Patient Zoom/Video Visit Script

Introduction

Hello, my name is [_____]. I'm calling on behalf of Dr. XX at University of California San Francisco General Medicine. May I speak with Ms/Mr. [_____]?

If Available go to **B**
If Unavailable go to **A**

[A] This message is for Ms/Mr. _____, my name is _____calling from the UCSF Division of General Internal Medicine. UCSF offers video visits which allow you to see your provider without leaving home. I'd like to assist you with setting this up as many visits are being converted to video right now to help keep patients safe from the coronavirus. At this moment we do not know if your appointment will be in person or video, but we are reaching out in case it is held in video. I'll outreach you again in a few hours to assist you with this. **CB Number: (XXX) XXX-XXXX**

[B] Hello, my name is XXXX and I am calling on behalf of Dr. XX at the UCSF Division of General Internal Medicine. UCSF offers video visits, which allows you to see your provider without leaving home. I'd like to assist you with setting this up as many visits are being converted to video right now to help keep patients safe from the coronavirus. At this moment we do not know if your appointment will be in person or video, but we are reaching out in case it is held in video. This process will take about 10 minutes to complete, do you have the time right now?

If Yes [Continue to **C**]

If No: That's fine, when would be the best time to give you a call back? [Record Call back time/number]

If Patient changed appointment to in-person: Since we don't know if your appointment will be in person or video by then, we are reaching out to help you get set-up with Zoom in case it is held in video. Is this something you are interested in getting set-up with now?

For test ID, before outreach the CRC will [In Zoom]:
• Schedule a meeting (In zoom on left panel select "Meetings")
• Set the duration of meeting to the CRC's outreach schedule
• Enable Waiting Room

Download/Set-up

[C] For a video visit with your provider, you can use a smartphone, tablet, or computer with a camera to see and hear your doctor, do you have any of these devices?

If Yes [Continue to **D**]

If No: [Probe] Do you have any similar electronic devices? What type of device do you have?

[D] Okay, I'll wait while you retrieve the device and I'll walk you through the process.

What type of device will you be using today? [PC or Smartphone?]
Does your device has BOTH a camera and a microphone?
Please make sure you will be using the same device for your scheduled video appointment.
Is there anyone in the home that will be assisting with set up?

Let's download Zoom

PC: In your browser please enter

https://zoom.us/support/download
[Please write down your login information if applicable]

Smartphone: 1) Download the "Zoom Cloud Meetings" app from the App Store (iPhone)
or Google Play (Android)

Test

Now let's test this out
PC: Open up a browser and paste in the following link: https://ucsf.zoom.us

Smartphone: Touch the Zoom icon to open up the app

Select Join a Meeting", and enter the Meeting ID: [XXX-XXX-XXXX] *CRC's personal meeting ID

Select Join with video

[If you see a prompt, "Zoom Would Like to Access the Camera", select "OK"]

[If you see a prompt, "Zoom would Like to Access the Microphone," select "OK"]

[To hear the coordinator, select "Connect to internet audio"]

Are you able to see/hear me?

[Troubleshoot if needed]

Okay, so let's review some items for the date of your visit:

If you are using your smartphone, open the Zoom app, click "Join a Meeting" and enter provider's meeting ID number

If you are using your computer, go to
https://zoom.us/join and enter the provider's meeting ID number.

You will follow the steps you and I reviewed to turn on your video and then be placed in a virtual waiting room until the clinician joins the meeting.
When admitted, you must connect to audio to hear your provider. If not prompted when joining the meeting, make sure you choose an audio option by clicking "Join Audio."
Any questions about how to use Zoom?

For further instructions visit https://videovisit.ucsf.edu/
For questions/troubleshooting contact MyChart customer service at XXX-XXX-XXXX

Survey (added 4/30)

Also, in an effort for DGIM to plan opening in-person visits in the near future, we'd like to get feedback from patients. Do you have a couple of minutes to answer 5 questions about this topic?

IF Yes. [Great. I will be asking you five open ended questions]
Go to REDCap and follow the Survey form to record the patient's open ended questions. If you're able to quote the patient, even better.

If No. [Not a problem, my I ask the reason for your refusal?]
Log this answer in REDCap Survey form. Select reason for refusal.

Thank You have a great day

For clinical questions

First state: "If you think you are having a medical emergency we can hand up and you should dial 911."

Then say: "I am not a medical person, so I can't answer any clinical questions or give medical advice."

For questions/concerns about new cough, fever, body aches, trouble breathing please refer patients to the UCSF coronavirus information line at XXX-XXX-XXXX.

For any other clinical questions (or to send a message to your doctor/provider), please call your doctor's office:

Clinic Name and Location	XXX-XXX-XXXX
Clinic Name and Location	XXX-XXX-XXXX
National Suicide Prevention Lifeline	1-800-273-8255