

Cerner Powerchart Video Visits – Powered by Amwell

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Document Purpose: This job aid serves to educate the clinics on how to use the Amwell video visit platform that is embedded into Cerner Powerchart.

Document Scope: This job aid applies only to clinics and providers using Cerner for scheduling and documentation, and for scenarios when the patient is remote (not present in the clinic). Any other variations in the above-mentioned workflow would follow a different process not included in this job aid.

Preparing for a Video Visit

Browser Requirements: Please ensure your browser is running the latest version of the available software.

Windows:

- Chrome (Preferred Web Browser)
- Edge Chromium
- Firefox

Mac:

- Safari

Ensure there is no conflicting software running in the background. For example, these are applications that may try to use your webcam (e.g., WebEx, GoToMeeting, Skype, FaceTime, etc.). Please be sure you have quit and/or exited these applications prior to launching a visit.

Cerner Powerchart Integrated Video Visits

Amwell is a video visit platform integrated within OneMcLaren Cerner. It allows clinicians access the video visit platform and connect with patients without leaving the EMR. The below steps provide a high-level overview of this workflow from start to finish.

- 1) Front Desk staff schedule patient in Cerner scheduling (*either Revenue Cycle or SchApptBook*) for Telehealth appointment type.
 - a. *Note: There is NO invite sent at the time of scheduling. Sending of the invite is a manual process which will be done through Cerner PowerChart right before the visit.*
- 2) At time of visit, designated staff member contacts patient via phone, completes normal registration intake, and sends invite accordingly.
- 3) Designated staff member guides patient to join video visit.
- 4) Designated staff member checks-in visit.
 - a. *If visit isn't checked-in, Steps 9 & 10 won't work.*
- 5) Patient clicks on link and joins virtual waiting room
- 6) Clinical Staff member joins video visit with patient and confirms audio and visual connectivity.
- 7) Clinical Staff member conducts patient intake and documents on intake form within Cerner as normal. Upon signing intake form, the Patient Status on the Ambulatory Organizer updates automatically.
- 8) When finished with intake, Clinical Staff leaves video visit.
- 9) Provider reviews Ambulatory Organizer for "**Seen by MA**" status and joins video visit when ready.
- 10) Designated staff member checks out visit.

Clinic Process Map

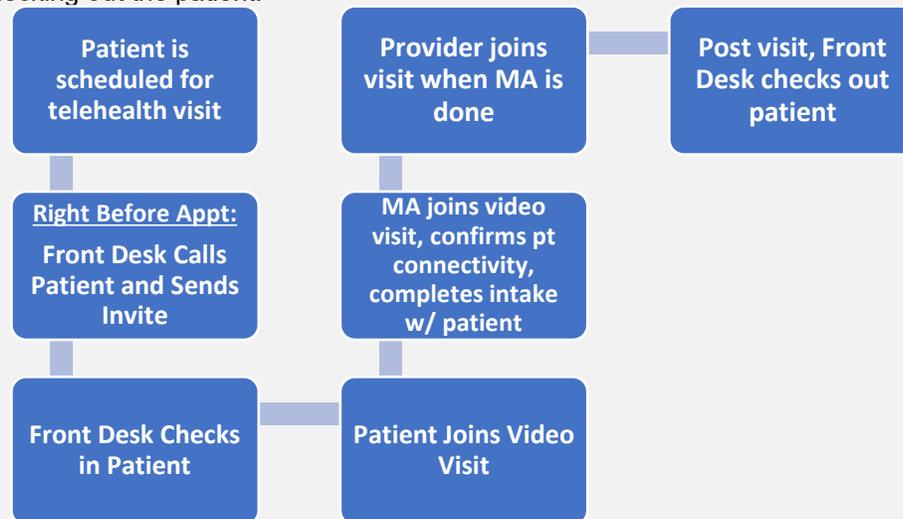
Each office will need to determine who performs certain steps of the workflow. The workflow allows for slight variations in who completes certain steps. This allows offices to adopt their own process based on their staffing model and preferred flow. Below are the items that offices need to determine role and responsibility:

- **Calling of Patient Prior to Visit**
- **Sending patient invite from PowerChart**
- **Checking in Visit in Cerner scheduling system**
- **Checking out Visit in Cerner scheduling system**

The process maps below show slight variation in workflow depending on who is performing certain steps of the workflow. This is to accommodate various staffing models within the practices.

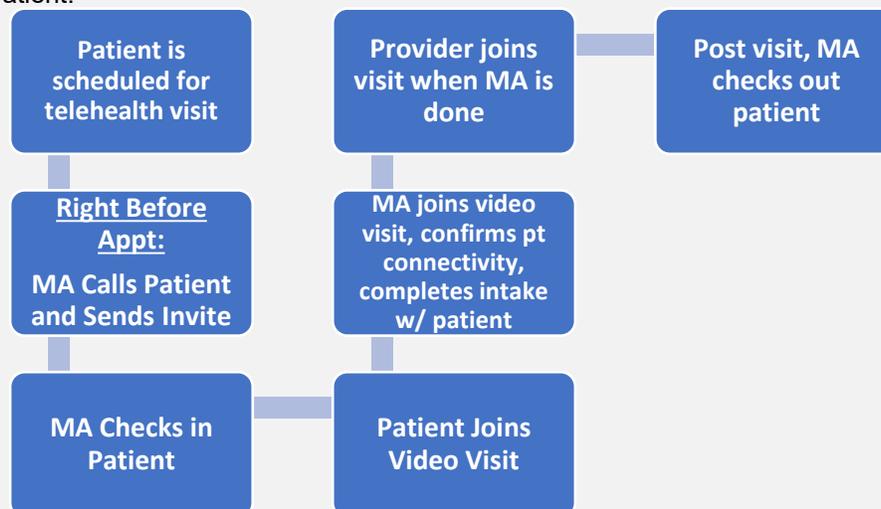
Shared Workflow: Front Desk & Clinical Staff

This process flow assumes the front desk staff is calling the patient right before the visit, sending the invite and checking in and checking out the patient.



Clinical Staff Only Workflow

This process flow assumes the MA is calling the patient right before the visit, sending the invite and checking in and checking out the patient.

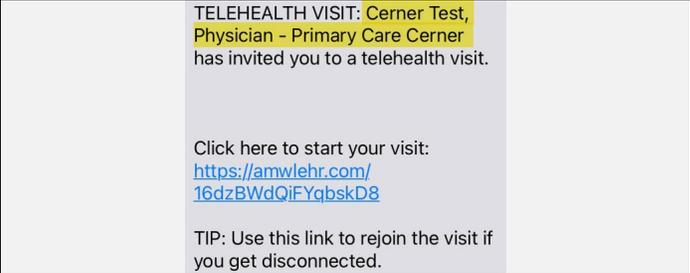


Scheduling of Video Visit

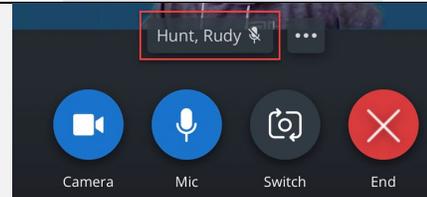
- 1) Front Desk schedules a patient for a video visit using the **Telehealth** appointment type.
 - a. *The telehealth appt type must be used for the video visit visual indicator to display on the Ambulatory Organizer in PowerChart.*
- 2) Front Desk staff will document patient invite preference (email or text invite) in the **Scheduling Comments**.
 - a. *This is necessary so it displays on the Ambulatory Organizer for whoever is sending the invite on the day of visit.*
 - b. *Be sure to include the desired cell phone number in scheduling comments.*
- 3) Front Desk staff complete the rest of the normal appointment scheduling workflow (being sure to validate mobile phone number and email address on file).
- 4) Front Desk staff to educate the patient on what to expect the day of their visit.
 - a. ***Note: There is no invite sent at the time of scheduling. The invite link is only good for 72 hours and will then expire.***

Pre-Requisite: Update Your Display Name

Sending of Invite: The staff person who sends the invite will have their name appear in the text or email invite to the patient, exactly as the sender's name displays in Cerner.

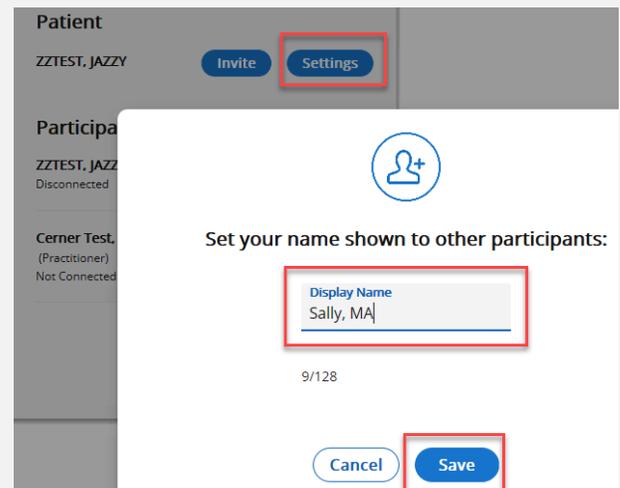


In Video Visit: Any user who joins the video visit platform will have their name displayed to the patient exactly as it displays in Cerner.



To Update Display Name:

- 1) Navigate to the **Video Visit** component in PowerChart.
- 2) Click **Settings**.
- 3) Update the **Display Name** field.
- 4) Click **Save**.
 - a. *This update must only be done once and will carry forward each time an invite is sent.*



Day of Visit: Pre-Visit Phone Call, Sending Invite, and Check-In

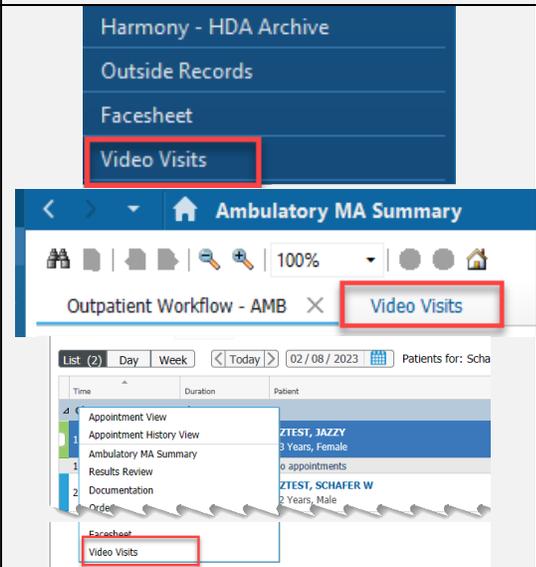
A designated staff member will call the patient the day of their appointment when ready to begin the visit. Staff member will send the invitation from PowerChart and guide patient how to join the visit. Below outlines the process:

- **Note:** The invite link is only good for 72 hours and will then expire so timing of sending the invite is important.

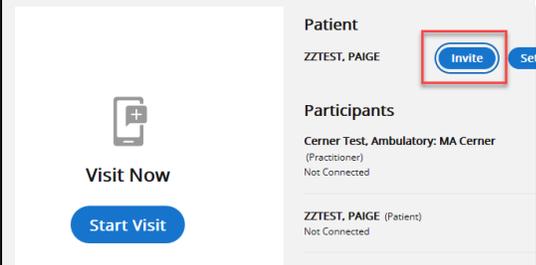
1) Designated staff member calls patient over the phone.

- 2) Select patient from **Ambulatory Organizer** and select the **Video Visit** mpage from one of the following methods:
- Menu Bar
 - Workflow Page
 - Right-click on Amb Organizer and select Video Visit

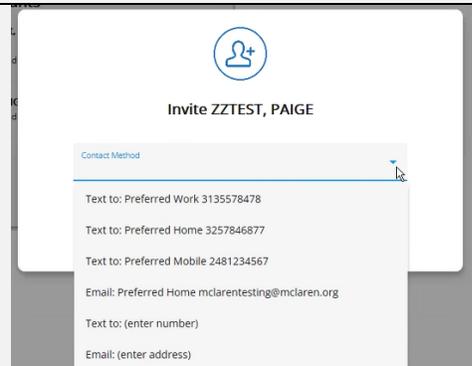
Note: There will be a 5-10 second delay before the video visit smart app appears on your screen.



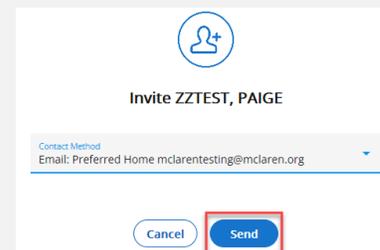
3) Click **Invite** from the **Video Visit** mpage.



- 4) From the **Contact Method** dropdown, choose **the appropriate contact method**.
- Note:** The phone numbers and email that display here are pulled from what is documented in the registration system. Staff can choose to free text a phone number or email if needed.



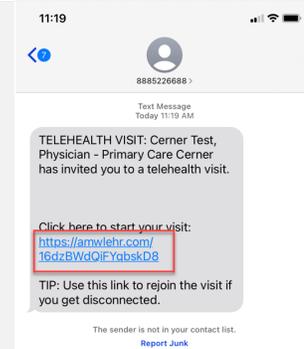
5) Click **Send** to send the invitation link



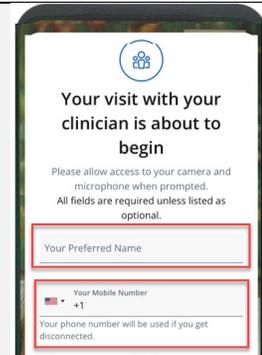
Patient Workflow

1) Prior to appt time, patient will receive a phone call from staff member who will confirm their desired invite method and will send invite.

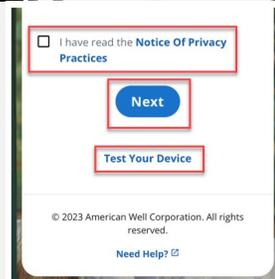
2) Patient clicks on invite link from email or text message.



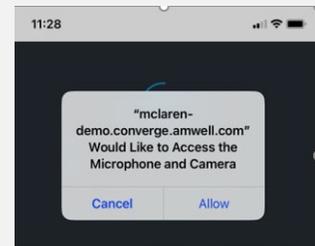
3) Patient will enter in their name and phone number on the sign-in screen.



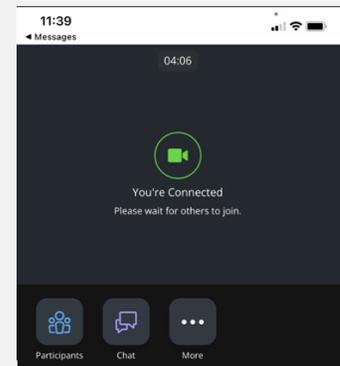
4) Patient must acknowledge notices of privacy policy and consent to video visit to be able to join the visit.



5) Patient clicks **Allow** to allow access to their device's camera and mic.
 a. **Note:** Patient can test device prior to joining call.



6) Patient enters virtual appointment.
 a. **Note:** Patient will enter waiting room if provider/MA has not joined yet.

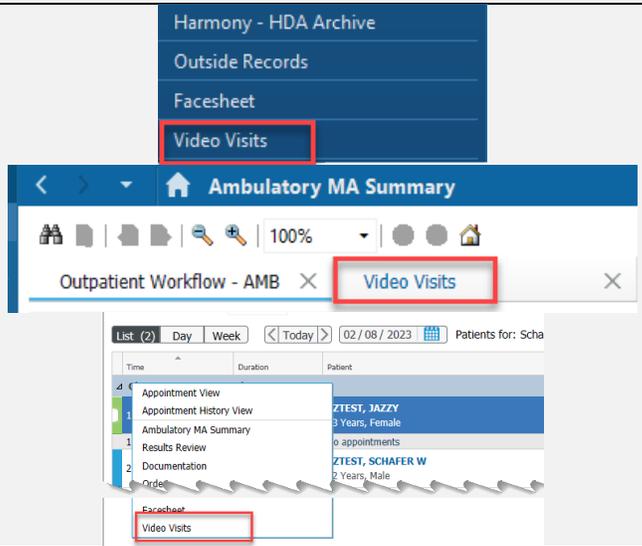


MA Joins Visit/Completes Intake

Clinical Staff will join the visit and complete their normal intake with patient. When done, the patient remains in the visit, and Clinical Staff will notify the provider that they are ready to be seen.

- 1) Select patient from **Ambulatory Organizer** and select the **Video Visit** mpage from one of the following methods:
 - a. Menu Bar
 - b. Workflow Page
 - c. Right-click on Amb Organizer and select Video Visit

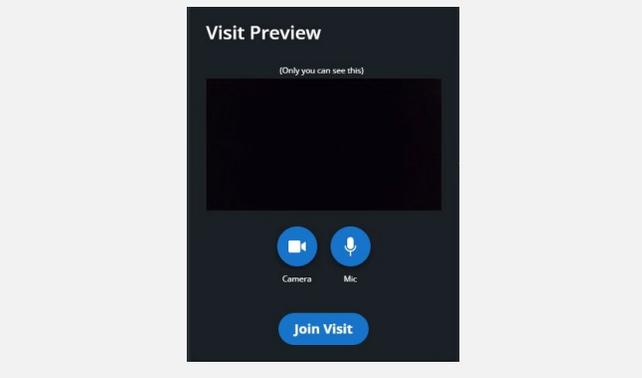
Note: There will be a 5-10 second delay before the video visit smart app appears on your screen.



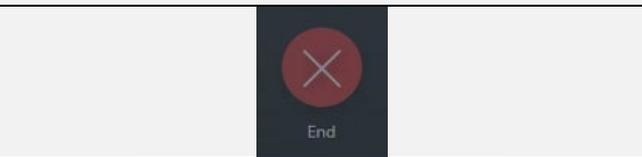
- 2) Select **Start Visit** from the **Video Visit** mpage.
 - a. **Staff will see that the patient is in the visit already- this shows under the Participants section.**



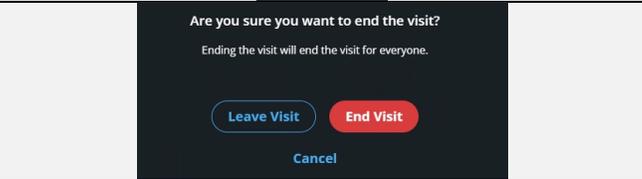
- 3) A new browser window is opened, and user will see "connecting" displayed.
- 4) Once connected, user will see the **Visit Preview** window.
- 5) The Camera and Mic are enabled by default.
- 6) To mute the mic, click the mic icon prior to joining the visit. It will turn gray to signify it's muted.
- 7) Click **Join Visit** button when ready.



- 8) When finished with the patient, MA will select the red **End** icon.



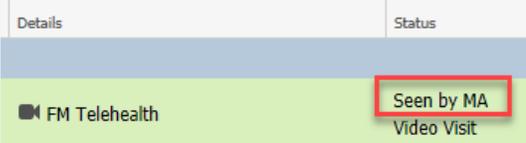
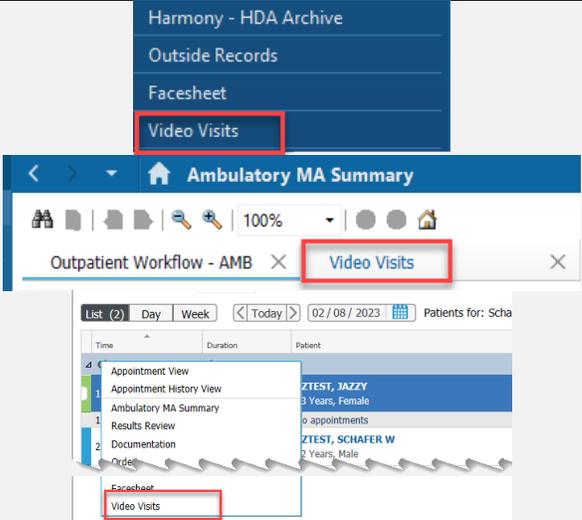
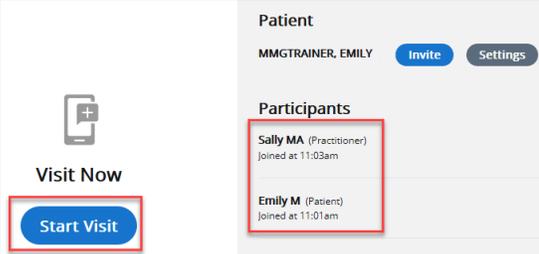
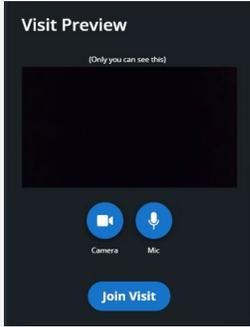
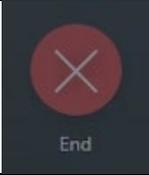
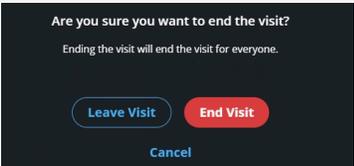
- 9) Click **Leave Visit** to leave the visit but keep the visit going for the patient.
 - a. **Note: Do not click End Visit as that will end the visit for everyone.**



- 10) Once the intake form has been signed, the **Patient Status** on the **Ambulatory Organizer** will update to **"Seen by MA"**.

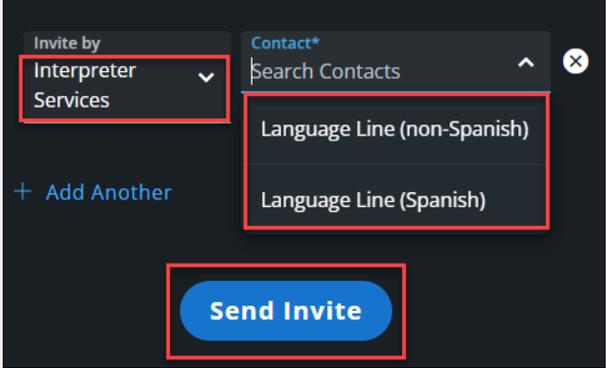
Provider Joins and Completes Video Visit

The provider will be notified via the status on the Ambulatory Organizer that the patient has been “Seen by MA”. This signifies the MA is ready for the provider to enter the visit.

<p>1) Monitor schedule for “Seen by MA” status.</p>	
<p>2) Select patient from Ambulatory Organizer and select the Video Visit mpage from one of the following methods:</p> <ol style="list-style-type: none"> Menu Bar Workflow Page Right-click on Amb Organizer and select Video Visit <p>Note: There will be a 5-10 second delay before the video visit smart app appears on your screen.</p>	
<p>4) Select Start Visit from the Video Visit mpage.</p> <p><i>Provider will see under the Participant list who is connected/not connected to the video visit prior to joining.</i></p>	
<p>5) A new tab is opened, and user will see “connecting” displayed in the browser window.</p> <p>6) Once connected, user will see the Visit Preview window.</p> <p>7) The Camera and Mic are enabled by default.</p> <p>8) To mute the mic, click the mic icon prior to joining the visit. It will turn gray to signify it’s muted.</p> <p>9) Click Join Visit button when ready.</p>	
<p>10) When finished with the patient, MA will select the red End icon.</p>	
<p>11) Click End Visit to end the visit for everyone.</p>	

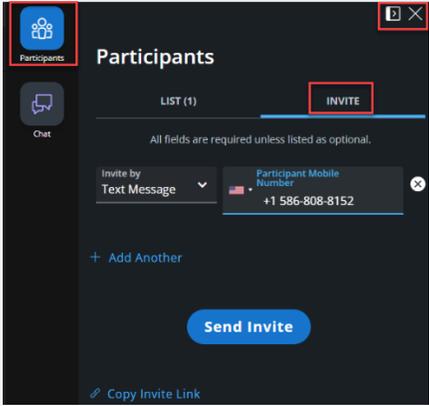
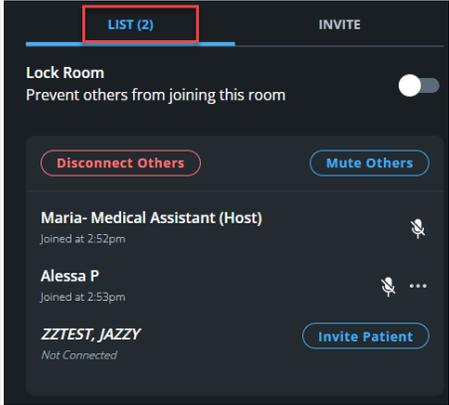
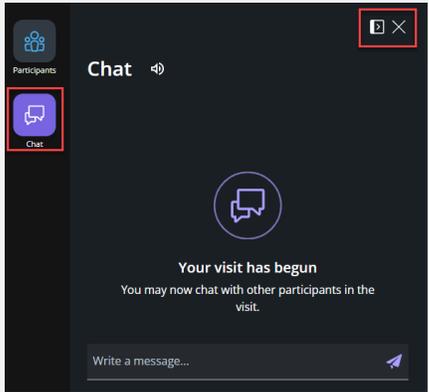
Adding Language Line to a Video Visit

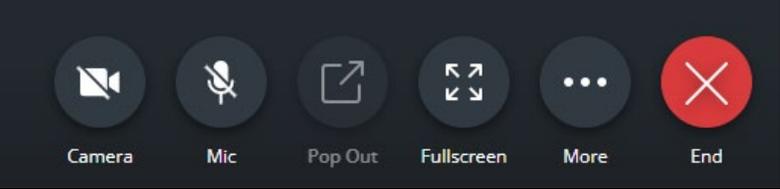
If a patient requires interpreter services, follow the below steps to add Language Line to the video visit.

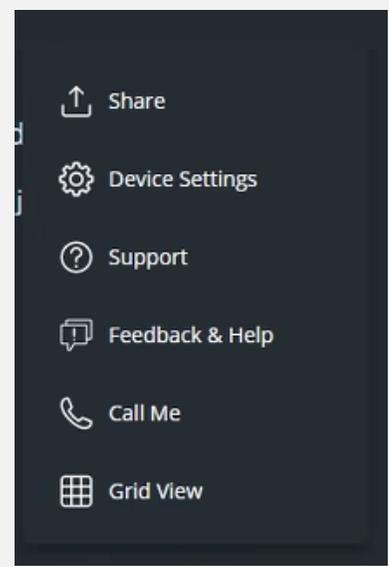
1) From within the video visit, navigate to the Participants tab.	
2) From the Invite By dropdown, select “ Interpreter Services ”.	
3) From the Contact dropdown, select the appropriate Language Line contact, either Spanish or Non-Spanish .	
4) Click Send Invite .	
5) A call will go out to Language Line.	
6) If Non-Spanish was selected, the user will be prompted to speak the language needed. a. User will be prompted to confirm the language.	
7) User will hear hold music until an interpreter joins.	

Functionality in the Video Visit Platform

The below table outlines the various icons and different functionality available within the video visit platform.

Feature	Notes	Corresponding Screenshot
Participants	<p><u>Invite Tab</u></p> <ul style="list-style-type: none"> • Send Invite- Staff can invite a participant to the video visit by filling out the Invite By field and the Contact field and clicking Send Invite. • Right Facing Arrow Icon- Makes the participants window larger • X Icon- Removes the Participants window. Staff can add it back by clicking on the participant icon or chat icon. 	
	<p><u>List Tab</u></p> <ul style="list-style-type: none"> • Disconnect Others- Staff can disconnect participants individually. • Mute Others- Staff can mute participants. • Lock Room- Staff can lock the room to prevent other participants from joining. This shouldn't be used until all expected participants have joined. • Invite Patient- Staff can invite patient from this list. 	
Chat	<ul style="list-style-type: none"> • The Chat feature will be “locked” if no other participants are present in the call. • The Chat feature functions like the chat in Teams or other similar software. 	

	
Camera	<ul style="list-style-type: none"> Allows users to connect and disconnect from camera/video.
Mic	<ul style="list-style-type: none"> Allows users to mute and unmute the microphone.
Pop- Out	<ul style="list-style-type: none"> Allows user to work in PowerChart while also viewing the patient video. This is beneficial for users who do not have a dual monitor setup.
Full Screen	<ul style="list-style-type: none"> Takes away the browser at the top and task bar at the bottom to make the actual video visit screen larger. Click icon again to leave full screen.
More	<ul style="list-style-type: none"> The following icons are available if staff select the “More” icon:
Share	<ul style="list-style-type: none"> Allows staff to share their monitor with patient in order to review anything needed on-screen, such as lab results, reports, images, etc.
Device Settings	<ul style="list-style-type: none"> Camera- Allows staff to change which camera is utilized during the visit if more than one is available. Background Effects- Allows staff to blur background, select an alternate background, and indicate a default background. <ul style="list-style-type: none"> <i>Virtual Background is the McLaren logo--- Will always appear mirrored in self-view for staff but looks appropriate to the patient.</i> Audio- Change audio to another mic/etc Speaker-Change default speaker
Support	<ul style="list-style-type: none"> This page is patient-facing and includes FAQs and the McLaren Telehealth support phone number.
Feedback & Help	<ul style="list-style-type: none"> Allows staff to give feedback to Amwell. Includes the McLaren IT Service Desk number.
Call Me	<ul style="list-style-type: none"> The Call Me feature can be used if staff are having connection issues. Staff enter their personal phone, and a third-party line connects them to the visit via phone instead. Personal phone number isn't visible to the patient.
Grid View	<ul style="list-style-type: none"> Allows staff to see all participants video frames in a grid view format.
Exit	<ul style="list-style-type: none"> Allows staff to Leave the Meeting or End the Meeting.

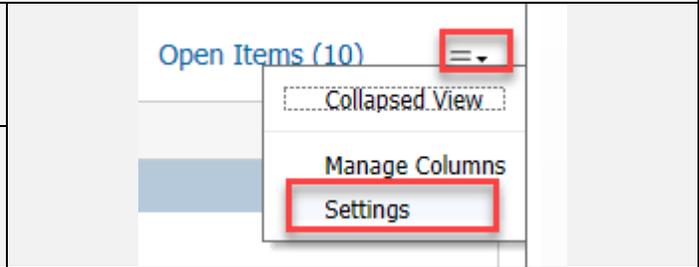


Updating Ambulatory Organizer Settings

Users can update their settings to indicate which appointment statuses will highlight the appointment row. This helps draw attention to the patient row.

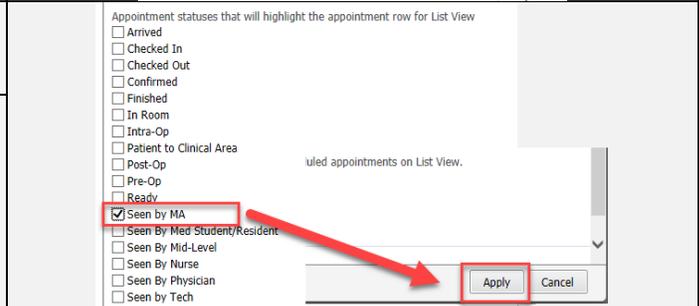
1) From the Ambulatory Organizer, click the hamburger icon located in the upper right corner.

2) Click **Settings** from the menu.



3) Check the desired status options.

4) Click **Apply**.



5) The entire row highlights when the patient status updates.

Time	Duration	Patient	Details	Status	Notes
Clinic - LN59 GrLg FmHlt					
2:00 PM	15 mins	ZZTEST, SCHAFER W 52 Years, Male	FM Telehealth Use text for link	Checked Out Video Visit	Reason for Visit: Other Chief Complaint: chest pain
2:20 PM	15 mins	ZZTEST, MICHAEL 62 Years, Male	FM Telehealth Please email the link	Arrived Video Visit	Reason for Visit: Other Chief Complaint: chest pain
2:40 PM	15 mins	ZZTEST, PATIENTFIVE 55 Years, Female	FM Telehealth Send link to 5178817759	Seen by MA Video Visit	Reason for Visit: Other
3:00 PM	15 mins	MMGTRAIN, HUNTER A 44 Years, Male	FM Telehealth Patient prefers Text 810-955-6688, Visit Re...	Checked Out Video Visit	Reason for Visit: Other Chief Complaint: Sore Throat