San Francisco
Department of Public Health

SFDPH Zoom Video Visit Patient Sign-Up Script – Marisol Edited 12/16

CONTACTING THE PATIENT

IF VOICEMAIL:

"Hello, this message is for _____. My name is _____ calling you from RFPC at San Francisco General Hospital. I am calling to see if you are interested in doing a video visit (instead of a telephone visit) for your appointment with *[Provider]* on_____ *[day/date/time of appointment].* If you would be interested in doing a video visit, Please call me back at 628-206-8494. **[END CALL]- indicate in notes sections "LM for video visit"**

IF CALL ANSWERED:

"Hello, may I speak with _____.? *(When patient on phone):* My name is _____ and I'm calling from the [CLINIC] at San Francisco General Hospital. *(Confirm identity through DOB and home address or other appropriate identifying information).*

I am calling to see if you would be interested in doing a video visit instead of a telephone visit for your appointment with *[Provider]* on____ *[day/date/time of* ?
If NO: Schedule telephone/ in-person visit with Provider

If YES:
- o *Do you have a device with a camera?*
- o If NO- Schedule telephone/ in-person visit with Provider

- o IF YES- Go to next question
- *Do you have wifi or an unlimited data plan?*
  - o If NO- Schedule telephone/ in-person visit with Provider
  - o IF YES-Switch the appt to THV

"I have switched your telephone visit to a telehealth video visit.
- o *DO you need help setting up for zoom?*
- o IF YES- schedule a Video set up appt.
- o IF NO-Provide the providers PMI # and let them know the day of the appt someone will call them 10-15 minutes before the provider enters the visit room.

If video set up appt is not available, secure chat Health Worker/Nurse to indicate which pt's need zoom set up support

Indicate in notes sections "video visit confirmed" "THV confirmed/needs video visit set appt" "Declined THV""LVM for video visit"

SFDPH Zoom Video Visit Patient Zoom On-Boarding

<u>Before getting started</u>:
- **Have patient's full name and DOB ready to confirm their identity.**
- Review patient's preferred language (Epic) and use interpreter if not English
- Have the **provider's "Personal Meeting ID (PMI)"** available to give to the patient when you are finished helping them get set up.
  - It's helpful to have a list of all clinic providers and their PMIs handy when calling patients
- If you have a SFDPH Zoom account, please have your PMI available as well and be ready to open a Zoom "New Meeting" from a device with a webcam so that you are ready to test Zoom with the patient if needed.
  - If you do not have an SFDPH Zoom account and would like to request one, please email telehealth@sfdph.org.

  Note: There is also a patient-facing webpage on how to set up Zoom and prepare for video visits, available in seven languages that can be used for your own reference and shared with patients via phone/secure email: https://sfhealthnetwork.org/videovisits/

  Policy information on electronic communication (emails, texts) and MyChart set-up/support can be found at the end of this document.

- ❖ **NOTE: Patients do NOT need to download the Zoom app if they will be joining from a laptop or PC that has a webcam. They can access Zoom via their web browser at https://zoom.us/. If they plan to join the video visit with a smartphone or iPad/tablet, they will need to download the app. In either case, they do not need to create an account to join the Zoom visit.**

"Hello, may I speak with _____.? (When patient on phone): My name is _____ I am calling from (Dermatology, Cardiology, Silver Avenue Family Health Center, Castro Mission Health Center, or Richard Fine Peoples Clinic 1M). I am calling in regards to your upcoming video visit with Dr. _____. Can you please confirm your date of birth? I will be assisting you in preparing for your visit. Do you have time now to review the video visit process?"

If Yes: Proceed with steps below
If No: "When is a good time to call you back? (document date and time in excel). Thank you for your time, I will contact you at your suggested time."

Will you be using a smartphone/tablet/iPad (If NO, scroll down)?
<mark>If YES:</mark>
I just want to confirm that you will have WiFi access/ unlimited data at home or where you will be for your video visit (This is when you should have your "New Meeting" open and YOUR PMI# (not the provider's).
(If setting up on smartphone while patient is talking on that phone): Can you please turn on your speakerphone so you can hear me while I walk you through this?

- Do you know how to open the App store/Google play (for Android)?
  - If YES: Go to the app store/Google play, and search for "Zoom" app. It should come up as "Zoom Cloud Meetings." Click on it and select "Install." Let me know when it finishes downloading.
  - If NO: Is there someone there able to assist you? (If NO, attempt to walk the patient through how to find the App store. If unsuccessful tell the patient their Provider will call them for a telephone visit instead of a video visit).
- Now open the app. You should see a white page with some options. Do you see the a button that says "**Join**?" Click that button.
- Enter the following meeting ID: _____ *(give YOUR personal meeting ID; the one you are using on the "New Meeting" you have open),* then click "Join Meeting."
  - *(Note: Under "Join Options," the patient should NOT select "Don't connect to audio" or "Turn off My Video" – the buttons should be white, not blue.)*
- Enter your name under "Screen Name."
- Click "Join."
- Click "Join with Video."
  - If patient reports they are directed to sign-up, let them know they **DO NOT** need to sign-up
- You should see a message that says something like "Please wait, the meeting host will let you in soon." Do you see that?

- This is what you'll see on the day of your visit. I'm going to let you into the visit now. *(Admit the patient into the visit).* Can you see that you have joined my meeting?
- Click on "Call using internet Audio"
- You should be able to see me and hear me. Is it working for you?

<mark>IF IT WORKS:</mark> SKIP TO <mark>FINAL INSTRUCTIONS</mark> BELOW
<mark>If not,</mark> help troubleshoot possible issues.
If audio/video isn't working, walk them through testing their computer audio and make sure their "join with video" and "join with computer audio" buttons were properly selected. They may need to exit and re-enter the meeting.

Will you be using a computer (desktop/laptop)?
<mark>If YES:</mark>

I just want to confirm that you will have WiFi access/ unlimited data at home or where you will be for your video visit (This is when you should have your "New Meeting" open and YOUR PMI# (not the provider's).

Guide the patient with these steps:
- Are you by your computer now?
- Open up a browser window and search for "Zoom"
- Click "Join meeting"
- **Enter the following meeting ID: _____ (give your personal meeting ID)**
- **Enter your name where says "Your Name"**
- Click Join
- *Click "Join with Video"*
- You should see a message that says something like "Please wait, the meeting host will let you in soon." Do you see that?
- This is what you'll see on the day of your visit. I'm going to let you into the visit now. *(Admit the patient into the visit).* Can you see that you have joined my meeting?
- *Click "Join with computer audio"*
- It might take a second, but you should be able to see me and hear me. Is it working for you?

<mark>IF IT WORKS:</mark> SKIP TO <mark>FINAL INSTRUCTIONS</mark> BELOW
<mark>If not,</mark> help troubleshoot possible issues.
If audio/video isn't working, walk them through testing their computer audio and make sure their "join with video" and "join with computer audio" buttons were properly selected. They may need to exit and re-enter the meeting.

"Great. I will make a note that you have tested and downloaded (if applicable) the Zoom app and are ready for video visits. On the day and time of your appointment, will you have a private space or room for the video visit to ensure privacy of the conversation? It's OK to have someone else present in the room as long as you inform your provider that someone else can see or hear the conversation."

For your video visit with [provider], you will be joining a meeting and entering a 10-digit meeting ID. I am going to give you your Provider's Meeting ID for your video visit.
Are you ready to write this down? *(Give patient the provider's PMI and ask them to repeat it back to you to confirm.)*

"On the day of your appointment, a Medical Assistant will call you before your visit to assist you in joining your video visit.

Do you have any questions for me?"
　　Answer any questions the patient has to the best of your ability. Follow-up with patient if needed. **[END CALL]**

　　NOTE: If patient asks you to **text or email** the appointment info or meeting ID, please explain to them that unfortunately, we don't yet have the ability to do this (we have just started doing video visits and are working to make the process as easy and convenient as possible). The meeting ID can be sent through **MyChart** if the patient is already signed up.

**Document in patient's chart whether they consented to or declined video visits and that they consented to have you help them set up Zoom (if applicable).