

## **Telehealth Video Links Procedures Microsoft Teams**

**Video Telehealth requests from providers can be done in one of two ways.**

Please verify that the client's email address is still valid.

**1. Written on provider's schedule.**

Schedules are required to be provided to support staff two weeks in advance. There is no need for a provider to submit an EHR request if this method is used. Support staff will send the provider an email in EHR with the subject line of "*Video Telehealth Link - (Date and Time)*" in the subject line, to confirm the request.

**2. Provider email request through EHR**

Providers must put "*Video Telehealth Link - (Date and Time)*" in the subject line of the EHR message to support staff. Always link the client's chart to the email. \*Before submitting a request through EHR the provider should first verify whether a request has previously been made.

**Clerical Staff: Once request is received from provider.**

1. Open EHR and create or update Appointment Scheduler to reflect the appointment.
  - i. Enter 'Video Telehealth' in the comments
  - ii. Change 'Face to Face' to 'Other'.
2. Open the Clinical Shared Calendar in Outlook
  - i. Select "New Teams Meeting"
    - Title it "Video Telehealth Appointment with Provider Name". Include full name and credentials.
    - Place the email address of the client in the Required line.
    - Select the date and times of the meeting.
  - ii. Delete everything AFTER "Click here to join the meeting"
    - Click below where the "Click here to join the meeting"
    - Click on "View Templates" and select the "Video Telehealth Appointment".
    - Change the information to reflect the meeting.
  - iii. Copy the Hyperlink of the "Click here to join meeting" and paste it with your response through EHR to the requester. Make sure to attach the client to the email if not already attached. (See example email below)
  - iv. DO NOT SEND email in outlook just yet.
    - Click out of the Outlook message and when prompted select "Save changes but do not send"

*Reply to original request – using subject as stated above.*

Hi \_\_\_\_\_,

An email will be sent to your client with the link to their video telehealth session with you. Please make sure that their email is correct in EHR.

For you to attend the appointment, please come back to this email and click on this link. "[Click here to join meeting](#)". Please be sure to use your full name and credentials when signing into the meeting. You will be asked to hold until clerical staff allows you and your client entrance to the meeting.

Let me know if you have any problems,

### **Clerical Staff: Beginning of each day**

1. Watch for appointments for the day – Make sure a clerical member is available for each meeting.
2. Send emails to the clients for the next day by opening each meeting scheduled and clicking the send button

### **At time of Appointment**

#### **Clerical staff**

1. Open the meeting in Outlook.
2. Click on the "Click here to join meeting"
3. Click "Join Now" button on lower right side of the screen.
4. If a pop-up appears asking you to admit or deny- just click the little X.
5. Click on "People" which is the first icon on the top of the screen.
  - a. This will show you the people waiting to be admitted.
6. You should see both the Provider and Client listed on the right-hand side.
7. When ready, click on the green check box to admit the client first.
  - a. Make the Client an "Attendee" directly after admitting them.
    - i. Do this by hovering over the "..." symbol, located to the right of their name and selecting "attendee".
  - b. Welcome the client to the meeting, **Ask the client to verify their name and date of birth.** Ask if any information has changed, collect any due balances, and then announce that you will be admitting the provider.
8. Admit the provider
  - a. Once you have admitted the provider, electronically sign the Superbill by asking for the client this question. "Do you consent to a verbal signature for this service?" YES or NO.
9. Leave the meeting.

#### **Provider**

1. Go to the client's chart in EHR.
  - a. Open messages in "Other List". This is located on the left side once you open the chart. Please check "Done – Inbox" folder if you don't see the email.
  - b. Find email by date and click on the link in the email. This will take you to a Microsoft Teams. Select "Continue on this Browser".
  - c. It is very important to enter your full name and credentials when prompted for your name.
2. Wait for clerical staff to admit you into the meeting.
  - a. Once admitted the clerical staff will obtain verbal consent from the client.
  - b. The clerical staff will witness the superbill and save it as a draft for you to use.
3. You may mute the client, share your screen, or remove them from the meeting.