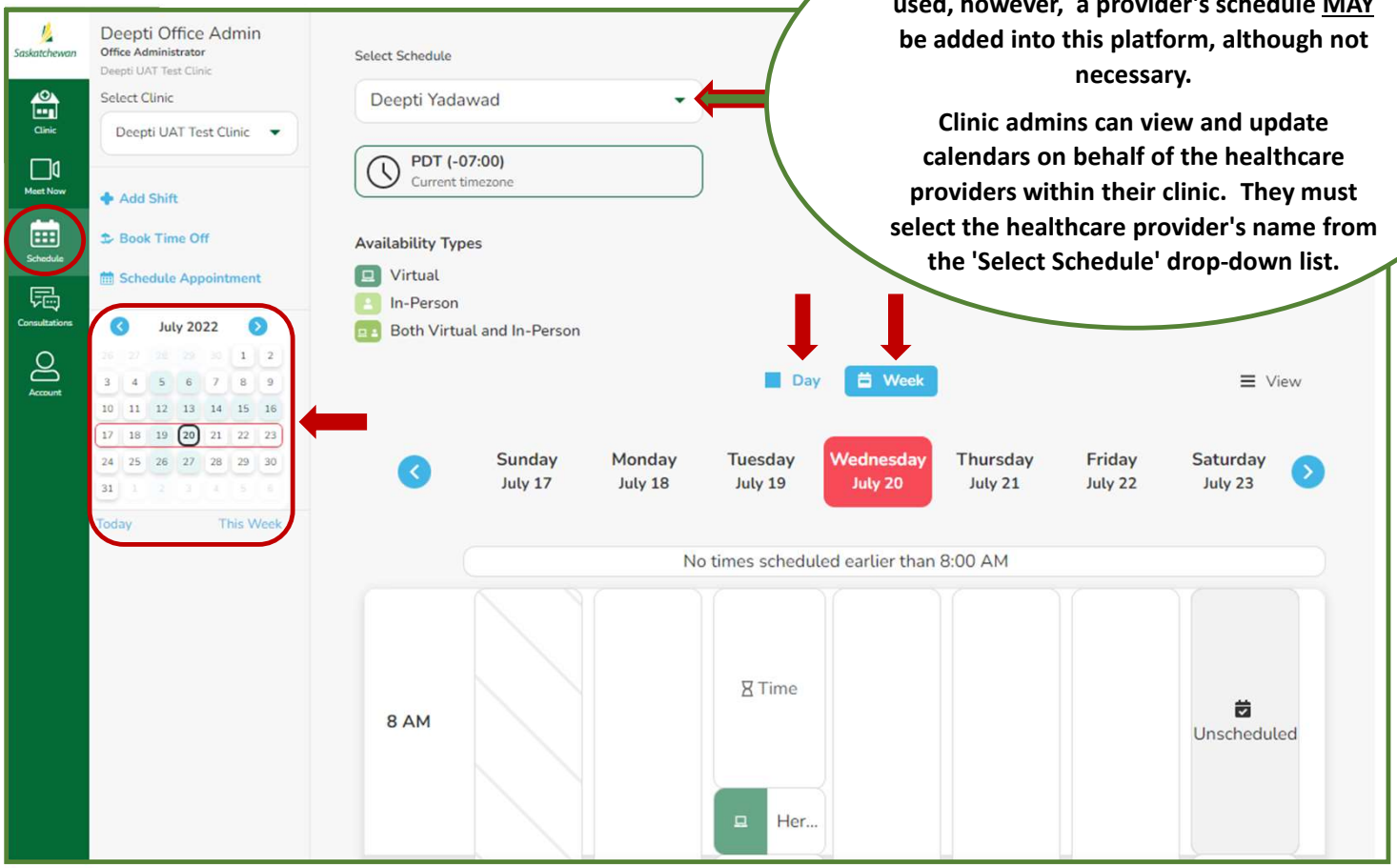
- Click on an individual day or 'Today'.
- Click 'This Week'
- Hover over a day to see the number of appointments scheduled.
- Day color darkens as the day is booked

WEEKLY View:

- A 7-day view of the schedule.
- Click on an appointment for details, to enter or cancel it, or to get the shareable Join-In information.

DAILY View:

- A daily view of the schedule.
- Click on an appointment for details, to enter or cancel it, or to get the shareable Join-In information.
- Delete a shift.

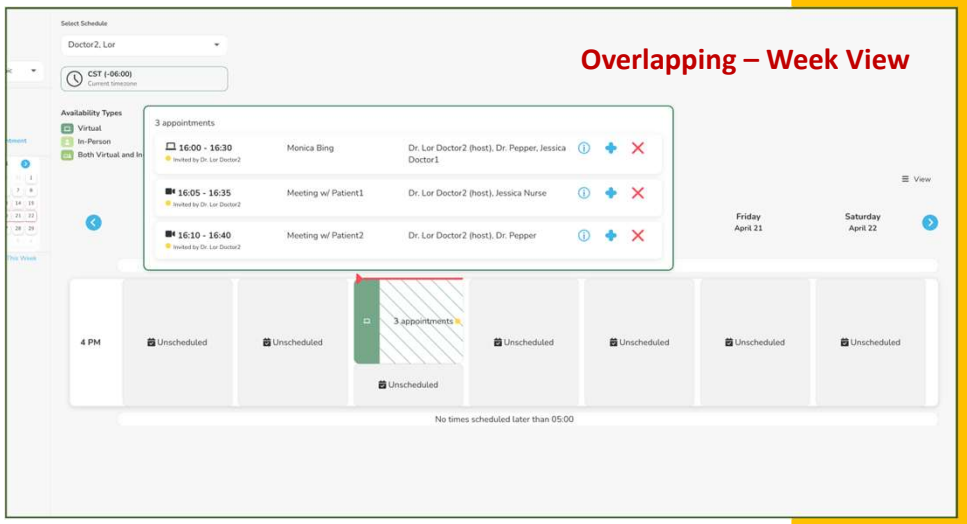


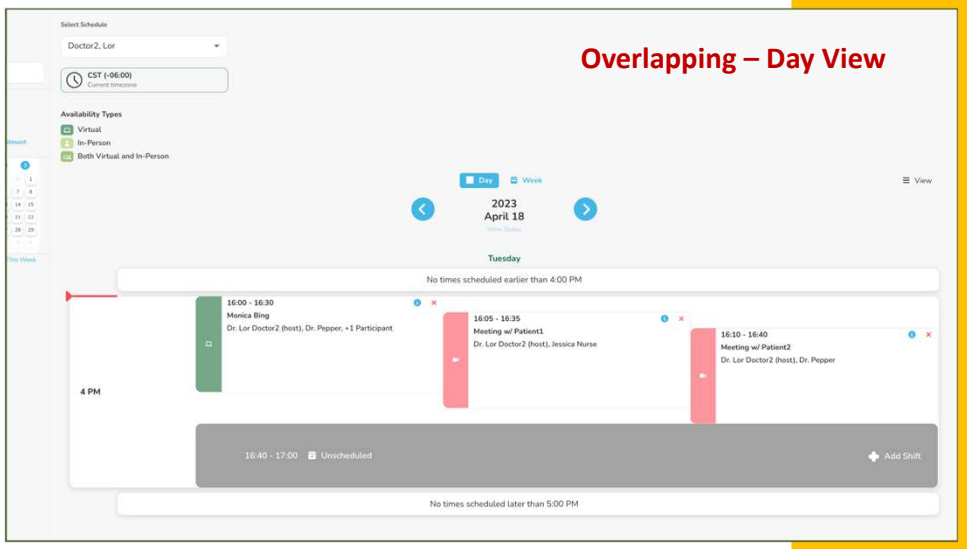
Your clinic's regular EMR system should be used, however, a provider's schedule MAY be added into this platform, although not necessary.

Clinic 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 list.

Overlapping Schedules

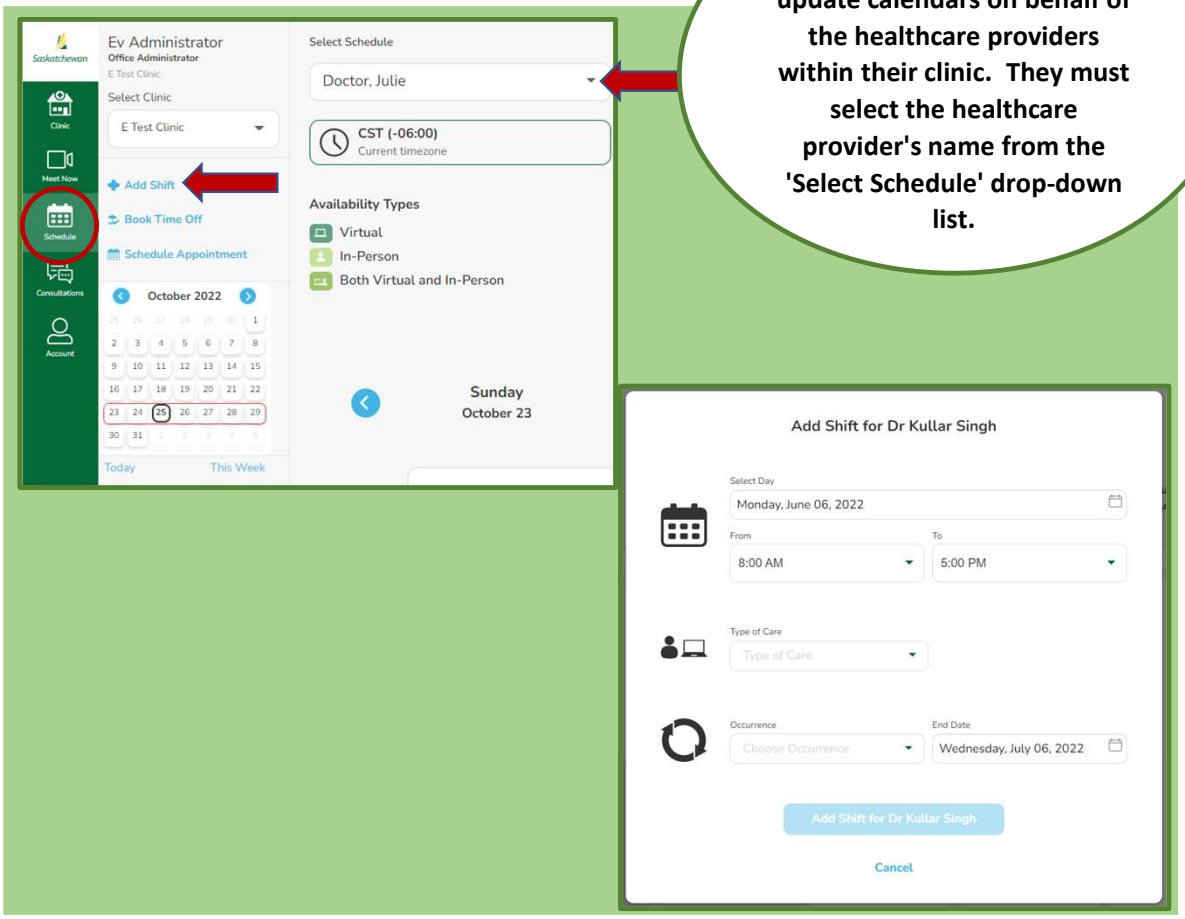
- If scheduled video meetings or consultations overlap with other appointments that a host provider or an invited provider currently has, a notification will appear to the person doing the scheduling (clinic admin or host provider).
- A **maximum of three** (3) overlapping video meetings or consultations can be booked into a provider's schedule.
- In '**Week View**', the overlapping appointments will show the number of appointments, in a box with a hashed background, in the affected timeslot.
- In '**Day View**', the overlapping appointments will show each appointment, within the affected timeslot





Add a Shift

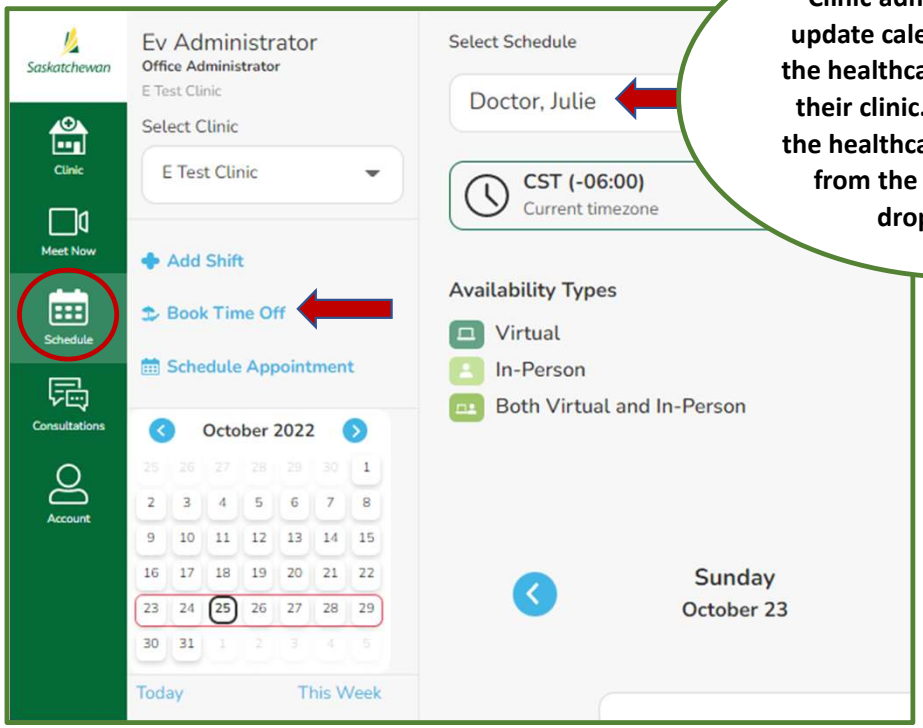
- ❑ Select '**Schedule**' in the dashboard.
- ❑ Click '**Add Shift**'.
- ❑ Select the **day** you wish to add the shift to.
- ❑ Select the from/to **time**.
- ❑ Select the **type of care** (virtual, in-person, or both)
- ❑ Choose the '**Occurrence**'.
- ❑ Choose an **end date** (if recurring occurrence).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



Clinic 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 list.

Book Time Off

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



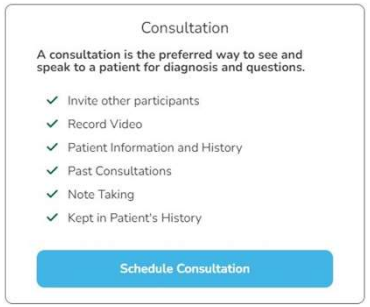
Clinic admins can view and update calendars on behalf of the healthcare providers within their clinic. They must select the healthcare provider's name from the 'Select Schedule' drop-down list.

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

11. 'Meet Now' Video Meetings vs Patient Consultations

'Meet Now' Video Meetings vs Patient Consultations

- **Patients/invited participants *DO NOT* require a 'SK Virtual Visit' account to join a video meeting.**
- Meetings are a way to meet with others (specialists, clinicians, patients, patient's family members or caregivers) via video or phone when patient info and history, past consultations, consultation notes, are not required.
- Meetings can be held immediately or scheduled into the healthcare provider's clinic schedule.
- Meetings will include a video call or, in certain situations, a phone call.
- **Video Meetings**: multiple participants may be invited by a clinic to attend with a meeting ID and passcode.
- **Phone Meetings**: two participants only. The healthcare provider's phone number will not be displayed to the patient.



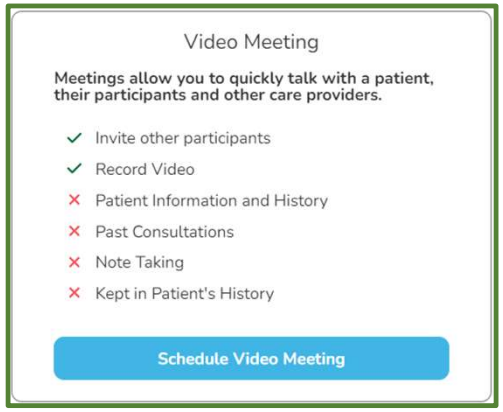
- **Patients *DO* require a 'SK Virtual Visit' account to join their patient consultation.**
- Patients must be invited by the clinic to join the virtual clinic.
- Patient consultations include patient information and history, past consultations, and consultation notes (if entered). This information is saved within the system.
- Patient consultations are always booked into the healthcare provider's clinic schedule.
- Patients may invite up to two guests to their virtual consultations. Invited guests ***DO*** require a 'SK Virtual Visit' account when invited by the patient.
- Healthcare providers may invite multiple guests (specialists, clinicians, patient family members or caregivers) to their patient's virtual consultation as well. Invited guests ***DO NOT*** require a '**SK Virtual Visit**' account when invited by the healthcare provider.
- Patient virtual consultations will include a video call or, in certain situations, can include a phone call.

12. 'Meet Now' Video & Phone Meetings

Meet Now

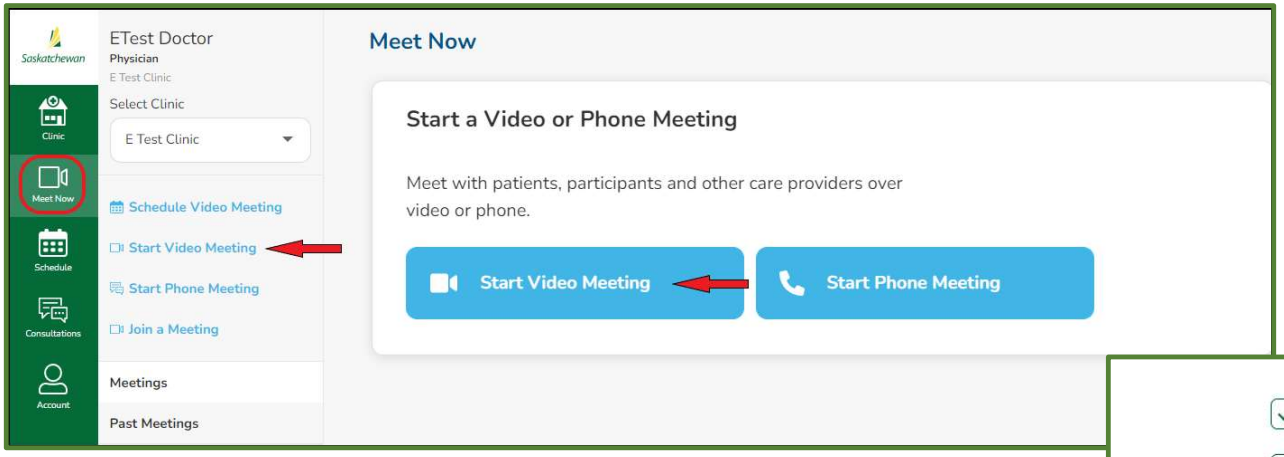
There are 3 options for conducting 'Meet Now' meetings

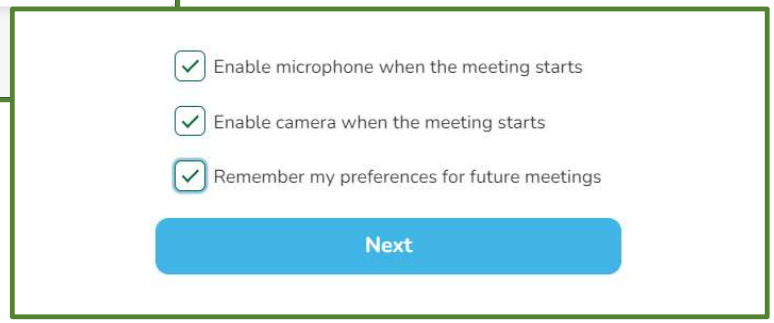
1. Start an Immediate Video Meeting
2. Start an Immediate Phone Meeting
3. Schedule a Video Meeting



- 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 your invited participants 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.

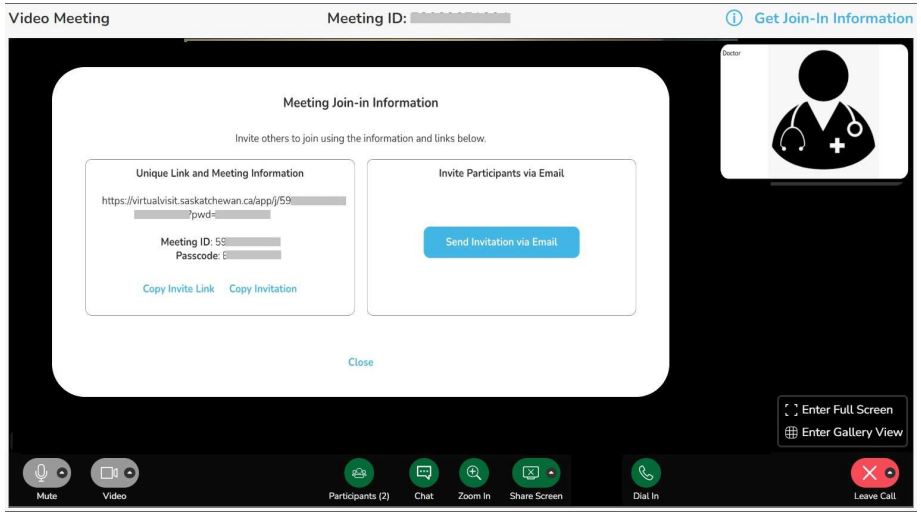
Start an Immediate Video Meeting – Step 1

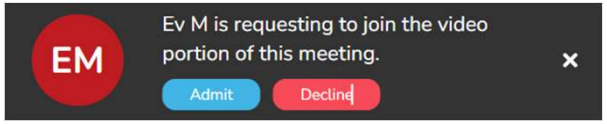


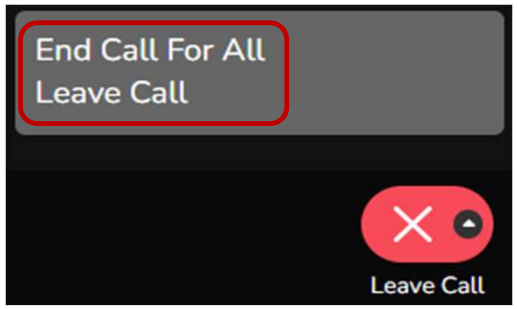


- ❑ Select '**Meet Now**' in the dashboard
- ❑ Click '**Start Video Meeting**'
- ❑ Enable your microphone, camera and select whether you wish to save these preferences for future meetings
- ❑ You will be taken directly into the video meeting to invite and wait for participants to arrive.

Invite Guests to a Video Meeting – Step 2





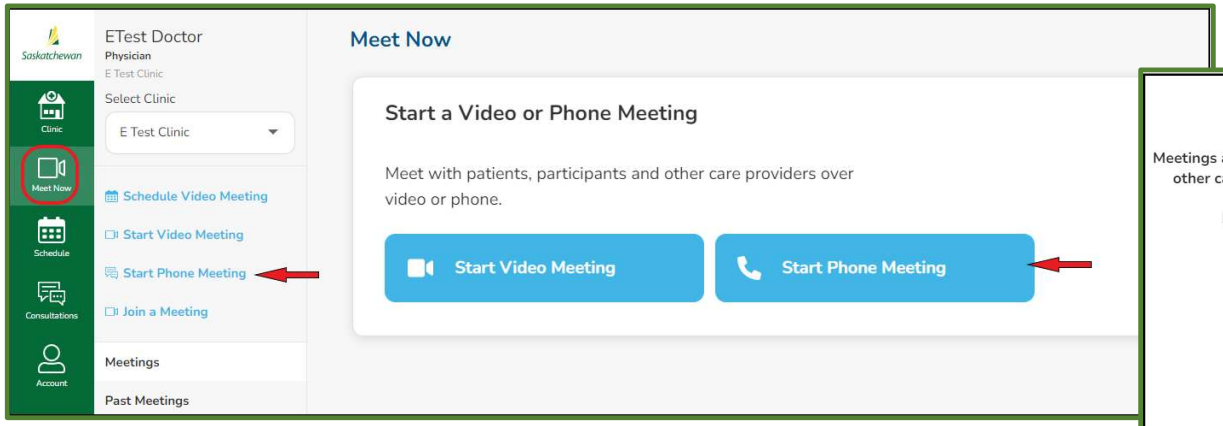


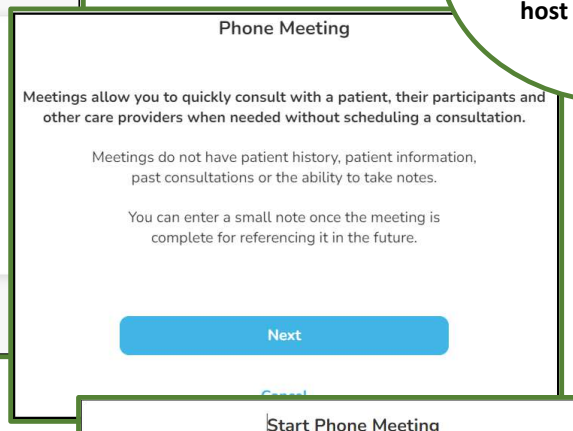
The '**Meeting Join-In Information**' screen will appear.

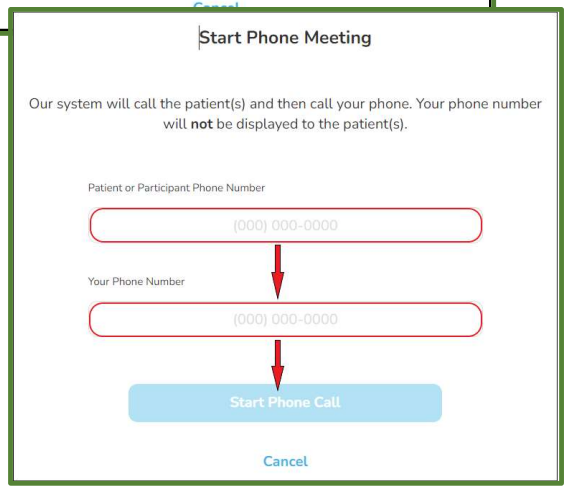
- The '**Send Invitation via Email**' button uses your computer's default email account (any email system can be used). If one other than your computer's default is desired, select either '**Copy Invite Link**' (meeting web link only) or '**Copy Invitation**' (entire meeting invitation info) and email it to your participant(s) using the email system you prefer.
- As participants arrive, the meeting host must either '**Admit**' or '**Decline**' them.
- Completing/leaving the meeting:
  - '**End Call for All**' - the host completely ends the meeting for all participants (invited participants do not have this feature)
  - '**Leave Call**' - the host and invited participants may leave and return to the meeting

Start an Immediate Phone Meeting

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



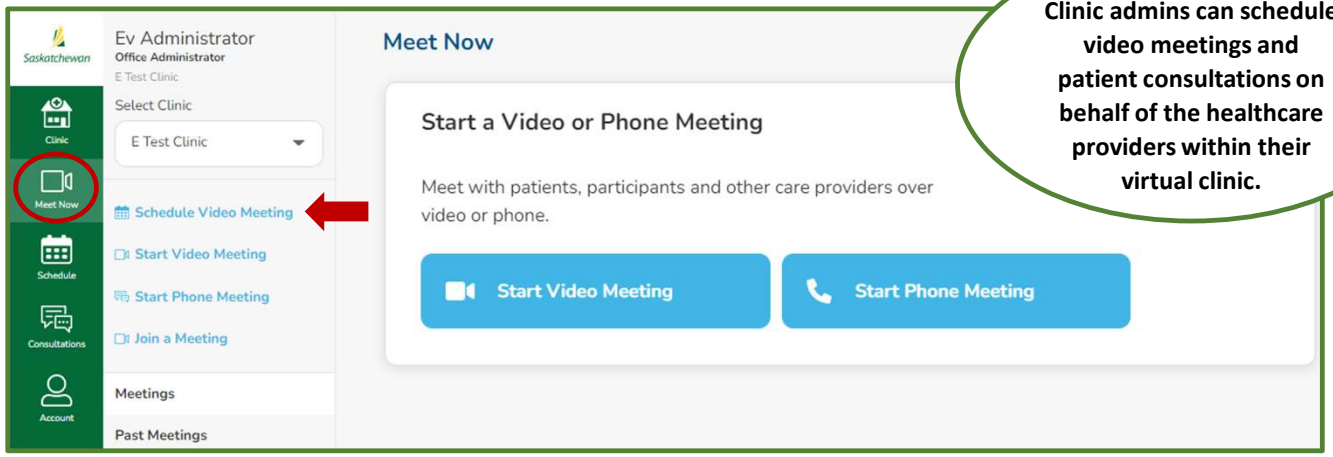




- ❑ Click '**Meet Now**' in the dashboard, then select '**Start Phone Meeting**'
- ❑ Review the screen, then click '**Next**'
- ❑ Enter the patient/participant's phone number and your number (your number is never shared and remains hidden)
- ❑ Click **'Start Phone Call'** (the system will call the host first; after they pick up, it will automatically call the other participant)

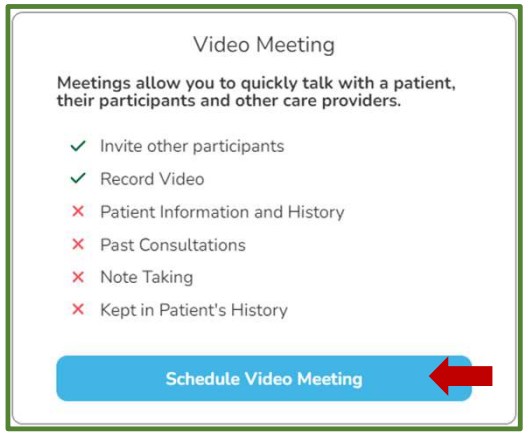
Schedule a Video Meeting – Step 1

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

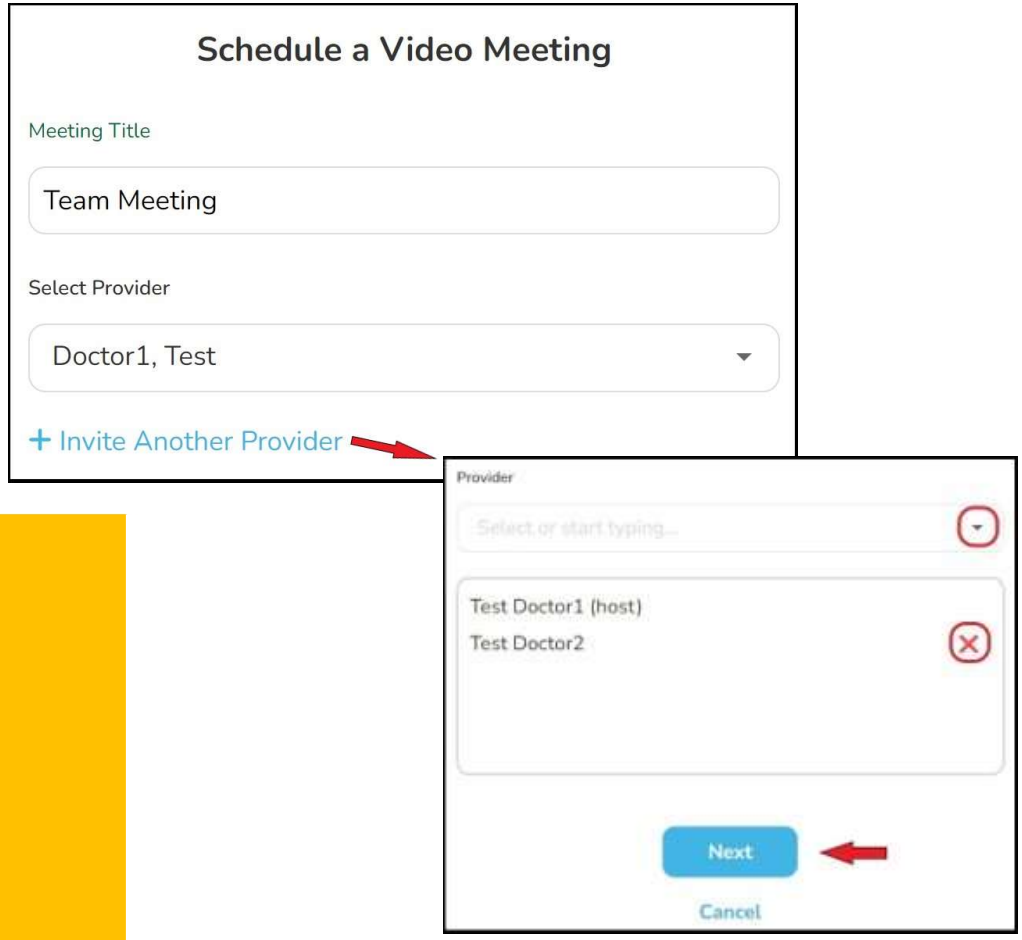


Clinic admins can schedule video meetings and patient consultations on behalf of the healthcare providers within their virtual clinic.

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



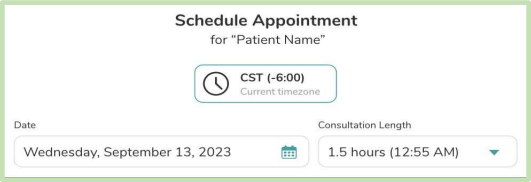
Schedule a Video Meeting – Step 2



- Enter a **'Meeting Title'**
- Clinic admins must select the healthcare provider's name from the '**Select Provider**' drop-down menu.
- If additional providers from the same virtual clinic are being invited to the meeting, click **'+ Invite Another Provider'.**
- Add their name from the '**Provider**' drop-down menu. If someone is added by mistake, click the red 'X' beside their name, to remove them from the list.
- Once complete, click '**Next**'

Schedule a Video Meeting - Step 3

- ❑ '**Date**' - Enter the date of the meeting or, if scheduling recurring meetings, the first meeting date.
- ❑ '**Length**' - the length of the meeting (this is approximate; the appointment will not automatically end if it extends past this time).



When scheduling multiple providers from the same virtual clinic to join a meeting, the following '**See Availability**' and '**Specific Time**' buttons will not appear.

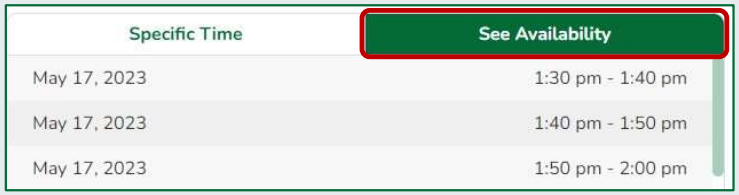
- ❑ Select a meeting '**Start Time**'.

When scheduling a single provider and their schedule **IS NOT** entered in SK Virtual Visit...

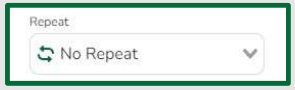
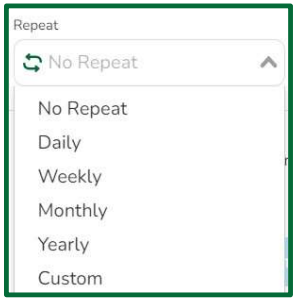
- ❑ Select '**Specific Time**'
- ❑ Under '**Start Time**' select the time of day the appointment(s) will start

When scheduling a single provider and their schedule **IS** entered in SK Virtual Visit...

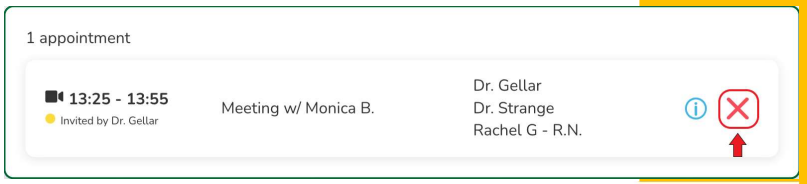
- ❑ Select '**See Availability**'
- ❑ Select an available time from the list



Schedule a Video Meeting - Step 4 - 'Repeat'

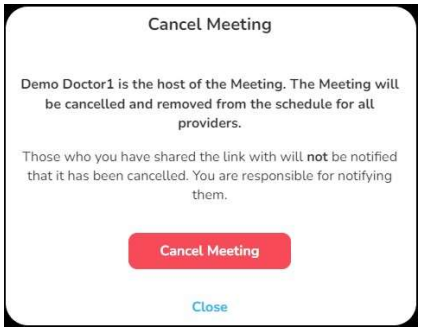
If scheduling a <u>one-time</u> meeting, select '**No Repeat**'.	
If scheduling <u>recurring</u> meetings, **choose the occurrence**: ▪ Daily – occurs every day, Monday thru Sunday ▪ Weekly – any day of the week, Monday thru Sunday ▪ Monthly – any day of the month OR the ordinal of a weekday ▪ Yearly – same day every year OR the ordinal of a weekday of a month ▪ Custom – every # of days (99 is max), every # weeks, every # of months	
Under '**End Date**', select the date the last meeting is to occur. A note will indicate the appointment(s) being scheduled.	This will create 7 appointments for Team Meeting with Demo Doctor1 and Demo Doctor2.
If scheduled video meetings overlap with other appointments that a host provider or an invited provider currently has, a notification will appear to the person doing the scheduling (host provider or clinic admin).	This appointment overlaps with other appointments at this time (3 max)
Click '**Schedule Appointment**'.	Schedule Appointment

Cancel a Scheduled Meeting or Decline an Invitation to a Scheduled Meeting



Cancel a Scheduled Meeting

- Done by the host provider or the clinic admin
- Cancels the appointment entirely and removes it from all invited providers' schedules
- All invited providers will receive a notification, based on their 'Notification Settings' (found under 'Account').



Decline an Invitation to a Scheduled Meeting

- Done by the invited provider or the clinic admin
- Removes the appointment from their schedule only and will not change the appointment or schedules of other invited providers.
- All invited providers will receive a notification, based on their 'Notification Settings' (found under 'Account').

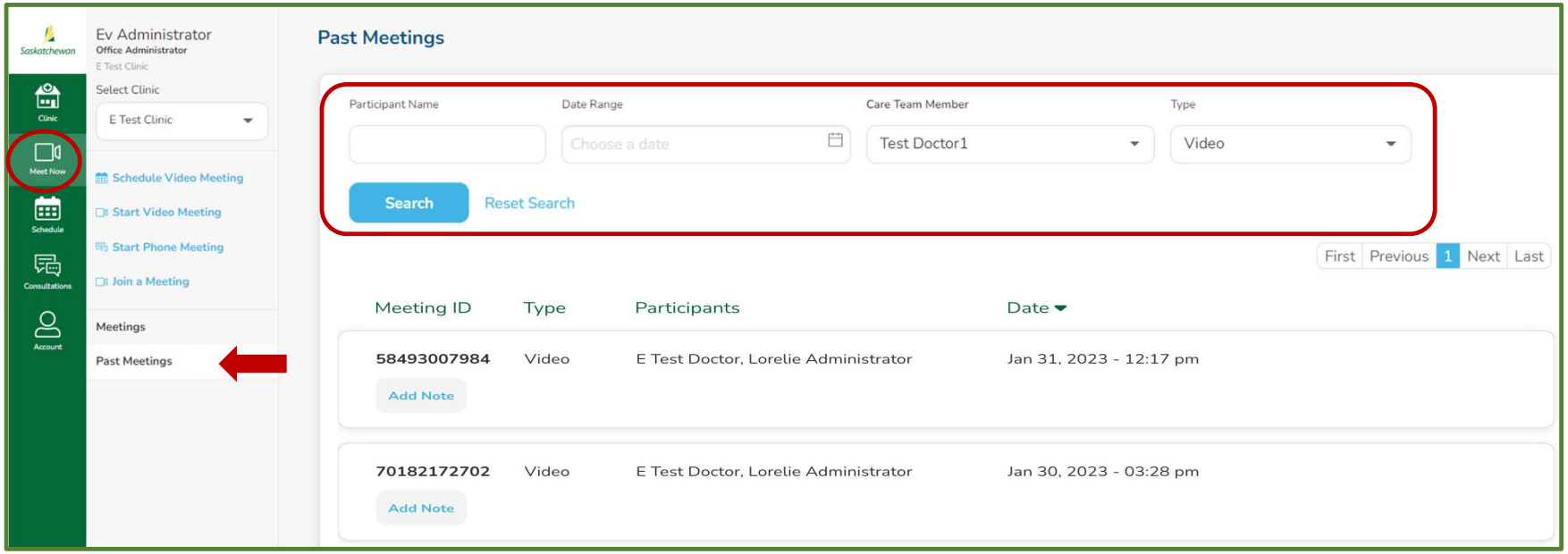
- ❑ Select '**Schedule**' in the dashboard
- ❑ Find and click on the meeting you want to cancel/decline
- ❑ Select '**X – Cancel/Decline**'
- ❑ A pop-up will appear asking you to confirm. If the meeting is recurring, there will be two options - '**This Meeting**' or '**All Meetings in This Series**'
- ❑ Select the applicable option to confirm.

Note: Appointments cannot be edited; they must be cancelled and rescheduled.

Patient Wants to Cancel Their Scheduled 'Meet Now' Meeting

- Patients do not need a SK Virtual Visit account to join 'Meet Now Meetings'; they can simply click the quick link in their email to access them.
- These appointments are not visible when patients are logged into their account, if they have one.
- Therefore, if they wish to cancel or reschedule a 'Meet Now Meeting' appointment, patients should contact their healthcare provider's clinic directly.

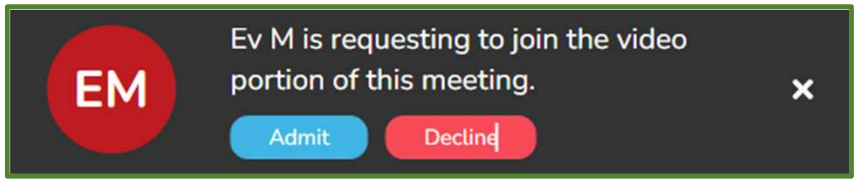
Past Meetings

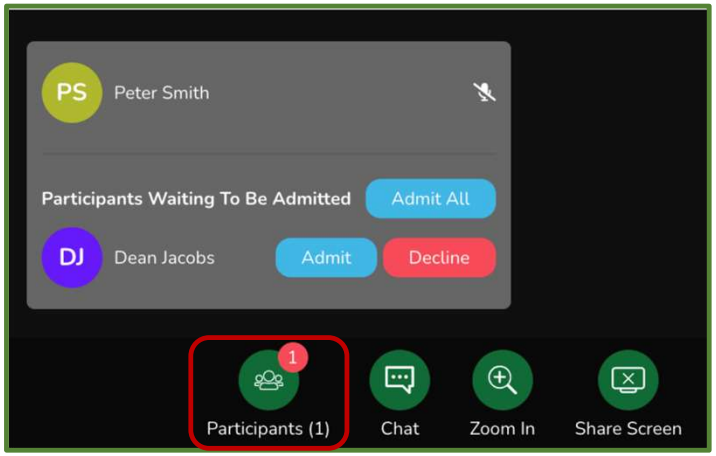


- Click '**Meet Now**' in the dashboard, then select '**Past Meetings**'. The most recent meetings will be listed.
- Use the '**Search**' criteria to find a specific meeting:
  - Participant Name
  - Date Range
  - Care Team Member (only available to clinic admins)
  - Type (video or phone)

13. Video Session Features

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





- All healthcare providers from your virtual clinic in the video call can 'Admit' participants to 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.

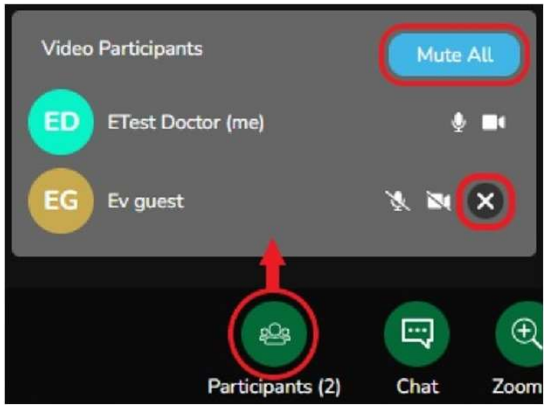
Video Features

Enter Full Screen / Exit Full Screen	Enter Full Screen / Exit Full Screen
Enter Speaker View	Video layout where the speaker shows larger to other participants – shared screens are visible in this view only
Enter Gallery View	Video layout where all participants are equal size on a grid – shared screens are not visible in this view
Mute	Mute/unmute yourself. Click the drop-down menu beside Mute to change selection of your microphone and speaker.
Video	Turn your video on/off. Click the drop-down menu beside Video to change selection of your camera, to blur your background or change your background image.
Participants (2)	Click to see participant names. The host can mute/unmute any or all participants or turn their camera on or off.
Chat	Chat with participants. Note: all participants can see the chat
or	Upload photo or document. In a patient consultation, found below the Message bar. In a meeting, found under the Chat bar.
Zoom In	Zoom In / Zoom Out – adjust to make the image larger or closer. Only works in Speaker View.
Leave Call	Leave Call – leave the video chat. If participants leave the call, the video will stay active for a short time, allowing them time to re-enter the video. End Call for All – ends the video chat completely. Those from outside the virtual clinic cannot do this.
Dial In / Share Screen / Record	Dial In, Share Screen and Record are discussed in more detail on the following screens.

Managing Participants

By clicking the 'Participants' button, the meeting host can:

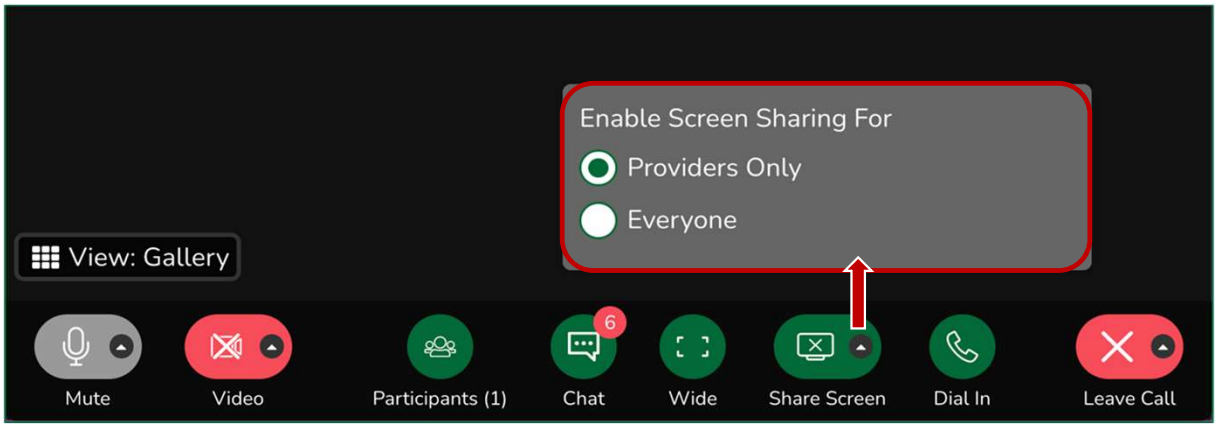
- See a list of participants who are in the video
- See who is muted/unmuted
- See who has their camera on or off
- 'Mute All' participants
- Click the 'X to immediately remove a participant from the video



By clicking the 3 dots in the lower-left corner of a participant's video, the meeting host can:

- 'Mute/Unmute' a specific participant
- 'Remove' a specific participant

Sharing a Screen Within a Video



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

- ❑ The host would click the small arrow next to '**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

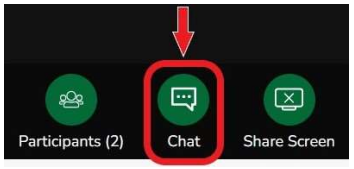
- ❑ **Stop Sharing** - Click to stop sharing your screen

Send a Chat Message

Chat messages are seen by ALL participants of the video session

Step 1: Open the '**Chat**' window:

On the web, click the '**Chat**' button along the bottom of the video window.



OR

On mobile, click the '**3 dots**' at the top of the video window and tap, '**View Text Chat**'.

Step 2: Type your chat message and press '**Send**'.

When opening a hyperlink from '**Chat**', a warning message will appear. By clicking '**Continue**', you will be taken to the hyperlink content in a new window.

Your video will remain open and may be accessed from the tab at the top of your screen.

When using a laptop/desktop, you may unsend a message, photo, video or document by hovering over the message/file and clicking 'Unsend Message', enter a reason and confirm.

Upload a File (Photo, Video or Document)

All participants within the video call can upload files into the 'Chat' window.

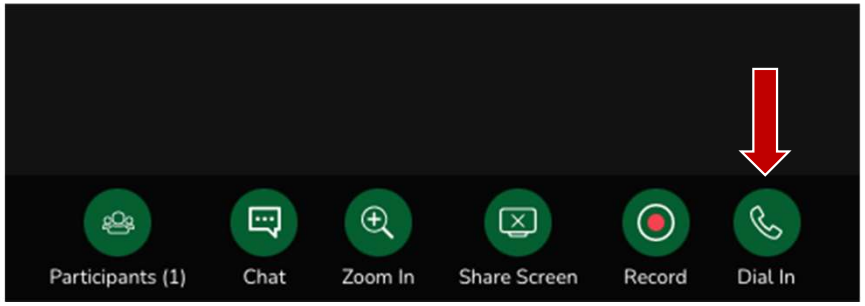
- Open the '**Chat**' window (see instructions on previous screen).
  - Select the camera/document icon  located beneath the 'message' box.

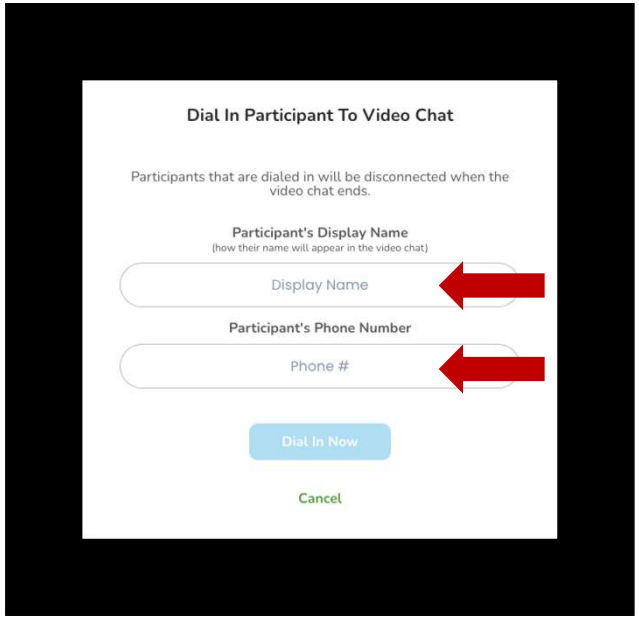
  - Note the supported file formats listed, then choose one of the 3 options:
    - Drag and Drop from a saved location on your device
    - Choose a saved file from your device
    - Take a webcam photo

Your photo, document or video will upload into the '**Chat**' window.

Note: When using a laptop/desktop, you may unsend a message, photo, video or document by hovering over the message/file and clicking 'Unsend Message', enter a reason and confirm.

Dial a Phone Guest Into the Video Chat

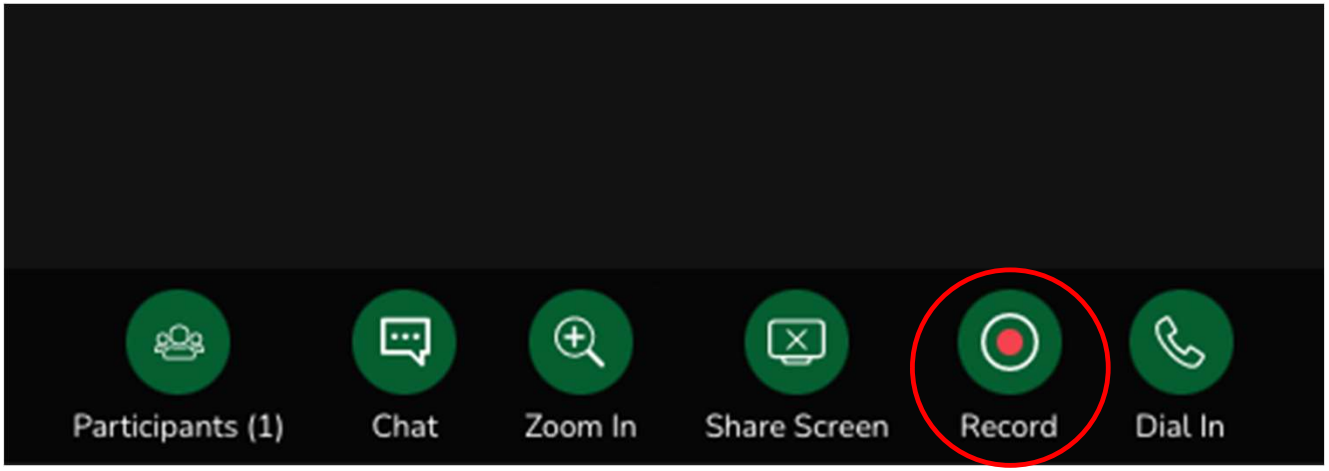




- ❑ Once in the video chat, click '**Dial In**'
- ❑ Enter the '**Participant's Display Name**' (*how their name will appear in the video chat)*
- ❑ Enter the '**Participant's Phone Number**'
- ❑ Click '**Dial In Now**'

- 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.

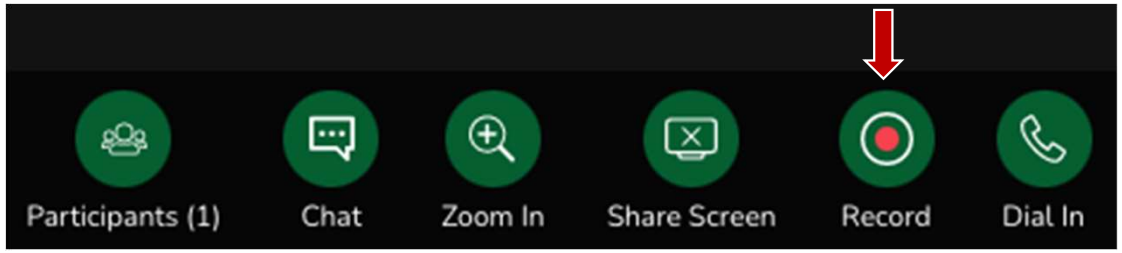
Recording a Video Call



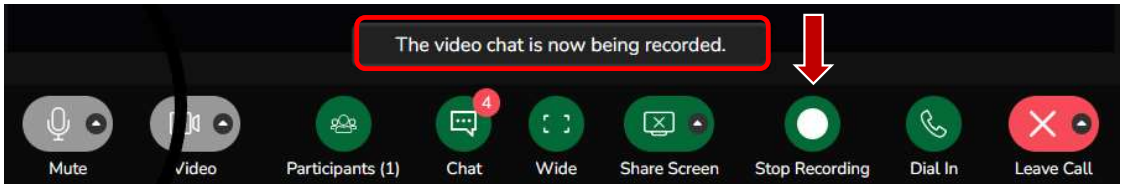
The 'Record a Video Call' feature is **turned off by default** and requires a request to your Organizational Approver to be turned on. *This button will not appear if the feature is disabled.*

- ❑ 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.

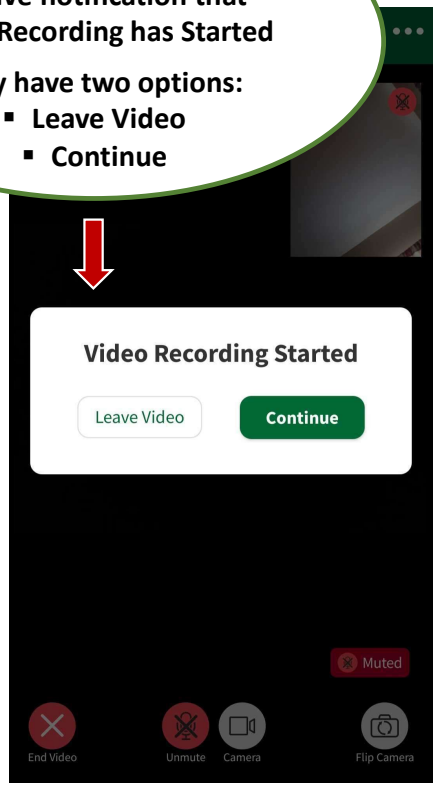


- To end recording, click ' **Stop Record**'. A message will appear letting you know recording has stopped.
- Once all participants are no longer present within a video meeting or consultation, the recording will stop automatically.

Video participants will receive notification that Video Recording has Started

They have two options:

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



14. Inviting Patients

(Not required when seeing patients via 'Meet Now' Video Meetings)

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 and many others, however 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 if you are scheduling them into Patient Consultations.

Inviting Patients

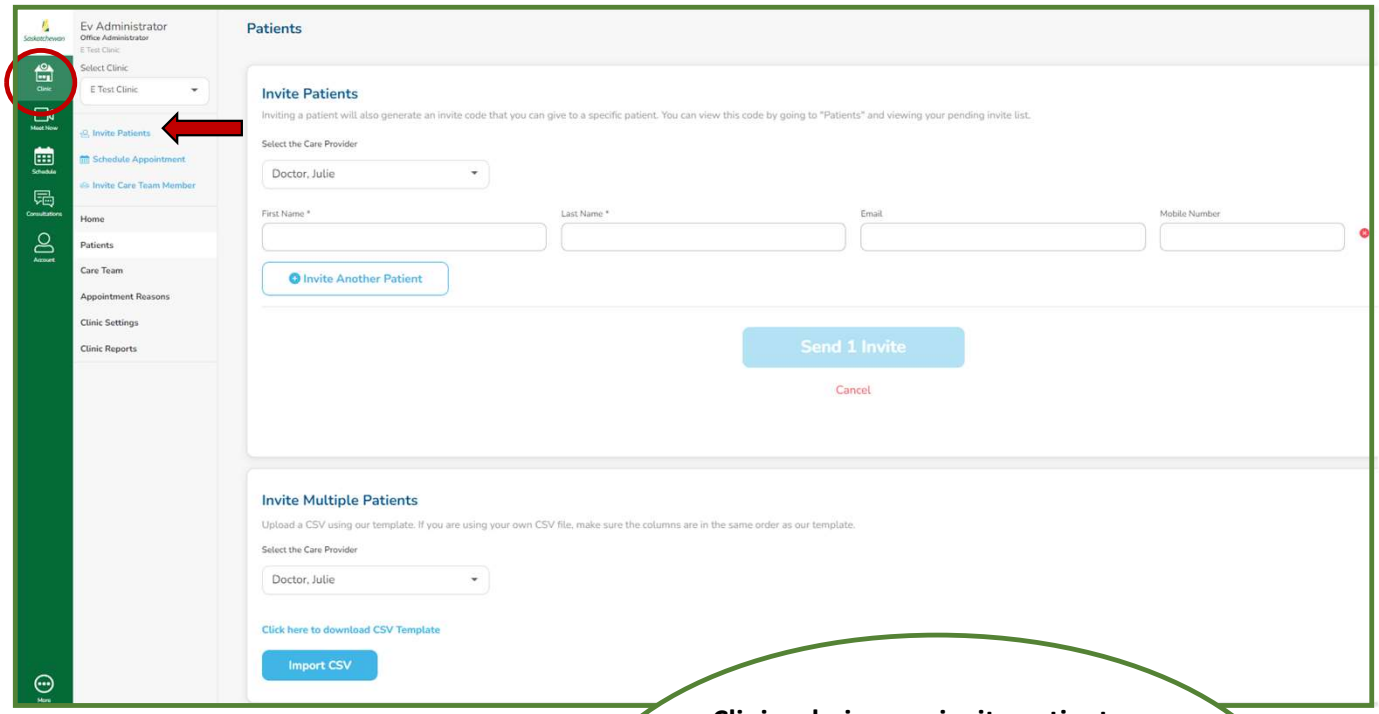
This step is required when you are seeing patients via patient consultations.

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**'.

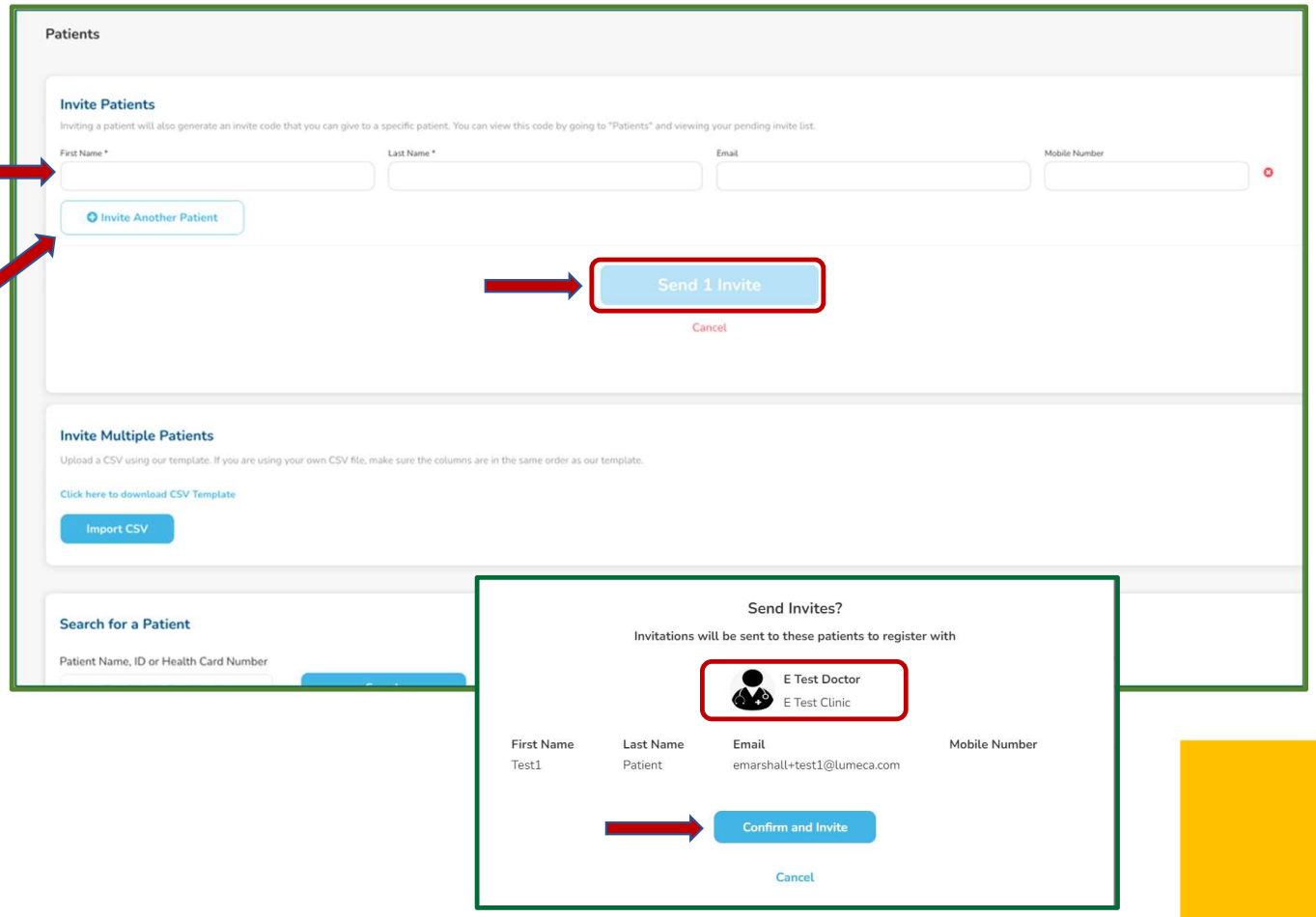


Clinic admins can invite patients on behalf of healthcare providers by following the same steps outlined on the next pages.

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

Method 1: Inviting one Patient or a Small Batch

- Type in the patient's first and last name, and either their email address and/or mobile number (if known)
- If you have more than one patient to add during this time, click '**Invite Another Patient**' and repeat the above step.
- Click '**Send # Invite**'
- Check you have selected the correct healthcare provider and clinic, then click '**Confirm and 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 Visit app information available from the Google Play/Apple Store and/or the web address

Invited Patients

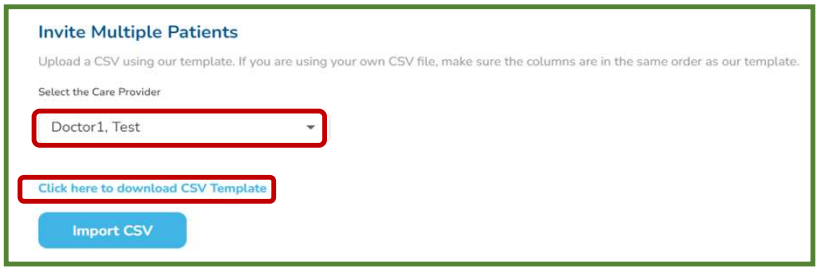
Search first name, last name or email

Name	Provider	Date Invited	Date Accepted	Phone Number	Email	Invite Code	Status	
Estelle Leonard	Dr. Bouffay	June 19, 2023	June 19, 2023		eleonard@mailinator.com	DTXCCC	Accepted	
Joseph Terhune	Dr. Bouffay	June 19, 2023			joeyt@mailinator.com	7KHTWQ	Pending	
Emily Waltham	Dr. Bouffay	June 19, 2023				QD449G	Pending	Remove Invite

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

- For PC and MAC Users if Excel is Used -

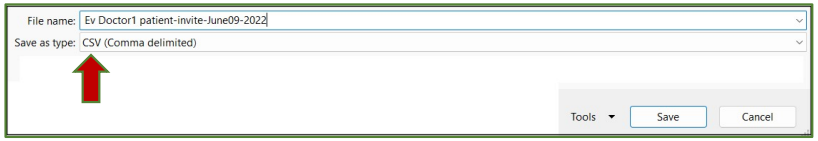
- ❑ Scroll down to '**Invite Multiple Patients**'.
- ❑ If you are the clinic admin with more than one healthcare provider, '**Select the Care Provider**' from the drop-down.
- ❑ Select '**Click here to download CSV Template**'.



- ❑ **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
8				
9				
10				

- ❑ 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**'.



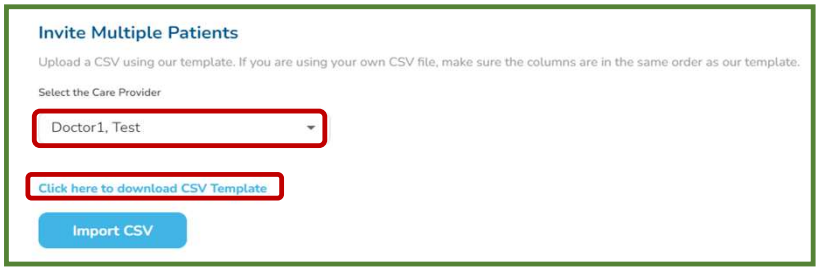
- ❑ Click '**Import CSV'**, locate the CSV file you saved and select it. The invitations to your patients will be sent and a pop-up screen will appear stating that your CSV upload sent successfully.

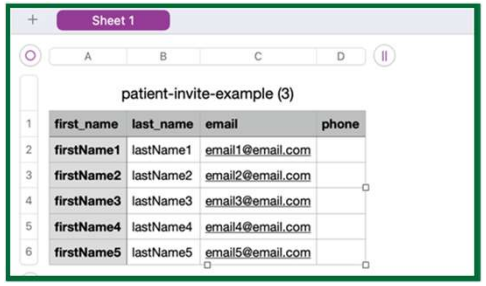
Note: Previously invited patients will not receive an additional invitation

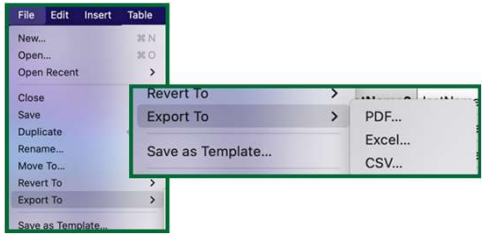
Method 3: Import a CSV File with a Large Group of Patients

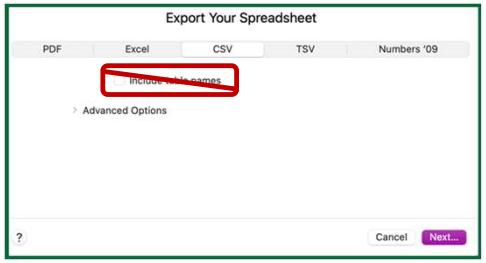
- For MAC Users Without Excel Installed -

- ❑ Scroll down to '**Invite Multiple Patients**'.
- ❑ If you are the clinic admin 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.







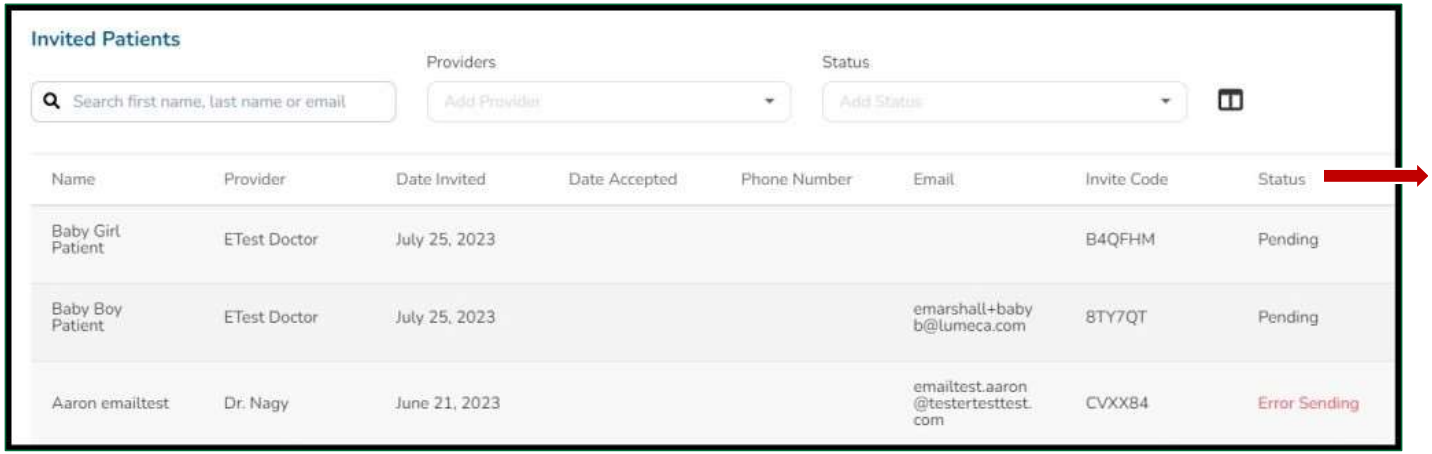


Note: Previously invited patients will not receive an additional invitation

Invited Patients

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

- ❑ Patient's name, phone number and email (if known at time of sending the invitation).
- ❑ The healthcare provider the patients were invited under.
- ❑ The date that the invitation was sent, as well as the date the invitation was accepted by them. Note: accepted invites do not immediately disappear from this list but remain for approximately 72 hours*.
- ❑ The 'Invite Code', which can be shared with patient(s) and they use to join your virtual clinic (when their email address or cell # are unknown).
- ❑ If this information remains under this section for an extended time, it means that the patient has not created their account and joined your virtual clinic. The invitation either must be '**Resent**', or '**Removed & Resent**' (if the wrong details were entered).



Status:

Accepted – patient has created their account and joined your virtual clinic*

Pending – still waiting for patient to join your clinic and create their account

Error Sending – the email did not reach the patient (i.e. misspelt email address)

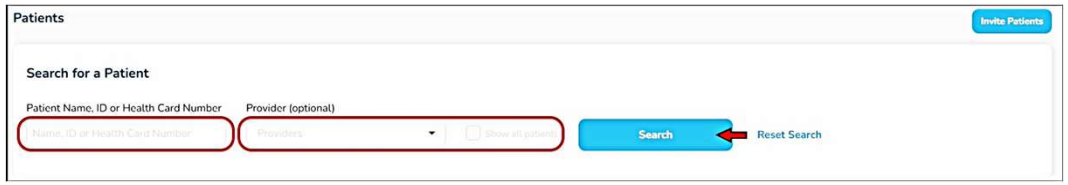
Expired – the invitation time has expired

15. Searching for Patients

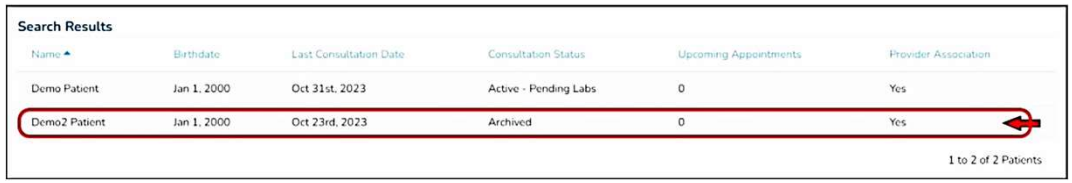
(Patients will only appear after you have invited them to join your virtual clinic, they have accepted your invitation and created their 'SK Virtual Visit' account)

Patient Search

- Select '**Clinic**' in the dashboard, then click '**Patients**'.
- Either:
  - Enter the patient's first name, last name or health card number, OR
  - ***Feature currently in development -*** Select the correct healthcare provider from the drop-down list. Check '**Show all patients**' if you wish to see all patients who are actively part of your virtual clinic as well as those who have been removed from your virtual clinic. If you do not check this box, you will only see all patients who are part of your virtual clinic, under the healthcare provider you selected.
- Click '**Search**'. *If your patient's name does not appear after searching for them, they have either not yet accepted the invitation to join your clinic, or they still need to be invited by you.*



- Select your patient from the list.



Patient Search

ETest Doctor
Physician

Invite Patients
Schedule Appointment
Invite Care Team Member

Home
Patients
Care Team
Appointment Reasons
Clinic Settings
Reports
Consultation Feedback

Lady Patient

Patient ID: **6272** Health Card Number: **123456789**

New Consultation

Remove Patient

Contact Information
emarshall+lady@lumeca.com
Mobile Phone: (306) 434-5335

Age and Gender
Born on January 1, 2000
23 years old
Female

Location
Regina, Saskatchewan
S4S 4S4
Box 10

Providers
ETest Doctor

Upcoming Appointments
No upcoming appointments.

Consultations Requiring Follow-Up
No consultations requiring follow-up.

You will see the following:

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

***based on manual input within the platform**

The Patient Information screen will appear. You may:

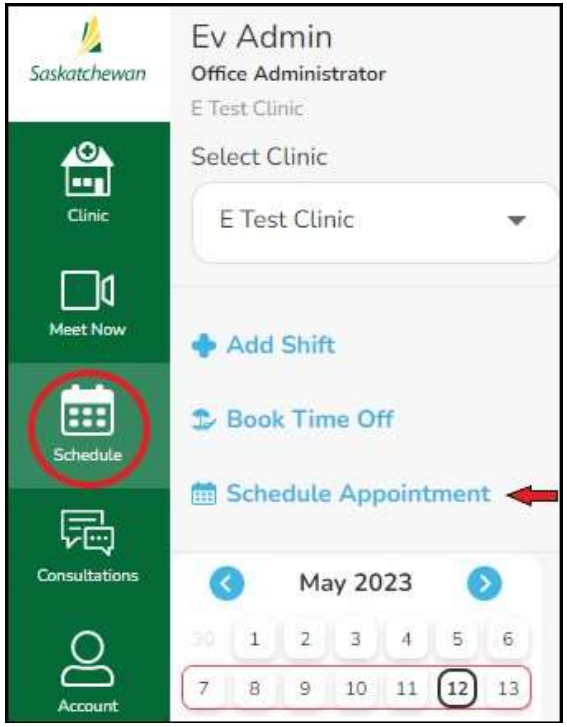
- Verify the patient is associated with your clinic. If you could not find a patient, they may not have been invited or have not accepted the clinic invite yet.
- View additional information about the patient
- Schedule a '**New Consultation**'
- **'Remove Patient**' or if removed, '**Add Patient to Clinic**'

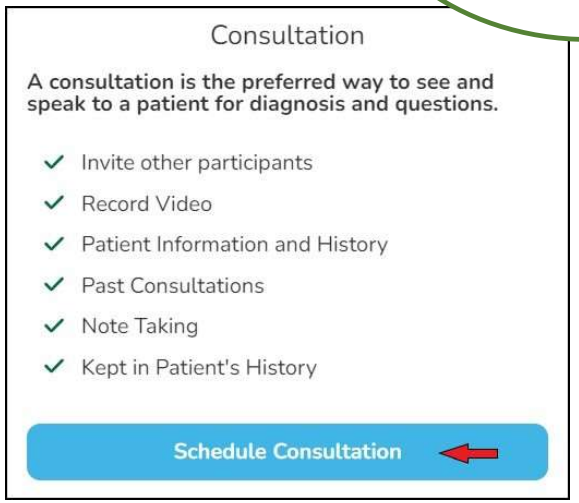
Patient Removed
Add Patient to Clinic

16. Scheduling and Canceling Patient Consultations

Schedule a Patient Consultation - Step 1

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

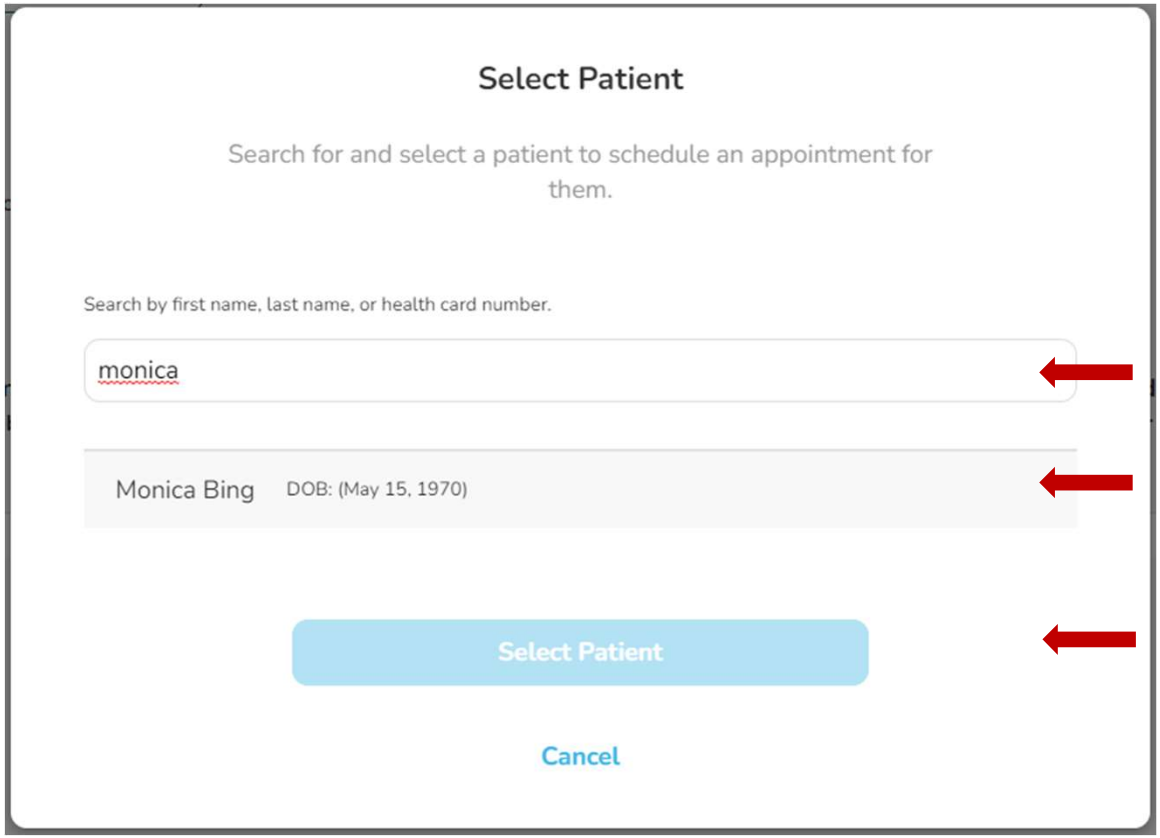




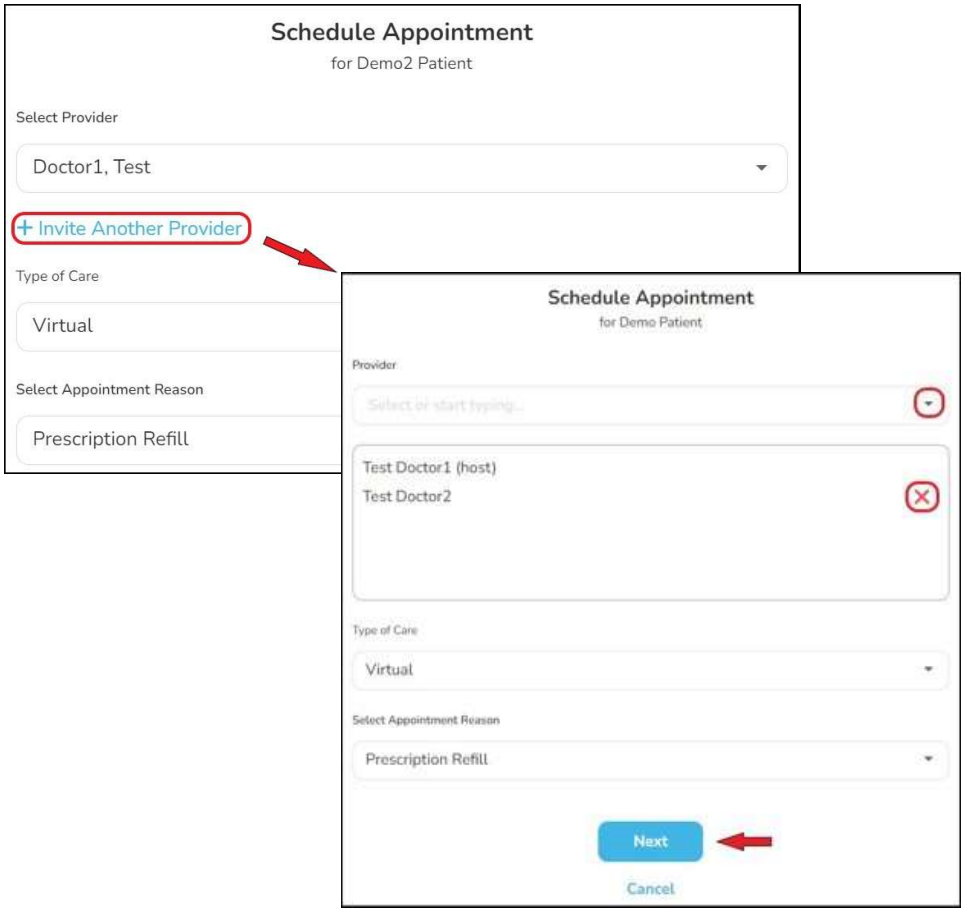
Clinic admins can schedule video meetings and patient consultations on behalf of the healthcare providers within their virtual clinic.

Schedule a Patient Consultation - 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**'



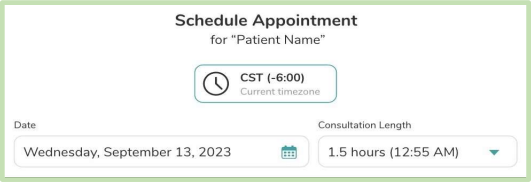
Schedule a Patient Consultation - Step 3



- ❑ Clinic admins must select the healthcare provider's name from the '**Select Provider**' drop-down menu.
- ❑ Choose '**Type of Care**' (virtual or in-person) and '**Appointment Reason**' from the drop-down menus.
- ❑ If additional providers from the same virtual clinic are being invited to the patient consultation, click **'+ Invite Another Provider'.**
- ❑ Add their name from the **'Provider'** drop-down menu. If someone is added by mistake, click the red 'X' beside their name, to remove them from the list.
- ❑ Once complete, click '**Next**'

Schedule a Patient Consultation - Step 4

- ❑ '**Date**' - Enter the date of the appointment or, if scheduling recurring appointments, the first appointment date.
- ❑ '**Length**' - the length of the appointment (this is approximate; the appointment will not automatically end if it extends past this time).



When scheduling multiple providers from the same virtual clinic to join a consultation, the following '**See Availability**' and '**Specific Time**' buttons will not appear.

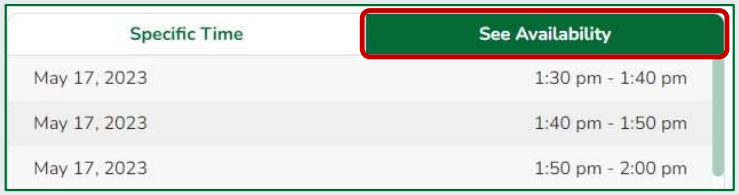
- ❑ Select a consultation '**Start Time**'.

When scheduling a single provider and their schedule **IS NOT** entered in SK Virtual Visit...

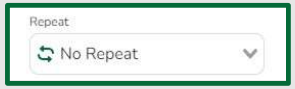
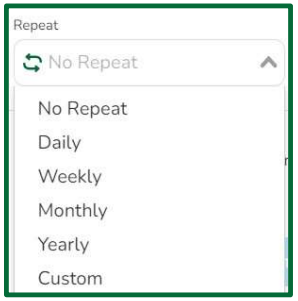
- ❑ Select '**Specific Time**'
- ❑ Under '**Start Time**' select the time of day the appointment(s) will start

When scheduling a single provider and their schedule **IS** entered in SK Virtual Visit...

- ❑ Select '**See Availability**'
- ❑ Select an available time from the list



Schedule a Patient Consultation - Step 5 - 'Repeat'

If scheduling a <u>one-time</u> consultation, select '**No Repeat**'.	
If scheduling <u>recurring</u> consultations, **choose the occurrence**: ▪ Daily – occurs every day, Monday thru Sunday ▪ Weekly – any day of the week, Monday thru Sunday ▪ Monthly – any day of the month OR the ordinal of a weekday ▪ Yearly – same day every year OR the ordinal of a weekday of a month ▪ Custom – every # of days (99 is max), every # weeks, every # of months	
Under '**End Date**', select the date the last consultation is to occur. A note will indicate the appointment(s) being scheduled.	This will create 7 appointments for Team Meeting with Demo Doctor1 and Demo Doctor2.
If scheduled patient consultations overlap with other appointments that a host provider or an invited provider currently has, a notification will appear to the person doing the scheduling (host provider or clinic admin).	This appointment overlaps with other appointments at this time (3 max)
Click '**Schedule Appointment**'.	Schedule Appointment

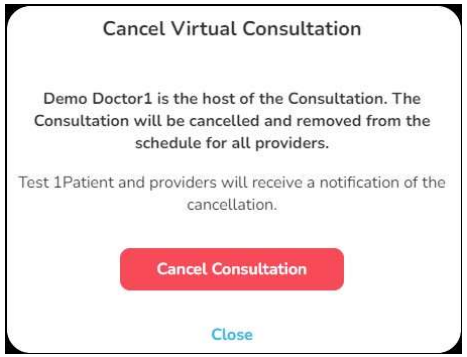
Cancel a Scheduled Consultation or Decline an Invitation to a Scheduled Consultation

Cancel a Scheduled Consultation

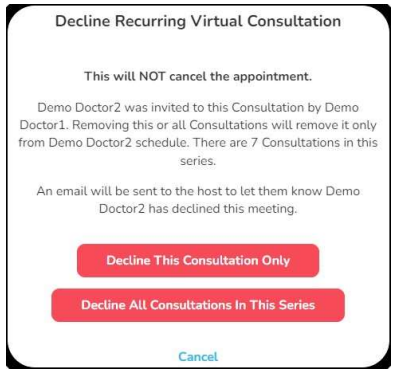
- Done by the host provider or the clinic admin
- Cancels the appointment entirely and removes it from all invited providers' schedules
- All invited providers will receive a notification, based on their 'Notification Settings' (found under 'Account').

Decline an Invitation to a Scheduled Consultation

- Done by the invited provider or the clinic admin
- Removes the appointment from their schedule only and will not change the appointment or schedules of other invited providers.
- All invited providers will receive a notification, based on their 'Notification Settings' (found under 'Account').



- ❑ Select '**Schedule**' in the dashboard
- ❑ Find and click on the consultation you want to cancel/decline
- ❑ Select '**X – Cancel/Decline**'
- ❑ A pop-up will appear asking you to confirm. If the consultation is recurring, there will be two options - '**This Consultation**' or '**All Consultations in This Series**'
- ❑ Select the applicable option to confirm.



Note: Appointments cannot be edited; they must be cancelled and rescheduled.

Patient Makes an Online Request to Cancel Their Scheduled Consultation

Patients may log into their 'SK Virtual Visit' account and make an online request to have their appointment cancelled.

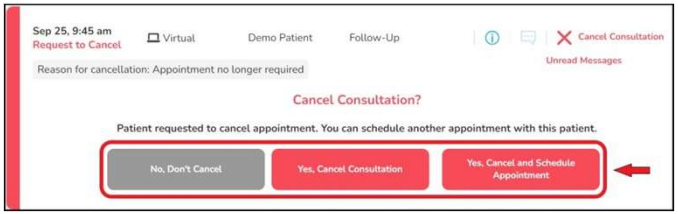
Clinic users will find these requests under either...

Consultations Tab >

'Active and Pending' or 'Requests to Cancel':

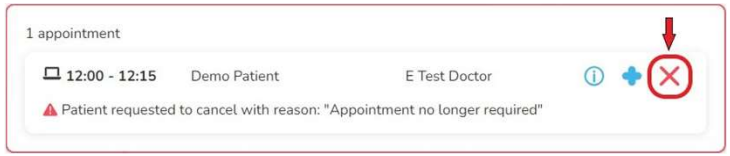
- ❑ Locate the scheduled appointment, then click '**X Cancel Consultation**'.

- ❑ Select one of the three available choices:
  - **No, Don't Cancel**
  - **Yes, Cancel Consultation** – choosing this option will promptly cancel the appointment.
  - **Yes, Cancel and Schedule Appointment** – by clicking this option, the appointment will be cancelled immediately, and you will be redirected to the '**Schedule Appointment**' screen, where you can proceed to reschedule.

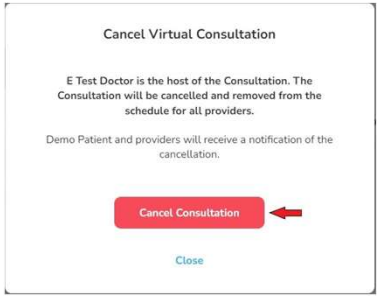


Schedule Tab >

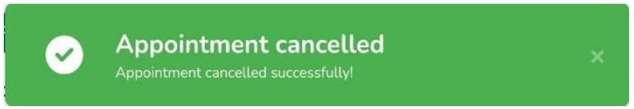
- ❑ Locate the scheduled appointment, tap into it, then click the '**X**'.



- ❑ Click '**Cancel Consultation**' to confirm.



A green notification will pop up, indicating that the appointment has been successfully cancelled.



17. Enter Scheduled Appointments

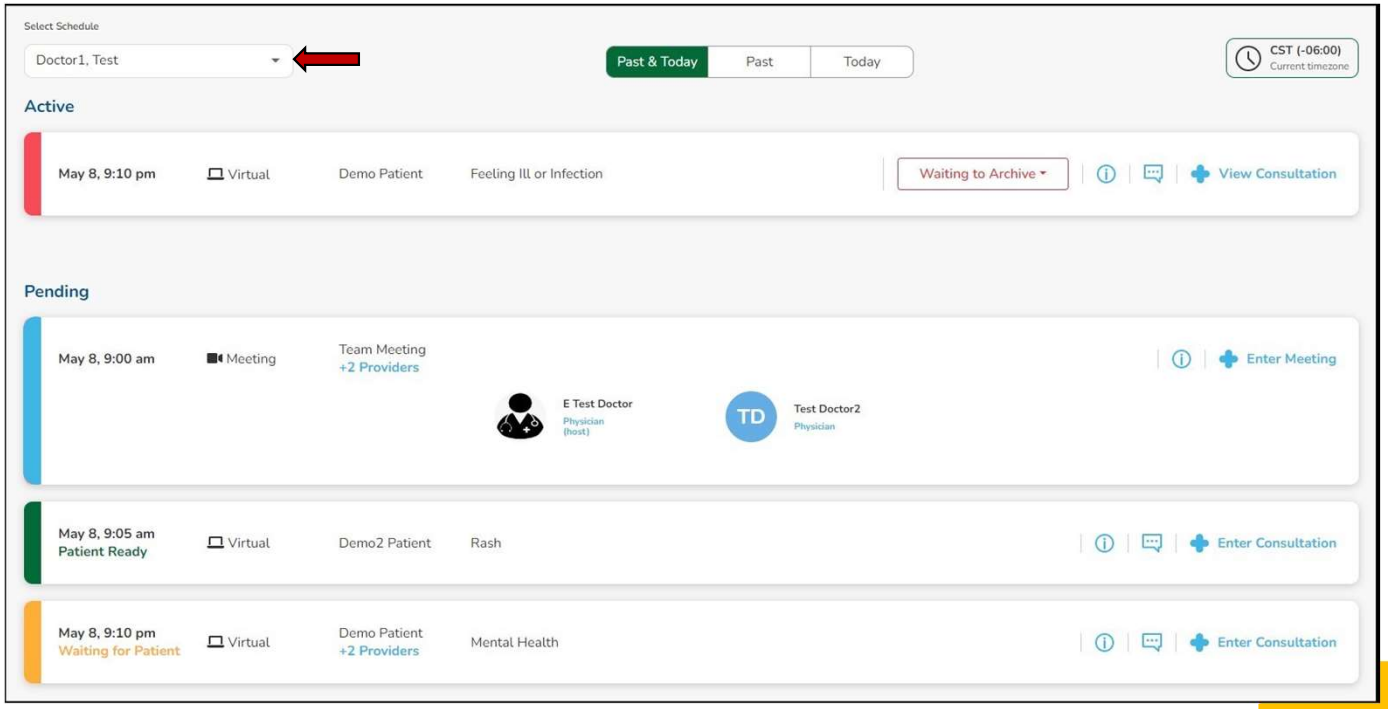
The 'Active & Pending' Screen

Scheduled video meetings and patient consultations can be accessed from two places in the dashboard, either the '**Schedule**' tab, or here on the **'Active & Pending**' screen, which is designed to display a provider's schedule in booking sequence. There are a few additional features available here as well.

- ❑ Select '**Consultations**' in the dashboard, then click '**Active & Pending**'

- ❑ If working with more than one clinic/location, choose from the '**Select Clinic**' drop-down menu.

- ❑ Clinic admins must select the healthcare provider's name from the '**Select Schedule**' drop-down menu.



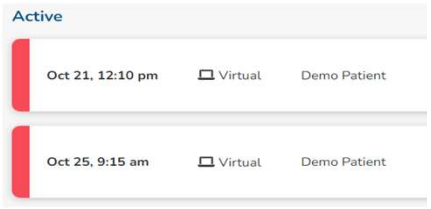
Active & Pending Screen Headings & Color Schemes

Active:
Consultations you have entered and started communicating in:

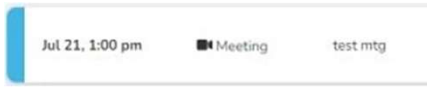
- Completed and 'Archived'
- Active & not yet 'Archived'
- Active where a patient has not arrived or responded to you

Pending:
Scheduled Consultations and Meetings:

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



RED – 'Waiting to Archive - completed 'Archived' consultations. There is a wait of 3 hours that these consults remain open, in the event additions need to be made. Afterwards, they may be found under 'Search for Consultations'.
Also seen here are consults entered by the healthcare provider, but not yet Archived.



BLUE – scheduled Video Meetings

GREEN – 'Patient Ready' - the patient is marked as ready and is available for their appointment

GOLD – 'Waiting for Patient' – the patient has a scheduled consultation

Active & Pending Screen Features – Page 1

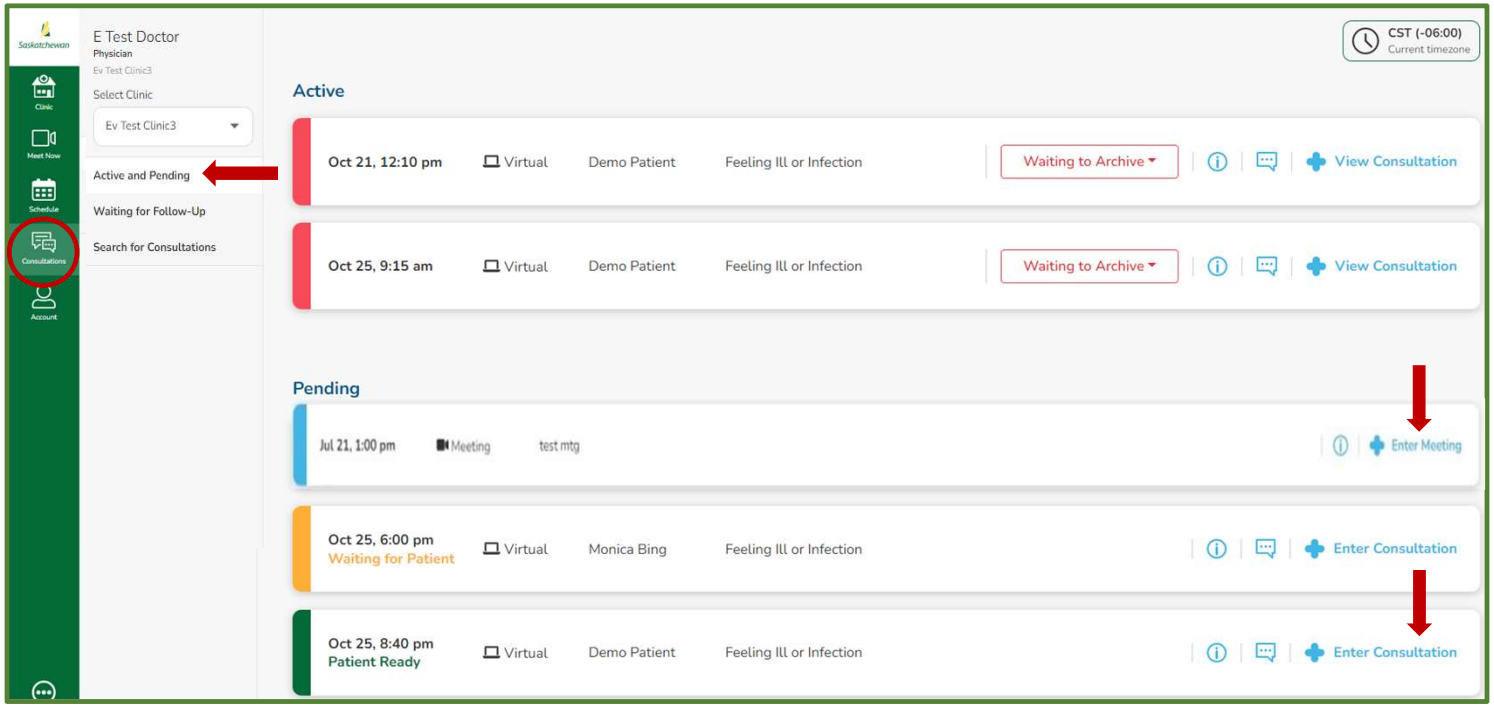
Past & Today / Past / Today	Past & Today – filter appointments from today, the past or both
May 8, 9:00 am	Appointment Date and Time
or or	Appointment Type (Virtual, In-Person or Video Meeting)
Team Meeting or Demo Patient	Name of Meeting or Patient
+2 Providers	Number of providers from the same virtual clinic invited to this appointment. Click this button to see their names. If only one provider is scheduled, this button will not appear.
Feeling Ill or Infection	Reason for patient consultation
	Shareable Consultation or Meeting Link
	Quick Message – present messages to send to patients (available for consults only)

Active & Pending Screen Features – Page 2

View Consultation	'View Consultation' under the 'Active' section – consultations the healthcare provider has entered and started, including 'Archived' and those the patient has not yet responded to or entered.
Enter Consultation	'Enter Meeting/Consultation' under the 'Pending' section – When you initially enter the patient consultation, the patient will not realize you are there until you click '**Enter Consultation**' again at the top of the chat area. This gives you a chance to review the consult info ahead of time, as well as leave the consult and return later, when ready.
Cancel Consultation Decline Meeting	Cancel – the host provider or their admin can cancel the appointment entirely Decline – the invited provider can decline their invitation to the appointment only
Request to Cancel	Patient Request to Cancel (for patient consultations only) - after clicking 'X Cancel Consultation, there are 3 options to choose from – No, Don't Cancel; Yes, Cancel Consultation or Yes, Cancel and Schedule Appointment
Waiting to Archive	Consultation Status – options include Active, Pending Imaging, Labs, Other, Referred to Specialist, Cancel Consultation, Archive Consultation, Waiting to Archive. This can be changed on this screen or within the consultation itself.

18. Starting a Scheduled Patient Consultation or Video Meeting

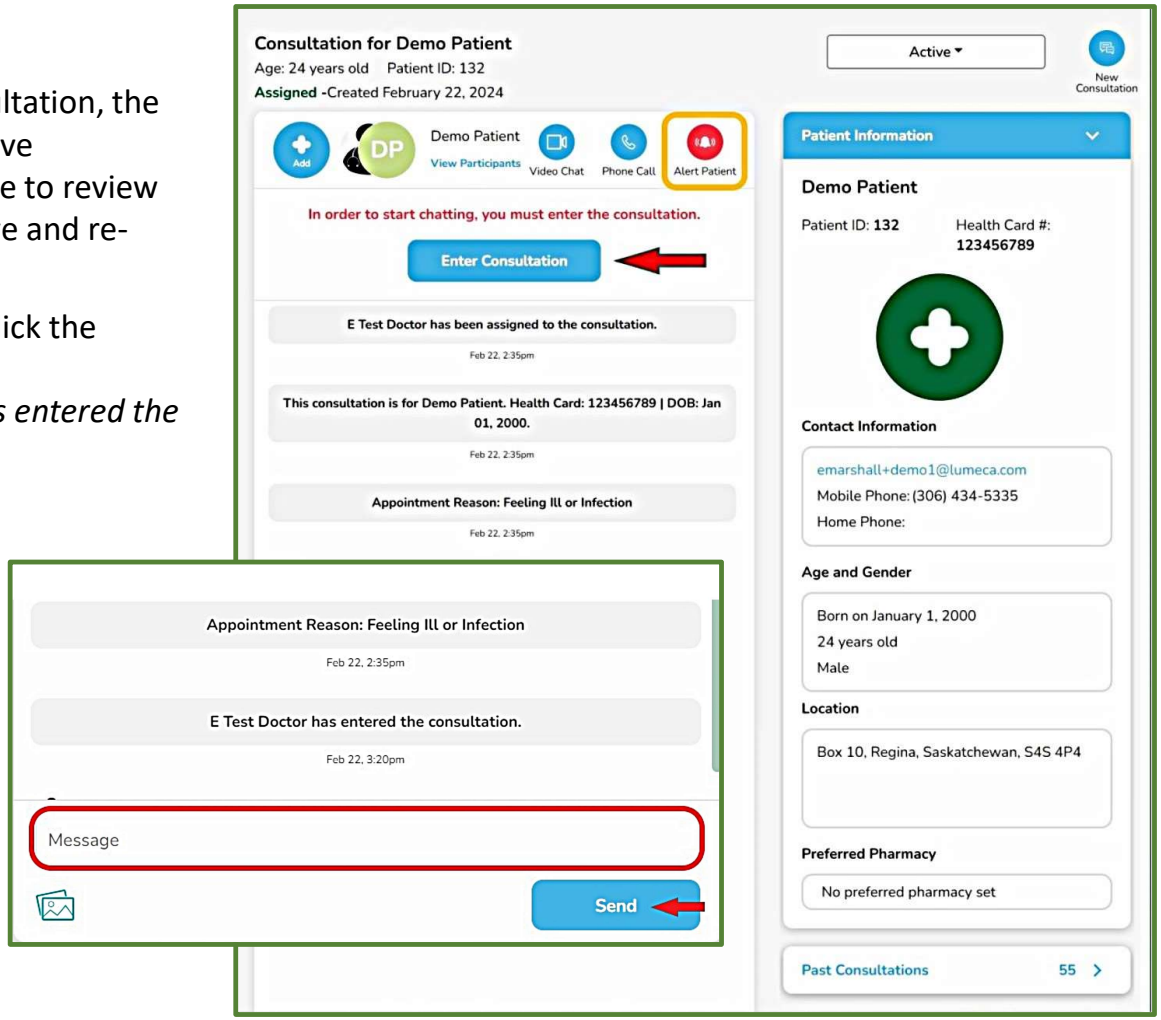
Starting a Patient Consultation or Video Meeting



- ❑ Click '**Consultations**' in the dashboard
- ❑ Select '**Active & Pending**'
- ❑ Click '**Enter Consultation/Meeting**'

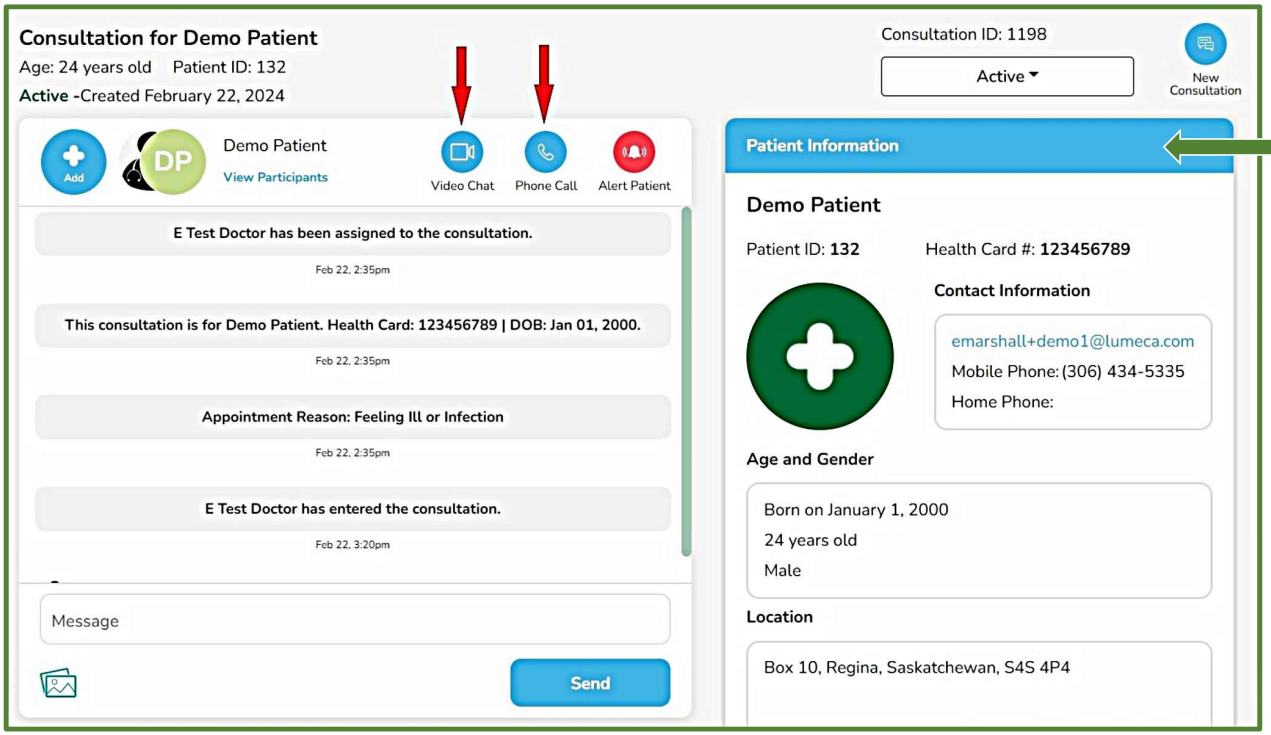
The Patient Consultation – Step 1

- When you first enter the consultation, the patient is not yet aware you have arrived. This gives you a chance to review the appointment. You can leave and re-enter as desired.
- Once you are ready to begin, click the '**Enter Consultation**' button.
  The patient will see '*Dr ~~~ has entered the consultation*'.



- **Message via Chat** to let them know you have arrived.
- Click '**Alert Patient**'  when patients are not responding. Send them a quick message which gets pushed to them via text or a chat message in the consultation itself.

The Patient Consultation Video Chat– Step 2



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

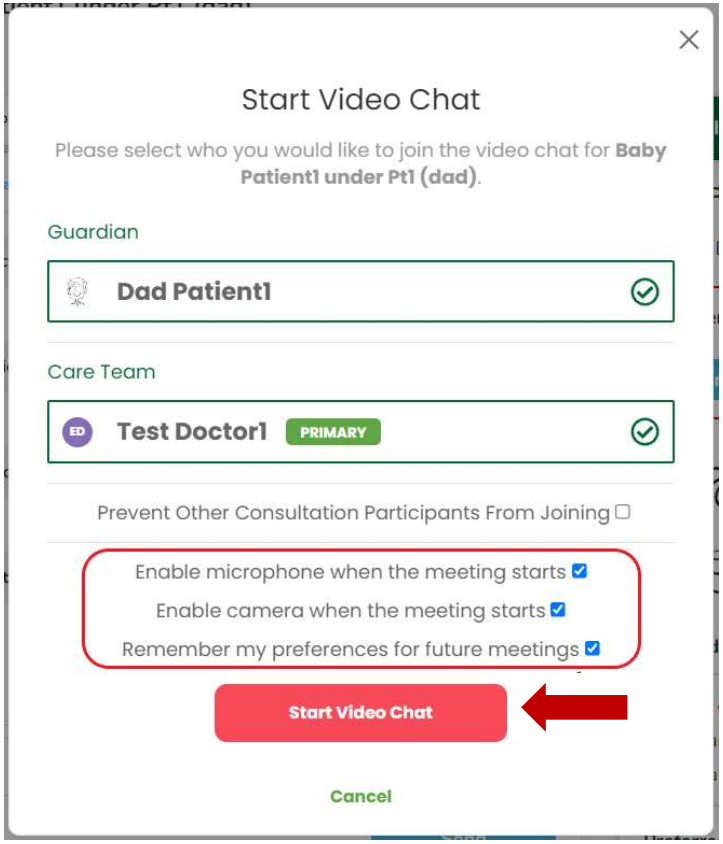
- The following options are available:
  - Video Chat – begin the video portion of the consultation
  - Phone Call – may be used if video chat does not work
- Once ready to proceed, click '**Video Chat**'

Starting / Ending a Video Chat in a Patient Consultation

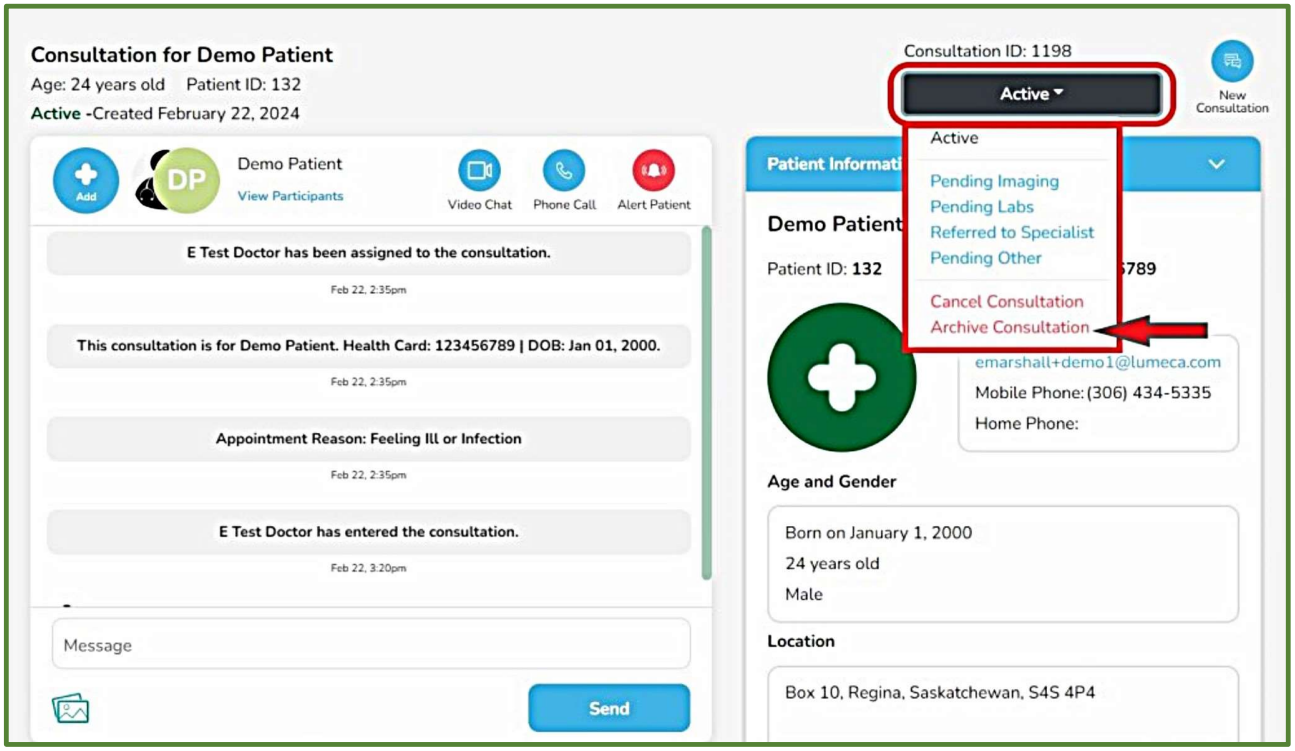
- ❑ Check the boxes to enable your microphone, camera and remember your preferences for future video chats (optional)
  - Note: You may prevent certain participants from joining the video by clicking '**Prevent Other Consultation Participants From Joining**', then unchecking their name. For example, you may wish to video with another colleague from your clinic first before having the patient join.
  - With 'consultations' you can end and start as many videos during the active consultation as necessary, adding and preventing participants as desired.
- ❑ When ready, click '**Start Video Chat**'.

'**Leave Call**' - if the provider host clicks this, the video call will remain active as long as there is another care team member from their clinic present in the video call.

'**End Call for All**' - if this is clicked, the video call will end.

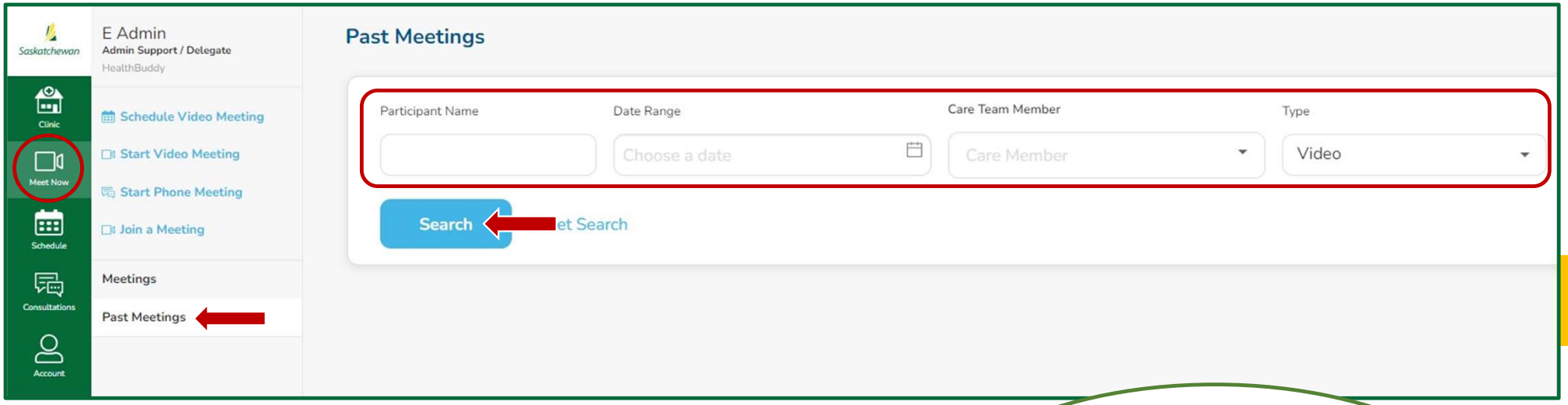


Archive Completed Consultations



- When the consultation is complete, click the '**Active**' drop-down and choose '**Archive Consultation**'.
  - 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 clinic admin or the patient) and then disappears from that screen. It may be located under '**Search for Consultations**'.
  - **Note**: unarchived consultations remain Active to both the clinic and patient and can create backlog and confusion.

Past 'Meet Now Video Meetings'

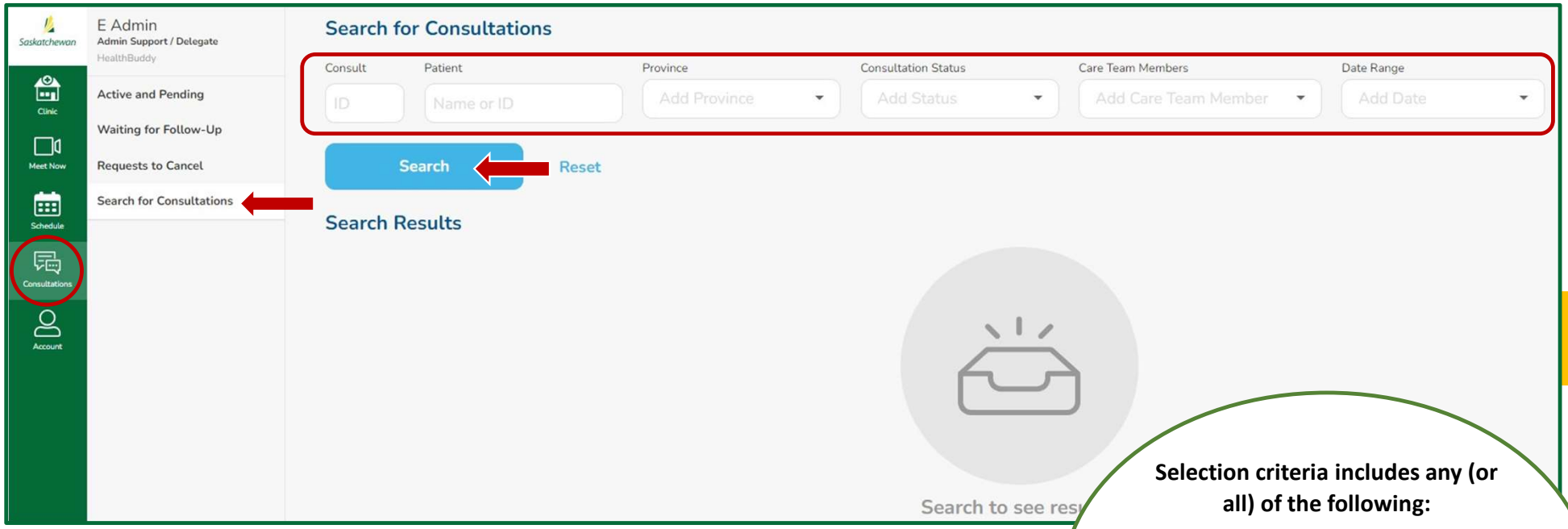


- ❑ Select '**Meet Now**' in the dashboard, then click '**Past Meetings**'
- ❑ Enter applicable search criteria
- ❑ Select '**Search**'

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

- **Participant First Name or Last Name**
- **Date Range**
- **Care Team Member (if Office Admin or Hybrid Care Team Member**
- **Type of Meeting (Video or Phone)**

Past 'Patient Consultations'



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**

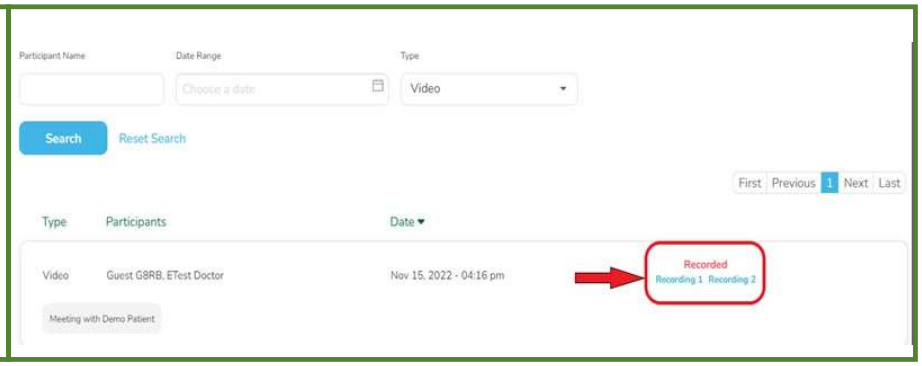
- ❑ Select '**Consultations**' in the dashboard, then click '**Search for Consultations**'
- ❑ Enter applicable search criteria
- ❑ Select '**Search**'

Finding Recordings of Video Meetings / Consultations

'Meet Now' Meetings

Past Meetings can be found under:

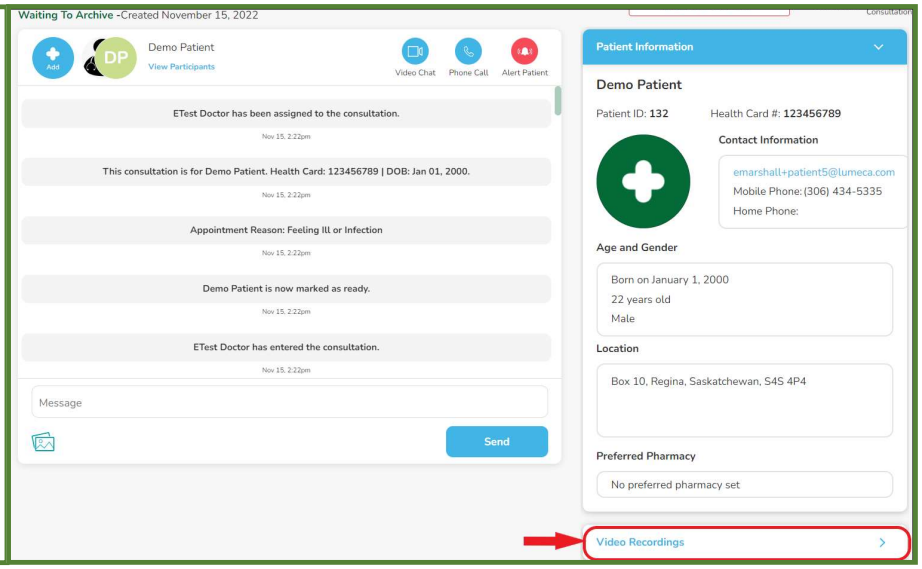
- Meet Now > Past Meetings
- Select the meeting from the list or search for it.
- If recorded, a video recording will be available to view after approximately an hour.



Patient Consultations

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

- Consultations > Active & Pending
- Consultations > Search for Consultations
- Open the applicable Patient Consultation
- If recorded, a video recording can be found within the consultation under 'View Recordings'



20. Provider Support

PHONE:
1-888-316-7446, ext 1 > 1 > 2 > 2

EMAIL:
virtualvisit@ehealthsask.ca

WEBSITE:
https://skvirtualvisit.zendesk.com

21. Citizen Support

PHONE:
1-844-767-8259, ext 4

EMAIL:
virtualvisit@ehealthsask.ca

WEBSITE:
https://skvirtualvisit.zendesk.com