

Saskatchewan Virtual Visit Provider User Guide



Canada

Saskatchewan

Saskatchewan
Health Authority

eHealth
Saskatchewan

Sask
cancer
AGENCY

SMA | SASKATCHEWAN
MEDICAL ASSOCIATION

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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 via video, chat and/or phone
- ❑ 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.

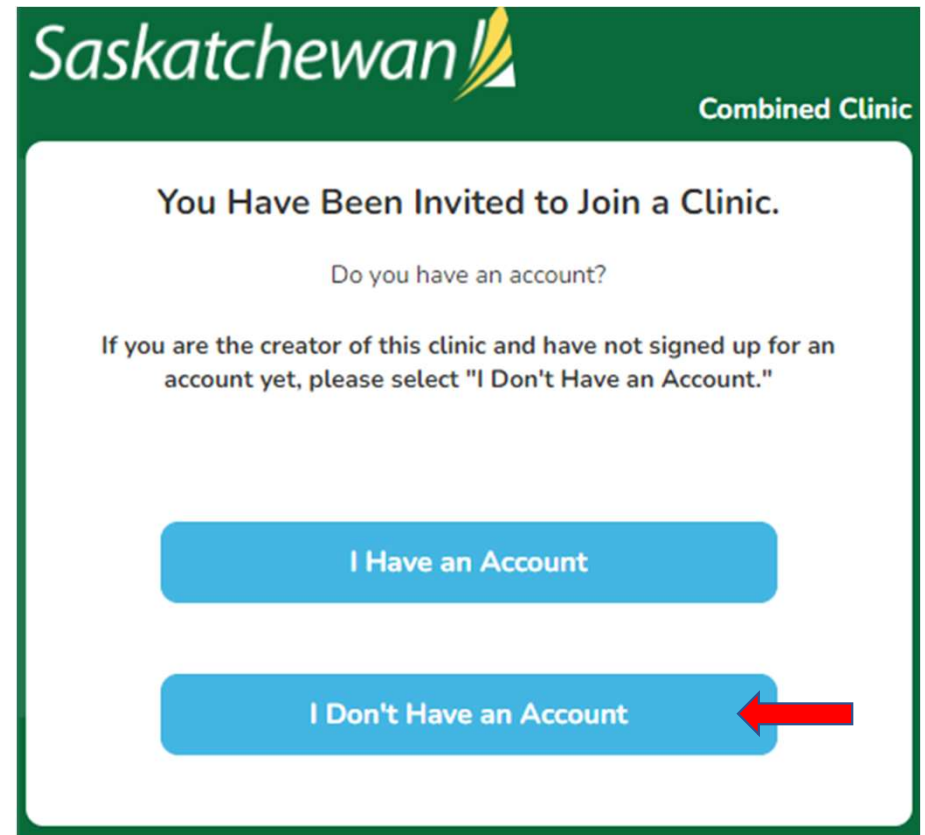
Create Your Account

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

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

Note: 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.

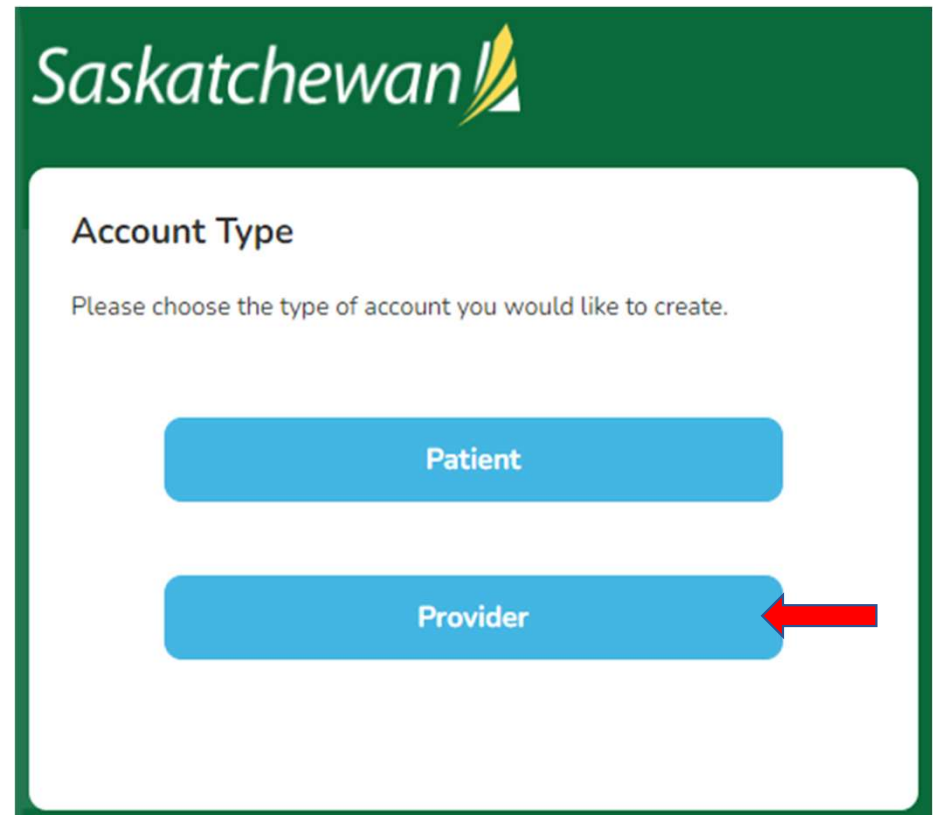


Create a 'Provider' Account

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')



The screenshot shows a green header with the Saskatchewan logo. Below it is a white box with a green border containing the text 'Account Type' and 'Please choose the type of account you would like to create.' There are two blue buttons: 'Patient' and 'Provider'. A red arrow points to the 'Provider' button.

Create a 'Provider' Account

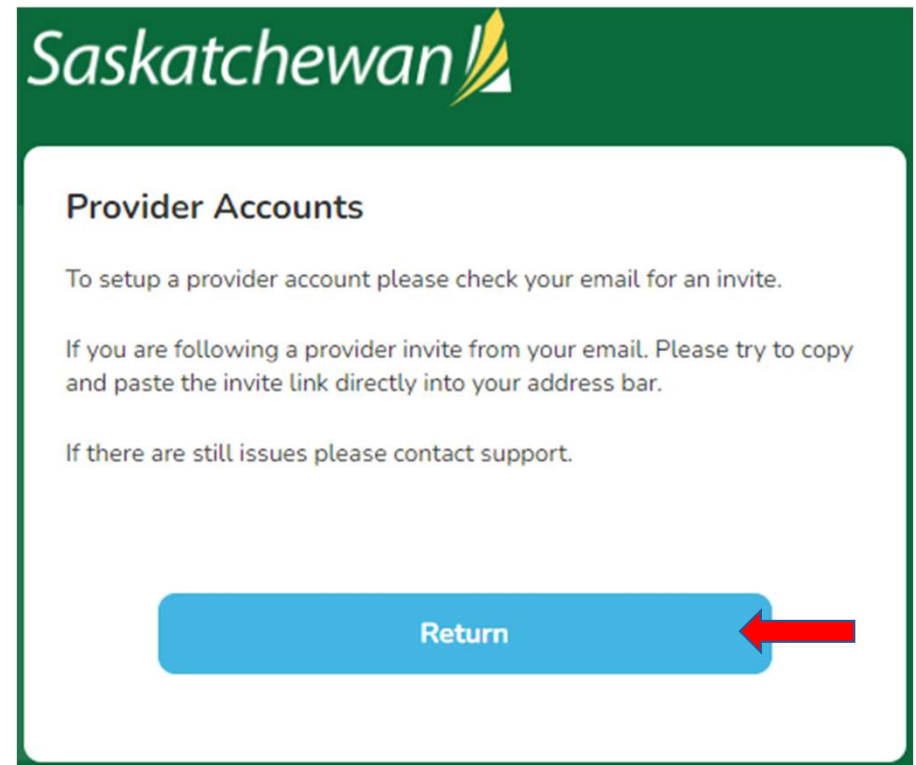
Read the directions, then click **'Return'**.

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

If that does not work...

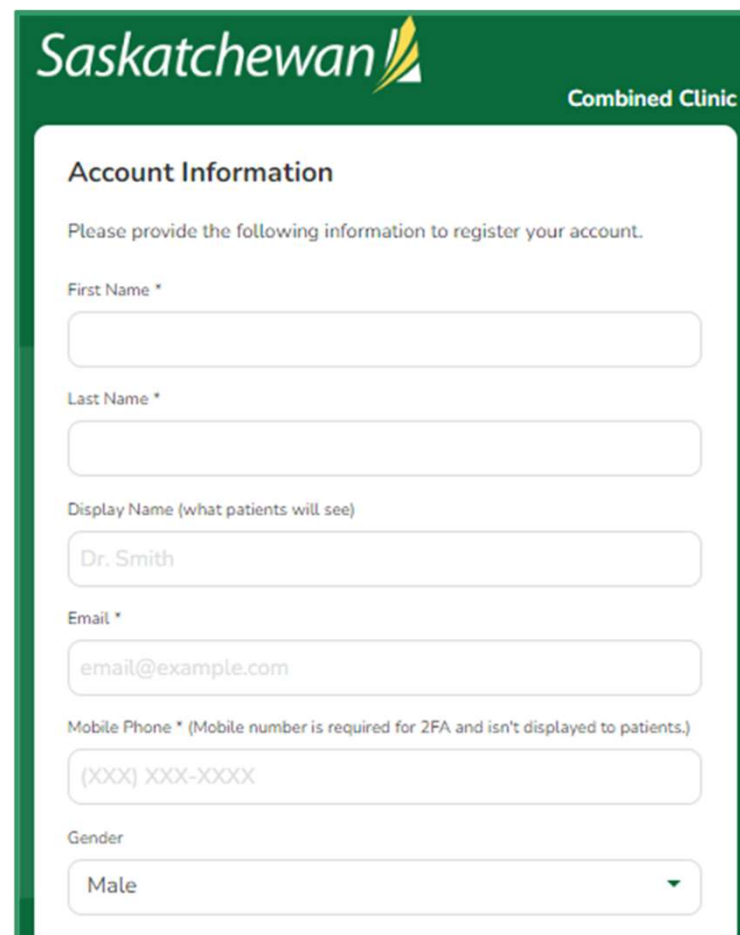
Copy (Ctrl+c) the **'click this link'** hyperlink from the email and paste (Ctrl+v) into your laptop/ computer browser's address bar. You should be directed to the proper screen.

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 platform
 - 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.*



The screenshot shows a registration form for the Saskatchewan Combined Clinic. The form is titled 'Account Information' and includes the following fields:

- First Name ***: A text input field.
- Last Name ***: A text input field.
- Display Name (what patients will see)**: A text input field with the example text 'Dr. Smith'.
- Email ***: A text input field with the example text 'email@example.com'.
- Mobile Phone * (Mobile number is required for 2FA and isn't displayed to patients.)**: A text input field with the example text '(XXX) XXX-XXXX'.
- Gender**: A dropdown menu with 'Male' selected.

Choose a Password

- Create a secure password. As the password requirements are met, checkmarks will automatically appear for each of them.
- Read and agree to the '**Access and Use Policy**' by adding a checkmark
- Click '**Continue**'

Choose a Password

Password

Confirm Password

I have read and agree to the Access and Use Policy

Continue

Password Requirements

- At least 8 characters
- At least 1 capital letter
- At least 1 lowercase letter
- At least 1 number
- At least 1 symbol (*, %, !, etc...)
- Confirmation password matches

YOU ARE NOW READY TO ACCESS YOUR CLINIC !

☐ Click

Go To Your Clinic

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



Log In

Email

Password

[Forgot Password?](#)

[Help](#)

Login

Need to register a new account?

Create Account

Have a meeting invite?

Join Meeting Now

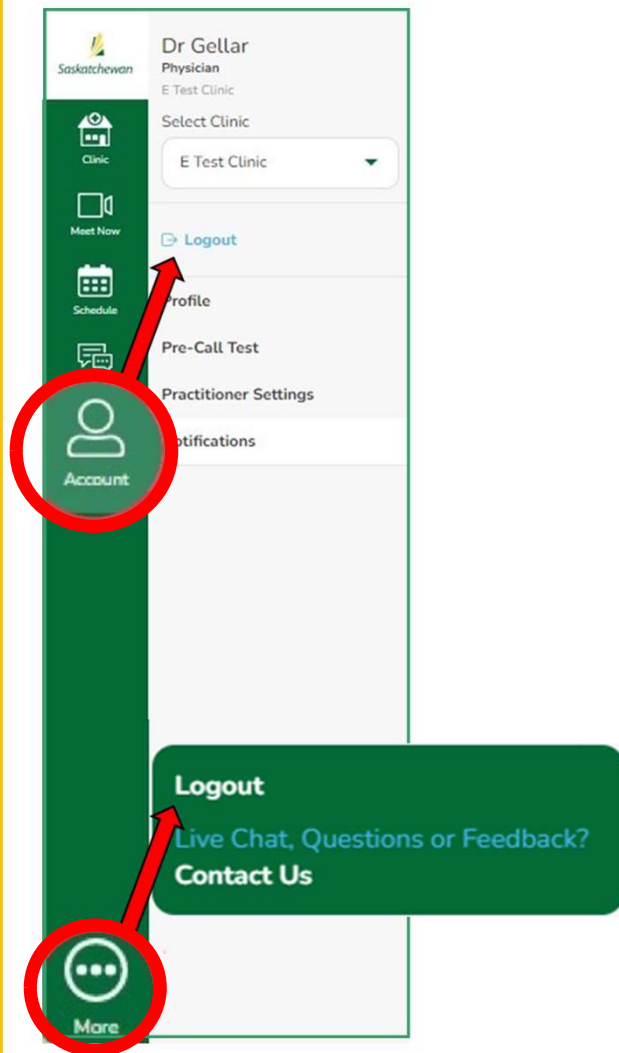
Account Login

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



**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

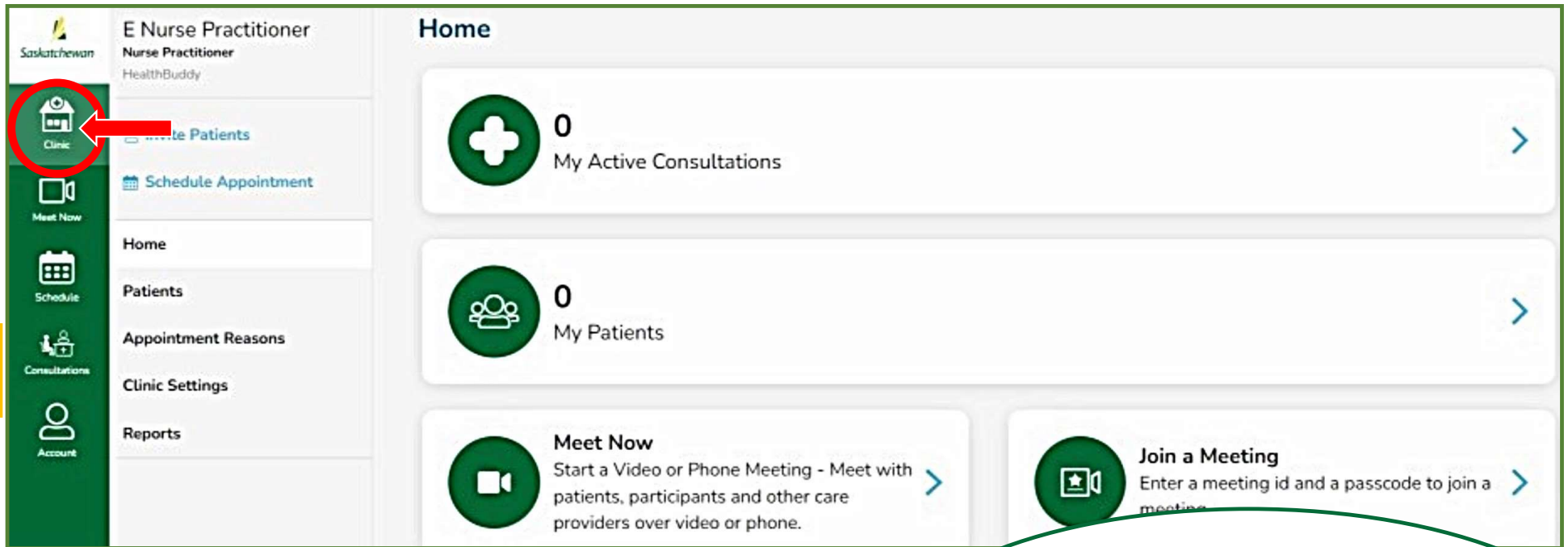
* There is an automatic 1-hour timeout of your account when you close or exit the browser without logging out.

You will remain logged in as long as your browser is open.

4. The 'Home' Screen



Home Screen



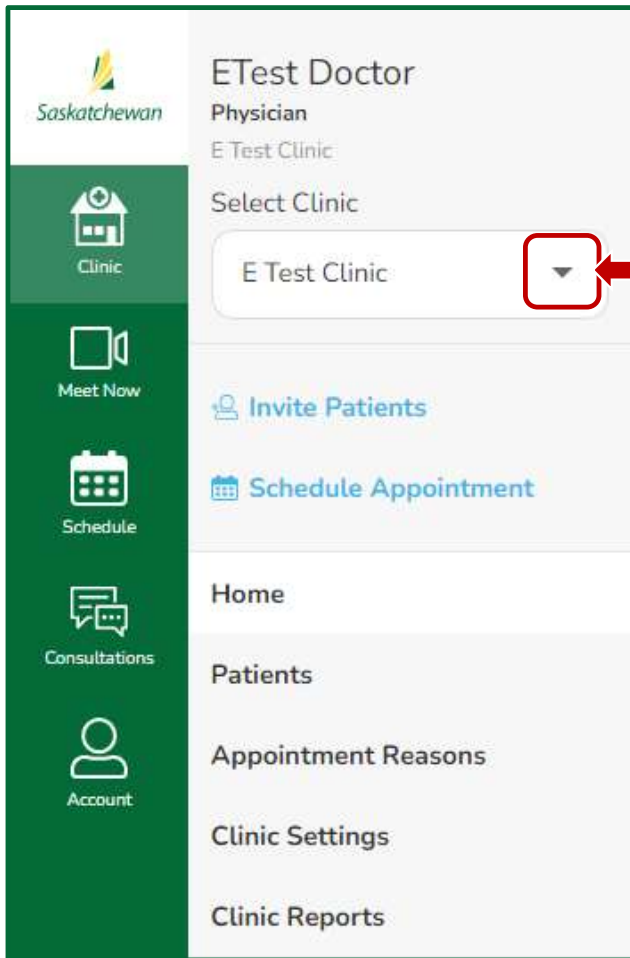
- To return to the Home screen, at any time, select **'Clinic'** in the dashboard

The Home screen provides condensed information about your clinic, which is populated from other areas in the platform. You cannot change info here.

Click on any box that contains an arrow to be directed to the section.

5. Select a Clinic





Select Your Clinic

- ❑ If you are part of more than one virtual clinic, use the '**Select Clinic**' drop-down to choose the clinic you are currently working in.
- ❑ If you are associated with one clinic only, you will not see this feature or drop-down



6. Your Profile Information



Your Profile Information

Saskatchewan
E Nurse Practitioner
Nurse Practitioner
HealthBuddy

Logout

Profile

Pre-Call Test

Provider Settings

Notifications

Access and Use Policy

Account

E Nurse Practitioner
Change Profile Picture

Change Password

Account Information

Display Information
Display Name (Displayed to patients)
E Nurse Practitioner

Address
Province
Province

Contact Information
Email
First Name
E Nurse
Last Name
Practitioner
Mobile Phone (Used for Two-Factor authentication.)

Age and Gender
Gender
Female

Save Changes Discard Changes

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.

❑ Click '**Account**' in the Dashboard, then select '**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

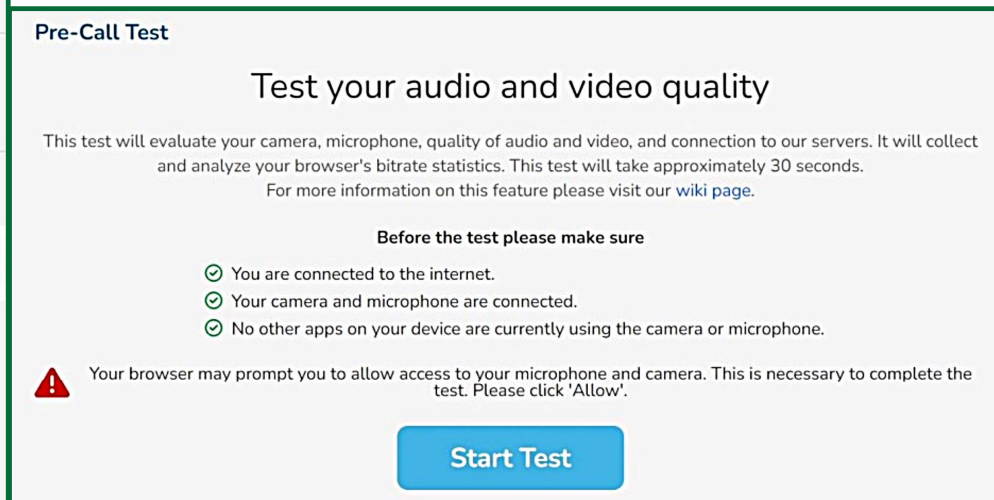
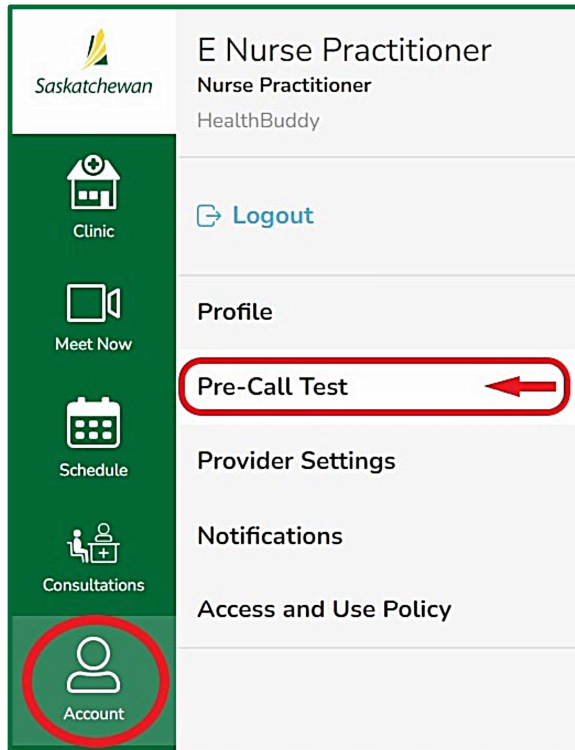
Others: servicedesk@ehealthsask.ca

7. The 'Pre-Call Test'



The 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 and to allow time to get things working **before** beginning virtual sessions, 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.

Pre-Call Test


Test your audio and video quality

This test will evaluate your camera, microphone, quality of audio and video, and connection to our servers. It will collect and analyze your browser's bitrate statistics. This test will take approximately 30 seconds.
For more information on this feature please visit our [wiki page](#).

Video Results

Video Detected: Yes ✓
Video Quality: Excellent ✓
Video Bit Rate: 2909 kbps

Video Preview



Audio Results

Audio Detected: Yes ✓
Audio Quality: Excellent ✓
Audio Bit Rate: 28 kbps

Audio Volume

1%
The 1% simply means there is currently no sound.

- ❑ **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



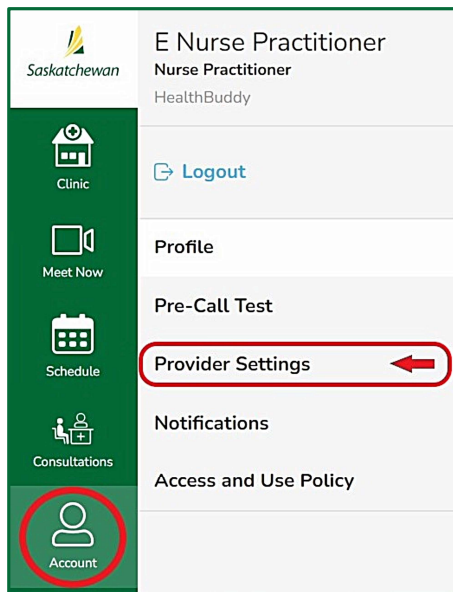
Provider Settings

The Provider Settings ONLY apply for clinics that have the 'Patient Self-Serve Scheduling' feature enabled. If disabled for your virtual clinic(s), this message will appear:



"Appointment Booking" and "New Patient" settings are unavailable because "Patient Self Serve Scheduling" is disabled.

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



If enabled, there are three settings available:

- **Lead Time** - the minimum amount of time before a patient can book an appointment
- **Patient Provider Selection** – allows a healthcare provider to permit their patients to consult with other healthcare providers from within their virtual clinic
- **New Patients** – A healthcare provider may allow new patients to schedule virtual appointments with them

Appointment Booking

Lead Time
The minimum amount of time before an appointment occurs that a patient can make a booking.

Patients can book immediately

Patient Provider Selection

Allow patients to select another provider at my clinic.

Select other Providers that your patients may select.

Select All

Dr. J Nagy 2 UAT

Dr. Lorelie

E Doctor2

I am not accepting new patients at this time.

I am accepting new patients.
You currently have 24 patients.
Stop accepting new patients once I reach

Appointment Notifications

- Notifications to Clinic Care Team Members -

Healthcare providers and clinic admin have the option to receive notifications to the email address and/or mobile phone number set in their account profile.

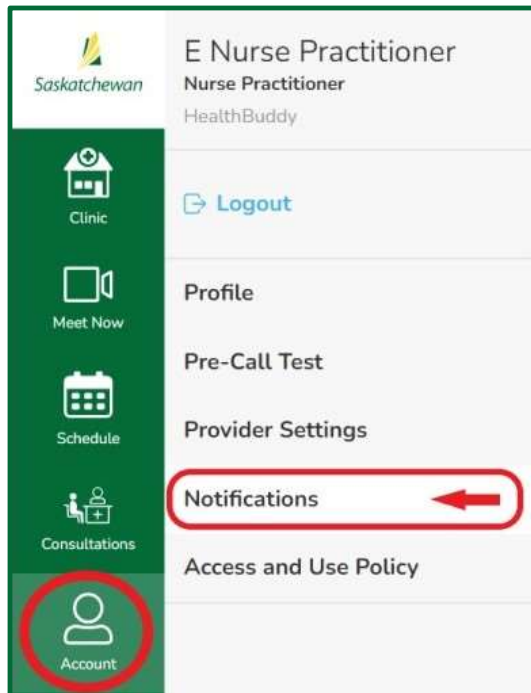
They can be received by email only, SMS text message only or both.

Notifications can be set for:

Appointments

- Created – when a new appointment is booked with you
- Cancelled – when one of your appointments get cancelled
- Invitation – when you are invited to an appointment by another team member
- Decline – when a team member you invited to an appointment declines

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



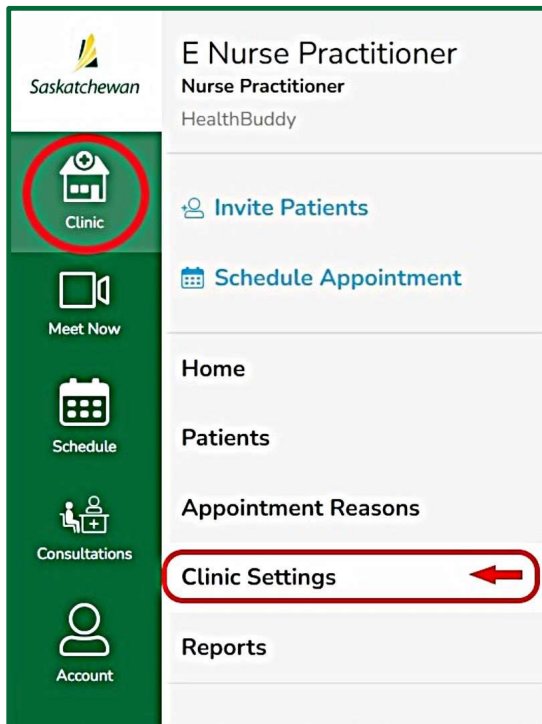
- Select '**Account**' from the Dashboard, then click '**Notifications**'.
- The clinic admin must select the healthcare provider from the drop-down menu. Healthcare providers will not see this drop-down.
- Check the desired notifications, then click '**Save**'.

Clinic Settings

- Appointment Notifications & Reminders to Patients/Participants -

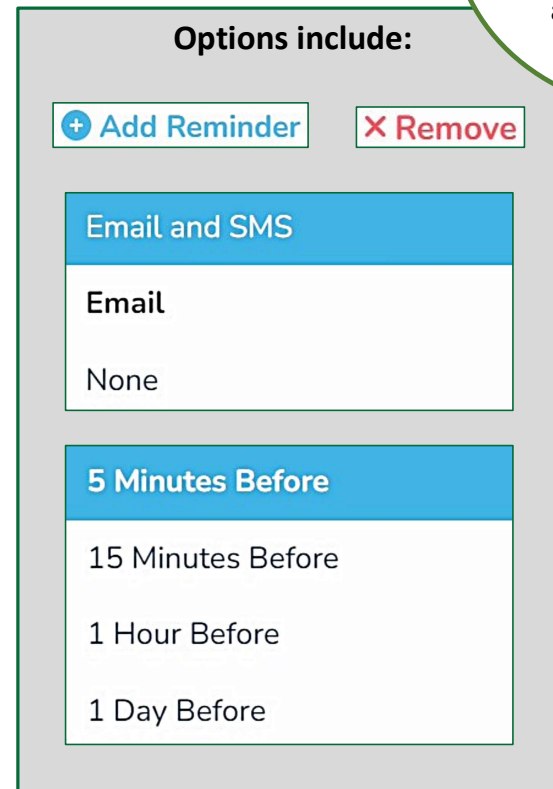
It is highly recommended that you send patients/participants appointment reminders for their scheduled patient consultations, via email and/or SMS text message.

These settings are set for the entire clinic, not for individual users. Any changes will impact all clinic care team members.



- ❑ Select 'Clinic' in the dashboard, then 'Clinic Settings'

The 'Appointment Notifications and Reminders' section is at the top of this screen



Clinic Settings

(Quick Messages to Patients/Participants)

Quick Messages help healthcare providers, or their clinic admin manage patient consultations by sending a message to patients before the consultation begins.

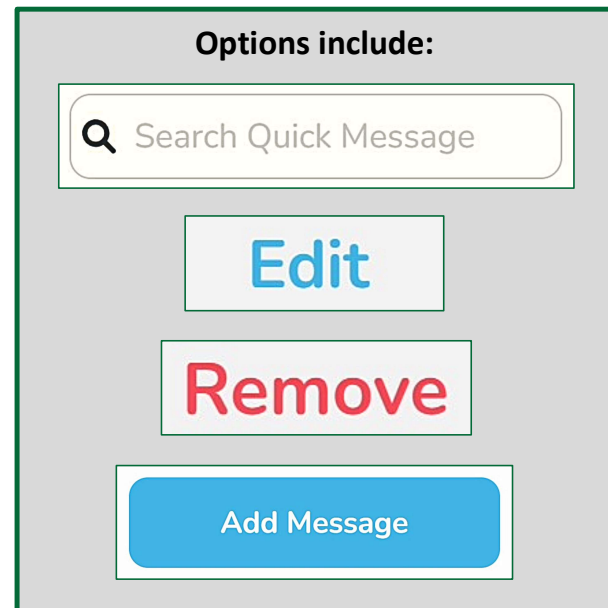
They are accessed from the **'Active & Waiting'** screen, however, are managed here under **'Clinic Settings'**.

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

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

These are created by clinic admins on behalf of the healthcare provider.

- ❑ Select **'Clinic'** in the dashboard, then **'Clinic Settings'**.
- ❑ Scroll down to **'Quick Messages'** to view, edit, remove or add messages.



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**'

The screenshot shows two parts of the application interface. The top part is a modal titled 'Add Message' with a blue header button. Below the header is a 'Provider' dropdown menu with a search bar containing 'Practitioners'. The dropdown list includes 'Lorelie Doctor', 'Jessica Doctor1', 'Test Doctor1', 'Julie Doctor', 'Jeff Peters' (highlighted in green), and 'Test Doctor2'. A red circle highlights the search bar. The bottom part is a modal titled 'Add Quick Message' with a white background and a blue header button. It contains instructional text: 'If you want to create a message for all providers, you can use the provider's name variable. Simply click Insert Provider Display Name Variable where you want the provider's name to be dynamically inserted.' Below this is a 'Provider' dropdown menu set to 'All'. The 'Message' field contains the text: '{Provider Display Name} has been called away due to an emergency, please call the clinic directly to reschedule your appointment.' A red box highlights the variable placeholder, and a red arrow points from the 'Insert Provider's Display Name Variable' button below to the placeholder. At the bottom are 'Add Quick Message' and 'Cancel' buttons.

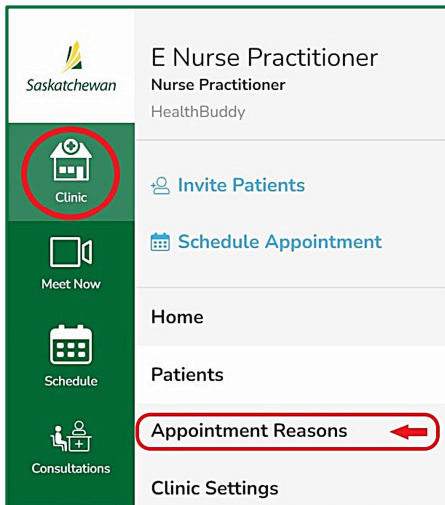
9. Appointment Reasons



Adding, Editing & Removing Appointment Reasons

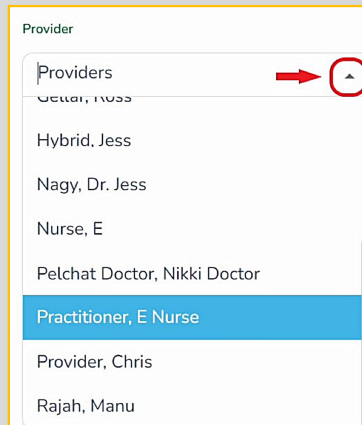
These preset Appointment Reasons are used when scheduling patient consultations and help the clinic care team prepare for the appointment.

- ❑ Select '**Clinic**' in the dashboard, then click '**Appointment Reasons**'.

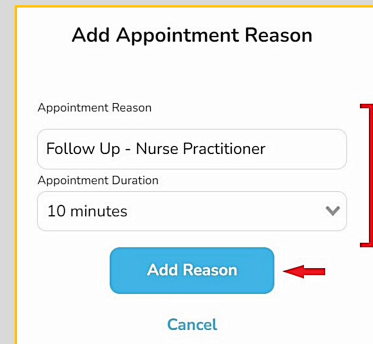


- ❑ Clinic admins must select the correct healthcare provider from the '**Provider**' drop-down menu.

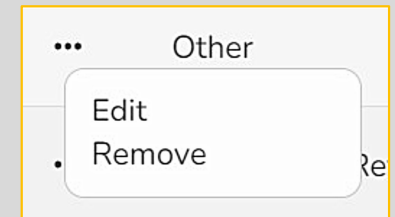
Healthcare providers will not see this drop-down.



- ❑ Select '**Add Reason**'.
- ❑ Type in the new appointment reason, a duration that is suitable. Note – at the time appointments are being scheduled, the preset duration may be overridden.
- ❑ When ready, click '**Add Reason**'.



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



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

10. Managing Healthcare Provider's Schedule & Calendar



Managing Schedules

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

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

The screenshot displays the HealthBuddy dashboard for 'E Admin, Admin Support / Delegate, HealthBuddy'. The left sidebar contains navigation icons for Clinic, Meet Now, Schedule (circled in red), Consultations, Account, and More. The main content area is titled 'Select Schedule' and features a dropdown menu currently set to 'Practitioner, E Nurse'. Below this is a time zone selector set to 'CST (-06:00)'. Under 'Availability Types', there are three options: 'Virtual', 'In-Person', and 'Both Virtual and In-Person'. At the bottom, there are view toggles for 'Day' and 'Week', and a 'View' menu icon. A calendar view shows the week of September 22-28, 2024, with 'Monday September 23' highlighted in red. A green circle highlights the 'Select Schedule' dropdown menu, with a red arrow pointing to it from a text box on the right.

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.

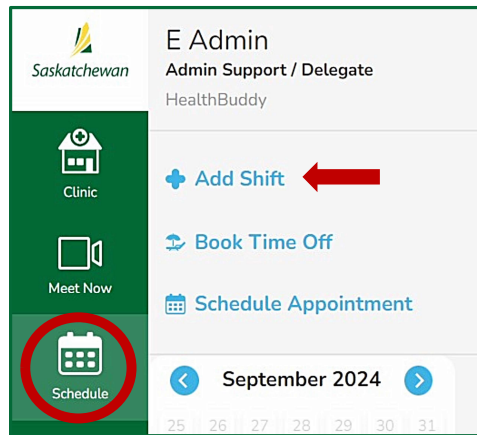
Viewing Appointments

- | MONTH View: | DAY View: | WEEK View: |
|--|--|--|
| <ul style="list-style-type: none"> Click on an individual day or 'Today' Click on 'This Week' Hover over a day to see the number of appointments scheduled. | <ul style="list-style-type: none"> The day's view of the schedule. Click on an appointment + to enter, X cancel the entire appointment, X decline an invitation to it, or to get/send the shareable Join-In info. Delete a shift. | <ul style="list-style-type: none"> A 7-day view of the schedule. Click on an appointment for details, to enter, cancel the entire appointment, decline an invitation to it, or to get/send the shareable Join-In info. |

The screenshot displays the user interface for viewing appointments. On the left is a green sidebar with navigation icons: Home, Meet Now, Schedule (highlighted with a red circle), Consultations, and Account. The main content area shows the user's profile (E Admin, Admin Support / Delegate, HealthBuddy), a dropdown for 'Practitioner, E Nurse', and the current time zone 'CST (-06:00)'. Under 'Availability Types', options for Virtual, In-Person, and Both Virtual and In-Person are listed. A calendar for September 2024 is shown, with the 23rd highlighted. Below the calendar are 'Day' and 'Week' view buttons, both highlighted with red boxes and arrows. The 'Day' view shows a grid for Monday, September 23, with a '2 PM' slot containing one appointment: '14:45 - 15:15 Team Meeting' by 'E Nurse Practitioner'. A red arrow points to the '+' icon on the appointment card. The bottom of the grid shows 'Unscheduled' slots for other days.

Add a Healthcare Provider's Shift

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

The screenshot shows the 'Add Shift for E Nurse Practitioner' form. It includes the following fields:

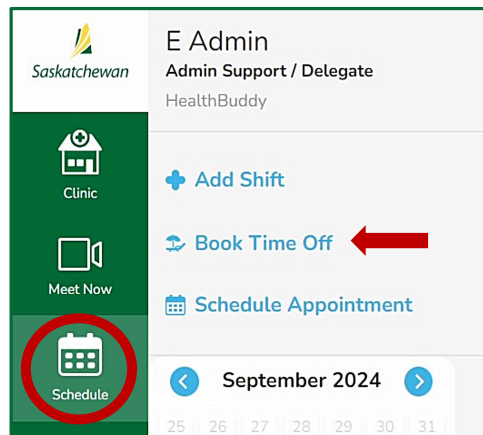
- Select Day:** Monday, September 23, 2024
- From:** 8:00 AM
- To:** 5:00 PM
- Type of Care:** Virtual
- Occurrence:** Weekly
- End Date:** Monday, October 28, 2024

At the bottom, there is a blue button labeled 'Add Shift for E Nurse Practitioner' (highlighted with a red arrow) and a 'Cancel' button.

Book Time Off

This feature can be used to indicate times unavailable for full or partial days (such as breaks).

- ❑ Click '**Schedule**' in the dashboard
- ❑ Select '**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

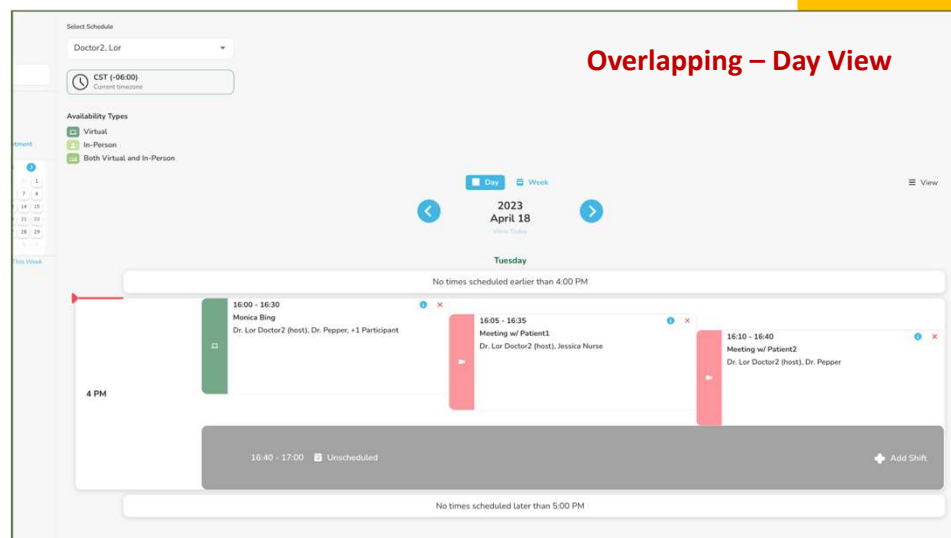
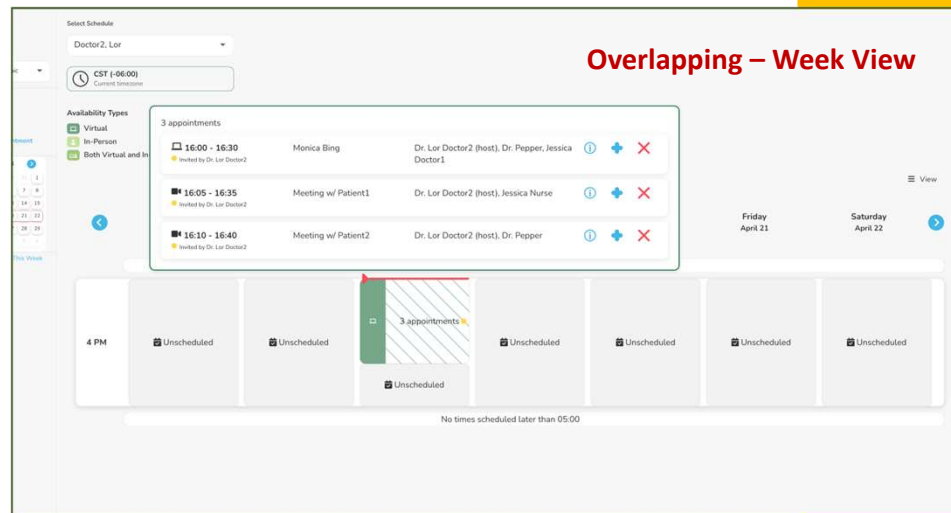
A screenshot of the 'Book Time Off for E Nurse Practitioner' form. It includes fields for 'Select Day' (Monday, September 23, 2024), 'From' (1:30 PM) and 'To' (2:30 PM) times, 'Occurrence' (Weekly), and 'End Date' (Wednesday, October 23, 2024). A blue 'Book Time Off' button is at the bottom, highlighted with a red arrow.

The time off will appear in the calendar as '**Unavailable**'



Overlapping Schedules

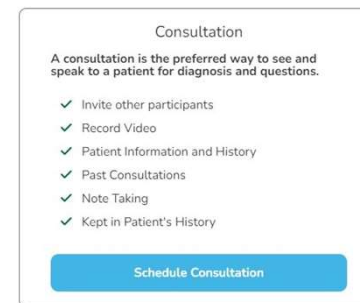
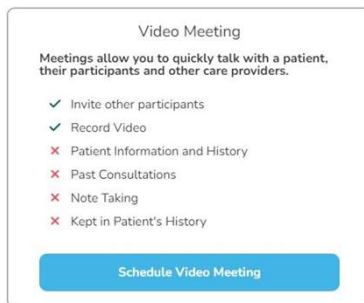
- If scheduled video meetings or consultations overlap with other appointments that a host provider or an invited provider currently has, a notification will appear to the person doing the scheduling (clinic admin or host provider).
- A **maximum of three (3)** overlapping video meetings or consultations 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.



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.
- **Video Meetings:** multiple participants may be invited by a clinic to attend with a meeting ID and passcode that is sent via email, SMS text message or given verbally
- Meetings can be held immediately or scheduled into the healthcare provider's clinic schedule.
- Meetings will include a video call and, if needed, a phone call.
- **Phone Meetings:** held immediately with 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 ***MUST*** create and log into 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 and, if needed, a phone call.

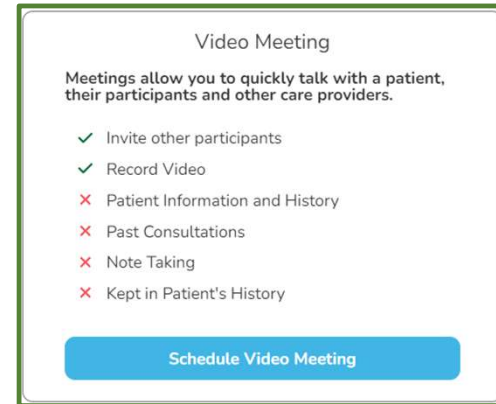
12. 'Meet Now' Video & Phone Meetings



Meet Now Video Meetings

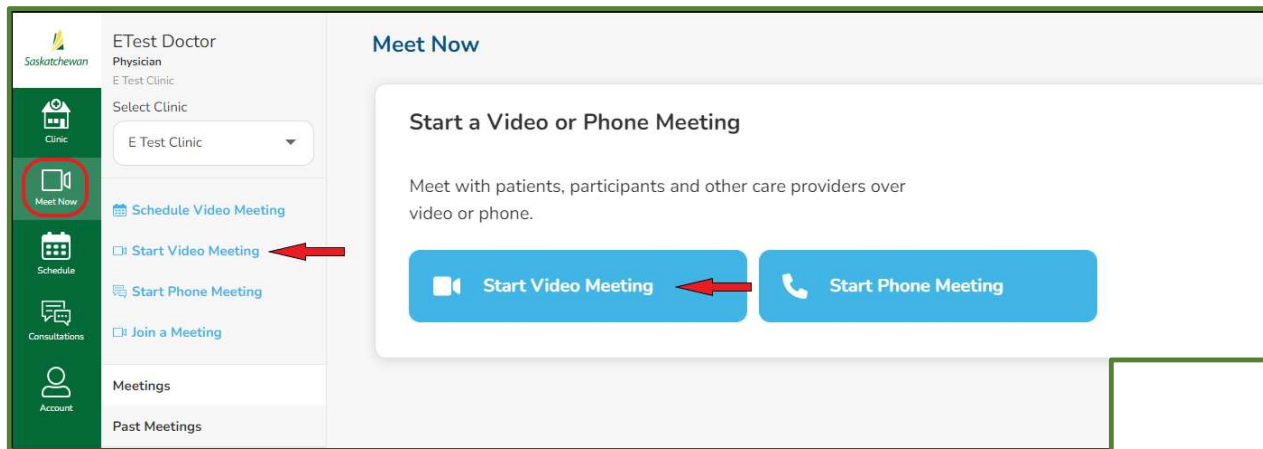
There are 3 options for conducting 'Meet Now' meetings

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



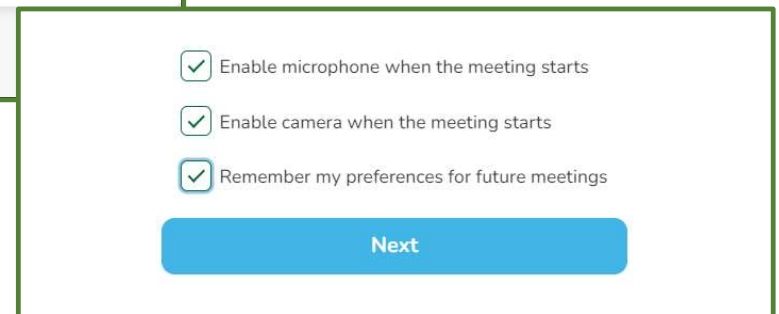
- ❑ These meetings allow you to quickly consult with a patient, their family or caregivers, other healthcare providers, specialists or members of your clinic's care team by video or phone, without scheduling a consultation and without your invited participants requiring an account with SK Virtual Visit.
- ❑ 'Meet Now' 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



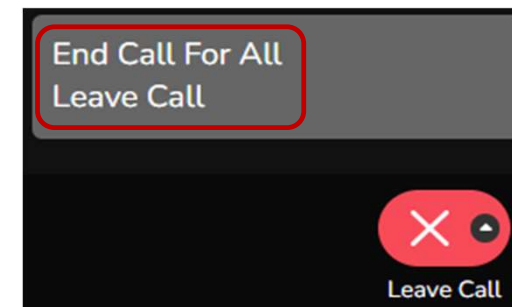
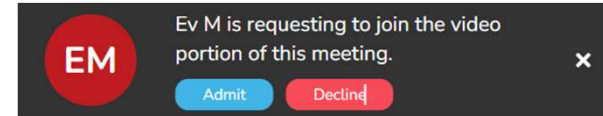
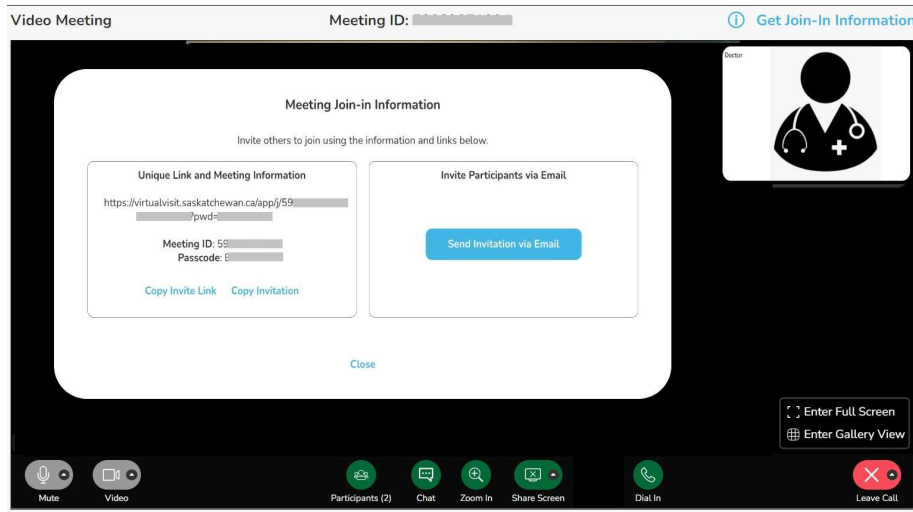
- Select '**Meet Now**' in the dashboard
- Click '**Start Video Meeting**'
- Enable your microphone, camera and select whether you wish to save these preferences for future meetings.

If you are currently on the phone with your participant, ensure the 'microphone' setting is unchecked, as you will be speaking with them over the phone and only require video.



- Click '**Next**'.
- You will be taken directly into the video meeting.

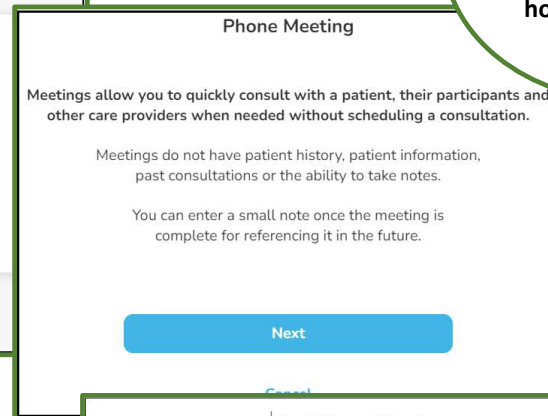
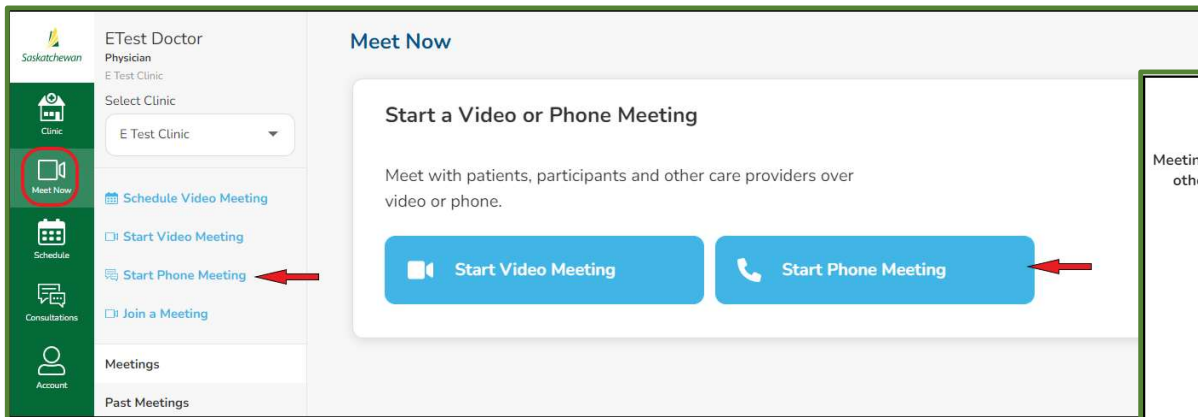
Invite Guests to a Video Meeting – Step 2



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

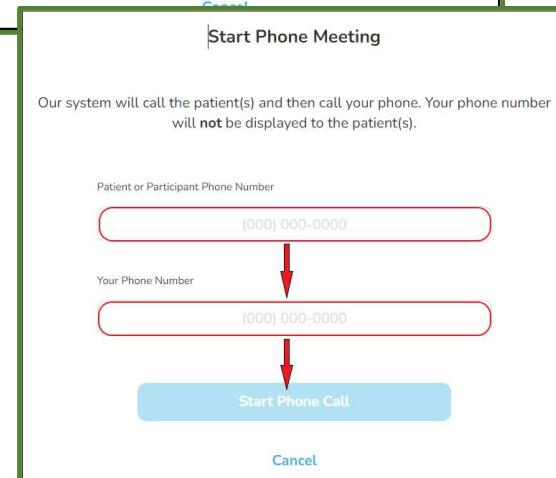
- The '**Send Invitation via Email**' button uses your computer's default email account (any email system can be used). If one other than your computer's default is desired, select either '**Copy Invite Link**' (meeting web link only) or '**Copy Invitation**' (entire meeting invitation info) and email 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'**

Ev Administrator
Office Administrator
E Test Clinic

Select Clinic
E Test Clinic

Schedule Video Meeting

Start Video Meeting

Start Phone Meeting

Join a Meeting

Meetings
Past Meetings

Meet Now

Start a Video or Phone Meeting

Meet with patients, participants and other care providers over video or phone.

Start Video Meeting

Start Phone Meeting

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

❑ Click **'Schedule Video Meeting'**

Video Meeting

Meetings allow you to quickly talk with a patient, their participants and other care providers.

- ✓ Invite other participants
- ✓ Record Video
- ✗ Patient Information and History
- ✗ Past Consultations
- ✗ Note Taking
- ✗ Kept in Patient's History

Schedule Video Meeting

Schedule a Video Meeting – Step 2

Schedule a Video Meeting

Meeting Title

Team Meeting

Select Provider

Doctor1, Test

+ Invite Another Provider

Provider

Select or start typing...

Test Doctor1 (host)

Test Doctor2

Next

Cancel

- ❑ 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).

Schedule Appointment
for "Patient Name"

CST (-6:00)
Current timezone

Date: Wednesday, September 13, 2023

Consultation Length: 1.5 hours (12:55 AM)

Specific Time See Availability

Start Time: 2:00 PM

Specific Time See Availability

May 17, 2023	1:30 pm - 1:40 pm
May 17, 2023	1:40 pm - 1:50 pm
May 17, 2023	1:50 pm - 2:00 pm

Date: Monday, September 23, 2024

Length: 15 mins (5:15 PM)

Start Time: 5:00 PM

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

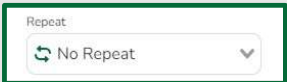
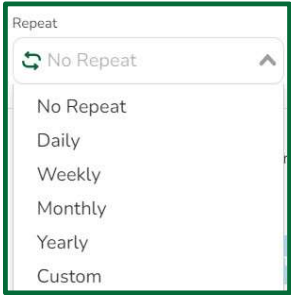
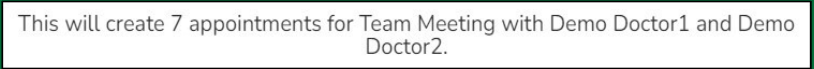


When scheduling a single provider and their schedule **IS** entered in 'SK Virtual Visit' ...

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

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

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

Schedule a Video Meeting - Step 4 - 'Repeat'

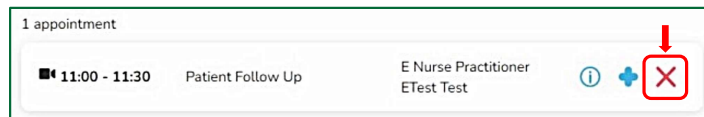
<p>If scheduling a <u>one-time</u> meeting, select 'No Repeat'.</p>	
<p>If scheduling <u>recurring</u> meetings, choose the occurrence:</p> <ul style="list-style-type: none"> ▪ Daily – occurs every day, Monday thru Sunday ▪ Weekly – any day of the week, Monday thru Sunday ▪ Monthly – any day of the month 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 	
<p>Under 'End Date', select the date the last meeting is to occur. A note will indicate the appointment(s) being scheduled.</p>	
<p>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).</p>	
<p>Click 'Schedule Appointment'.</p>	

Cancel a Scheduled Meeting

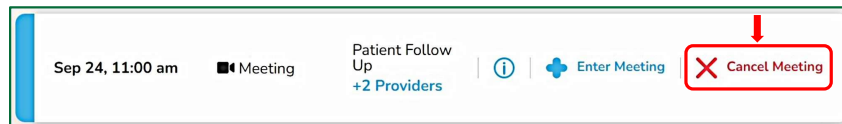
Note: Appointments cannot be edited; they must be cancelled and rescheduled.

- ❑ Log into your account as the meeting host or clinic admin
- ❑ Go to either **'Schedule'** or **'Consultations'** in the dashboard. In the **'Schedule'** tab, you must click on the meeting you want to cancel (in 'Week' or 'Day' view).
- ❑ Select **'X – Cancel Meeting'**
- ❑ A pop-up will appear asking you to confirm. Confirm the cancellation.

'Schedule' Tab

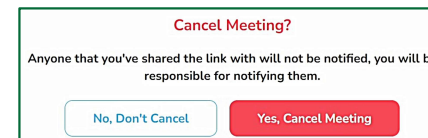


'Consultations' Tab

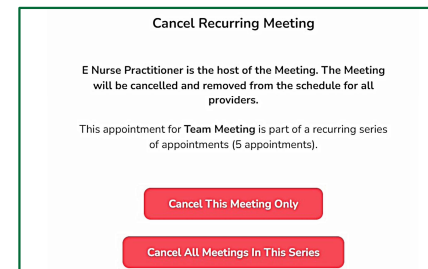


- Done by the host provider or the clinic admin
- Cancels the appointment entirely and removes it from all invited providers' schedules
- All invited providers will receive a notification, based on their 'Notification Settings' (found under 'Account').

Confirm 'One-Time' Meeting



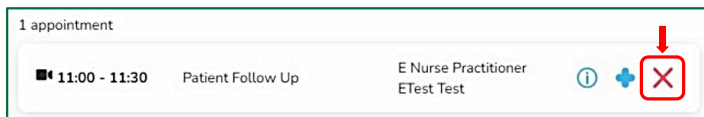
Confirm 'Recurring' Meetings



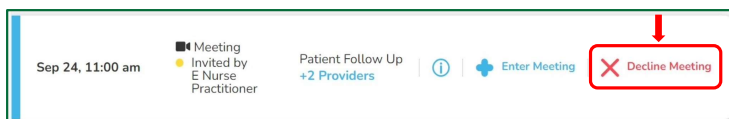
Decline an Invitation to a Scheduled Meeting

- ❑ Log into your account as the invited clinician or the clinic admin
- ❑ Go to either **'Schedule'** or **'Consultations'** in the dashboard. In the **'Schedule'** tab, you must click on the meeting you want to decline (in 'Week' or 'Day' view).
- ❑ Select **'X – Decline Meeting'**
- ❑ A pop-up will appear asking you to confirm. Confirm the cancellation.

'Schedule' Tab

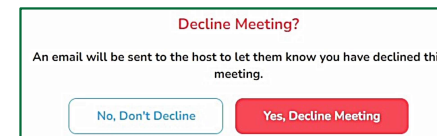


'Consultations' Tab

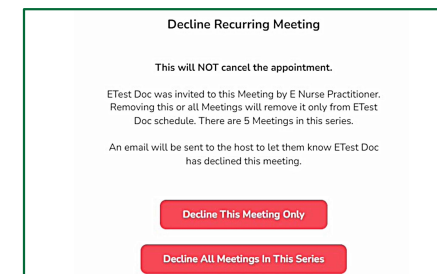


- Done by the invited provider or the clinic admin
- Removes the appointment from their schedule only and will not change the appointment or schedules of other invited providers.
- The meeting host and office admin will receive a notification, based on their 'Notification Settings' (found under 'Account').

Confirm 'One-Time' Meeting



Confirm 'Recurring' Meetings



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 an ‘https/...’ quick link in their email or SMS text message to access them.
- “Meet Now” meeting 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, 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 or users with the 'Hybrid' role)
 - Type (video or phone)

The screenshot shows the 'Past Meetings' page. On the left sidebar, the 'Meet Now' icon is circled in red, and a red arrow points to the 'Past Meetings' option. The main content area has a search bar with four filters: Participant Name, Date Range, Care Team Member, and Type. Below the search bar is a table of past meetings.

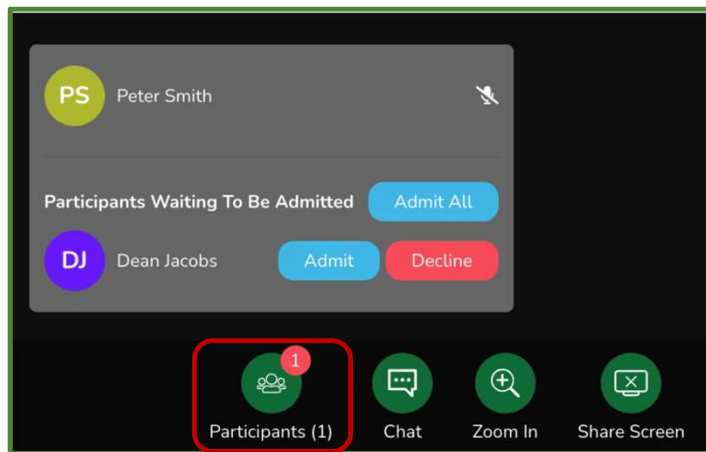
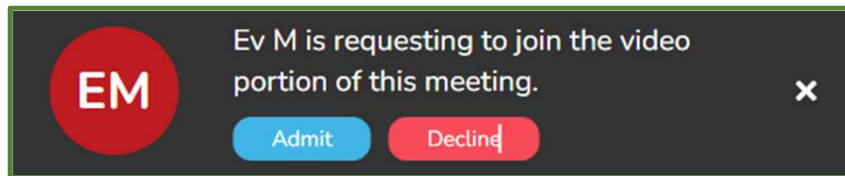
Meeting ID	Type	Participants	Date
58493007984	Video	E Test Doctor, Lorelie Administrator	Jan 31, 2023 - 12:17 pm
70182172702	Video	E Test Doctor, Lorelie Administrator	Jan 30, 2023 - 03:28 pm

13. Video Session Features

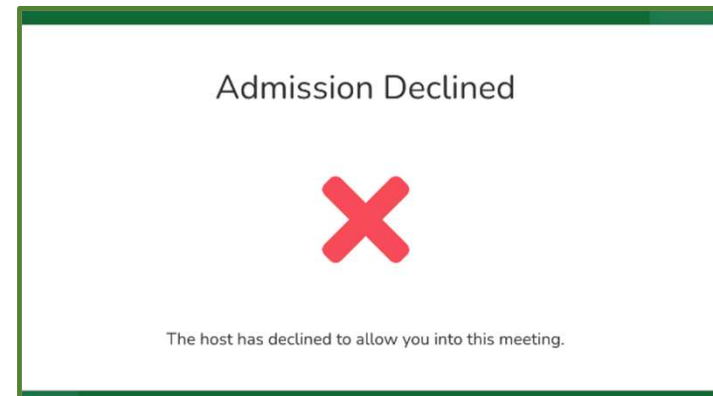


'Admit' or 'Decline' Users into the Video

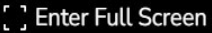
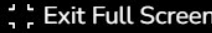
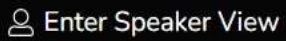
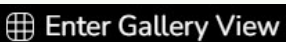











- ❑ All present care team members of your virtual clinic can '**Admit**' participants or '**Decline**' participants who are requesting to enter the video call.
- ❑ This can be done using the popup that appears over the video screen or from the '**Participants**' button.



- ❑ When a user is 'Declined' from joining the call, they will be notified however, may attempt to re-join, in the event they were declined in error.



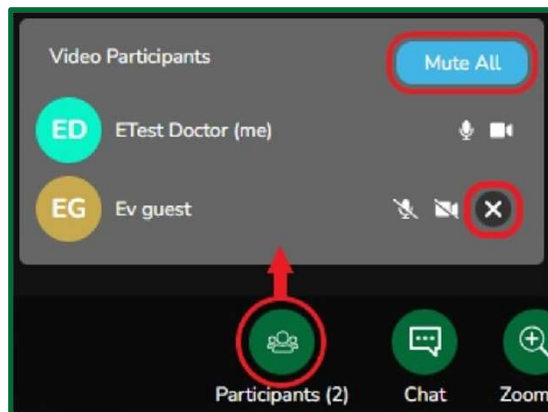
Video Features

 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

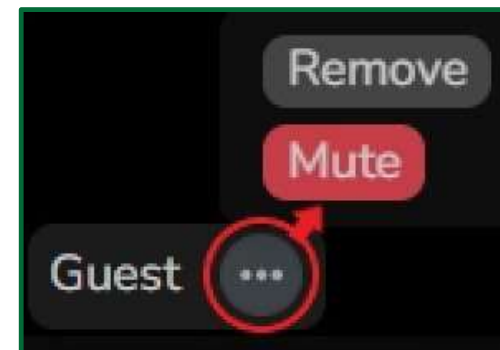
By clicking the '**Participants**' button, the meeting host can:

- 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

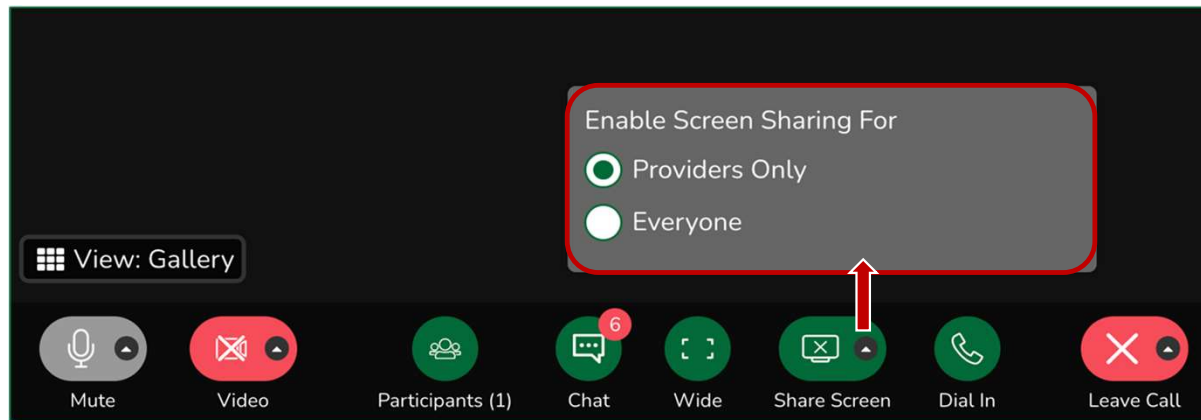


By clicking the '**3 dots**' in the lower-left corner of a participant's video, the meeting host can:

- '**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, if enabled by the video chat host.

- ❑ 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:

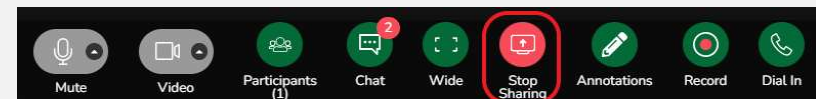
Annotations

Click to highlight specific areas on your shared screen



Stop Sharing

Click to stop sharing your screen

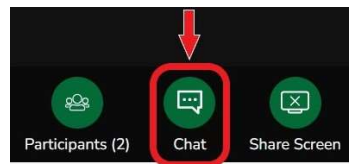


Send a Chat Message

Chat messages are seen by ALL participants. This includes those in a patient consultation, who may not currently be in the video itself.

- ❑ 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'.



- ❑ Type your chat message and press 'Send'.


You may 'unsend' a message, photo, video or document by hovering over the message/file (on laptop/desk) or holding your finger on the item (on mobile) and clicking 'Unsend Message/Unsend', enter a reason and confirm.

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.

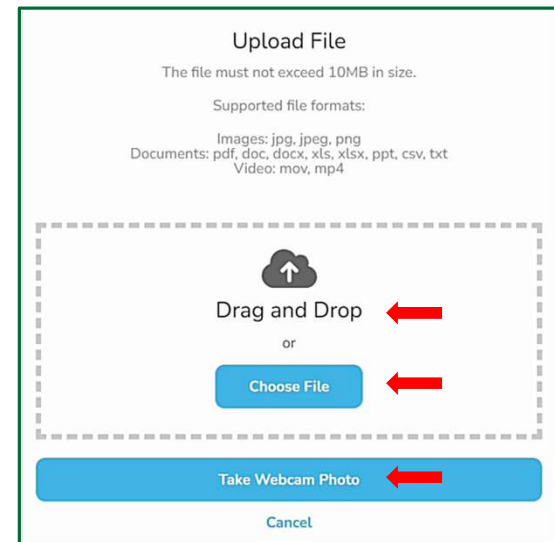
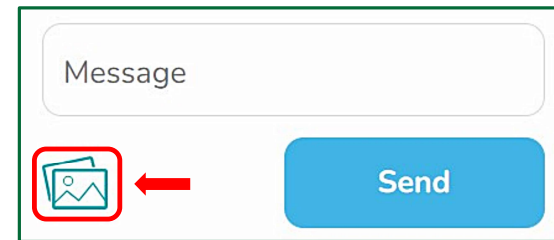
Upload a File (Photo, Video or Document)

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

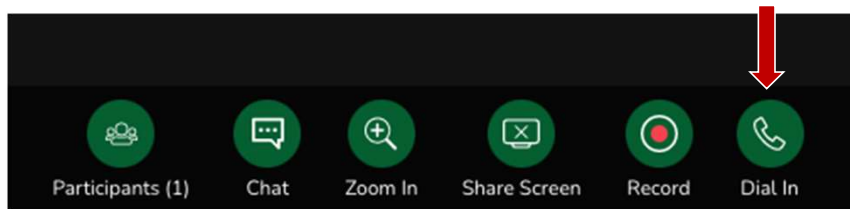
- ❑ Open the 'Chat' window (see instructions on previous screen).
- ❑ Select the camera/document icon  located beneath the 'message' box.
- ❑ Note the supported file formats listed, then choose one of the 3 options:
 - Drag and Drop from a saved location on your device
 - Choose a saved file from your device
 - Take a webcam photo

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

You may 'unsend' a message, photo, video or document by hovering over the message/file (on laptop/desk) or holding your finger on the item (on mobile) and clicking 'Unsend Message/Unsend', enter a reason and confirm.

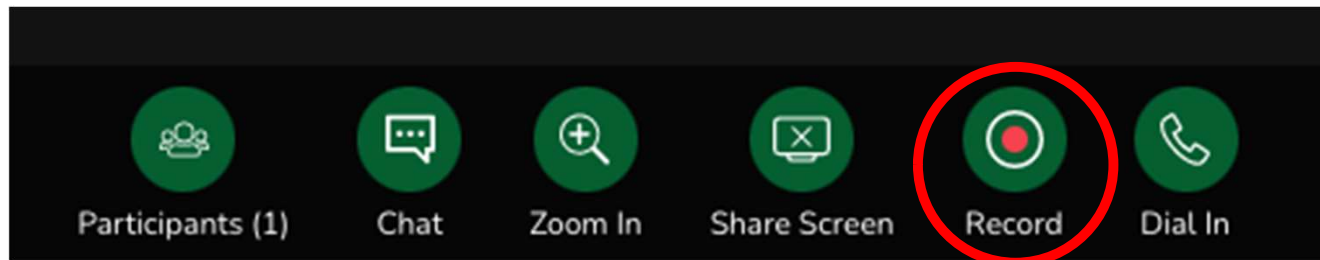


Dial a Participant Into the Video Chat

A screenshot of a dialog box titled 'Dial In Participant To Video Chat'. It contains the following elements: a warning message 'Participants that are dialed in will be disconnected when the video chat ends.', a section for 'Participant's Display Name' with a subtext '(how their name will appear in the video chat)' and a text input field with a red arrow pointing to it, a section for 'Participant's Phone Number' with a subtext 'Phone #' and a text input field with a red arrow pointing to it, a blue 'Dial In Now' button, and a green 'Cancel' button.

- ❑ 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



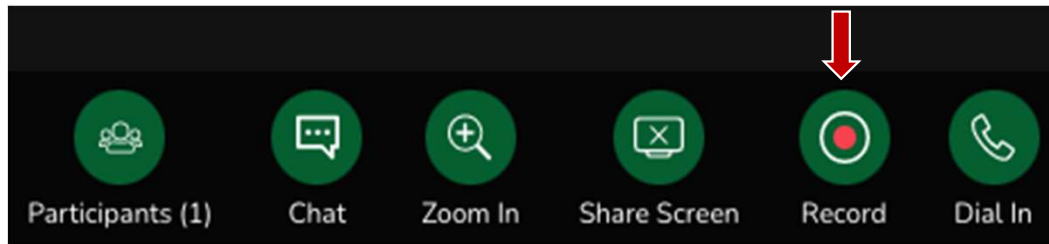
The 'Record a Video Call' feature is **turned off by default** and requires a request to your Health Service Provider to be turned on. *This button will not appear if the feature is disabled.*

Forward your request via email:

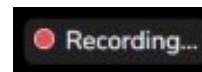
SHA	virtualcare@saskhealthauthority.ca
SCC/SCA	virtual.care@saskcancer.ca
SMA	emr@sma.sk.ca
ISC	ehealthisc@canada.ca
Users other than the HSPs mentioned above	servicedesk@ehealthsask.ca

Recording a Video Call

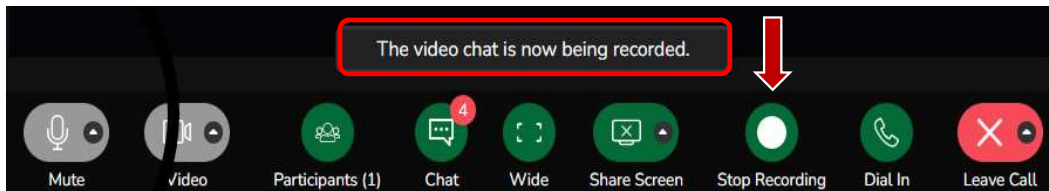
- ❑ To begin recording, click '**Record**'



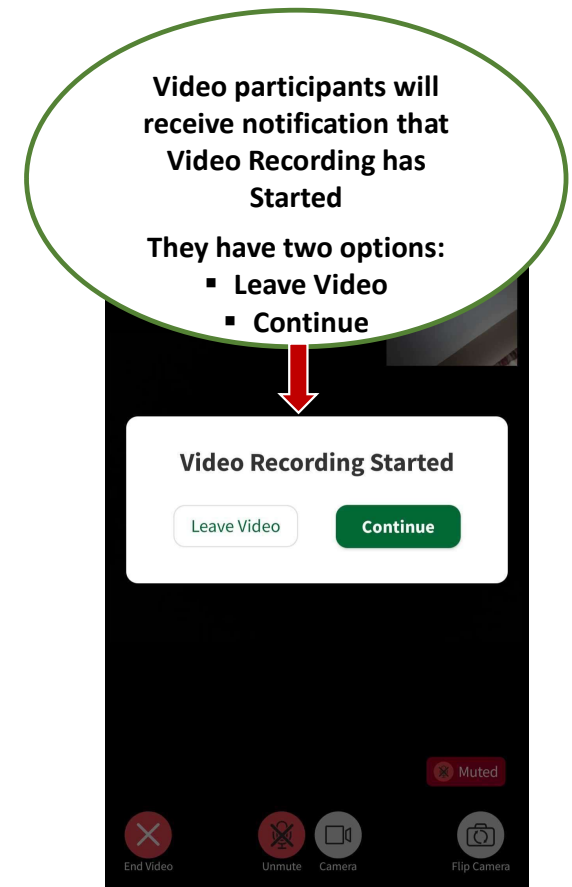
A message will appear letting you know recording has begun.



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



- ❑ When all participants leave a video meeting or consultation video call, the recording will stop automatically.



14. Inviting Patients

This feature is for clinics using the 'Patient Consultation' method of seeing patients.

When seeing patients via 'Meet Now' Video Meetings, a clinic does not need to invite them to join as a virtual patient, nor do these patients need to create an account.



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 most clinics, and a request must be made if you wish it turned on. Although off, 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.

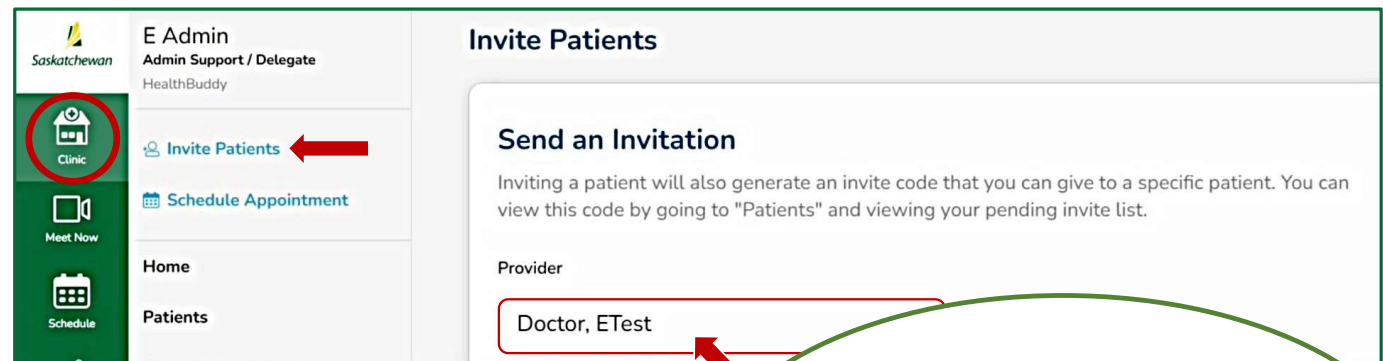
Even though self-scheduling is turned off, your patients still need to be invited to join your virtual clinic if you are scheduling them into Patient Consultations.

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, creating an account and accepting their invitation. This helps protect your clinic and also ensures your virtual clinic is not overwhelmed with unexpected patients.

- ❑ Select 'Clinic' in the dashboard, then click 'Invite Patients'.



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

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 **'Invite Patient(s)'**
- ❑ Check you have selected the correct healthcare provider and clinic, then click **'Confirm and Invite'**

Send an Invitation

Inviting a patient will also generate an invite code that you can give to a specific patient. You can view this code by going to "Patients" and viewing your pending invite list.

Provider
Doctor, ETest

First Name * Last Name * Email Mobile Number

Man Patient

[+ Invite Another Patient](#)

You will invite **1 patient** to join your clinic.
If you enter a email or mobile number for a patient they will receive a message with a link to accept the invite. Otherwise, you must provide them with the invite code directly.

[Invite Patient\(s\)](#)

Send Invites?

Invitations will be sent to these patients to register with

ED ETest Doc HealthBuddy

First Name Last Name Email Mobile Number

Man Patient

[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							
<input type="text" value="Search first name, last name or email"/>		Providers		Status			
<input type="text" value="Add Provider"/>		<input type="text" value="Add Status"/>					
Name	Provider	Date Invited	Date Accepted	Phone Number	Email	Invite Code	Status
Man Patient	ETest Doc	September 27, 2024				YG2J8Q	Pending

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

- For PC and MAC Users Who Are Using Excel -

- ❑ Scroll down to '**Upload File 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](#)'.

Upload File to Invite Multiple Patients

Upload a CSV using our template. If you are using your own CSV file, make sure the columns are in the same order as our template.

[Click here to download CSV Template](#)

Provider

Doctor, ETest

Import CSV

- ❑ **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	E	F	G	H	I	J
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**'.

File name: Ev Doctor1 patient-invite-June09-2022

Save as type: CSV (Comma delimited)

Tools Save Cancel

- ❑ 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 'Upload File 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 success.

Note: Previously invited patients will not receive an additional invitation

Upload File to Invite Multiple Patients

Upload a CSV using our template. If you are using your own CSV file, make sure the columns are in the same order as our template.

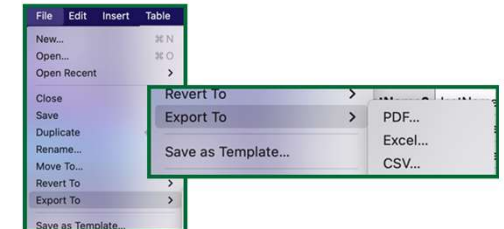
[Click here to download CSV Template](#)

Provider

Doctor, ETest

Import CSV

	first_name	last_name	email	phone
1				
2	firstName1	lastName1	email1@email.com	
3	firstName2	lastName2	email2@email.com	
4	firstName3	lastName3	email3@email.com	
5	firstName4	lastName4	email4@email.com	
6	firstName5	lastName5	email5@email.com	



Export Your Spreadsheet

PDF Excel CSV TSV Numbers '09

Include Table Names

Advanced Options

Cancel Next...

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).

Invited Patients							
<input type="text" value="Search first name, last name or email"/>		Providers <input type="text" value="Add Provider"/>		Status <input type="text" value="Add Status"/>		<input type="button" value=""/>	
Name	Provider	Date Invited	Date Accepted	Phone Number	Email	Invite Code	Status
Baby Girl Patient	ETest Doctor	July 25, 2023				B4QFHM	Pending
Baby Boy Patient	ETest Doctor	July 25, 2023			emarshall+babyb@lumeca.com	8TY7QT	Pending
Aaron emailtest	Dr. Nagy	June 21, 2023			emailtest.aaron@testertesttest.com	CVXXB4	Error Sending

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
 - 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 active patients of the provider you selected.
- ❑ Click '**Search**'.
- ❑ Select your patient from the list that appears.

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.

The screenshot shows the top navigation bar of the HealthBuddy application. On the left is the Saskatchewan logo. On the right, the user is identified as 'E Admin' with the role 'Admin Support / Delegate' and the organization 'HealthBuddy'. Below this, there are three main menu items: 'Clinic' (highlighted with a red circle), 'Meet Now', and 'Schedule'. To the right of these are two buttons: 'Invite Patients' and 'Schedule Appointment'. Below the main menu is a 'Home' section with a 'Patients' button (highlighted with a red box and an arrow pointing left).

The screenshot shows the 'Search for a Patient' form. It has two input fields: 'Patient Name, ID or Health Card Number' (containing 'Demo') and 'Provider (optional)' (a dropdown menu showing 'Providers'). There is a 'Show all patients' checkbox which is currently unchecked. Below the form are 'Search' and 'Reset Search' buttons. Below the buttons is a table titled 'Search Results' with the following data:

Name ▲	Birthdate	Last Consultation Date	Consultation Status	Upcoming Appointments	Provider Association
Demo1 Patient	Jan 1, 2000	Apr 15th, 2024	Archived	0	Yes
Demo2 Patient	Jan 1, 2000	Apr 4th, 2024	Archived	0	Yes
Demo3 Patient	Jan 1, 2000	--	--	0	Yes

The 'Demo2 Patient' row is highlighted with a red box and an arrow pointing to the 'Yes' in the 'Provider Association' column.

Patient Search

Demo2 Patient

Select Physician
Doctor, ETest

Patient ID: 6820 Health Card Number: No Health Card Info [New Consultation](#)

Contact Information
emarshall+demo2@lumeca.com

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

Location
No Address Info

[Remove Patient](#)

Providers
ETest Doctor

Upcoming Appointments
No upcoming appointments.

You will see the following:

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

*info must be manually entered

The Patient Information screen will appear. You may:

- Verify the patient is associated with your clinic
- Schedule a 'New Consultation'
- View information patient entered when they created their profile
- 'Remove Patient' or
- If removed, 'Add Patient to Clinic'

[Remove Patient](#)

[Patient Removed](#)

[Add Patient to Clinic](#)

16. Scheduling and Canceling Patient Consultations

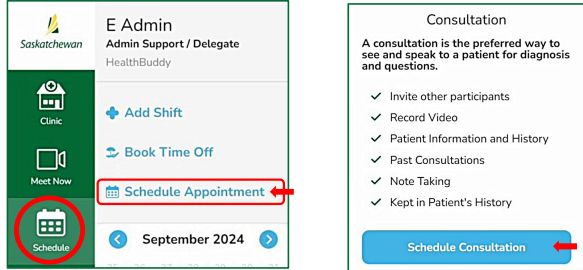
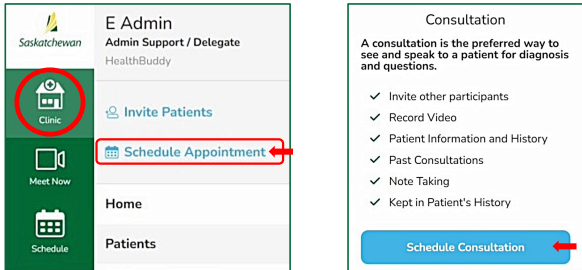

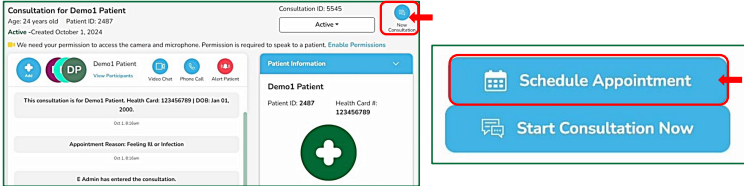
Clinic admins can schedule video meetings and patient consultations on behalf of the healthcare providers within their virtual clinic.



Schedule a Patient Consultation - Step 1

There are four places within the platform from where a patient consultation can be scheduled.

In this section, we will cover doing so from the 'Schedule' tab. ★

<p>★ 1. The 'Schedule' tab ></p> <ul style="list-style-type: none">Select 'Schedule Appointment' > 'Schedule Consultation' 	<p>2. The 'Clinic' tab ></p> <ul style="list-style-type: none">Select 'Schedule Appointment' > 'Schedule Consultation' 
<p>3. The 'Patients' tab ></p> <ul style="list-style-type: none">Search for the patient > click their name > tap 'New Consultation' > 'Schedule Appointment' 	<p>4. While in an active patient consultation ></p> <ul style="list-style-type: none">Tap 'New Consultation' > 'Schedule Appointment' 

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'**

< Back

Select Patient

Search for and select a patient to schedule an appointment for them.

Search by first name, last name, or health card number.

Demo1 Patient DOB: (January 1, 2000)

Demo2 Patient DOB: (January 1, 2000)

Demo3 Patient DOB: (January 1, 2000)

1 to 3 of 3 Patients

Select Patient

Cancel

Schedule a Patient Consultation - Step 3

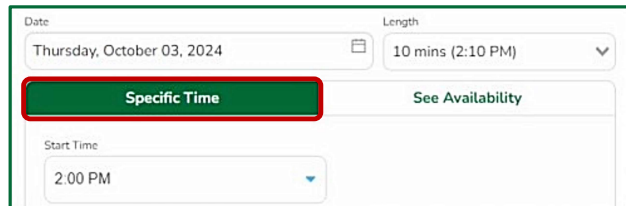
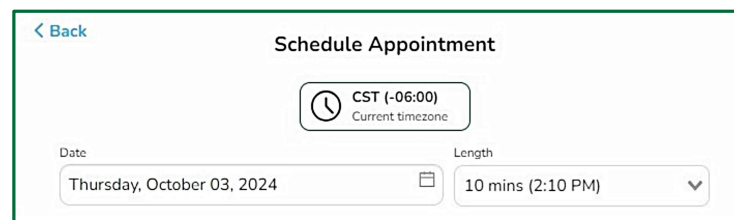
The image shows two overlapping screenshots of the 'Schedule Appointment' form for 'Demo2 Patient'. The top screenshot shows the main form with a 'Select Provider' dropdown menu set to 'Doctor1, Test', a '+ Invite Another Provider' button highlighted with a red box, and a 'Type of Care' dropdown set to 'Virtual'. The bottom screenshot shows the 'Invite Another Provider' dialog box, which has a 'Provider' search field, a list of providers including 'Test Doctor1 (host)' and 'Test Doctor2' (with a red 'X' next to it), and 'Type of Care' and 'Select Appointment Reason' dropdowns. A red arrow points from the '+ Invite Another Provider' button in the top screenshot to the dialog box in the bottom screenshot. Another red arrow points to the 'Next' button at the bottom of the dialog box.

- ❑ 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

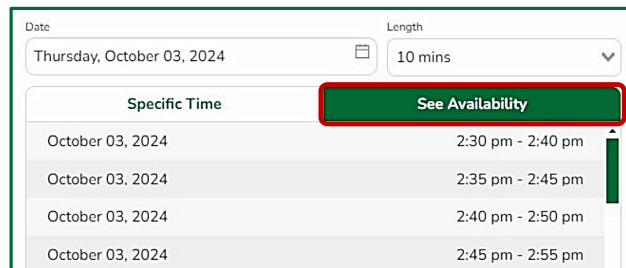
'Date' - Enter the date of the meeting or, if scheduling recurring meetings, the first meeting date.

'Length' - the length of the meeting (this is approximate; the appointment will not automatically end if it extends past this time).



When scheduling a single provider and their schedule **IS NOT** entered:

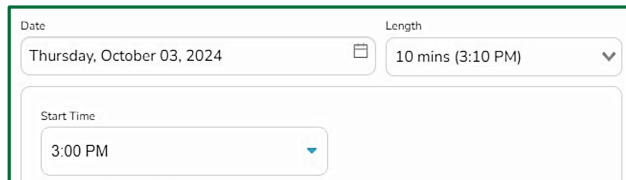
- Select 'Specific Time'
- Under 'Start Time' select the time of day the appointment(s) will start



Specific Time	See Availability
October 03, 2024	2:30 pm - 2:40 pm
October 03, 2024	2:35 pm - 2:45 pm
October 03, 2024	2:40 pm - 2:50 pm
October 03, 2024	2:45 pm - 2:55 pm

When scheduling a single provider and their schedule **IS** entered:

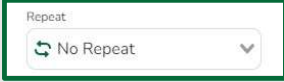
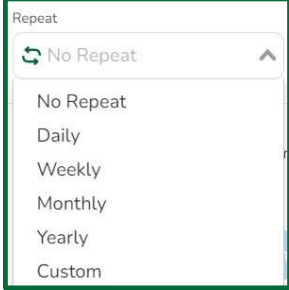



- Select 'See Availability'
- Select an available time from the list



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

- Select a 'Start Time'.

Schedule a Patient Consultation - Step 5 - 'Repeat'

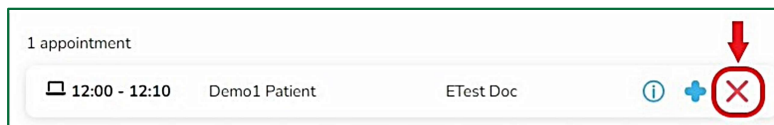
<p>If scheduling a <u>one-time</u> consultation, select 'No Repeat'.</p>	
<p>If scheduling <u>recurring</u> consultations, choose the occurrence:</p> <ul style="list-style-type: none"> ▪ Daily – occurs every day, Monday thru Sunday ▪ Weekly – any day of the week, Monday thru Sunday ▪ Monthly – any day 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 	
<p>Under 'End Date', select the date the last consultation is to occur. A note will indicate the appointment(s) being scheduled.</p>	
<p>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).</p>	
<p>Click 'Schedule Appointment'.</p>	

Cancel a Scheduled Patient Consultation

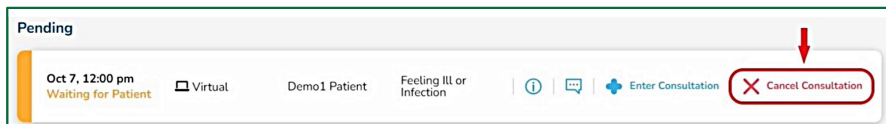
Note: Scheduled appointments cannot be edited; they must be cancelled and rescheduled.

- ❑ Log into your account as the consultation host or clinic admin
- ❑ Go to either **'Schedule'** or **'Consultations'** in the dashboard. In the **'Schedule'** tab, you must click on the consultation you want to cancel (in 'Week' or 'Day' view).
- ❑ Select **'X – Cancel Consultation'**
- ❑ A pop-up will appear asking you to confirm. Confirm the cancellation.

'Schedule' Tab

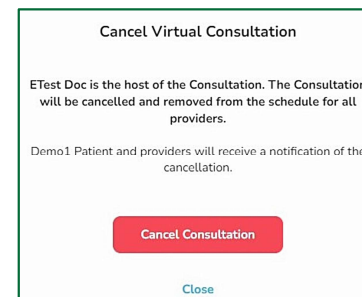


'Consultations' Tab

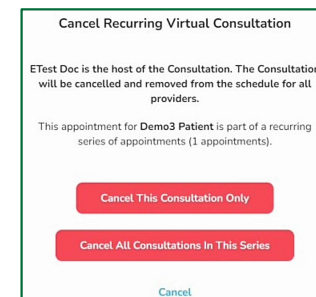


- Done by the host provider or the clinic admin
- Cancels the appointment entirely and removes it from all invited providers' schedules
- All invited providers will receive a notification, based on their 'Notification Settings' (found under 'Account').

Confirm 'One-Time' Consultation



Confirm 'Recurring' Consultations

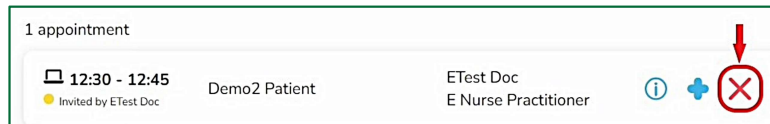


Decline an Invitation to a Scheduled Patient Consultation

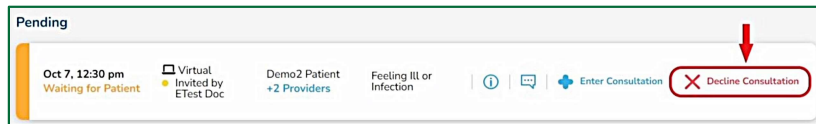
- ❑ Log into your account as the invited clinician or the clinic admin
- ❑ Go to either '**Schedule**' or '**Consultations**' in the dashboard. In the '**Schedule**' tab, you must click on the consultation you want to decline (in 'Week' or 'Day' view).
- ❑ Select '**X – Decline Consultation**'
- ❑ A pop-up will appear asking you to confirm. Confirm the cancellation.

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

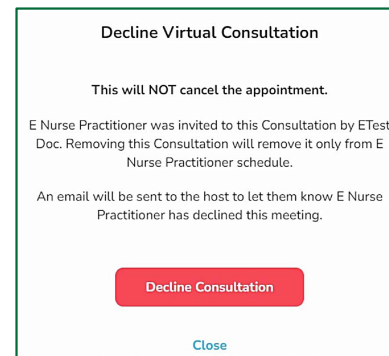
'Schedule' Tab



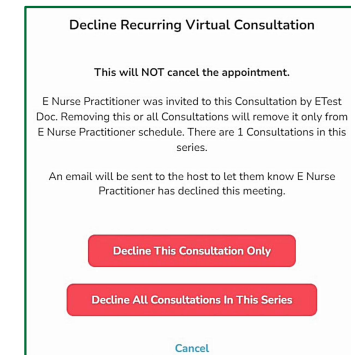
'Consultations' Tab



Confirm 'One-Time' Consultation



Confirm 'Recurring' Consultations



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...

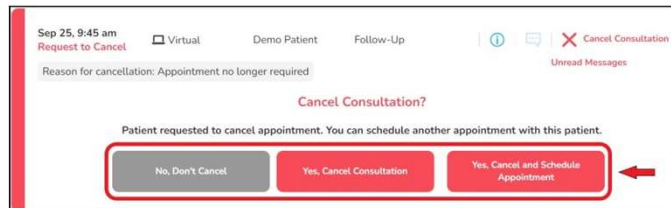
Consultations Tab >

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

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

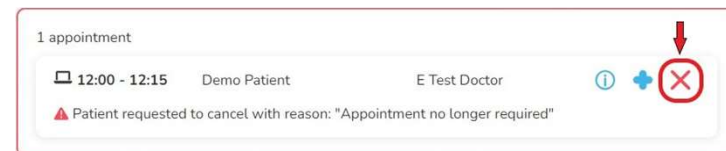


- ❑ Select one of the three available choices:
 - **No, Don't Cancel**
 - **Yes, Cancel Consultation** – choosing this option will promptly cancel the appointment.
 - **Yes, Cancel and Schedule Appointment** – by clicking this option, the appointment will be cancelled immediately, and you will be redirected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

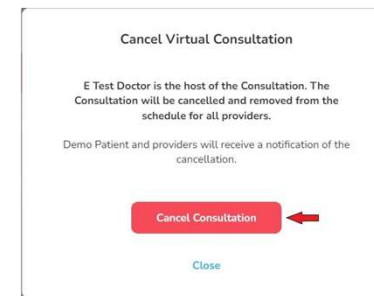


Schedule Tab >

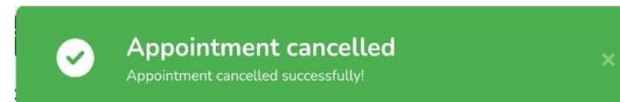
- ❑ Locate the scheduled appointment, tap into it, then click the '**X**'.



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



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



17. Enter Scheduled Appointments



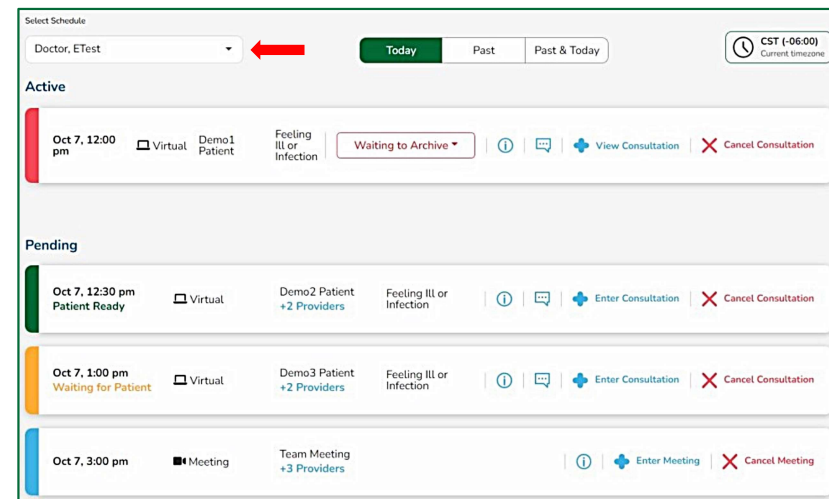
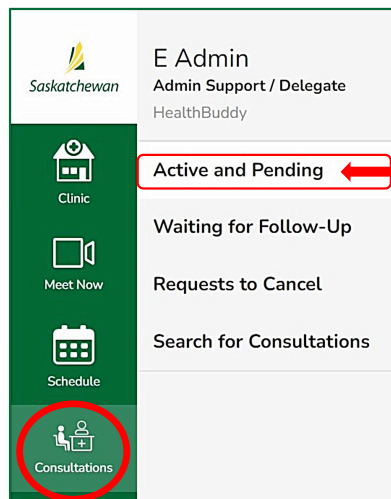
The 'Active & Pending' Screen

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.

- ❑ If working with more than one clinic/location, choose from the **'Select Clinic'** drop-down menu.
- ❑ Select **'Consultations'** in the dashboard, then click **'Active & Pending'**



- ❑ 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

Active

Oct 21, 12:10 pm	Virtual	Demo Patient
Oct 25, 9:15 am	Virtual	Demo Patient

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.

Pending:

Scheduled Consultations and Meetings:

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

Jul 21, 1:00 pm	Meeting	test mtg
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BLUE – scheduled Video Meetings




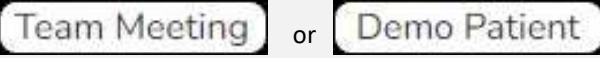

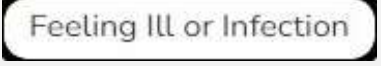


Oct 25, 8:40 pm Patient Ready	Virtual	Demo Patient
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GREEN – 'Patient Ready' - the patient is marked as ready and is available for their appointment







Oct 25, 6:00 pm Waiting for Patient	Virtual	Monica Bing
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GOLD – 'Waiting for Patient' – the patient has a scheduled consultation

Active & Pending Screen Features – Page 1

	<p>Past & Today – filter appointments from today, the past or both</p>
	<p>Appointment Date and Time</p>
	<p>Appointment Type (Virtual, In-Person or Video Meeting)</p>
	<p>Name of Meeting or Patient</p>
	<p>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.</p>
	<p>Reason for patient consultation</p>
	<p>Shareable Consultation or Meeting Link</p>
	<p>Quick Message – present messages to send to patients (available for consults only)</p>

Active & Pending Screen Features – Page 2

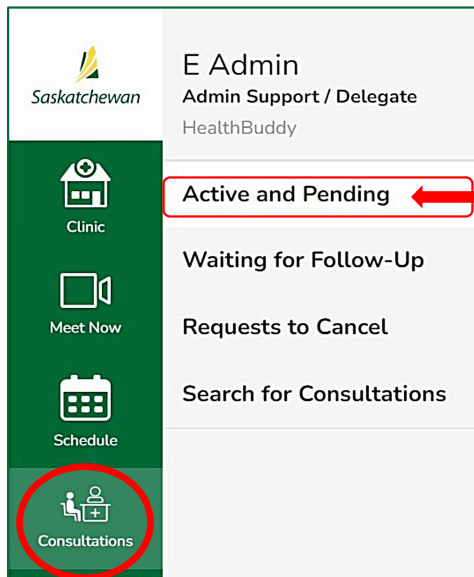
	<p>'View Consultation' under the 'Active' section – consultations the healthcare provider has entered and started, including 'Archived' and those the patient has not yet responded to or entered.</p>
	<p>'Enter Meeting/Consultation' under the 'Pending' section – When you initially enter the patient consultation, 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.</p>
 	<p>Cancel – the host provider or their admin can cancel the appointment entirely Decline – the invited provider can decline their invitation to the appointment only</p>
	<p>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</p>
	<p>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.</p>

18. Starting a Scheduled Patient Consultation or Video Meeting

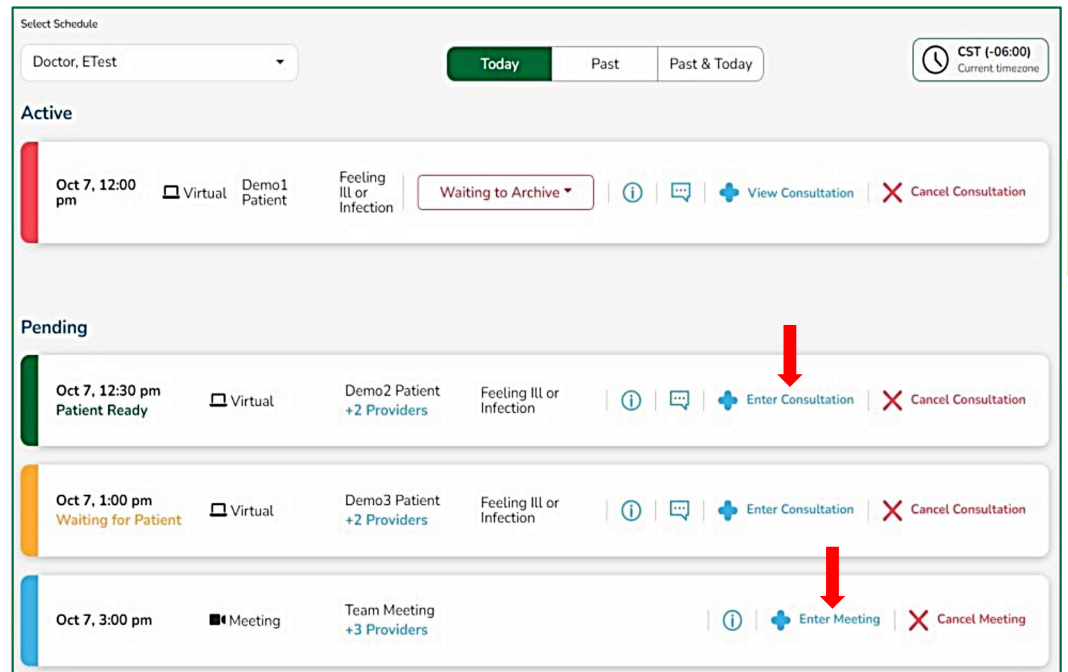


Starting a Patient Consultation or Video Meeting

- ❑ Click **'Consultations'** in the dashboard
- ❑ Select **'Active & Pending'**

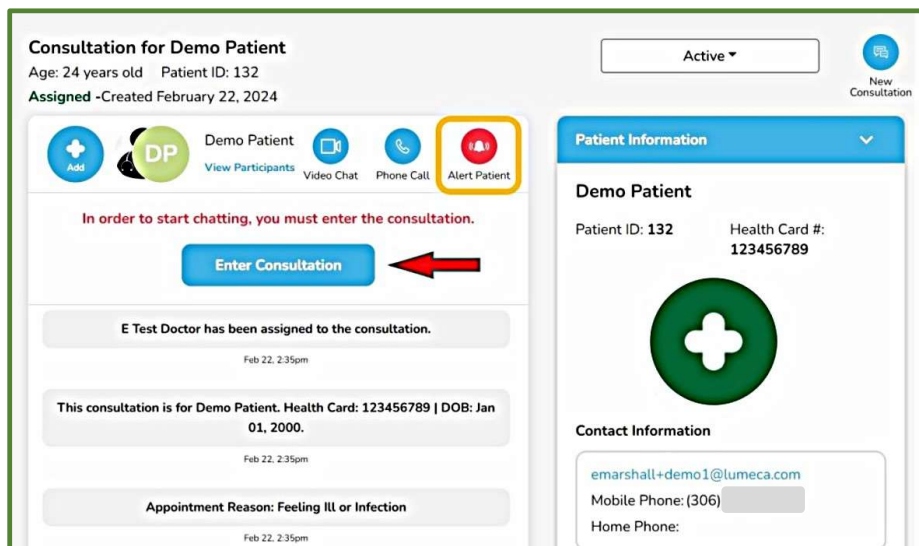


- ❑ Click **'Enter Consultation/Meeting'**

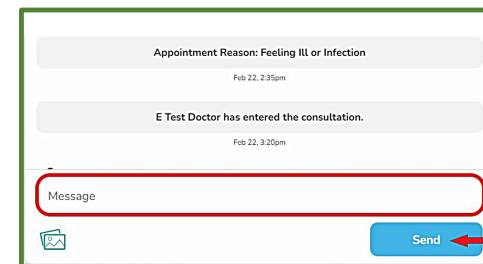



The Patient Consultation – Step 1

- ❑ 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'*.



- ❑ Send a **'Message'** to let them know you have arrived.



- ❑ Click **'Alert Patient'**  when patients are not responding. Send them a quick message via SMS text or a message within the consultation itself.

The Patient Consultation Video Chat– Step 2

Consultation for Demo Patient
Age: 24 years old Patient ID: 132
Active -Created February 22, 2024

Consultation ID: 1198
Active ▾

New Consultation

DP Demo Patient
View Participants

Video Chat Phone Call Alert Patient

E Test Doctor has been assigned to the consultation.
Feb 22, 2:35pm

This consultation is for Demo Patient. Health Card: 123456789 | DOB: Jan 01, 2000.
Feb 22, 2:35pm

Appointment Reason: Feeling Ill or Infection
Feb 22, 2:35pm

E Test Doctor has entered the consultation.
Feb 22, 3:20pm

Message

Send

Patient Information

Demo Patient
Patient ID: 132 Health Card #: 123456789

Contact Information
emars hall+demo1@lumeca.com
Mobile Phone: (306)
Home Phone:

Age and Gender
Born on January 1, 2000
24 years old
Male

Location
Box 10, Regina, Saskatchewan, S4S 4P4

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

- Once yourself and the patient are ready to proceed, click 'Video Chat'



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
- **Message**

Start a Video Chat in a Patient Consultation

If prompted by your laptop/desktop for camera and microphone use when entering the video chat, always 'Allow/Enable' your camera and microphone. These are permissions for your browser and this platform.

- ❑ With 'patient consultations' you can start and end as many video chats during the active consultation as necessary, adding and preventing participants as desired.
- ❑ You may prevent certain participants from joining a video chat. For example, you may wish to video with another colleague from your clinic first, before having the patient join. End that video, then start a new one with the patient. To do this you:
 - **Check** the 'Prevent Other Consultation Participants From Joining' checkbox, then
 - **Uncheck** the name of the participant(s) you do not want in the video chat, and
 - **Check** the name(s) of the participant(s) you want in the video chat.
- ❑ **Check** the boxes to enable your microphone, camera, and 'Remember your preferences for future meetings' for within the video chat .
- ❑ When ready, click '**Start Video Chat**'.

Start Video Chat

Please select who you would like to join the video chat for Demo2 Patient.

Patient

DP Demo2 Patient

Care Team

ED E Test Doc PRIMARY

E Nurse Practitioner

Prevent Other Consultation Participants From Joining

Enable microphone when the meeting starts

Enable camera when the meeting starts

Remember my preferences for future meetings

Start Video Chat

Cancel

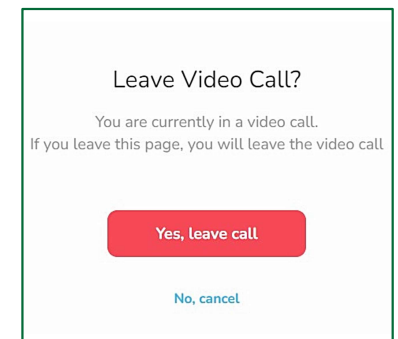
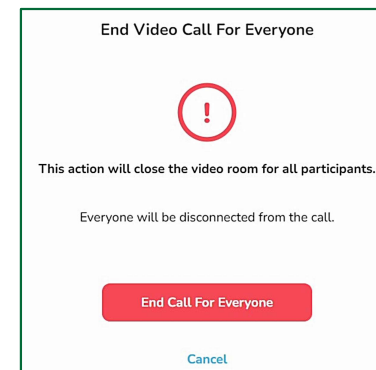
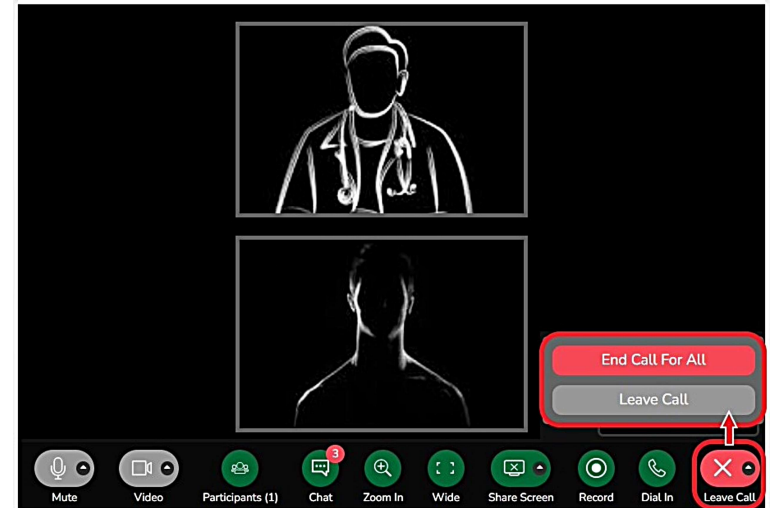
End a Video Chat in a Patient Consultation

At the bottom-right corner of the screen, click the red **'Leave Call'** button. The host and members of their clinic care team who are present, will see two options:

- **'End Call for All'**- will immediately end the call for the host and all other participants of the video chat. Important: if any of the host's care team members are present and click this button, they will end the call for everyone. If the host wishes to continue a video chat with their patient, they will have to start a new video chat.
- **'Leave Call'** - available to all participants in the video call - the host, patient and others. Important: as long as the host or one of the clinic care team remain in the video chat, it will remain open. All others may **'Leave Call'** and return to the video chat.
- If only the host and patient are in the call, when the host clicks either **'End Call for All'** or **'Leave Call'**, the video chat will end for them both.

A message will appear on the screen asking to confirm:

- **'End Call for Everyone'** - ends the video call for all participants. In patient consultations, you can start and end as many video chats as desired during an active consultation.
- **'Yes, leave call'** – if any member of the clinic care team remains on the video call, others can leave the video and rejoin if needed.

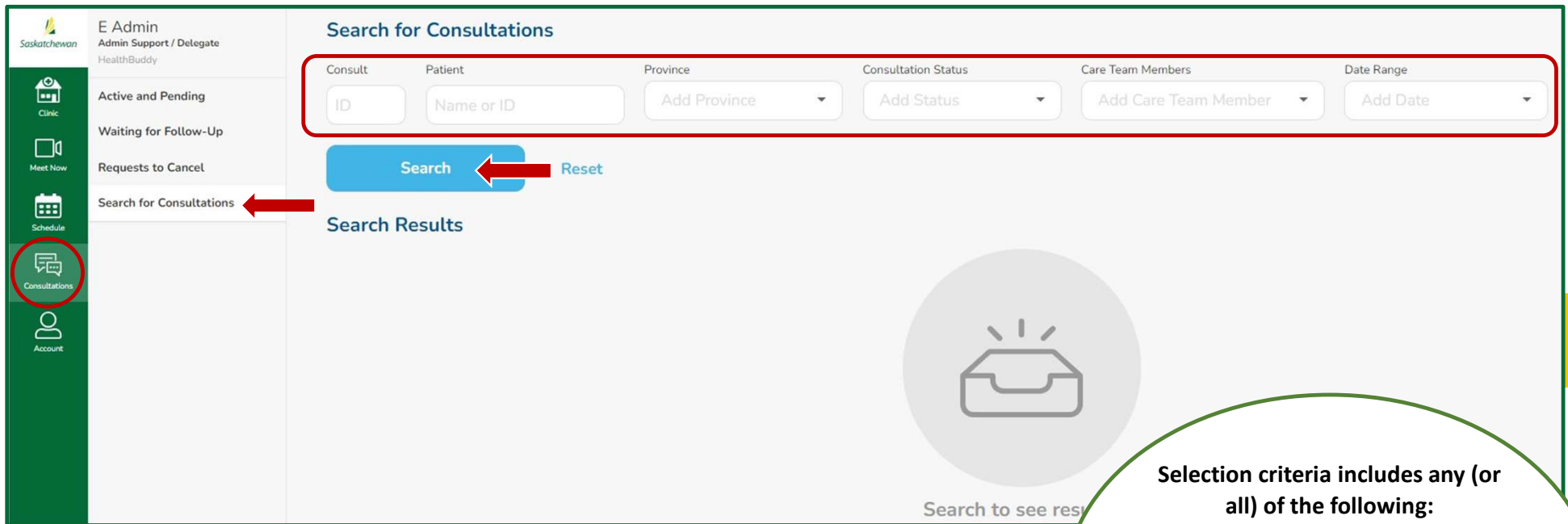


Archive Completed Consultations

The screenshot displays a consultation interface for a 'Demo Patient'. At the top, it shows 'Consultation ID: 1198' and 'Active' status. The consultation log on the left contains several entries: 'E Test Doctor has been assigned to the consultation.' (Feb 22, 2:35pm), 'This consultation is for Demo Patient. Health Card: 123456789 | DOB: Jan 01, 2000.' (Feb 22, 2:35pm), 'Appointment Reason: Feeling Ill or Infection' (Feb 22, 2:35pm), and 'E Test Doctor has entered the consultation.' (Feb 22, 3:20pm). The patient information on the right includes 'Patient ID: 132', 'Age and Gender: Born on January 1, 2000, 24 years old, Male', and 'Location: Box 10, Regina, Saskatchewan, S4S 4P4'. A red box highlights the 'Active' dropdown menu, which is open, showing options: Active, Pending Imaging, Pending Labs, Referred to Specialist, Pending Other, Cancel Consultation, and Archive Consultation. A red arrow points to the 'Archive Consultation' option.

- ❑ 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. After that time, it may be located under '**Consultations > Search for Consultations**').
 - **Note:** unarchived consultations remain Active to both the clinic and patient and can create backlog and confusion.

Past 'Patient Consultations'



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

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

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.

Participant Name: Date Range: Type:

[Search](#) [Reset Search](#)

First Previous 1 Next Last

Type	Participants	Date
Video	Guest G8RB, ETest Doctor	Nov 15, 2022 - 04:16 pm

Meeting with Demo Patient

Recorded
Recording 1 Recording 2

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'

Waiting To Archive - Created November 15, 2022

DP Demo Patient
View Participants

Video Chat Phone Call Alert Patient

EText Doctor has been assigned to the consultation.
Nov 15, 2:22pm

This consultation is for Demo Patient. Health Card: 123456789 | DOB: Jan 01, 2000.
Nov 15, 2:22pm

Appointment Reason: Feeling Ill or Infection
Nov 15, 2:22pm

Demo Patient is now marked as ready.
Nov 15, 2:22pm

EText Doctor has entered the consultation.
Nov 15, 2:22pm

Message [Send](#)

Patient Information

Demo Patient

Patient ID: 132 Health Card #: 123456789

Contact Information
emarshall+patient5@lume.ca.com
Mobile Phone: (306) 434-5335
Home Phone:

Age and Gender
Born on January 1, 2000
22 years old
Male

Location
Box 10, Regina, Saskatchewan, S4S 4P4

Preferred Pharmacy
No preferred pharmacy set

Video 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>