**Provider: Converting Telephone visits to Video Visits**

***\*\*These instructions assume you have installed Zoom on your device and feel comfortable initiating a visit\*\****

* If this is not the case, see the tip sheet on setting up your Zoom

***OVERALL Workflow for converting from a phone visit to a telemedicine visit***



**AT THE BEGINNING OF THE CLINIC DAY**

1. **Make sure your Zoom settings are correct**
	* Make sure “**Personal Meeting ID**” and “**Waiting Room**” features are enabled
	* Make sure you know your personal meeting ID
		+ Open the Zoom app 🡪 click the carrot next to “**New Meeting”** 🡪 personal meeting ID listed here

**BEFORE VISIT**

1. **Check the visit type for the patient:** If “Telephone”, consider offering video visit
2. Check to see if patient has already downloaded and practiced with Zoom (clinic specific flow)

**DURING THE TELEPHONE VISIT**

1. **Call the patient at the indicated telephone visit time**
	* **Confirm** the patient’s ID (full name and DOB)
	* **For those with zoom downloaded:**
		+ “I see that you downloaded the zoom app, which means that we can do this visit by video. I would love the opportunity to interact face-to-face rather than just by phone; would you be open to that today?”
	* **For those who do NOT have zoom already downloaded**:
		+ “We are starting to introduce video visits so that we can interact face-to-face rather than doing visit by phone. It would require you to downloading a video app on your phone or tablet, which takes 2 minutes. Would you be open to doing this now so we can do this visit by video?
		+ Help them download the Zoom app
2. **If agrees to video visit:**
	* *Open the Zoom app on your desktop 🡪 Click* ***“New Meeting”***
	* **Say**: “I’m going to give you a meeting ID to convert to a video visit. Can you open up the Zoom app now? (\**wait for the patient to confirm app is open*\*) Please Click **“Join a meeting”** 🡪 **Enter (give your personal meeting ID)**🡪 Click “**Join**”🡪 Click “**Join with Video.**” You should be in the waiting room. Let me know when you are"
3. **Admit the patient to the video visit**
	* If the **Admit** button is not visible, click “**Participants**.” The Waiting room will appear on the right of the screen.
	* If you can’t see the patient’s video, send the patient a prompt to turn on their video by clicking “**Manage participants**” 🡪 **More 🡪 Ask to start video**

**AFTER THE VISIT**

1. **Document consent**
2. **What to document**
* Chief complaint
* Patient history
* Assessment and plan
* Names and roles of visit participants
* *DO NOT* document physical exam elements that require physically touching the patient!
1. **Sign the encounter**

Questions or feedback on this tool? Please submit here: <http://tiny.ucsf.edu/telemedsurvey>