Saskatchewan Virtual Visit Provider User Guide

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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.
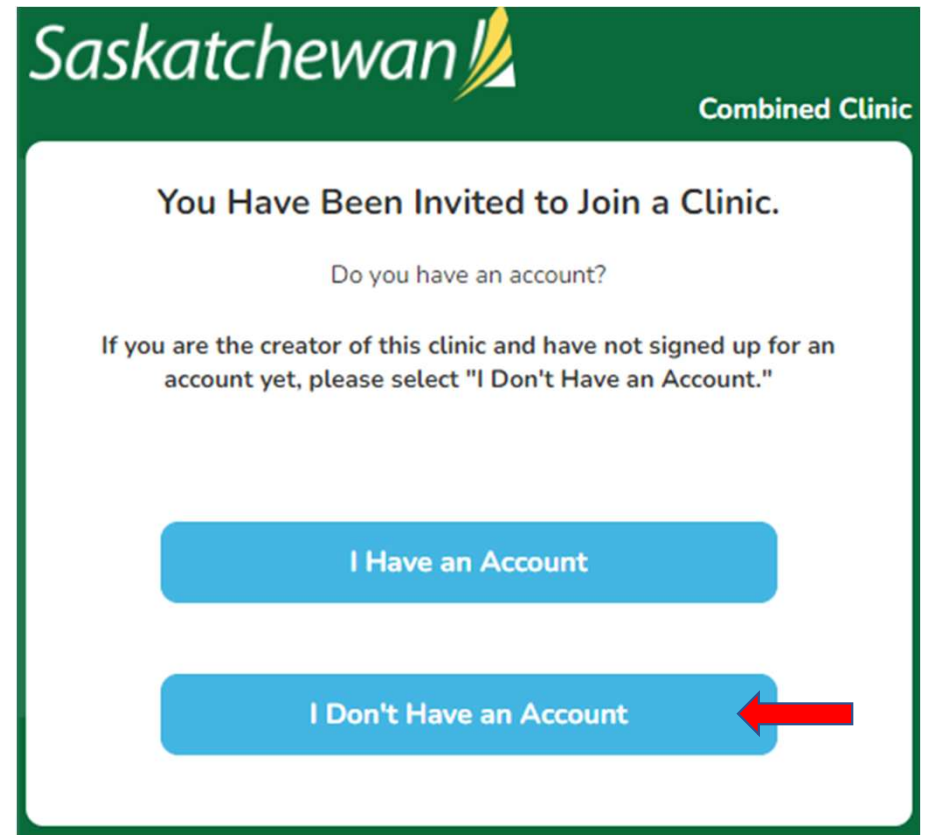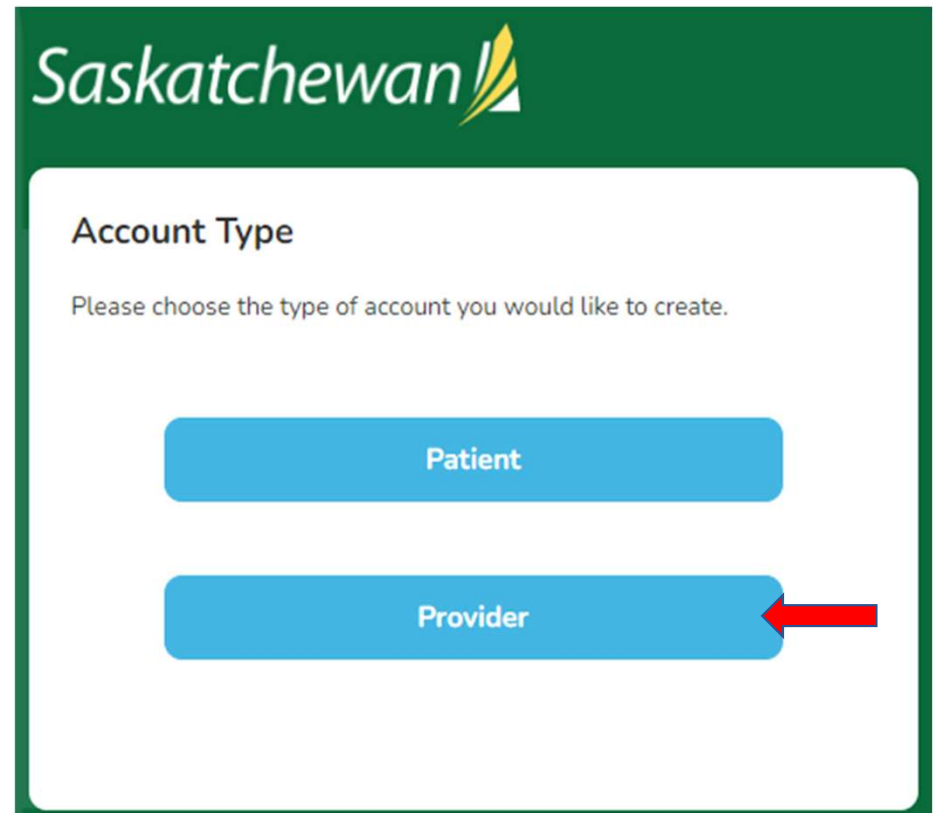
Create a 'Provider' Account

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.

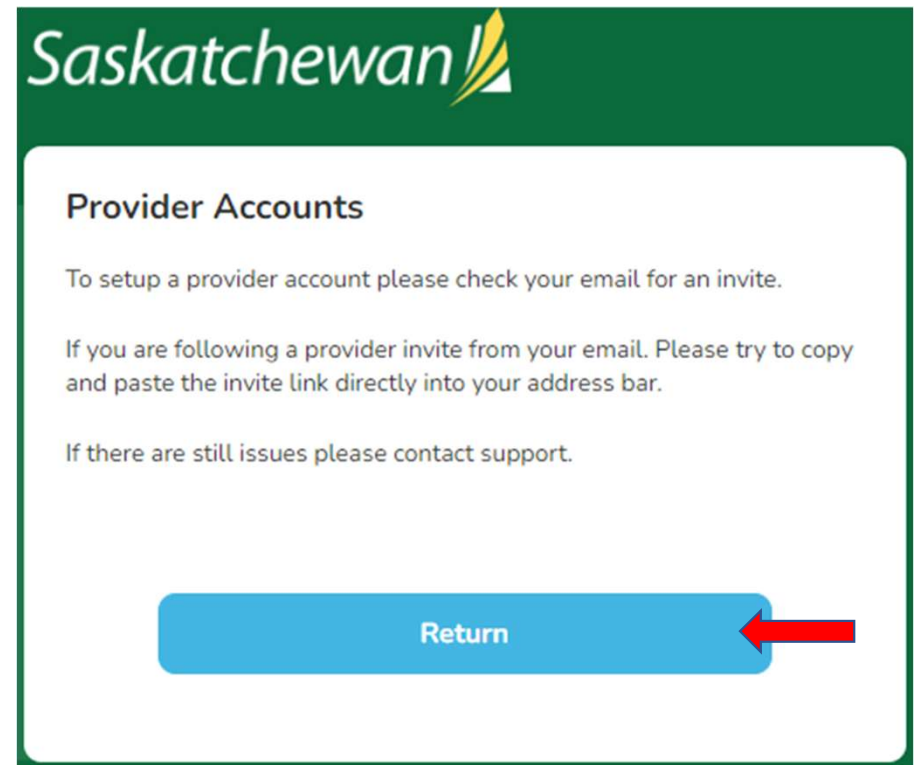   **(DO NOT click 'Patient')**

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**'

Saskatchewan

Provider Accounts

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

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

If there are still issues please contact support.

Return

Account Information

❑ 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.*

Saskatchewan
Combined Clinic

Account Information

Please provide the following information to register your account.

First Name *

Last Name *

Display Name (what patients will see)

Dr. Smith

Email *

email@example.com

Mobile Phone * (Mobile number is required for 2FA and isn't displayed to patients.)

(XXX) XXX-XXXX

Gender

Male

Choose a Password

❑ 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**'

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

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/
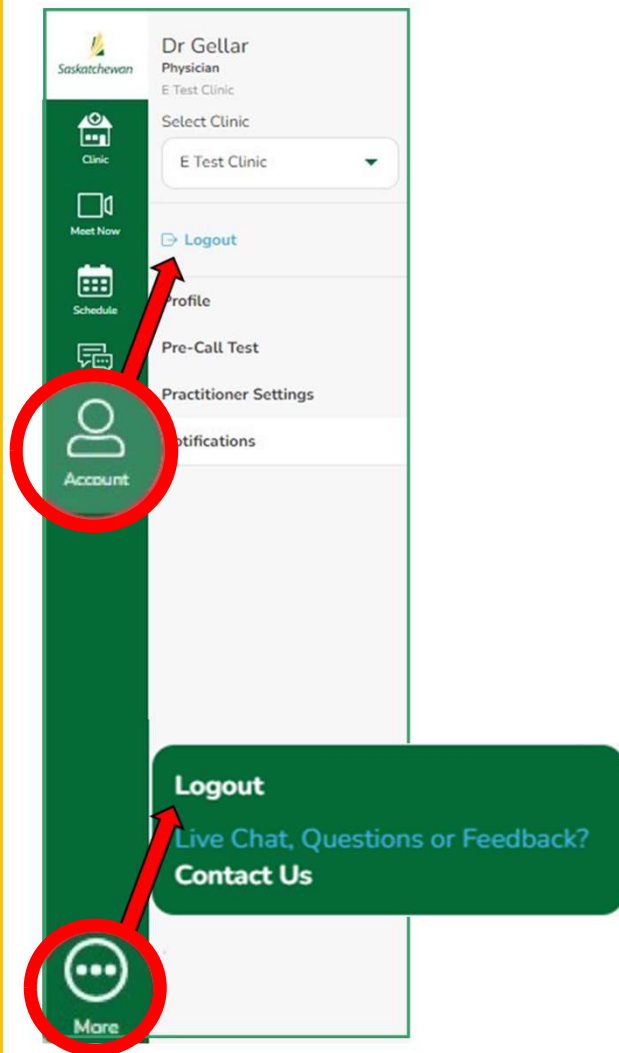
Account Logout

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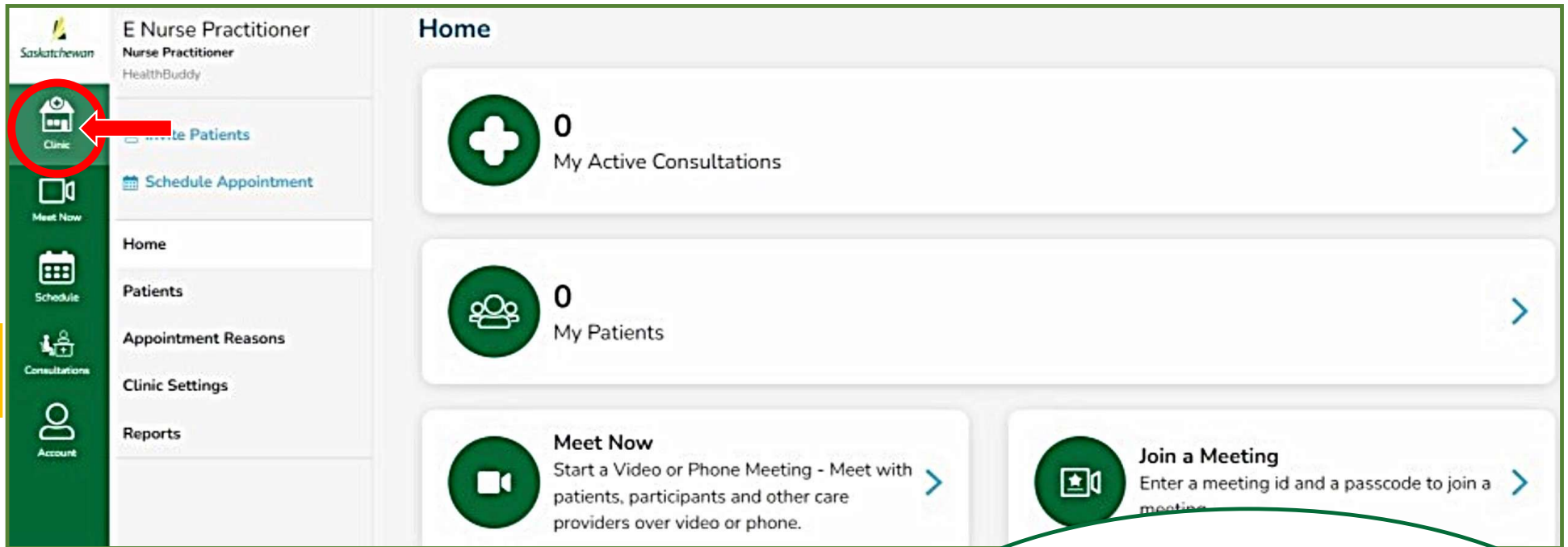
☐ To return to the Home screen, at any time, select '**Clinic**' in the dashboard

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
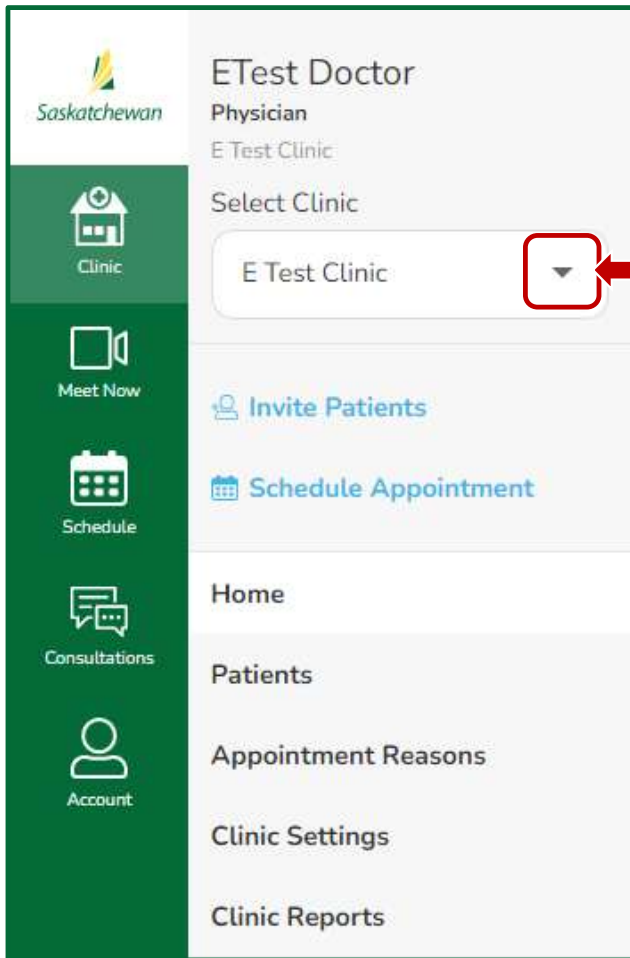
Select Your Clinic

❑ 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

□ 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.
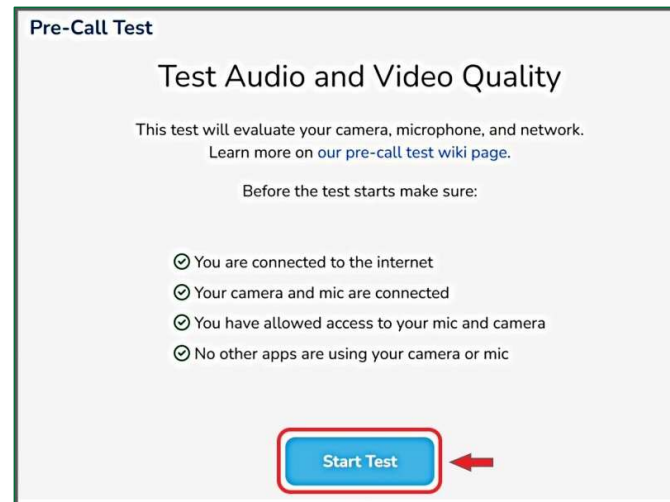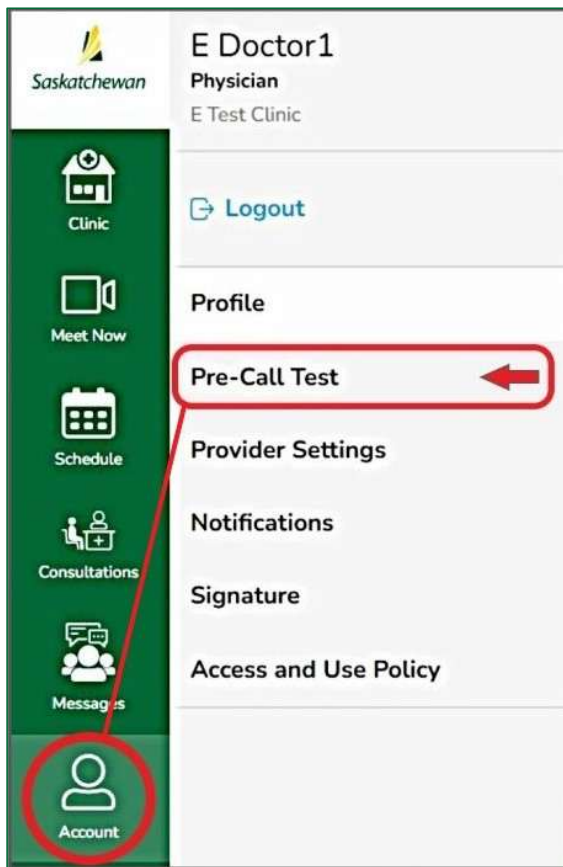
- ❑ The Pre-Call Test is available from two places in the platform:
  - When logged in to your account: select '**Account**', then '**Pre-Call Test**'
  - When not logged in and joining a video meeting: click '**Test Audio & Video**' on the '**Join a Meeting screen**'
- ❑ Review the screen, then click '**Start Test**'
  - The system may prompt you for video and camera permission. If so, press '**Allow**' for both
  - Set your device on a stable surface and speak during the test, to ensure proper camera and microphone testing

Pre-Call Test Results

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

❑ **If the Pre-Call test results are good:**
  - ▪ Proceed to conducting virtual consultations or meetings.

❑ **If the Pre-Call test fails or the results are bad:**
  - ▪ Make sure other applications on your laptop/computer are not using your camera or microphone or are closed
  - ▪ Double-check your internet connection, as slow speeds can affect the quality of your video sessions
  - ▪ 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

Bitrate - the amount of video data transmitted (a higher bitrate usually translates to better quality

Round Trip Time – the time it takes for data packets to complete a round trip from source to destination and back (the efficiency & reliability of your network connection

Packet Loss – incomplete or delayed data transmission

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**'.
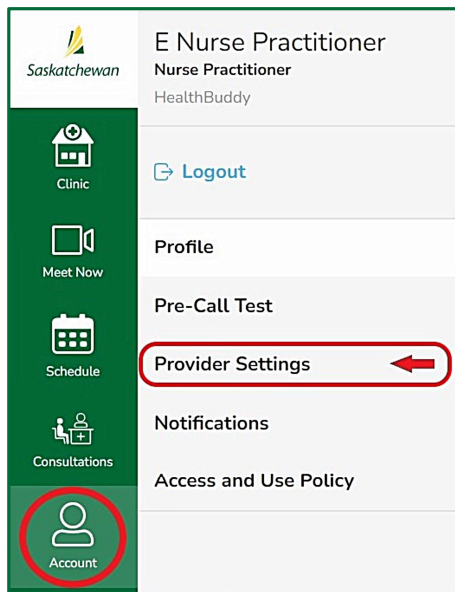
If enabled, there are three settings available:

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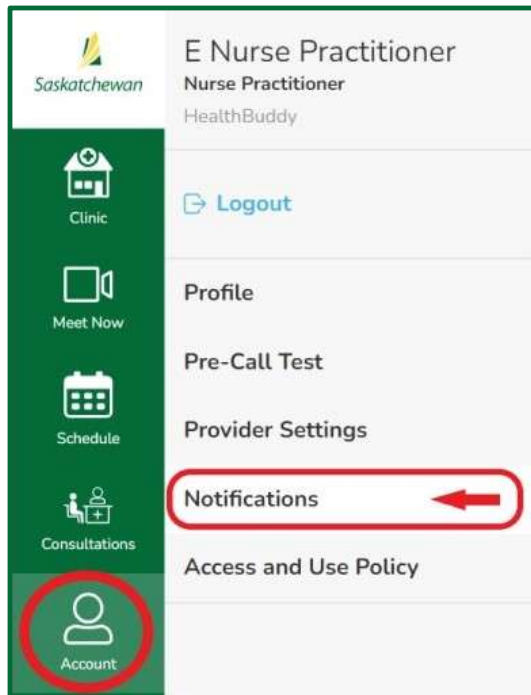
- ❑ Select '**Account**' from the Dashboard, then click '**Notifications**'.
- ❑ The clinic admin must select the healthcare provider from the drop-down menu. Healthcare providers will not see this drop-down.
- ❑ Check the desired notifications, then click '**Save**'.

Clinic Settings

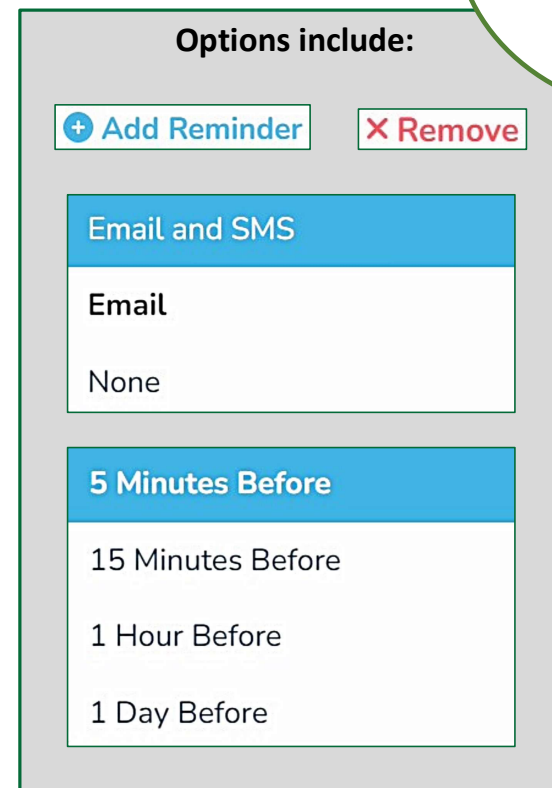**- Appointment Notifications & Reminders to Patients/Participants -**

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.
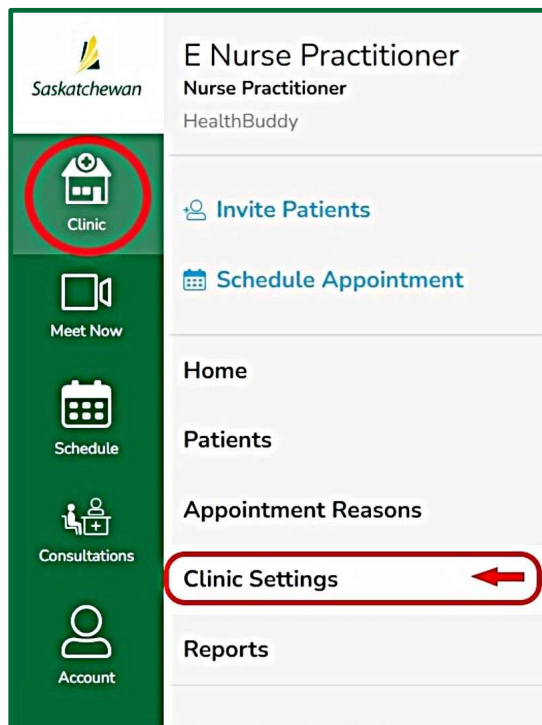
❑ Select '**Clinic**' in the dashboard, then '**Clinic Settings**'

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

Options include:

⊕ Add Reminder   ✕ Remove

Email and SMS
Email
None

5 Minutes Before
15 Minutes Before
1 Hour Before
1 Day Before

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.

Options include:

Q Search Quick Message

Edit

Remove
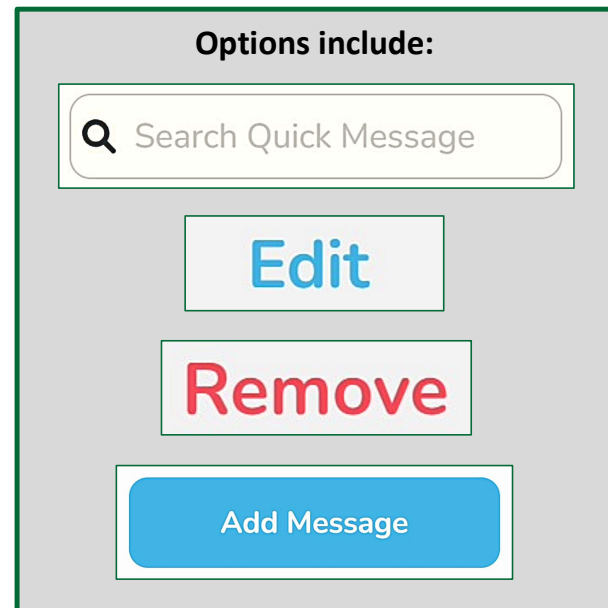
Add Message

Add a New Quick Message

❑ Select '**Clinic**' in the dashboard, then '**Clinic Settings**'.

❑ Scroll down to '**Quick Messages**' and click '**Add Message'.**

❑ If you are the clinic admin, under **'Provider'**, select a particular healthcare provider **or leave blank for all** healthcare providers in the clinic.

❑ When creating a new message for 'All' providers, you have an option to add the provider's name into the quick message. To do this, click **'Insert Provider Display Name Variable'** in the spot where you want their name to appear. Type the new message.
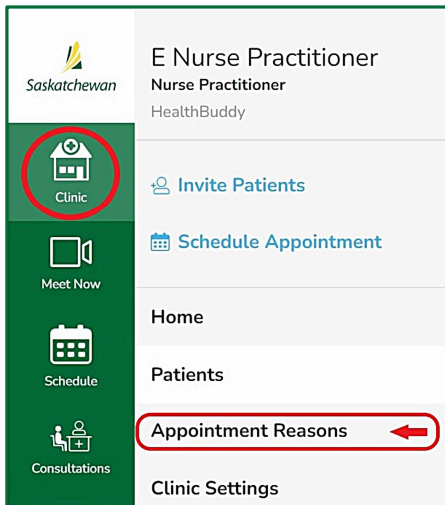
❑ Click '**Add Quick Message**'

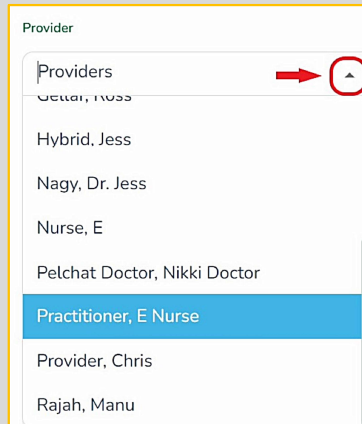9. Appointment Reasons

Adding, Editing & Removing Appointment Reasons

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

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

E Nurse Practitioner
Nurse Practitioner
HealthBuddy

Clinic

Meet Now

Schedule

Consultations

👥 Invite Patients

📅 Schedule Appointment

Home

Patients

Appointment Reasons

Clinic Settings

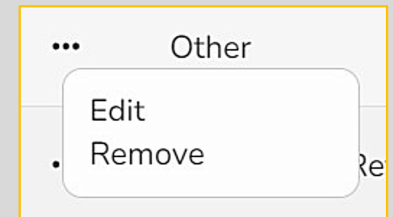❑ Clinic admins must select the correct healthcare provider from the '**Provider**' drop-down menu.

Healthcare providers will not see this drop-down.

Provider

Providers

Gettar, Ross
Hybrid, Jess
Nagy, Dr. Jess
Nurse, E
Pelchat Doctor, Nikki Doctor
Practitioner, E Nurse
Provider, Chris
Rajah, Manu

❑ 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**'.

Add Appointment Reason

Appointment Reason

Follow Up - Nurse Practitioner

Appointment Duration

10 minutes

Add Reason

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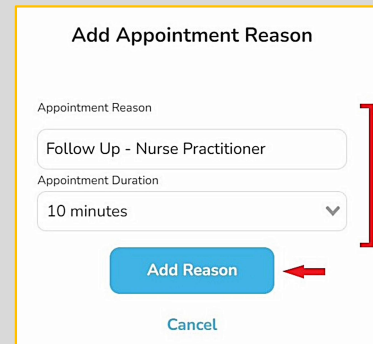
❑ Click the 3 dots to '**Edit**' or '**Remove**' an appointment reason

••• Other

Edit
Remove

Re

10. Managing Healthcare Provider's Schedule & Calendar

Managing Schedules

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

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

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.
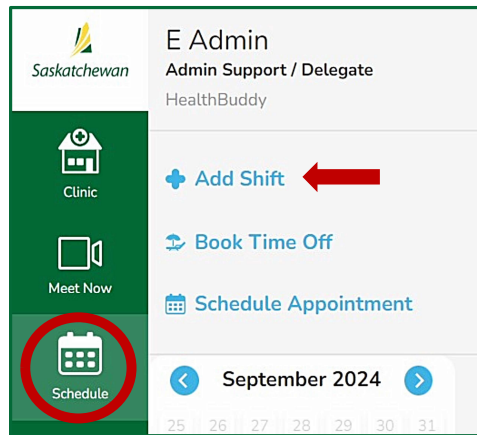
Viewing Appointments

MONTH View:	DAY View:	WEEK View:
▪ Click on an individual day or 'Today' ▪ Click on 'This Week' ▪ Hover over a day to see the number of appointments scheduled.	▪ 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.	▪ 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.

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)
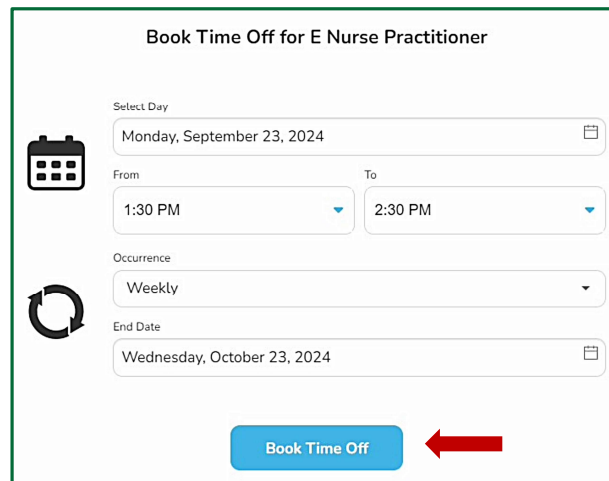
❑ Click '**Add Shift for ...**'

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**'
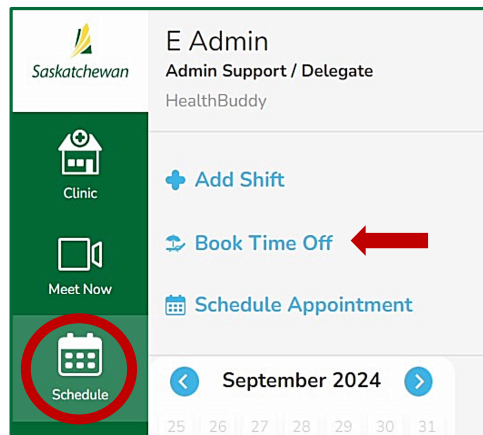
☐ Select the **day** you wish to add the time off to

☐ Select the from/to **time**

☐ Choose the '**Occurrence**'

☐ Choose an **end date** (if recurring occurrence)

☐ Click '**Book Time Off**' and confirm


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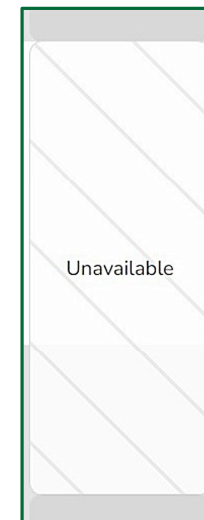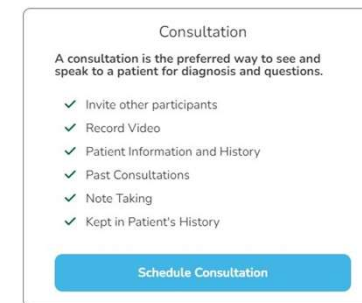
Overlapping Schedules

- 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

Overlapping – Week View

Overlapping – Day View
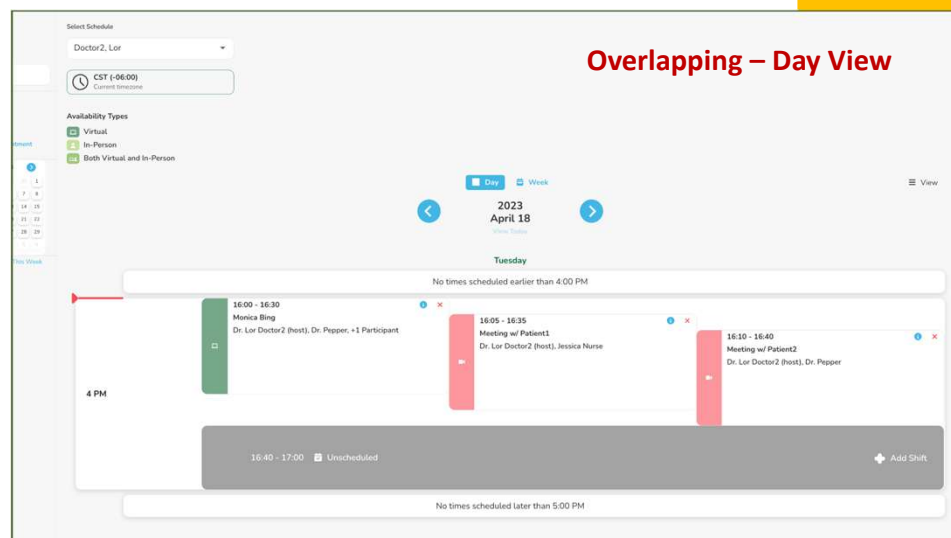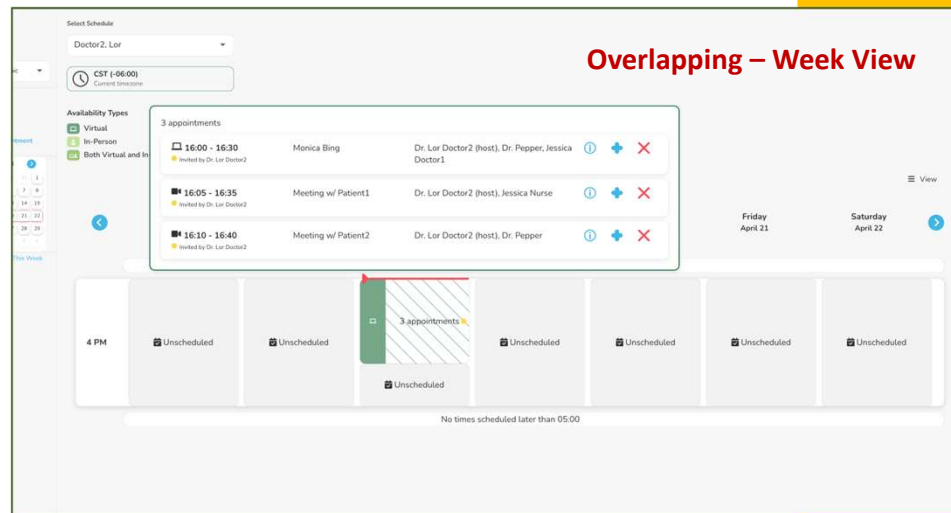
11. 'Meet Now' Video Meetings vs Patient Consultations

'Meet Now' Video Meetings vs Patient Consultations

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

Consultation

A consultation is the preferred way to see and speak to a patient for diagnosis and questions.

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

Schedule Consultation

- **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.
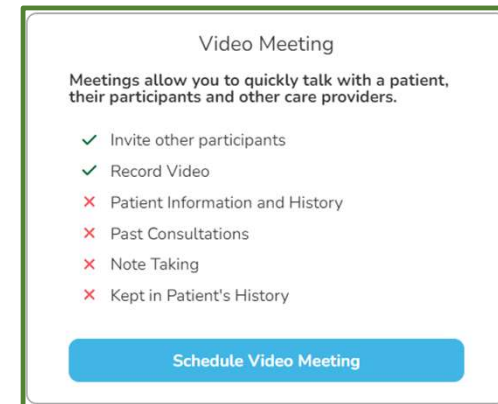
12. 'Meet Now' Video & Phone Meetings
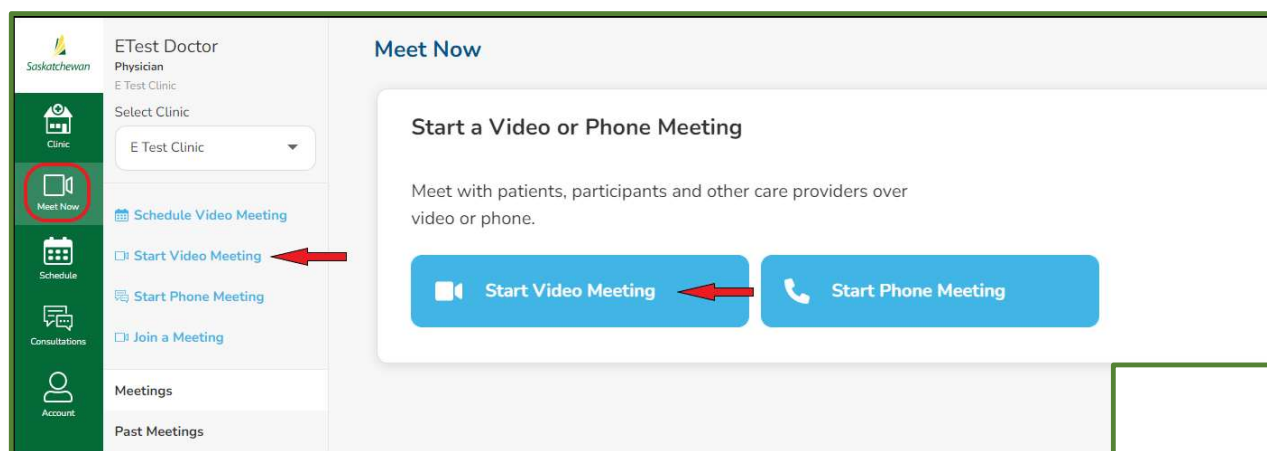
Meet Now Video Meetings

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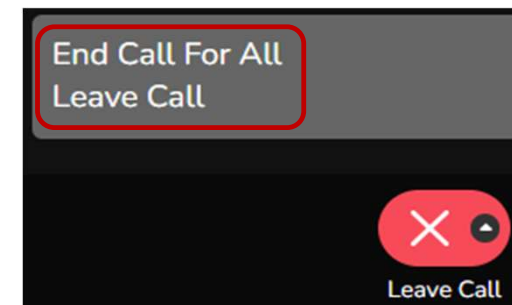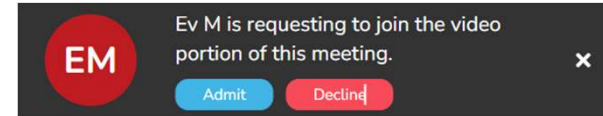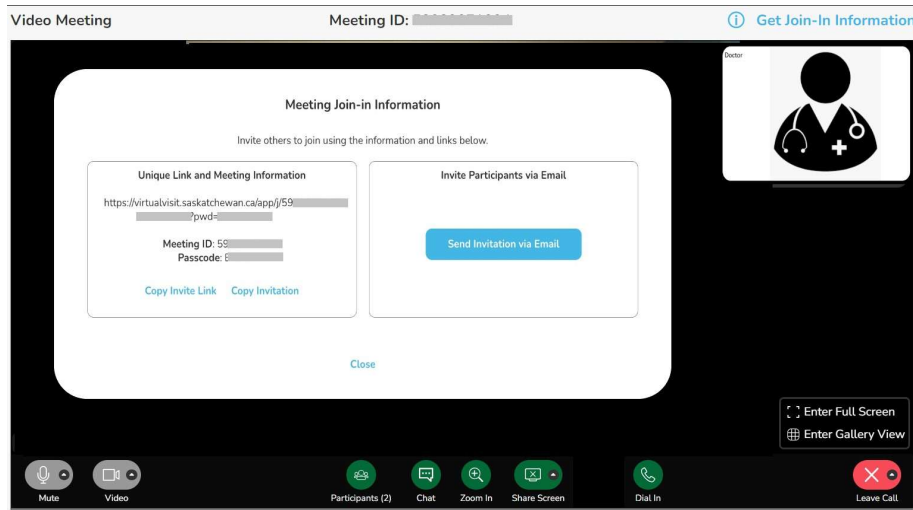
If you are currently on the phone with your participant, ensure the 'microphone' setting is unchecked, as you will be speaking with them over the phone and only require video.

- ❑ Click '**Next**'.

You will be taken directly into the video meeting.

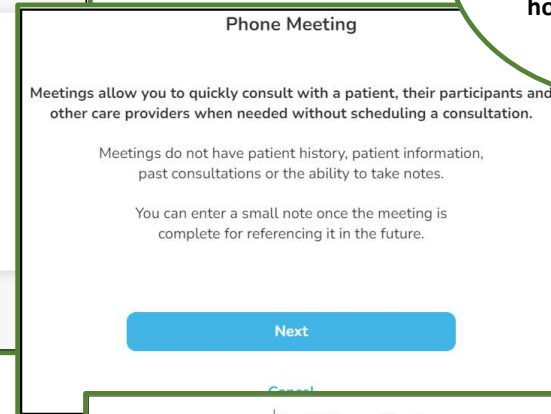# Invite Guests to a Video Meeting – Step 2

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.
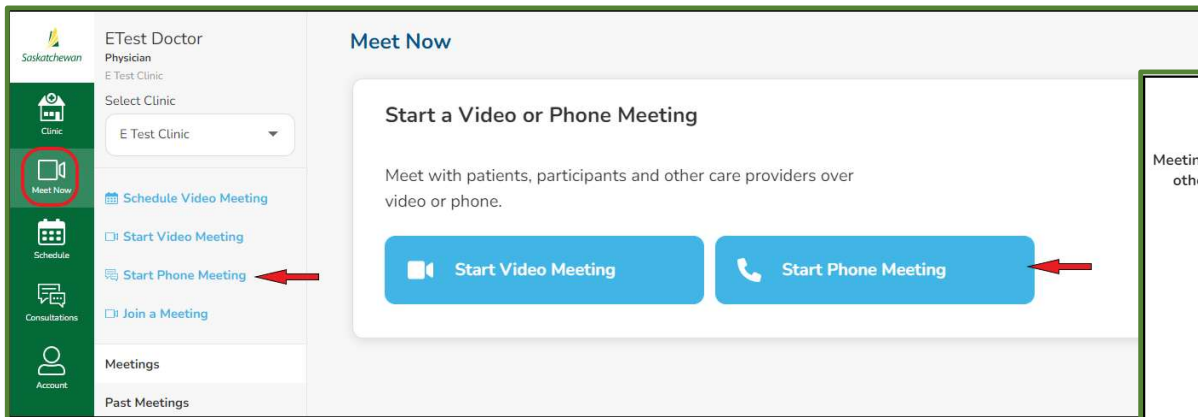
- ❑ Click '**Meet Now**' in the dashboard, then select '**Start Phone Meeting**'

- ❑ 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)
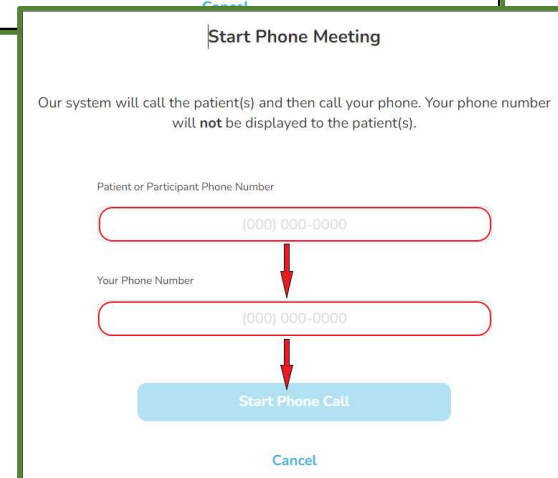
Schedule a Video Meeting – Step 1

□ Select '**Meet Now**' in the dashboard

□ Click '**Schedule Video Meeting**'

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

□ Click '**Schedule Video Meeting**'

Schedule a Video Meeting – Step 2

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

Schedule a Video Meeting - Step 3

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

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

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 ▼

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

---

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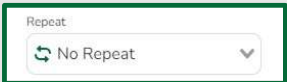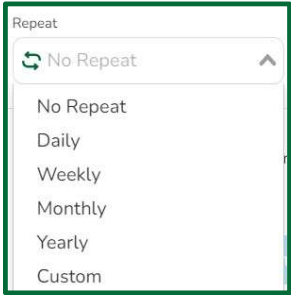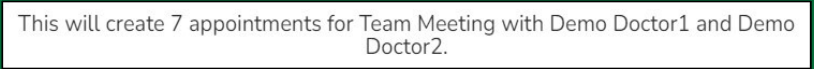
When scheduling a single provider and their schedule **IS** entered in   'SK Virtual Visit' ...

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

Date
Monday, September 23, 2024 📅

Length
15 mins (5:15 PM) ⌄

Start Time
5:00 PM ▼

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**'.

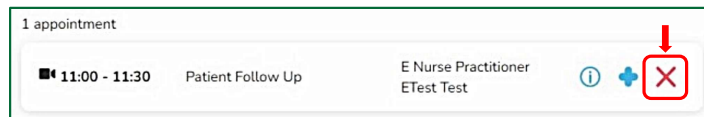# Schedule a Video Meeting - Step 4 - 'Repeat'

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

Cancel a Scheduled Meeting

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**'
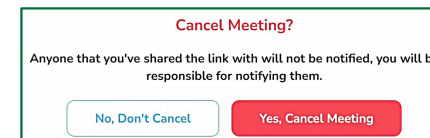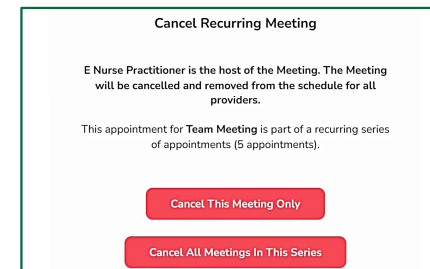- A pop-up will appear asking you to confirm. Confirm the cancellation.

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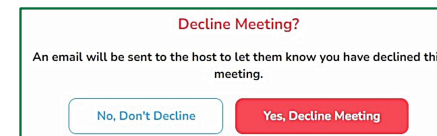- Cancels the appointment entirely and removes it from all invited providers' schedules
- All invited providers will receive a notification, based on their 'Notification Settings' (found under 'Account').

'Schedule' Tab

'Consultations' Tab

Confirm 'One-Time' Meeting

Cancel Meeting?

Anyone that you've shared the link with will not be notified, you will be responsible for notifying them.

No, Don't Cancel   Yes, Cancel Meeting

Confirm 'Recurring' Meetings

Cancel Recurring Meeting

E Nurse Practitioner is the host of the Meeting. The Meeting will be cancelled and removed from the schedule for all providers.

This appointment for **Team Meeting** is part of a recurring series of appointments (5 appointments).

Cancel This Meeting Only

Cancel All Meetings In This Series

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.
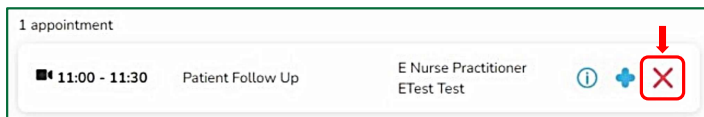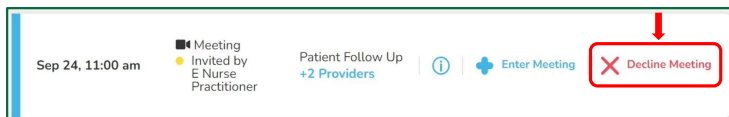
▪ Done by the invited provider or the clinic admin

▪ 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').

'Schedule' Tab

1 appointment					
📹 11:00 - 11:30	Patient Follow Up	E Nurse Practitioner ETest Test	ⓘ	➕	❌

'Consultations' Tab

Sep 24, 11:00 am	📹 Meeting ● Invited by E Nurse Practitioner	Patient Follow Up +2 Providers	ⓘ	➕ Enter Meeting	❌ Decline Meeting

Confirm 'One-Time' Meeting

> **Decline Meeting?**
>
> An email will be sent to the host to let them know you have declined this meeting.
>
> No, Don't Decline | Yes, Decline Meeting

Confirm 'Recurring' Meetings

> **Decline Recurring Meeting**
>
> This will NOT cancel the appointment.
>
> ETest Doc was invited to this Meeting by E Nurse Practitioner. Removing this or all Meetings will remove it only from ETest Doc schedule. There are 5 Meetings in this series.
>
> An email will be sent to the host to let them know ETest Doc has declined this meeting.
>
> Decline This Meeting Only
>
> Decline All Meetings In This Series

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)

13. Video Session Features

'Admit' or 'Decline' Users into the Video
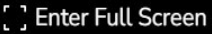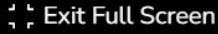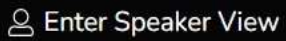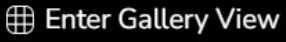
❑ All present care team members of your virtual clinic can '**Admit**' participants or '**Decline**' participants who are requesting to enter the video call.

❑ This can be done using the popup that appears over the video screen or from the '**Participants**' button.
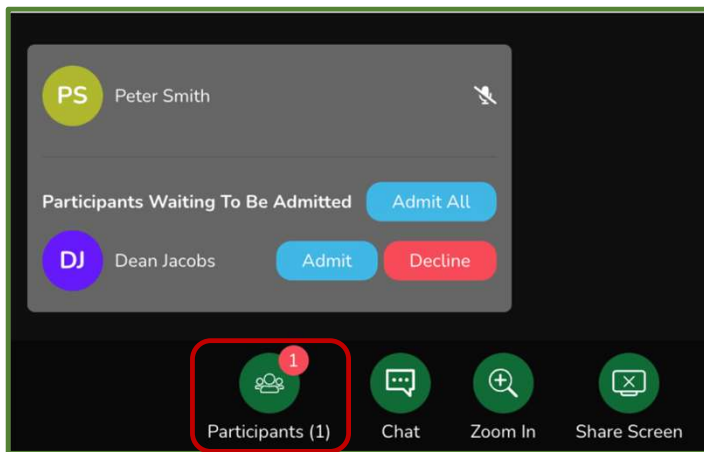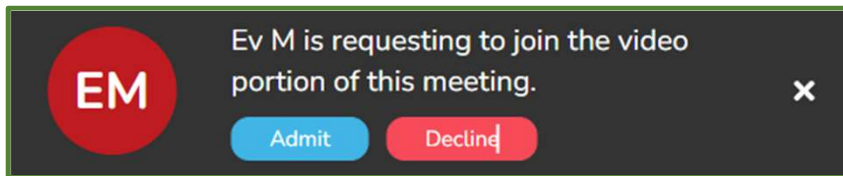
❑ When a user is 'Declined' from joining the call, they will be notified however, may attempt to re-join, in the event they were declined in error.

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.
Leave Call	Leave Call – leave the video chat. If participants leave the call, the video will stay active for a short time, allowing them time to re-enter the video. End Call for All – ends the video chat completely. Those from outside the virtual clinic cannot do this.
Dial In Share Screen Record	Dial In, Share Screen and Record are discussed in more detail on the following screens.

Managing Participants

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

- See a list of participants who are in the video
- See who is muted/unmuted
- See who has their camera on or off
- **'Mute All'** participants
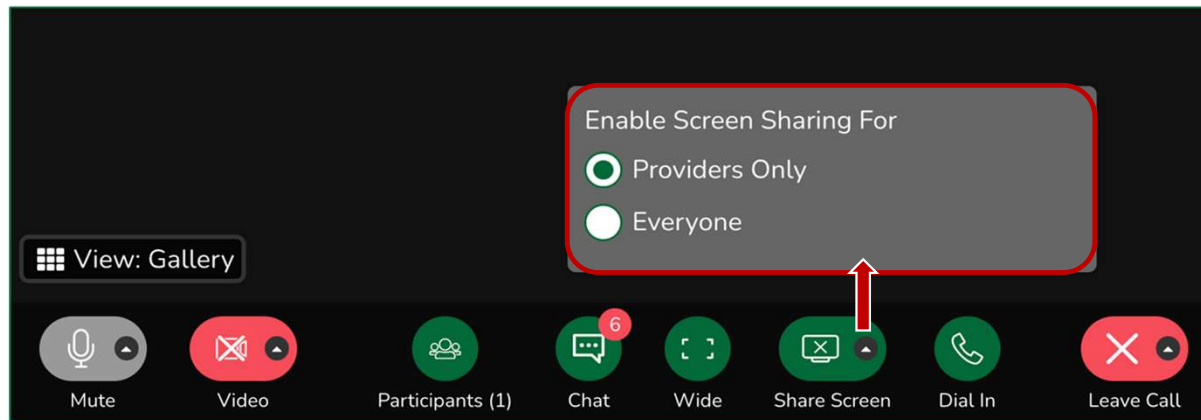- Click the '**X'** to immediately remove a participant from the video
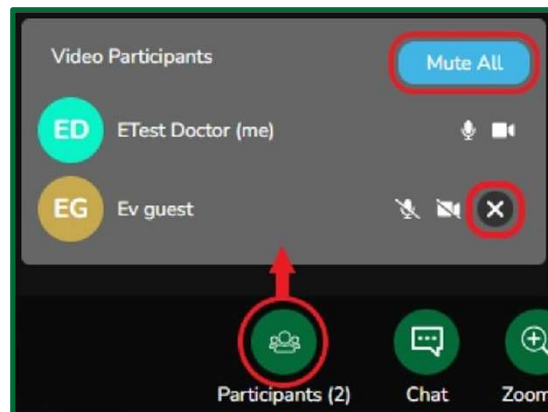
By clicking the '**3 dots**' in the lower-left corner of a participant's video, the meeting host can:

- **'Mute/Unmute'** a specific participant
- **'Remove'** a specific participant
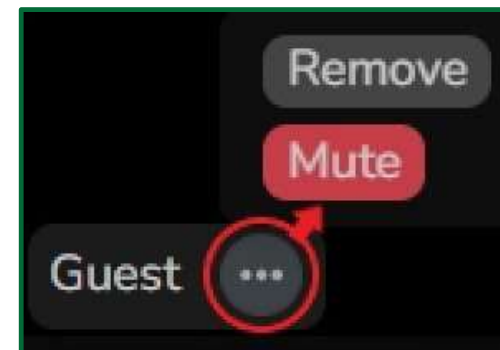
Sharing a Screen Within a Video

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

❑ The host would click the small arrow next to '**Share Screen**', then choose '**Providers Only**' or '**Everyone**'

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

| **Annotations** | **Stop Sharing** |
| Click to highlight specific areas on your shared screen | Click to stop sharing your screen |
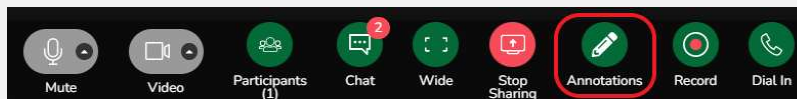
Send a Chat Message

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.
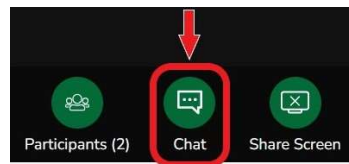
OR

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.
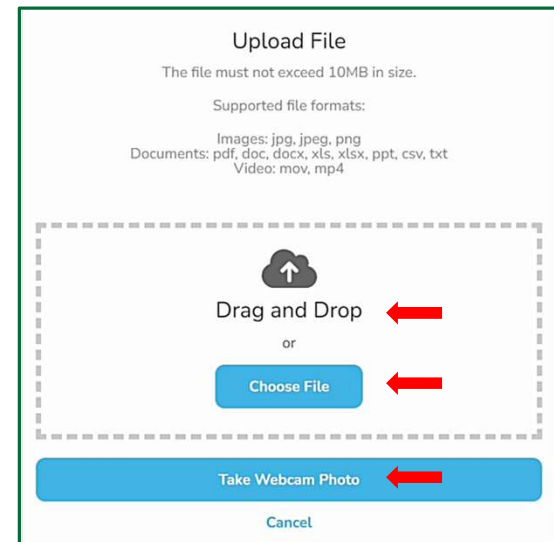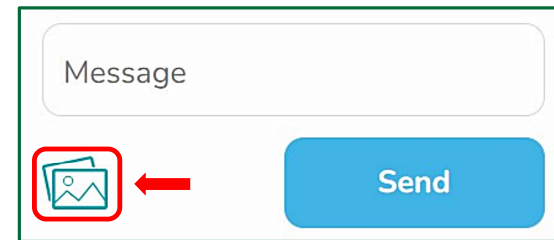
Upload a File (Photo, Video or Document)

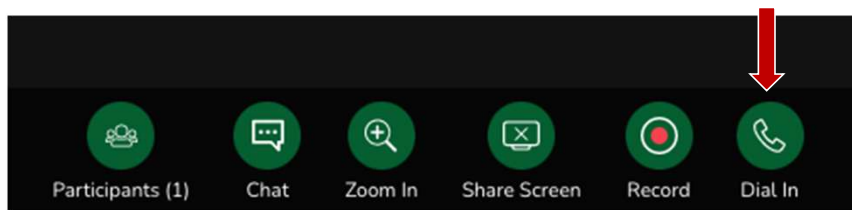**All participants within the video call can upload files into the 'Chat' window**.

❑ 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.

Message

🖼 ⬅ Send

Upload File

The file must not exceed 10MB in size.

Supported file formats:

Images: jpg, jpeg, png
Documents: pdf, doc, docx, xls, xlsx, ppt, csv, txt
Video: mov, mp4

Drag and Drop ⬅

or

Choose File ⬅

Take Webcam Photo ⬅

Cancel

Dial a Participant Into the Video Chat


❑ Once in the video chat, click '**Dial In**'

❑ Enter the '**Participant's Display Name**' (*how their name will appear in the video chat)*

❑ Enter the '**Participant's Phone Number**'

❑ Click '**Dial In Now**'

▪ All participants in the video chat will hear the dialed-in person's phone ring and once they answer, will be able to hear them speak.

▪ If an answering machine is picked up, it will be up to the video call host to remove the participant from the call.

▪ Multiple people can be dialed into a video call - simply repeat the process for multiple participants.

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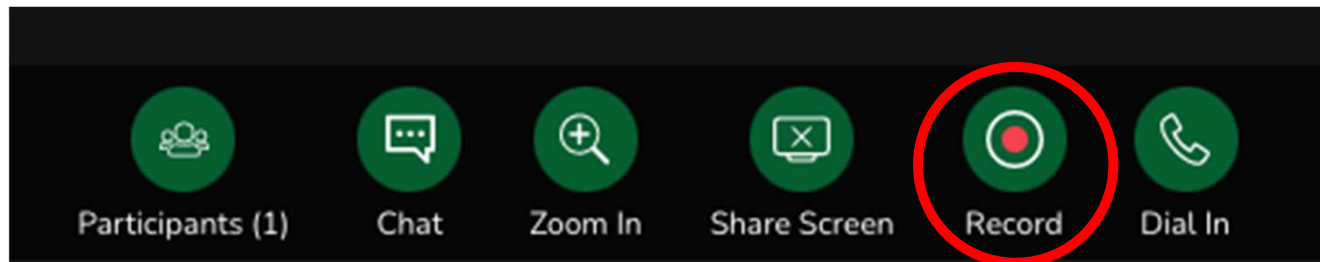
The 'Record a Video Call' feature is **turned off by default** and requires a request to your Health Service Provider to be turned on. *This button will not appear if the feature is disabled.*

❑ 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**
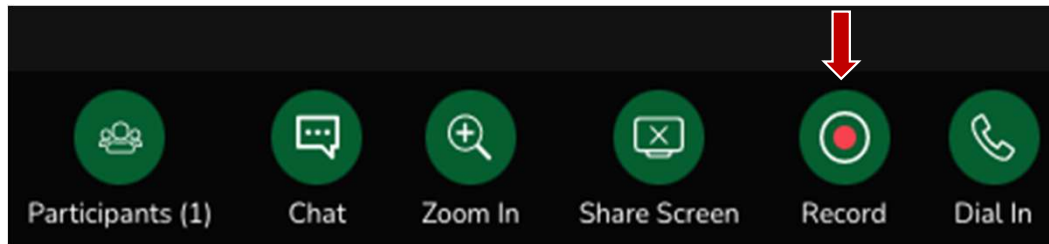
A message will appear letting you know recording has begun.
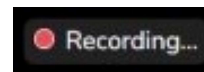
❑ To end recording, click ' **Stop Record**'. A message will appear letting you know recording has stopped.
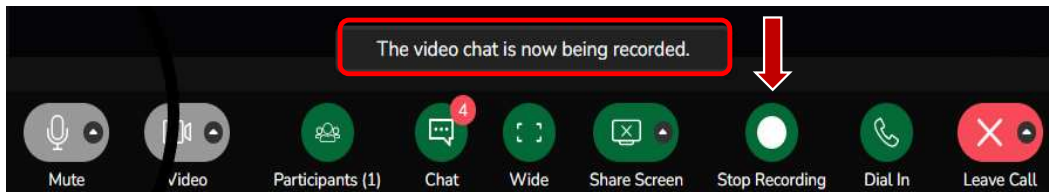
❑ When all participants leave a video meeting or consultation video call, the recording will stop automatically.

Video participants will receive notification that Video Recording has Started

They have two options:
- **Leave Video**
- **Continue**
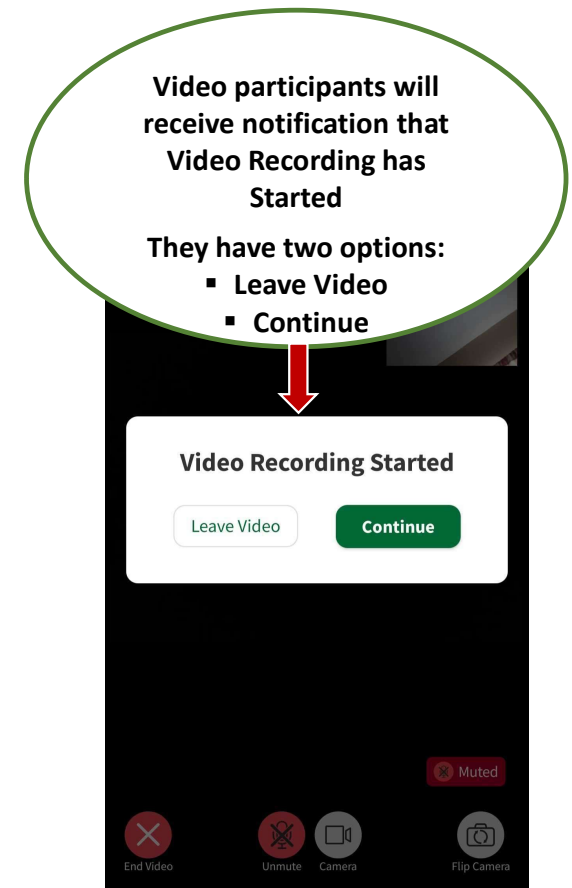
14. Inviting Patients

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**'.
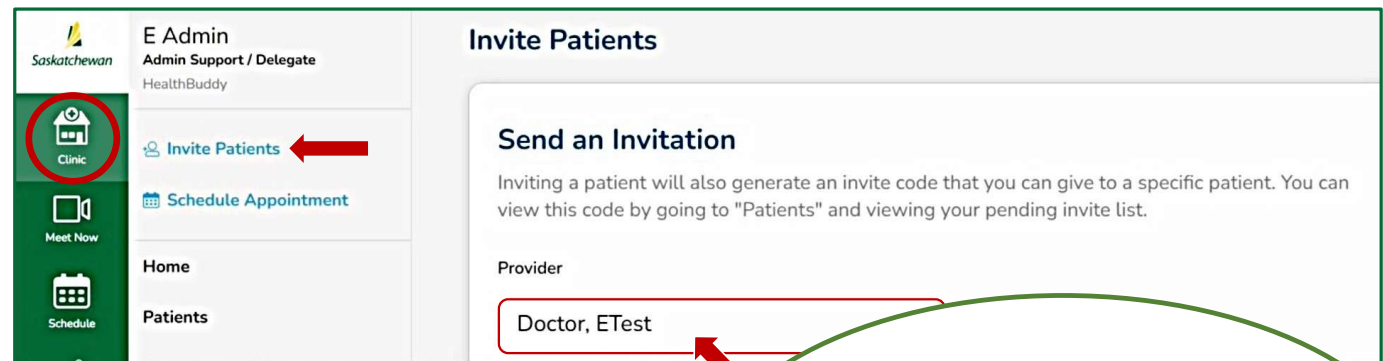
There are 3 ways to invite patients:

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
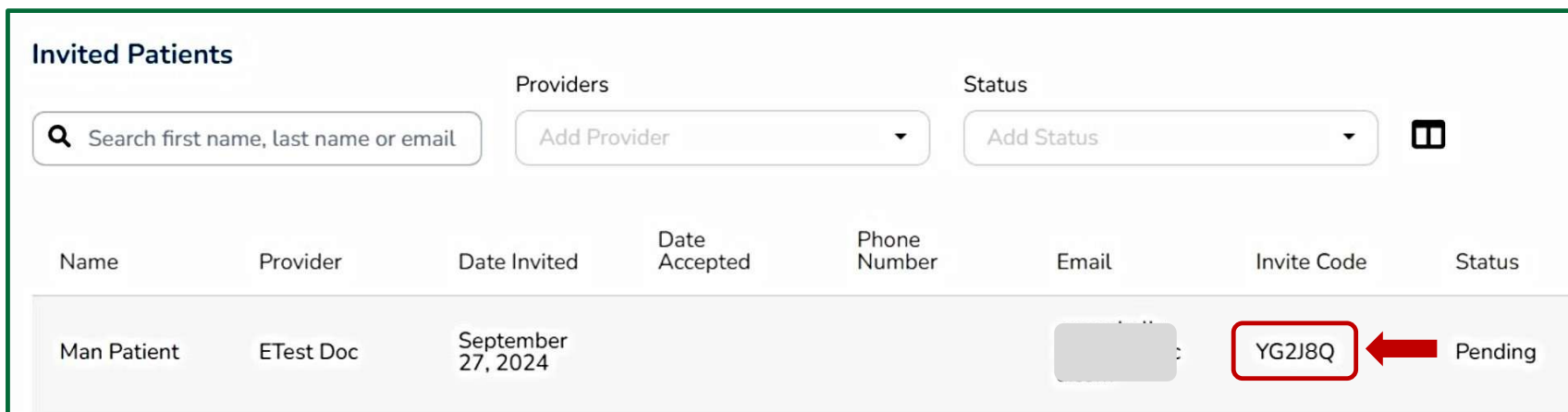
First Name	Last Name	Email	Mobile Number
Man	Patient		

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

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**'.

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

☐ Save the CSV template to a secure folder, by clicking '**Save As**', give it a file name (ensure the extension remains as .CSV), ★ then '**Save**'.

☐ 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

Invited Patients

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

❑ Patient's name, phone number and email (if known at time of sending the invitation).

❑ The healthcare provider the patients were invited under.

❑ The date that the invitation was sent, as well as the date the invitation was accepted by them. Note: accepted invites do not immediately disappear from this list but remain for approximately 72 hours*.

❑ The 'Invite Code', which can be shared with patient(s) and they use to join your virtual clinic (when their email address or cell # are unknown).

❑ If this information remains under this section for an extended time, it means that the patient has not created their account and joined your virtual clinic. The invitation either must be **'Resent'**, or **'Removed & Resent'** (if the wrong details were entered).

Status:

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

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

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

Expired – the invitation time has expired

15. Searching for Patients

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

Patient Search

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

❑ Either:
- Enter the patient's first name, last name or health card number, OR
- 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.
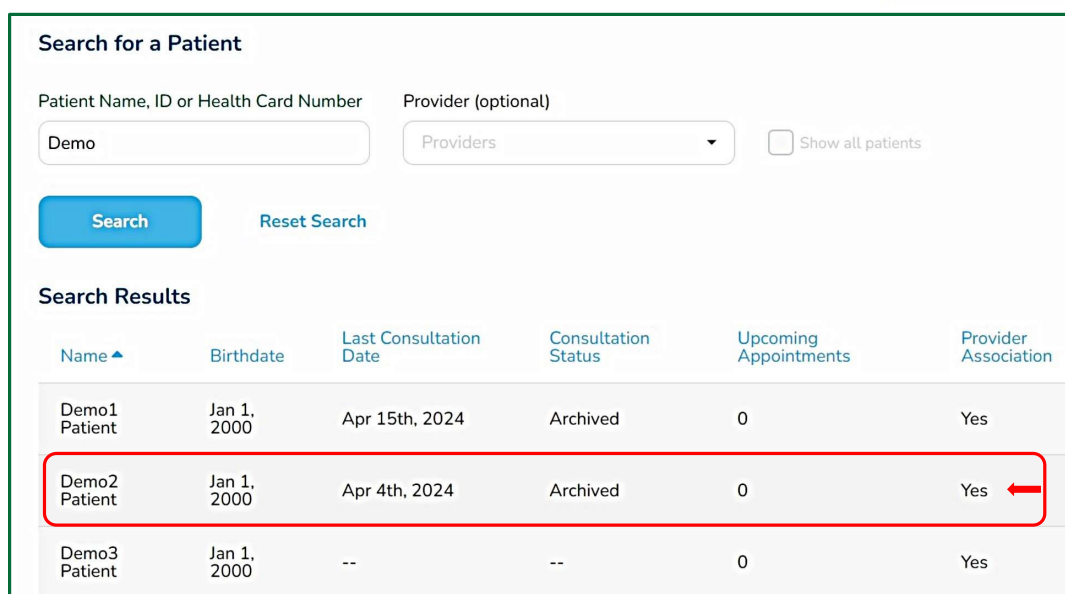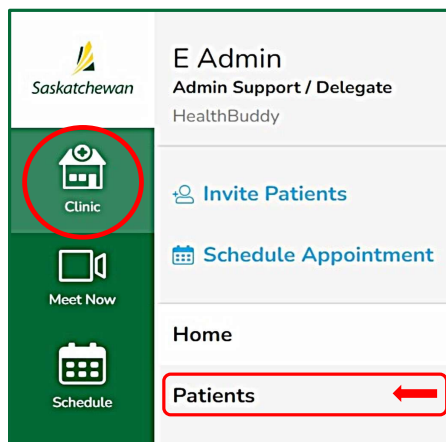
Patient Search

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
- View information patient entered when they created their profile

- Schedule a **'New Consultation'**
- **'Remove Patient'** or
- If 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.
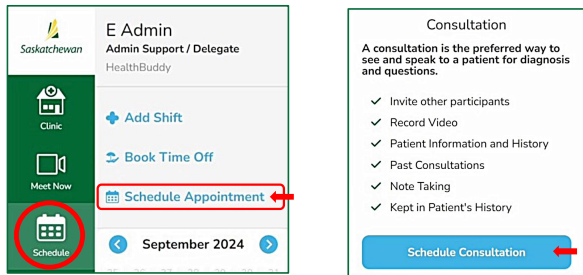
Schedule a Patient Consultation - Step 1

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. ★
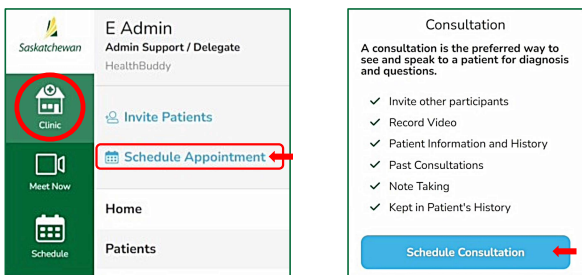
★ 1. The 'Schedule' tab >
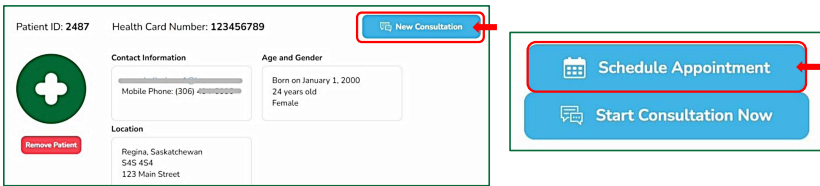
- Select 'Schedule Appointment' > 'Schedule Consultation'

2. The 'Clinic' tab >

- Select 'Schedule Appointment' > 'Schedule Consultation'
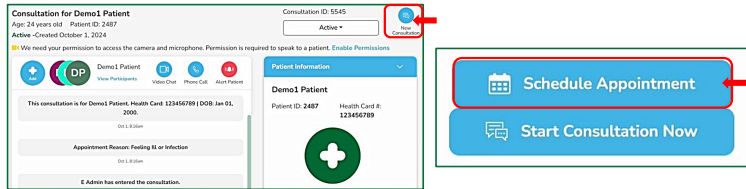
3. The 'Patients' tab >

- Search for the patient > click their name > tap 'New Consultation' > 'Schedule Appointment'

4. While in an active patient consultation >

- 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**'

SK Virtual Visit Application: User Guide

Schedule a Patient Consultation - Step 3

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

- ❑ Choose '**Type of Care**' (virtual or in-person) and '**Appointment Reason**' from the drop-down menus.

- ❑ If additional providers from the same virtual clinic are being invited to the patient consultation, click '**+ Invite Another Provider**'.

- ❑ Add their name from the **'Provider'** drop-down menu. If someone is added by mistake, click the red '**X**' beside their name, to remove them from the list.

- ❑ Once complete, click '**Next**'

Schedule a Patient Consultation - Step 4

'**Date**' - Enter the date of the 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).
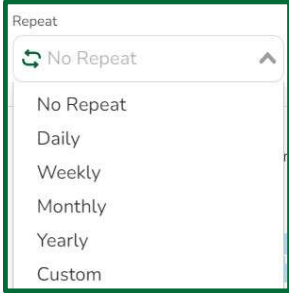

When scheduling <u>a single provider</u> and their schedule IS NOT entered:

- ❑ Select '**Specific Time**'
- ❑ Under '**Start Time**' select the time of day the appointment(s) will start
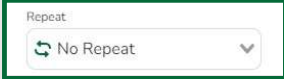
When scheduling <u>a single provider</u> and their schedule IS entered:

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

When scheduling <u>multiple providers</u> from the same virtual clinic to join a consultation, the '**See Availability**' and '**Specific Time**' buttons <u>will not</u> appear.
- ❑ Select a '**Start Time**'.

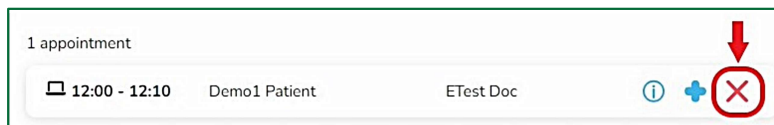# Schedule a Patient Consultation - Step 5 - 'Repeat'

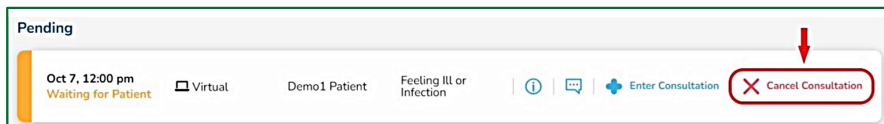|	
If scheduling a <u>one-time</u> consultation, select '**No Repeat**'.	
If scheduling <u>recurring</u> consultations, **choose the occurrence**: • Daily – occurs every day, Monday thru Sunday • Weekly – any day of the week, Monday thru Sunday • Monthly – any day of the month OR the ordinal of a weekday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

Cancel a Scheduled 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.

- ▪ 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').

'Schedule' Tab

1 appointment			
🖥 12:00 - 12:10	Demo1 Patient	ETest Doc	ⓘ ➕ ⊗

'Consultations' Tab

Pending					
Oct 7, 12:00 pm **Waiting for Patient**	🖥 Virtual	Demo1 Patient	Feeling Ill or Infection	ⓘ ▯ ➕ Enter Consultation	✕ Cancel Consultation

Confirm 'One-Time' Consultation

Cancel Virtual Consultation

ETest Doc is the host of the Consultation. The Consultation will be cancelled and removed from the schedule for all providers.

Demo1 Patient and providers will receive a notification of the cancellation.

Cancel Consultation

Close

Confirm 'Recurring' Consultations

Cancel Recurring Virtual Consultation

ETest Doc is the host of the Consultation. The Consultation will be cancelled and removed from the schedule for all providers.

This appointment for **Demo3 Patient** is part of a recurring series of appointments (1 appointments).

Cancel This Consultation Only

Cancel All Consultations In This Series

Cancel
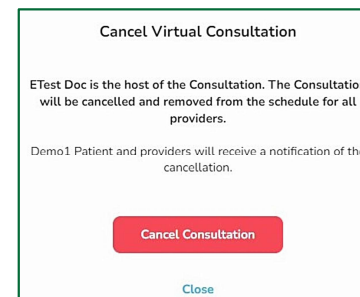
# Decline an Invitation to a Scheduled Patient Consultation

❑ 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').
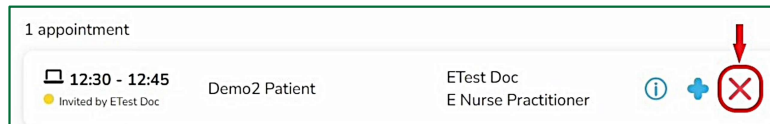
'Schedule' Tab
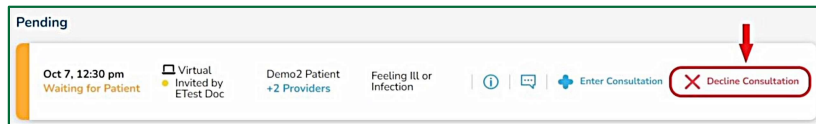
'Consultations' Tab

Confirm 'One-Time' Consultation
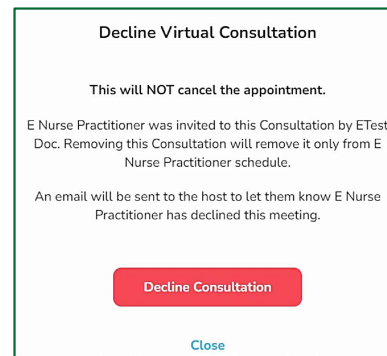
Confirm 'Recurring' Consultations
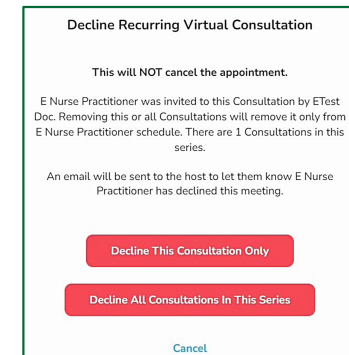
Patient Makes an Online Request to Cancel Their Scheduled Consultation

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.
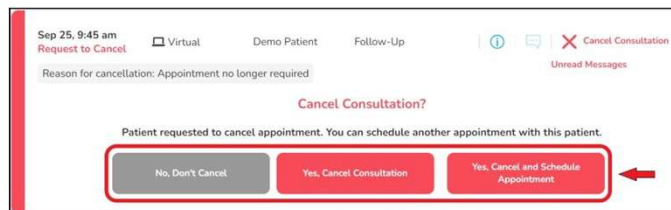
Schedule Tab >

❑ Locate the scheduled appointment, tap into it, then click the '**X**'.
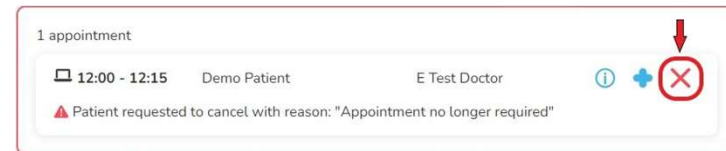
❑ Click '**Cancel Consultation**' to confirm.
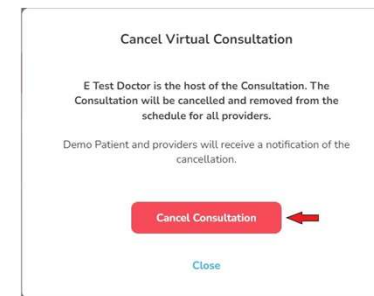
A green notification will pop up, indicating that the appointment has been successfully cancelled.
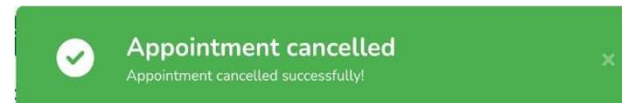
17. Enter Scheduled Appointments

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**'
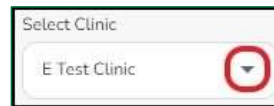
❑ Clinic admins must select the healthcare provider's name from the '**Select Schedule**' drop-down menu.
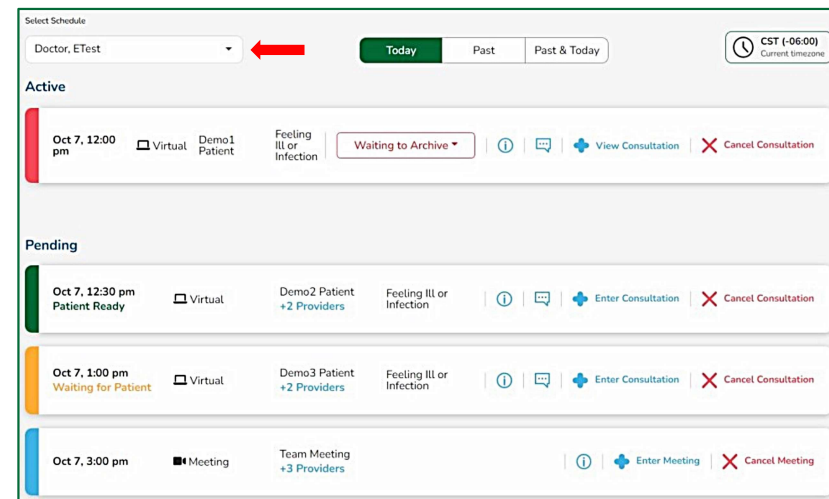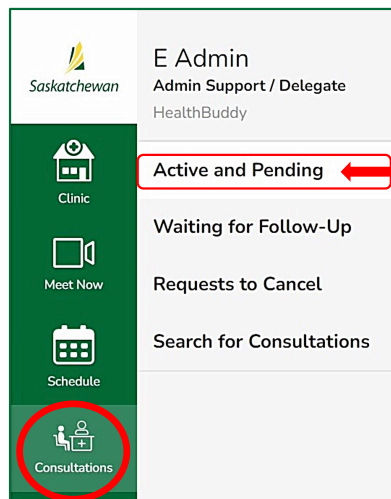
Active & Pending Screen Headings & Color Schemes

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

Pending:

Scheduled Consultations and Meetings:
- 'Patient is Ready'
- 'Waiting for Patient'
- Scheduled Video Meeting

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.

Jul 21, 1:00 pm	Meeting	test mtg

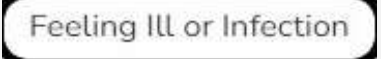**BLUE** – scheduled Video Meetings
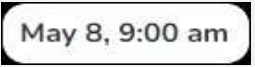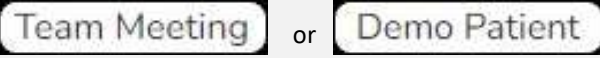
Oct 25, 8:40 pm Patient Ready	Virtual	Demo Patient

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

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

Active & Pending Screen Features – Page 1

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

Active & Pending Screen Features – Page 2

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

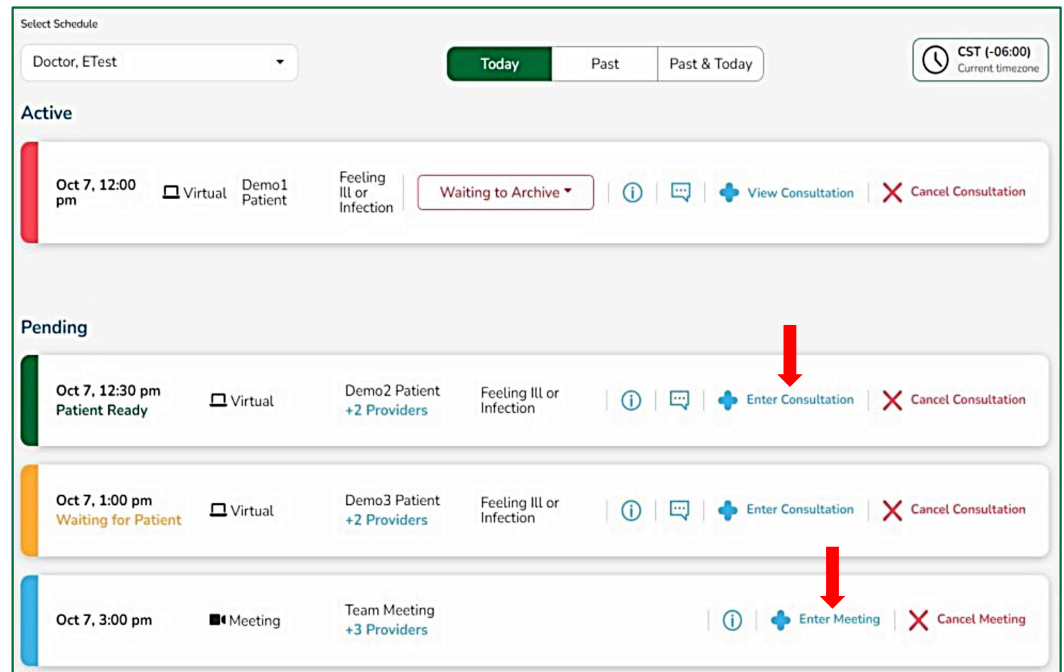# 18. Starting a Scheduled Patient Consultation or Video Meeting

Starting a Patient Consultation or Video Meeting

❑ Click '**Consultations**' in the dashboard

❑ Select '**Active & Pending**'
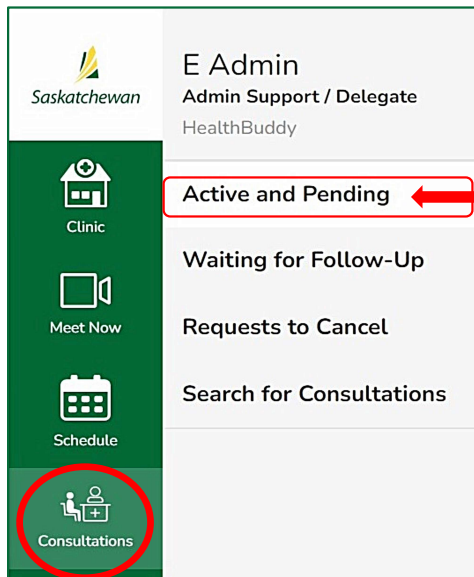
❑ Click '**Enter Consultation/Meeting**'

The Patient Consultation – Step 1

❑ When you first enter the consultation, the patient is not yet aware you have arrived. This gives you a chance to review the appointment. You can leave and re-enter as desired.

❑ Once you are ready to begin, click the 'Enter Consultation' button. The patient will see '*Dr ~~~ has entered the consultation*'.
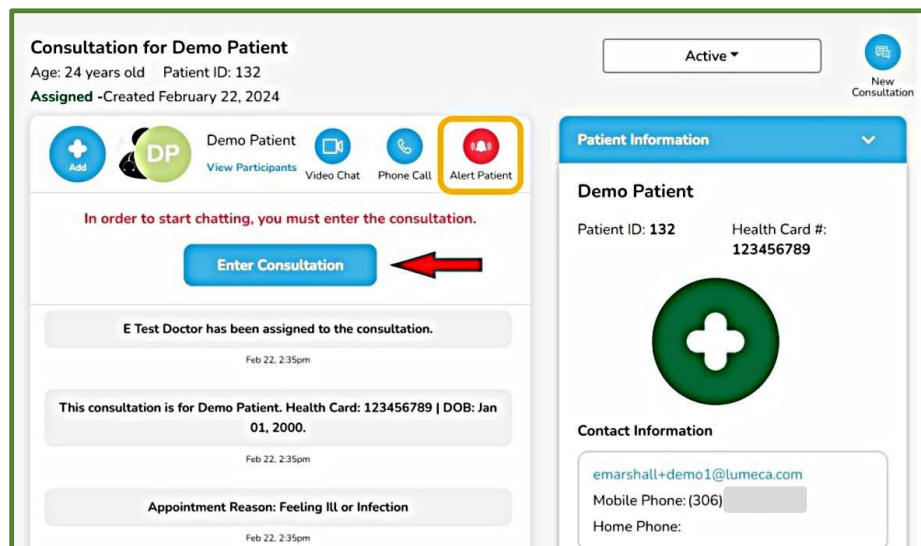
❑ Send a **'Message'** to let them know you have arrived.
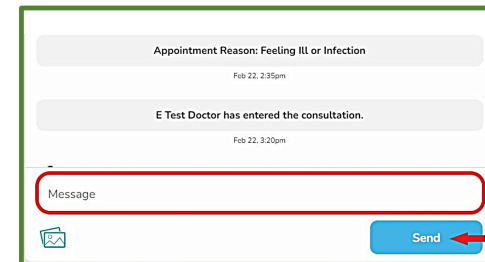
❑ Click '**Alert Patient**' when patients are not responding. Send them a quick message via SMS text or a message within the consultation itself.

The Patient Consultation Video Chat– Step 2

'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 | ETest Doc **PRIMARY** | ⊘ |
| 👤 | E Nurse Practitioner | ⊘ |

☑ Prevent Other Consultation Participants From Joining

☑ Enable microphone when the meeting starts
☑ Enable camera when the meeting starts
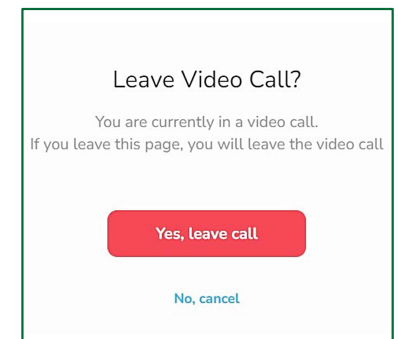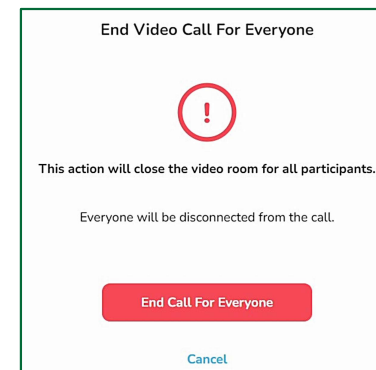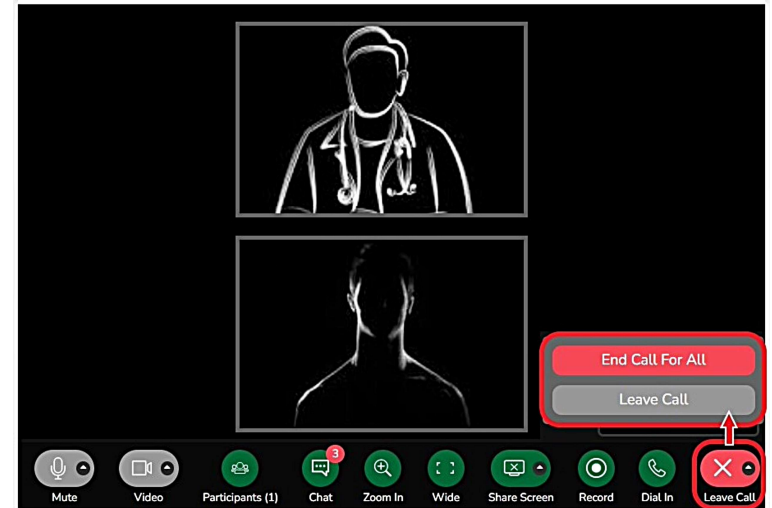☑ Remember my preferences for future meetings

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 tram remains on the video call, others can leave the video and rejoin if needed.

Archive Completed Consultations

- ❑ When the consultation is complete, click the '**Active**' drop-down and choose '**Archive Consultation**'.
  - ▪ Once '**Archived**', consultations remain in the '**Active & Pending**' screen for approximately 3 hours (in the event further action is needed by either the healthcare provider, the clinic admin or the patient. 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'
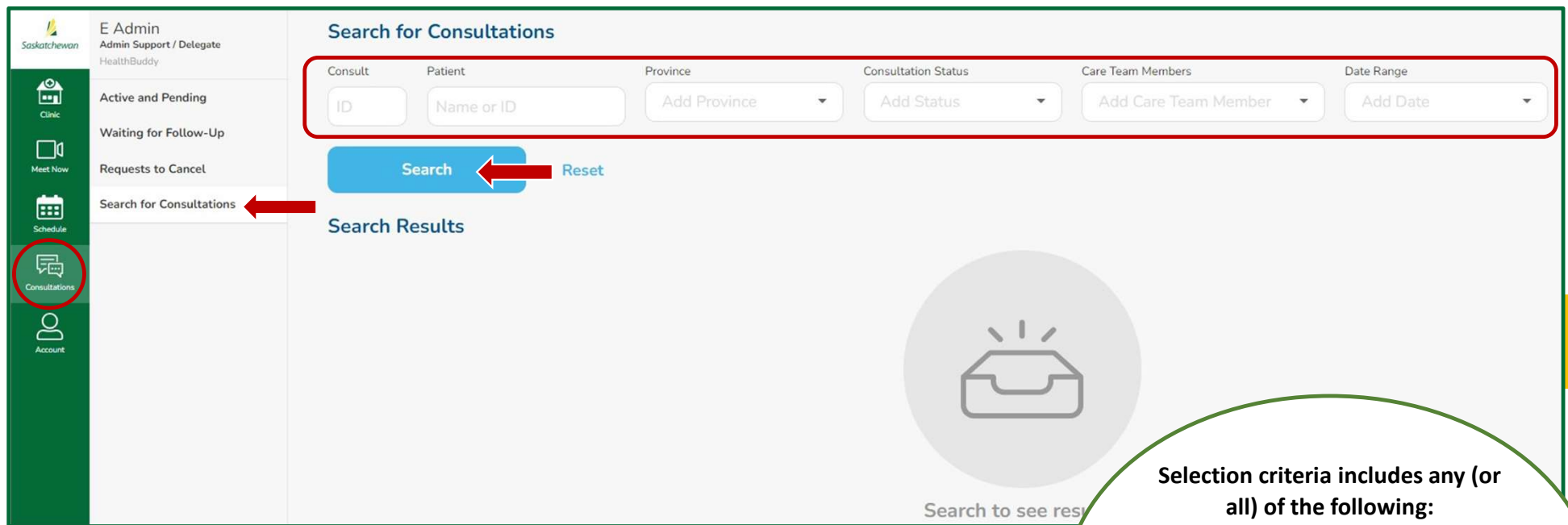
- ☐ Select '**Consultations**' in the dashboard, then click '**Search for Consultations**'
- ☐ Enter applicable search criteria
- ☐ Select '**Search**'

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.

Patient Consultations

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

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

20. Provider Support

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

EMAIL:
virtualvisit@ehealthsask.ca

WEBSITE:
https://skvirtualvisit.zendesk.com

21. Citizen Support

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

EMAIL:
virtualvisit@ehealthsask.ca

WEBSITE:
https://skvirtualvisit.zendesk.com