RWJMS TeleHealth Set Up Guide, Script, Instructions, & Troubleshooting Manual:

Pre-Shift Instructions (Day Prior to Shift):

1. **Assignment Verification:**
   a. Verify your shift assignment on "Sign-Ups" tab on Excel
2. **Reach-Out:**
   a. Reach out to attending via email the day before your shift.
      i. Do not wait until the evening.
      ii. Email is provided on Attendings tab
      iii. Use template below:
         1. Hi, my name is _____ and I'll be the medical student who is virtually rooming your patients for you tomorrow during the AM or PM shift (or both). I just wanted to confirm with you what I will be doing for your patients. I will be serving in an "MA-style" role to virtually room your patients for their telemedicine visits. This process will involve me:
            a. Calling each of your patients 30-40 min before their appt
            b. Creating a telemedicine note in EMR
            c. Collecting some basic info (chief complaint, review of meds and allergies – recorded in General HPI / Vital signs if possible – recorded in vital signs section – this info collected can be customized to your liking)
            d. Asking tech-related questions to confirm their ability to have a doxy.me appt, and if not telling patient to await phone call from physician for a simple phone appt
            e. If doxy.me, getting them all set up in the waiting room ready for you
            f. Routing a phone note to front desk stating the patient has been roomed, which should prompt "arrival" in IDX (black dot). I'll also text you when each patient is roomed, to expedite your workflow (so we aren't waiting for the delay to patient being "arrived" in IDX)
         2. Are the questions I'm asking patients sufficient, or is there any other info you'd like me to collect? [LOOK ON ATTEND PREFs tab to see if there are any preferences other students have identified: if so, write "I understand you'd like me to ask/gather _____. Is there any other info you'd like me to collect?]
         3. Can I get/confirm that your cell # and clinic phone number is ...? [CONFIRM if they are already in the spreadsheet (most are),GET if they're not]. My cell # is _____, so you can contact me if needed.
         4. Can I also ask if you'll be at home or in the office for your appointments tomorrow? (need to know so I can generate the telehealth note properly)
         5. Thank you, and looking forward to working with you tomorrow!
3. **DOXIMITY App Set-Up:**

     a. Download application on smart-phone (App Store/Google Play)
     b. Add department clinic phone number (listed on "Attendings" tab) OR you can find it on https://rutgershealth.org/provider to your Doximity app.

4. **Google Voice Account Set-Up:**
     a. Log into Student Telemedicine Google Voice account
          i. Voice.google.com
               1. Username:
               2. Password:
     b. This will allow you to text the patient a doctor's doxy.me waiting room link.

5. **DOXY.ME Review:**
     a. HIGHLY recommend practicing entering a doxy.me waiting room on your phone/computer to see what the experience is like for the patient.
     b. On your phone/computer, type in: rwjms.doxy.me/test account
     c. Enter your name and check in.
     d. Images of this process can be found in manual.

6. **EMR Review/Practice:**
     a. Sign into EMR on evening prior to your shift.
          i. Make sure you still have VMWare virtual access.
          ii. Verify the time of first/all scheduled appointments for your attending during your shift.
               1. Note: appt. time can change in real-time.
     b. If needed: watch EMR tutorial videos or read EMR written tutorial. (Includes protocol)

7. **Troubleshooting:**
     a. Shift Drops
          i. If you need to drop a shift any time between Sunday-Thursday:
               1. Remove your name, highlight slot in bright yellow
               2. Send a mass email to volunteer group to find a replacement.
                    a. List-Serv of email on "Emails" tab.
                    b. Send email via Outlook.
     b. Physician Response:
          i. When you email, give attending until the next morning (early) to respond. Most attendings are used to working with us and don't respond to the email since students pretty much send them the same thing every time they work with them.
          ii. If the attending does not get back to you by the morning of your shift, feel free to text them using their phone number provided in the "Attendings" tab and direct them to your email.

Shift Instructions (Day of Shift):

1. **Sign In:**
   a. Sign into EMR 1 hour prior to first appointment to AGAIN verify the schedule of the attending you are working with.
      i. Ensure you sign in under the correct location of care of the attending.
      ii. Incorrect location of care will lead to erroneous distribution of note to the wrong department.
   b. Log into Student Telemedicine Google Voice account
      i. Voice.google.com
         1. Username:
         2. Password:
   c. Sign into your Doximity dialer on our Doximity phone app.
   d. Note doxy.me waiting room URL for the doctor you are working for.
      i. www.rwjms.doxy.me
         1. Find doctors name you are working with by typing last name into the search box.
         2. Enter waiting room.
         3. Copy/paste URL for easy retrieval to text patient via Google Voice.

2. **Shift Start:**
   a. Text attending you are ready to start rooming their first patient.
      i. This is not optional
      ii. Create line of communication between you and the attending if there are any last minute changes or preferences.
   b. Start TeleMedicine note in EMR for first patient/each subsequent patient.
      i. Stop creation of note just before you complete Visit ID.
         1. Only proceed if you can reach patient via Doximity.
   c. Call patient via Doximity.
      i. Call patient 30 min before appointment.
      ii. If patient does not answer:
         1. Try sending Google Voice Text message from the Student TeleMedicine account.
         2. "Hello, I am writing from RWJ (Dept) clinic. You will be receiving a call shortly from (clinic phone number) to prepare you for your virtual appointment with Dr. (name). Please do not respond to this text."
         3. Try calling patient 2-3 more times.
            a. Contact attending via text.
            b. With attending approval, follow No-Show/Reschedule protocol.

3. **Phone Call with Patient:**
   a. **Script + Tasks:**
      i. Hello, my name is ___, and I am calling from the Rutgers Robert Wood Johnson University Hospital __Department__ Clinic. May I speak to __patient__?
      ii. I am calling to prepare you for your upcoming virtual appointment with Dr. ___ today, and just need to ask you a few questions to get you all set up.
      iii. ****If Translator needed, please see Quick Trouble Shooting below****
      iv. Start linking your EMR note to appt. visit from this point on.
      v. Click through the Telemedicine form: select audio and video, doxy.me, Home or other Rutgers location as default, you can change it later, and also ask patient quickly if their home is in NJ or another state

vi. Can you tell me the purpose of your appointment today? Is there anything you would like to tell the doctor today about how you've been feeling?

vii. For your safety, we would like to review your medications and how you are taking them. Can you please confirm which medications you take at home, which doses they are, and how frequently you take them? [note: instead of asking patient to tell you one by one, you can read the patient the list of meds that auto-populates into the note and ask them to verify]

viii. Do you need any refills of these medications? [don't need to ask which specific meds, just write "needs refills"]

ix. Do you have any allergies?

x. Normally when you come into the office, we take your blood pressure, pulse, temperature, and weight. If possible, we would like to record these in our electronic medical record for today.

xi. "Do you have a blood pressure cuff at home? Would you be able to measure your blood pressure quickly for us?

xii. Do you have a device to measure your oxygen at home? Would you be able to measure your oxygen level quickly for us?

xiii. Do you have a scale to weigh yourself at home? Would you be able to measure your weight quickly for us?

xiv. Lastly, do you have a thermometer at home? Would you be able to take your temperature quickly for us? How did you take it?" (i.e. forehead, mouth)

xv. All the doctors have been using a website for their virtual appointments called doxy.me, which allows you to see and talk to your provider face-to-face. This is the best way to have the appointment because you'll be able to see your doctor's face, and you can also choose to turn your video on or off. Do you have a smartphone or computer with a camera/webcam and built-in microphone?

    1. If no or patient adamantly refuses doxy.me >> proceed to **phone call**.

        a. I will tell the front desk that you are all set. The doctor will call you around the scheduled time of your appointment, so please stay by your phone.

xvi. If yes >> proceed to doxy.me below

    1. **DOXY.ME Appointment:**

        a. Will you be using your smartphone or computer? I am going to send you a [text/email] with the link you just need to click on your smartphone or computer to get into Dr. __'s waiting room.

        b. TEXT**** (best option)

            i. Send a text through the RWJMSStudentTelemedicine google voice account to the patient's phone number. (NOTE: if patient is talking to you on the same iPhone they are trying to get on doxy.me with, iPhone will block patient's camera and mic, no matter what you change in the settings-- ask the patient if you can call them on another phone number so they can use their iPhone for doxy.me. does NOT apply to Android).

        c. EMAIL****

            i. Send an email through RWJMSStudentTelemedicine Gmail.

        d. Confirm patient typed in URL.

i. Instruct the patient to type in the doc's waiting room URL into their browser (PC or Mac: Chrome, Firefox, or Safari; Android phone: Chrome only; iPhone: Safari only)

ii. You will see a space to type in your name. Type the patient's FIRST AND LAST name Do that, and press the "check in" button.

iii. Then, on the next screen, you may see something that says "please give us access to your camera." Press the big red button that says "Enable camera."

iv. Then you may get a pop-up that is asking for access to your camera and mic - press "Allow"

v. Then, it should check you in, and let you in the waiting room. You should see a welcome message at the top, and your doctor's name on the right with "online" or "offline" next to it. You should also see your face through your camera in the upper right.

vi. The doctor will come online shortly/closer to your appt time and start the appointment - you don't have to do ANYTHING else.

vii. PLEASE DON'T LEAVE THE WAITING ROOM, just leave this screen open (if phone- leave your phone plugged into a charger while waiting). The doctor will come online and start the appointment.

viii. If you have an issue, click the link again and repeat what we did to enter the waiting room. (you can also send your doctor a message from the waiting room at the bottom right of your screen, should say "send Dr. __ a message")

ix. THANK THE PATIENT FOR THEIR TIME AND ASK IF THEY HAVE ANY QUESTIONS OR CONCERNS. EMPLOY TEACHBACK TO ENSURE THEY ARE UNDERSTANDING OF THE INSTRUCTIONS.

b. **Note:**
   i. Finish the note after ending call with patient, fix whatever you need to fix in the note (Fix the Telemedicine form where you selected "audio and video" and "doxy.me" if the appt ends up being a phone call)
   ii. End the note ("End update") and route it to the attending (press "hold").

c. **Contact Attending:**
   i. TEXT YOUR ATTENDING to let them know that their patient is roomed (either in doxy.me or ready for phone call). Also recommend you communicate when you plan to call the next patient so you're both on the same page. i.e. "Hi Dr. __, patient RL is roomed in doxy.me/ready for phone call. Going to call next patient at 9:20 unless you tell me otherwise."
   ii. Tell front desk to "arrive" patient
   iii. You will now send an "Alert/Flag" to the front desk telling them to arrive the patient.

4. **Post-Shift Instructions:**
   a. **Hours Logging:**
      i. Please log the hours you actively spent making phone calls to patients - please be honest.
      ii. Record the number of patients successfully roomed.
      iii. Please complete the survey to the right, or your hours will not count. The survey will give us additional detail about the outcome of your patient calls, provide an opportunity for you to ask questions or provide feedback, and help gather attending-specific preferences.
5. **Quick Troubleshooting Reference:**
   a. **Patient Non-Response**
      1. Try sending Google Voice Text message from the Student TeleMedicine account.
      2. "Hello, I am writing from RWJ (Dept) clinic. You will be receiving a call shortly from (clinic phone number) to prepare you for your virtual appointment with Dr. (name). Please do not respond to this text."
      3. Try calling patient 2-3 more times.
         a. Contact attending via text.
         b. With attending approval, follow No-Show/Reschedule protocol.
   b. **Patient 'wants to reschedule.'**
      i. Follow No-Show/Reschedule Protocol
         1. Must get attending's approval.
   c. **Translator Services Required**
      i. If you realize patient speaks only Spanish and you don't speak enough Spanish to room the patient, check 'Volunteer Interpreter' tab on Excel sheet to see if there is <u>an interpreter on call today for your shift (AM or PM)</u>
         1. <u>If available:</u>
            a. Hang up with the patient.
            b. Call interpreter FIRST from your regular cell phone.
            c. While on the line with translator, use Doximity app to call patient.
            d. Merge the calls.
               i. Will not work if you try to merge regular phone call with Doximity phone call. Must call translator first and then the patient via Doximity.
         2. <u>If NOT available:</u>
            a. Use language line info at top of Sign Up page.
            b. Call language line FIRST from your regular cell phone.
            c. Provide code.
            d. While on the line with translator, use Doximity app to call patient.
            e. Merge the calls.
               i. Will not work if you try to merge regular phone call with Doximity phone call. Must call language line first and then the patient via Doximity.
         3. <u>If Language Line is NOT available:</u>
            a. Text attending and inform them you do not have an interpreter available and cannot room the patient.

b. Stop the EMR note-creation process.
c. Do not create alert/flag unless attending tells you.