

# The use of Telehealth within ORA Services

(Older Adults, Rehabilitation & Allied Health)

A guide for Patients, Clinicians and  
Managers

2020



Capital & Coast  
District Health Board  
ŪPOKO KI TE URU HAUORA



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## SECTION A: INTRODUCTION

### BACKGROUND

This suite of documents has been developed to support the use of Telehealth within CCDHB. This suite has been developed specifically for the Older Adults, Rehabilitation and Allied Health (ORA) Services, but the information may be of use to services wider across CCDHB.

The use of Telehealth is to support:

- Direct clinical care (clinical consultations, clinical discussions, multi-disciplinary meetings (MDMs), patient review and specialist advice.
- Reduction in patient and staff travel.

Telehealth encompasses four distinct domains of applications:

1. **Live Videoconferencing** (Synchronous): Live, two-way interaction between a person and a provider using audio-visual telecommunications technology.
2. **Store-and-Forward** (Asynchronous): Transmission of recorded health history through an electronic communications system to a practitioner, usually a specialist, who uses the information to evaluate the case or render a service outside of a real-time or live interaction.
3. **Remote Patient Monitoring** (RPM): Personal health and medical data collection from an individual in one location via electronic communication technologies, which is transmitted to a provider in a different location for use in care and related support.
4. **Mobile Health** (mHealth): Health care and public health practice and education supported by mobile communication devices such as cell phones, tablet computers, and PDAs. Applications can range from targeted text messages that promote healthy behaviour to wide-scale alerts about disease outbreaks, to name a few examples.

### SCOPE

For the purpose of the ORA services, this guideline focuses on the Live Videoconferencing domain of Telehealth.

### AIMS OF THIS GUIDE

To support managers and clinicians in understanding how to implement and use Telehealth within their services to deliver healthcare.

### ASSOCIATED CCDHB POLICY AND PROCEDURES

This guideline should be read alongside the following CCDHB policies:

[Informed Consent](#)

[Privacy Policy](#)

## SECTION B: CONSIDERING USING TELEHEALTH

### BACKGROUND TO TELEHEALTH – INFORMATION FOR CLINICIANS

#### What is Telehealth?

“The delivery of services and exchange of information relating to patient/client care that uses any form of technology including, but not limited to, video conferencing, internet and telephone, as an alternative to in-person interaction.”

Allied Health Aotearoa New Zealand  
Best Practice Guide for Telehealth

#### What are the benefits of Telehealth?

Telehealth can be a valuable tool in improving access to healthcare for many people who may struggle with accessing these services. It may also be valuable in helping healthcare professionals offer more timely and intensive input to the people they are working with.

Potential benefits of using Telehealth may include:

- Ease of access to healthcare services for patients who live remotely or rurally
- Reducing impact of lack of transport, other commitments such as work or childcare commitments, or physical impairments that may make attending appointments difficult.
- Healthcare professionals able to increase the intensity of treatment
- Reduced travel time for both healthcare professionals and patients
- Patients able to fit appointments around their work patterns
- Flexibility in timing of appointments

#### Things to consider from a Clinician Perspective:

Telehealth consultations can pose challenges and risks not present in in-person consultations, particularly when there has been no prior in-person contact between the healthcare professional and the client/patient. In some instances an in-person appointment will be the most appropriate care for the patient, and in others Telehealth is a better option.

When using Telehealth, you should ensure services are consistent with the standards of care delivered in person. This includes our normal standards around identifying that we are working with the correct client, cultural competence, assessment, diagnosis, consent, maintaining privacy and confidentiality, treatment and plans for follow up.

When deciding whether an appointment may be delivered via Telehealth, the following areas are worthwhile considering:

- Establishing rapport with the client/patient
- Cultural awareness – is it important for the appointment to be in-person to establish a connection with the client and whānau to then be able to deliver healthcare
- Is a physical examination required

- Could there be difficulty recognising emotion
- Client concerns about data safety/security
- Client and whānau ability to navigate technology

### **Providing best practice Telehealth Care:**

- Make sure that you have discussed or given information about Telehealth to the client in advance to support them making an informed choice about using Telehealth.
- Offer an in-person appointment if the client doesn't wish to use Telehealth.
- Ensure you verify the identity of the client if you haven't met them before. This may include their name, address, and date of birth.
- Ensure that both the healthcare professional and the client has the right equipment and an appropriate environment for a successful appointment.
- When documenting clinical notes, ensure it is documented that the appointment was via Telehealth and that the client consented to the appointment.
- Some professional bodies have published advice to healthcare professional around Telehealth – you may wish to consult these.

### **How might I use Telehealth in my practice?**

There are a number of ways that Telehealth may enhance your practice. Below are a few examples of how Telehealth may be used.

#### **Healthcare professional to patient examples:**

- A patient living in Wainuiomata needs to see a Wellington Dietitian for an outpatient renal appointment. Instead of having to travel the large distance for an in-person appointment, the person is able to attend a Telehealth appointment with the Dietitian from their own home.
- A patient who has recently had a stroke and is now returning to work, is able to Zoom their Occupational Therapist from their work place to discuss how their return to work plan is going and trouble shoot any issues they are having.
- A Speech and Language Therapist zooms and observes a patient eating their lunch to review their swallowing during a meal time instead of needing to complete a home visit.

#### **Healthcare professional to whānau examples:**

- A Social Worker zooms in a patient's relative who lives in Auckland to a family meeting to plan their discharge from hospital.
- A physiotherapist zooming in a patient's relative who is unable to leave work for the day to discuss falls prevention together with the patient during their appointment.
- An Occupational Therapist zooms a relative of a person who is unable to attend an appointment to discuss any concerns they may have about their relative.

#### **Healthcare professional to healthcare professional examples:**

- A wheelchair clinician in Wellington zooms in a wheelchair clinician in Kapiti during their face-to-face appointment with the patient to get a second opinion around the patient's posture.

- A Speech and Language Therapist in Kapiti zooms in a Kenepuru colleague for part of their aphasia assessment session to get advice around the patient's language breakdown and advice on therapy approaches.
- A Dietitian in Wellington zooms a Dietitian at Hutt Valley DHB for their supervision session.

Healthcare professional to clinical specialist examples:

- A Speech and Language Therapist in Kapiti is assessing a patient with a complex voice disorder who is unable to attend an SLT outpatient clinic. She zooms in one of the voice therapists to her assessment to assist with assessment and offer advice around treatment approaches.

Healthcare professional to environment:

- An Occupational Therapist is completing an assessment of the home environment for a patient in hospital following an amputation. The patient isn't able to leave hospital for an environmental assessment yet. The OT visits the house and completes the assessment, and zooms in the patient from the hospital to be able to discuss any issues with the environment and plans to safely modify.
- Patient is unable to attend clinic and agreed to have their Dietitian follow up via Telehealth. As part of assessment and information collecting the Dietitian is able to get a real life picture of what food is at home in cupboards and fridge, and what equipment is available for cooking. This allows an added dimension of information gathering not possible in typical clinic setting, particularly useful with patients who are vague with details, and/unknown home situation

Assistant to healthcare professional examples:

- During a face-to-face appointment, an Allied Health Assistant zooms in the Physiotherapist to show them the patient's mobility to get advice on extending their exercise programme.

### **Where to get more information about Telehealth and how it can be used:**

Here are some links to more information about Telehealth:

<https://www.sahealth.sa.gov.au/wps/wcm/connect/public+content/sa+health+internet/health+services/rehabilitation+services/telerehabilitation/telerehabilitation>

<http://www.flinders.edu.au/mnhs/Telehealth/about-Telehealth.cfm>

Patient stories about Telehealth:

<https://www.sahealth.sa.gov.au/wps/wcm/connect/public+content/sa+health+internet/health+services/rehabilitation+services/telerehabilitation/patient+stories+and+testimonials+on+telerehabilitation>

Video examples of Telehealth in use:

Speech and Language Therapy: <https://www.youtube.com/watch?v=h4EbzgcPO1M>

Social Work: <https://www.youtube.com/watch?v=cEpwP-d7ZF4>

## MANAGER CONSIDERATIONS FOR IMPLEMENTING TELEHEALTH

From a service perspective, there are a number of areas to consider to prepare a service and ensure the successful use of Telehealth.

### Funding Considerations:

- Identify how your service needs to record activity for statistical purposes
- Identify if there are any funding implications in utilising Telehealth (for example, if ACC are contracting services for CCDHB, have they consented to the use of Telehealth?)
- What equipment will you use for Telehealth in your team (e.g. iPad, laptops, are microphones or webcams also required?).

### Identifying potential use of Telehealth with your team:

- Complete needs assessment from a health consumer as well as a service perspective – identify which health care consumers will best benefit from Telehealth
- Involve team in discussions regarding appropriate patients for Telehealth
- Identify when it is not suitable to use Telehealth e.g. funding, physical assessment required, will first appointments be able to be completed via Telehealth or just follow ups?
- Recommend identifying Telehealth superusers/champions within team

### Training Staff

- Upskilling of staff to ensure they have sufficient confidence to enable basic troubleshooting in using the equipment you'll be using for Telehealth, as well as the Zoom application.

### Administrative Considerations:

- Who will book appointments – admin, clinicians?
- There are a number of different methods to setting up Telehealth appointments with health consumers – discuss options with team and identify what their preferred method will be. Options can include email invite or texting the meeting ID to patient at time of appointment

### Measuring the outcomes of using Telehealth:

- Patient experience measures
- Staff experience measures
- Consider benefit of measuring when Telehealth is not going to be used and why
- Financial savings based on mileage costs saved when clinicians do not have to travel to see patients
- Financial savings to patients who do not have to travel to appointments

## SECTION C: HEALTH CONSUMERS RESOURCES FOR TELEHEALTH

An important component of Telehealth is to ensure the health consumer understands Telehealth, has consented to their care being provided via Telehealth, and has the equipment for a successful Telehealth appointment. Please see the “Information for Patients – What do I need? Document for more details.

This suite of resources has been designed for sharing with health consumers to inform them about Telehealth, as well as step-by-step guides in preparing and setting up for their Telehealth appointment.

These resources can be emailed to a patient directly.



## Appendix A:

### Information for Patients - **What is a Telehealth appointment?**

Telehealth is where you connect with your healthcare professional over a video link where you will see and hear each other without being in the same location. This can be done from a computer or tablet using a programme called Zoom. Your appointment is then done 'virtually' rather than having to travel for an appointment. You may choose to be in your own home or your workplace for your appointment – it's really up to you.

#### **Why use Telehealth?**

Video consultations help you get seen by the right healthcare professional in the right place at the right time that's convenient to you. They usually result in less travelling to get to an appointment. Also, you may feel more comfortable being seen in a location closer to where you live or work.



#### **Frequently asked questions:**

##### **Is my Telehealth appointment private?**

The programme we use is designed as much as possible to protect your privacy, just like when you are seen in person. Your healthcare professional will be in a private room, and we would suggest you also find a quiet private space for the appointment.

##### **Is there a cost?**

The Zoom programme that CCDHB is using is free to use. You may incur a data charge depending on your home data plan.

##### **Can I have my Telehealth appointments at different places?**

As long as you have a device and a private space, you can have your appointment at a location which you're comfortable with.

##### **When would a Telehealth appointment not be suitable?**

If your healthcare professional needs to do a physical examination, then this would be better to be an appointment in person rather than via Telehealth.

## **Do I have to have my appointment by Telehealth?**

No, not at all. If you feel uncomfortable about the idea of Telehealth, or have a health or disability issue that would make it difficult for you, then let your healthcare professional know and they will arrange an in-person appointment for you.

Your health professional will discuss the option of using Zoom with you prior to arranging a video appointment. However, if you do not have:

- suitable equipment, and
- a suitable location, and
- an appropriate internet connection;

or if you do not feel comfortable using a device for your health appointment, let your healthcare professional know and we will arrange for you to have a face-to-face appointment instead.

## **What happens if there is a problem with the connection during my appointment?**

If the appointment can't be continued, your healthcare professional will arrange another time for you to be seen.

## **BEFORE, DURING AND AFTER YOUR TELEHEALTH APPOINTMENT.**

### **Choosing the right device for your appointment:**

Look through the "Accessing Telehealth – what equipment do I need" leaflet to check you have the right equipment and internet connection for a successful Telehealth appointment.

### **Getting ready for your appointment:**

It's a good idea to start getting ready 10 minutes before your appointment to make sure everything is ready and good to go.

Think to yourself, is your...

- room quiet and free from distractions with good lighting?
- friend or family member with you (if you wish them to be)?
- do I have a phone nearby in case there are connection issues.

To get your device ready:

- Mute notifications and any other devices before the appointment
- Close down unused programmes on your device to help it run more quickly
- Make sure your device is turned on and charged
- Log into the Zoom programme and enter the access code you have been sent

To help the appointment run smoothly, you may wish to prepare information to share with your healthcare professional. This may be a list of your medications, or questions that you would like to ask them. Sometimes it can be helpful to have pen and paper beside you to write notes down during your appointment.

You will either receive an email invitation to the Telehealth appointment which will include the Zoom ID that you will need to access your Telehealth appointment, or alternatively your healthcare professional

may text you the Zoom ID directly to use. Your healthcare professional may also provide a password for your Telehealth appointment.

When joining an appointment, the Zoom meeting won't begin until the clinician joins the session. Feel free to join the appointment a little early. If the session doesn't begin right away, please be patient while your clinician joins.

**During your appointment:**

If you haven't met your healthcare professional before, they will introduce themselves and ask you to confirm who you are. Then you are ready to get started. At times during your appointment it may appear as if your healthcare professional isn't looking at you. They are not being rude but simply are looking at the image of you on their screen rather than directly at their camera.

When you see your healthcare professional on the screen:

- Speak in a normal voice, as if you were there in person
- Look at them on the screen when talking to them
- Let them know if you can't hear or see them clearly

At the end of your consultation, you and your healthcare professional will talk about your next appointment should you need one.

**After your appointment:**

At the end of your appointment, the Zoom meeting should end automatically. Close down the Zoom app and you can re-enable notifications on any devices that you muted.

As we are trialling video appointments we would appreciate any feedback on the process. We will survey some patients after appointments to find out what worked, what didn't, and how we can continue to improve our services so we provide quality experiences for patients.

**Further Information:**

For further information or if you have any questions about your Telehealth appointment, please contact your healthcare professional.

You can read more about Telehealth here:

New Zealand Ministry of Health Website:

<https://www.health.govt.nz/our-work/ehealth/other-ehealth-initiatives/Telehealth>

New Zealand Health Navigator Website:

<https://www.healthnavigator.org.nz/clinicians/t/Telehealth/>

*We'd like to acknowledge Canterbury DHB's work and thank them for sharing their "Telehealth Video Consultation Patient Information Sheet Transalpine" leaflet with us to help form this information.*

## Appendix B:

### Information for patients - **Accessing Telehealth: What do I need?**

Capital & Coast DHB (CCDHB) uses Zoom for video appointments. Zoom is a free video conferencing application that can be downloaded onto your computer, tablet or smartphone to enable access to CCDHB's Telehealth services. Once installed, Zoom allows you to connect with your health professional for consultations, assessments and therapy.

The technical and setup requirements for a video appointment are below. Please review these prior to your appointment to ensure that you are set up appropriately for your appointment.

Equipment needed for a Video Appointment:

Please ensure that you have each of the following prior to your Appointment.

- A suitable device
  - this can be a tablet, a smartphone, a desktop or a laptop.
  - *note: most modern devices are well equipped to handle video appointments but if you are concerned, the technical requirements are available:*
    - [here for laptops and desktops \(https://support.zoom.us/hc/en-us/articles/201362023-System-Requirements-for-PC-Mac-and-Linux\)](https://support.zoom.us/hc/en-us/articles/201362023-System-Requirements-for-PC-Mac-and-Linux) and
    - [here for mobile devices \(https://support.zoom.us/hc/en-us/articles/201179966-System-Requirements-for-iOS-and-Android\)](https://support.zoom.us/hc/en-us/articles/201179966-System-Requirements-for-iOS-and-Android).
- A webcam
  - If you are using a tablet, smartphone or laptop with an in-built webcam, you can use this. Otherwise, USB webcams are available from most technology retailers.
- Speakers and a microphone
  - If you are using a tablet, laptop or smartphone, you can use the in-built speakers and microphone.
  - Headphones with a microphone can help to reduce outside distractions.
- A suitable internet connection – see below for requirements.

### How do I check that my internet connection is suitable?

We recommend using a broadband connection (WIFI or wired) for your video appointment.

*Note: Zoom can work over a mobile data connection, but the quality of the video will be reduced for you and your health professional. Due to this reduction in quality and the high cost of mobile data it is highly recommended that you use a broadband connection.*

Please ensure that your Wi-Fi connection is secured (i.e. it requires a password). The use of public or unsecured WIFI is not recommended as malicious third parties could intercept your data.

Most broadband connections will be suitable for a Zoom video appointment. If you are concerned that you might be on a slower connection or are in a rural location please check your connection speed:

Go to [speedtest.net](https://speedtest.net) to check your connection speed. Simply hit the "Go" button and the system will perform a test. If your download and upload speeds show at least 600kbps (or 1.2Mbps for High Quality video), your internet is suitable for a video appointment.

If your speed displays slower than 600kbps, please check the following:

- If you are using WIFI, can you move closer to your router? Or if using a computer, can you plug in a network cable?
- Are others using the network? If so, requesting that they do not use the internet during the appointment can help to improve the network speed.

## How much data will my appointment use?

Your usual internet service provider fees and charges apply when using Zoom for video appointments. If you do not have access to the internet or are concerned that the usage of data might impact upon your data cap, please let your health professional know and we will arrange for you to have a face to face appointment instead.

The data used will depend on your webcam and connection speed. The expected data usage for each call type is outlined below:

Video type	Data usage per minute	Data usage for a half hour appointment
Standard Definition	3 MB per minute	90 MB
High Definition	Up to 9 MB per minute	270 MB

Your clinician will discuss the expected length of your appointment with you when booking the session.

## How do I install and test Zoom?

Usage of Zoom is at the patient's own risk. CCDHB takes no responsibility for using the freely available application on your device. If you have any concerns, please seek independent advice before downloading and installing this application on any of your devices.

### Downloading Zoom

**Please install Zoom prior to your first appointment and check that it is installed correctly.**

**Desktop computer or laptop** - download and install the [Zoom Application](https://zoom.us/download) (<https://zoom.us/download>) and follow the instructions.

**Tablet or Smartphone** - download the “Zoom Cloud Meetings” application from the [iTunes](#) or [Google Play](#) store and follow the instructions.

When you receive a Zoom appointment via email, the meeting invitation will contain a link to join the meeting. If you have Zoom installed, when you click this link, Zoom will automatically launch.

### Unable to install zoom?

CCDHB recommends installing Zoom on the device that you will use for the appointment. However, if you are unable to install Zoom on your computer (e.g. if you do not have admin rights), you can instead use the browser-based version. To run the browser-based version, click the link in the

appointment email. When your browser launches, you will see the option:

**“If nothing prompts from browser, [click here](#) to launch the meeting, or download & run Zoom.”**

Launching...

Please click **Open Zoom Meetings** if you see the system dialog.

If nothing prompts from browser, [click here](#) to launch the meeting, or [download & run Zoom](#).

Click on the “[click here](#)” link displayed. The page will then give you the option to “[join from your browser](#)”. Click this link to use the browser-based Zoom.

Launching...

Please click **Open Zoom Meetings** if you see the system dialog.

If nothing prompts from browser, [click here](#) to launch the meeting, or [download & run Zoom](#).

If you cannot download or run the application, [start from your browser](#).

You may be prompted to give your browser permission to use your camera.

Once the appointment launches, select the “Start Video” icon to enable your webcam.



## Appendix B:

### Checklist for patients– Am I ready for my Telehealth appointment?

- ☐ Do I have a quiet, private space available?
- ☐ Is my Wi-Fi secure?
  - Does it require a password for someone else to access it?
- ☐ Download Zoom
  - **Desktop computer or laptop** - download and install the [Zoom Application](#) (opens in a new window) and follow the instructions.
  - **Tablet or Smartphone**
    1. Go to [iTunes](#) or [Google Play](#)
    2. Download 'Zoom Cloud Meetings' app
  - When you receive a Zoom appointment via email, the meeting invitation will contain a link to join the meeting. If you have Zoom installed, when you click this link, Zoom will automatically launch.
- ☐ Do I have a link for my appointment? Your therapist will either send you an email with this link, or text you the Zoom ID number to use.



## SECTION D: CLINICIAN RESOURCES FOR TELEHEALTH

### Appendix D: Technical Guide to Telehealth

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# Checklist for a video consultations

This document has been designed for clinicians to offer practical steps required to conduct successful clinical video consultations. Individual services may also have their own procedures covering responsibilities and booking process.

## User support

User support via the service desk is available during standard office hours (Monday to Friday 0730-1700hrs, not available public holidays or weekends)

Service Desk: Ext 6146 04 918 6146

For out of hours non urgent issues please email [ict.servicedesk@ccdhb.org.nz](mailto:ict.servicedesk@ccdhb.org.nz) and they will respond when available.

## Checklist

Stage	Pathway
<b>Prior to Telehealth appointment</b>	<ol style="list-style-type: none"><li>1. Consider whether it is appropriate to see this person via Telehealth.</li><li>2. Discuss the possibility of Telehealth at an in-person consultation. Please see <a href="#">Appendix A and B: Patient information appendices</a>.</li></ol> <p>If the person is happy to use Telehealth and has the required equipment, space, and internet connection:</p> <ol style="list-style-type: none"><li>3. Book an appointment:<ol style="list-style-type: none"><li>a set this up via Outlook (Please see <a href="#">Appendix 1: Scheduling a Zoom meeting</a>), or</li><li>b request that your administrator set it up.</li></ol></li><li>4. Provide the person with the “Patient information about Telehealth” document and/or links to CCDHB Telehealth location on the internet.</li><li>5. Ensure all patient information and results are available in MAP.</li><li>6. Have a suitable space available for the appointment.</li><li>7. Where possible, send a reminder to the patient the day prior to the consultation.</li><li>8. Ensure that the person has checked their connectivity</li></ol>
<b>Day of video Telehealth appointment</b>	<ol style="list-style-type: none"><li>9. Using the technical guide, test your equipment five minutes prior to the appointment start time. Check that your camera, microphone, lighting, and audio are functioning.<p>Please see <a href="#">Appendix 4: Testing audio and video settings in Zoom</a> for how to do this. Note, when joining a meeting for the first time you will be prompted to set up the call as per <a href="#">Appendix 2: Joining a Zoom meeting</a>.</p></li><li>10. Ensure that you have a contact number for the person just in case something goes wrong.</li></ol>





<b>Time of the Telehealth appointment</b>	<ol style="list-style-type: none"> <li>11. Check that the person and their family / whānau have received the Patient Information and provide an opportunity to ask any questions.</li> <li>12. Request verbal consent from the person and their family / whānau to continue with the consultation and document this in the notes. Ensure the person is aware of their right to terminate the consultation at any time.</li> <li>13. Explain there may be a slight delay between finishing speaking and the audio being received on the receiving device.</li> <li>14. Proceed with the consultation, providing opportunities for questions and answers; allow for delays in transmission time.</li> <li>15. Discuss next steps and follow up appointment (if required). Check for understanding.</li> <li>16. Ensure everyone involved in the consultation are clear on the next steps and answer questions.</li> </ol>
<b>After video conference</b>	<ol style="list-style-type: none"> <li>20. Document consultation in person's health record (including who attended).</li> <li>21. Organise follow up (if applicable).</li> <li>22. Stat the appointment. See <a href="#">Appendix 5</a></li> <li>23. If this is your last session with the patient, send experience survey available for staff and patients and/or their family / whānau if appropriate: <a href="https://www.surveymonkey.com/r/RST8JLG">https://www.surveymonkey.com/r/RST8JLG</a></li> </ol>

# Telehealth Appointments: Setup guide

Always test equipment prior to commencing a call – [you can run a test call](#) to check your connection.

*Note: There are a number of Zoom rooms for larger conferences and Zoom enabled rooms for smaller sessions. A list of rooms available can be found [here](#):*

<https://collaboration.huttvalleydhb.org.nz/workspaces/vc/SitePages/Zoom%20Room%20Locations.aspx>

Stage	Equipment	Set up Technical Guide
Before	Camera	<ol style="list-style-type: none"> <li>1. Camera cap? Ensure it is removed.</li> <li>2. Ensure that you are in a bright environment but that the camera is not directed at a bright light source (e.g. camera does not face windows) or you will appear as a silhouette to the person.</li> <li>3. Fill the screen: Aim to have your head and torso in the shot to give the person the feeling that they are sitting across from you. The larger you are on the screen the easier it is for the person to see your facial expressions.</li> </ol> <div style="display: flex; justify-content: space-around; align-items: center;">  <span style="font-size: 2em; color: red;">X</span>  <span style="font-size: 2em; color: green;">✓</span> </div>
	Microphone (if you are not using a headset or your device's built in microphone)	<ol style="list-style-type: none"> <li>1. Place microphone a minimum of an arm length distance from speaker(s).</li> <li>2. Place microphone on a hard surface.</li> <li>3. If you are in a non-sound-proofed environment, a headset will enable you to listen at a comfortable level. Have the microphone close to you so your voice is suitably modulated.</li> <li>4. You can set the volume levels for your speakers and microphone as described in <a href="#">Appendix 4</a>.</li> </ol>
	Lighting	<p>Ensure room lights are on and you can be seen clearly.</p> <div style="display: flex; justify-content: space-around; align-items: center;">  <span style="font-size: 2em; color: red;">X</span>  <span style="font-size: 2em; color: green;">✓</span> </div> <ol style="list-style-type: none"> <li>1. Lighting should come from overhead or in front of you.</li> <li>2. Overhead lights should not be in the camera view.</li> <li>3. Ensure that you are not positioned between the light and the camera as this can cause shadowing.</li> </ol>

During	Content Sharing	<p><i>Also referred to as data sharing</i></p> <p>If you are sharing your screen with the person, please have any content ready and open before commencing the call.</p> <p>If you intend to share your screen, please close down any other applications e.g. MAP or Outlook that you have running to avoid any chance of the patient seeing any information that should not be shared.</p>
	Joining	Join the appointment 5 minutes prior to the start time. This allows time to make camera and volume adjustments.
	Camera	<ol style="list-style-type: none"> <li>1. Limit body movements (i.e. hand gestures) as these can be quite distracting.</li> <li>2. Be alert and sensitive to nonverbal body language.</li> <li>3. To maintain the best eye contact with the person, look directly at the camera.</li> </ol>
	Audio	<ol style="list-style-type: none"> <li>1. Speak using the same tone and volume as you would if you were in the same room as the person.</li> <li>2. Allow time for transmission.</li> </ol>
	Beginning	<ol style="list-style-type: none"> <li>1. Ensure that you and the person can see and hear each other clearly.</li> <li>2. Allow time for the person and/or their support person to ask questions</li> </ol> <p>If the person has any whānau or support people present, ensure everyone participating is introduced and acknowledged.</p>
	Misc	<p>Where possible set your mobile to vibrate or silent.</p> <p>Avoid wearing highly patterned clothing, these do not project well.</p>
After	Camera	<ol style="list-style-type: none"> <li>1. Return camera setting to standard setting for room if applicable.</li> <li>2. Return camera cap if applicable.</li> </ol>
	Microphone	<ol style="list-style-type: none"> <li>1. Mute microphone.</li> <li>2. Tidy away microphone and cables.</li> </ol>

## Useful Tips

Refer quick guide for video conferencing system being used.

Top tips from frequent users:

- Allow time to set up and check the equipment.
- If you are not confident using the equipment – seek help before you need it.
- Have a contact number for [User Support](#) as per the Checklist of Video Consultations above.
- Check volume before starting.
- Ensure that you face towards the primary light source.
- Sharing content? Have the content set up before the meeting starts.
- Make sure you hang up at the end of the call.

## FAQ and problem solving

<p>For full Zoom FAQs, please see the Zoom Teleconferencing Online Guide here:</p> <p><a href="https://collaboration.huttvalleydhb.org.nz/workspaces/vc/_layouts/15/start.aspx#/SitePages/Zoom%20Quick%20FAQs.aspx">https://collaboration.huttvalleydhb.org.nz/workspaces/vc/_layouts/15/start.aspx#/SitePages/Zoom%20Quick%20FAQs.aspx</a></p>	
Unsure how to use Zoom?	<p>Please see the Zoom Teleconferencing online guides available here:</p> <p><a href="https://collaboration.huttvalleydhb.org.nz/workspaces/vc/_layouts/15/start.aspx#/SitePages/Zoom%20Quick%20FAQs.aspx">https://collaboration.huttvalleydhb.org.nz/workspaces/vc/_layouts/15/start.aspx#/SitePages/Zoom%20Quick%20FAQs.aspx</a></p>
How do I book a physical room?	<p>You can book a physical room through Outlook.</p> <p>There are Zoom Rooms and Zoom enabled rooms available. The list of these is here:</p> <p><a href="https://collaboration.huttvalleydhb.org.nz/workspaces/vc/_layouts/15/start.aspx#/SitePages/Zoom%20Room%20Locations.aspx">https://collaboration.huttvalleydhb.org.nz/workspaces/vc/_layouts/15/start.aspx#/SitePages/Zoom%20Room%20Locations.aspx</a></p>
Can't hear the person?	<p>Check the computer and Zoom volumes are set correctly.</p> <p>Confirm that you have the correct speakers selected from the pop up menu next to the mute button.</p> <p>The patient may have muted or selected the wrong microphone. If they can hear you, talk them through this, if they cannot hear you, please use the “<b>chat</b>” function to help them.</p>
The person is not visible on screen?	<p>The patient may have turned off their camera or selected the wrong camera. Please ask them to check the camera icon in the bottom left hand corner of the Zoom window.</p>
Patient cannot hear me	<p>If the patient cannot hear you, you can instant message the person using the “<b>Chat</b>” feature.</p>

# Appendix 1: Scheduling a Zoom meeting

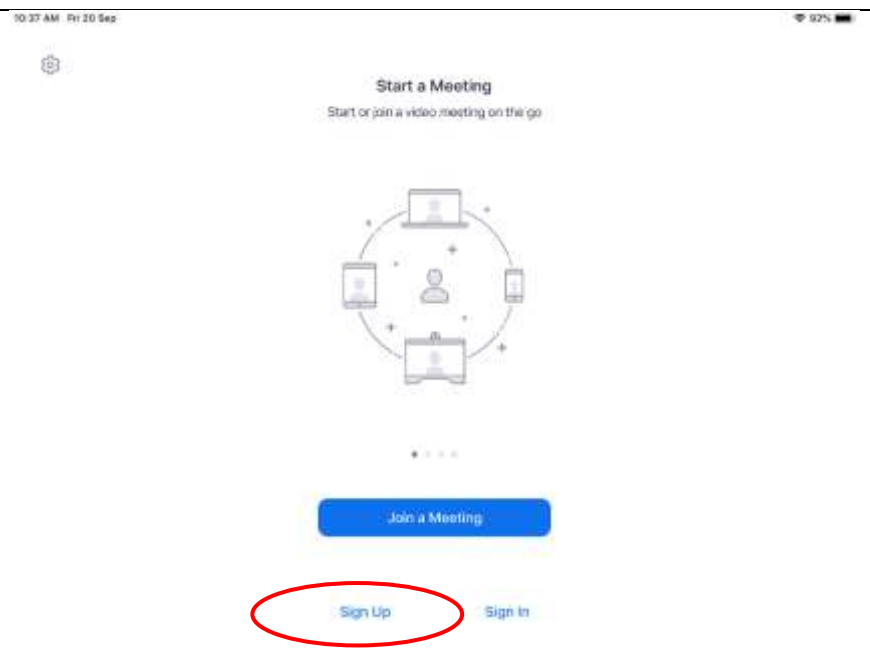
## Appendix 1.1: Register for Zoom

Before setting up a Telehealth appointment, please ensure that you are registered for Zoom. If you have already registered with your CCDHB email, this step is not required.

With your device in work mode, select Zoom.



If you have not yet signed in, select “Sign Up”.





Enter your CCDHB email address, details and choose an appropriate password.

*Please note: Your Zoom password is independent of your CCDHB password and should be different.*

## Sign Up Free

Your work email address

Zoom is protected by reCAPTCHA and the [Privacy Policy](#) and [Terms of Service](#) apply.

Sign Up

By signing up, I agree to the [Privacy Policy](#) and [Terms of Service](#).

Or, sign up with [Google](#) or [Facebook](#)

Zoom will send you a confirmation email.



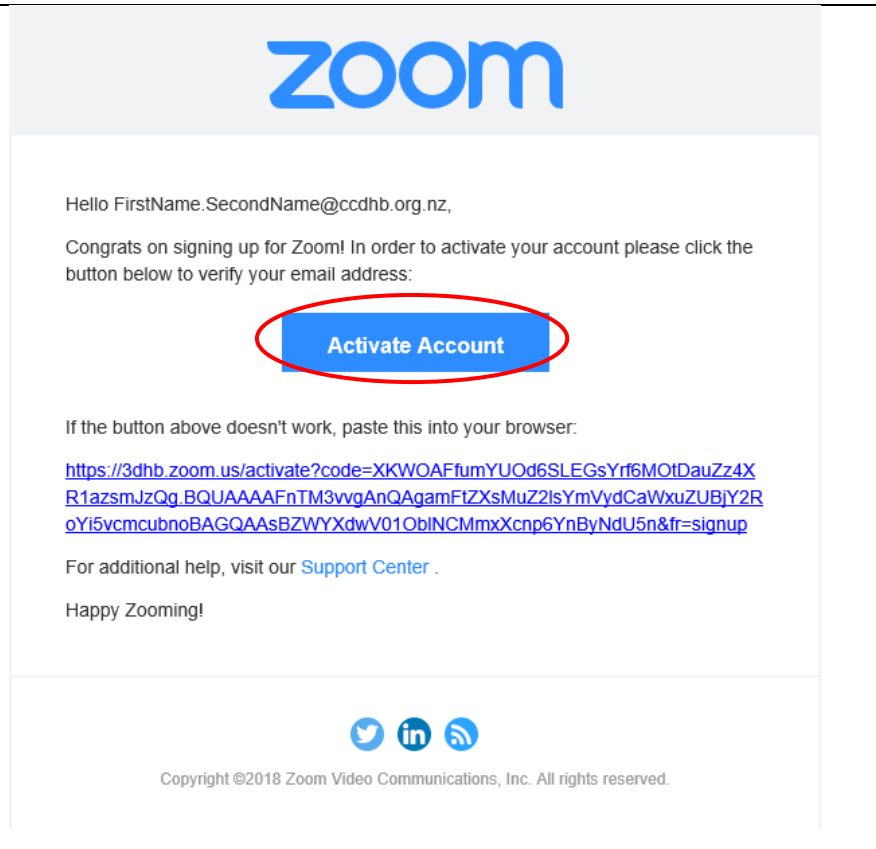
We've sent an email to `FirstName.LastName@ccdhb.org.nz`.  
Click the confirmation link in that email to begin using Zoom.

if you did not receive the email,

[Resend another email](#)

Find the “Zoom Account Activation” email in your Outlook and click the “Activate Account” button.

Zoom will open in your browser and inform you that you are now able to log in. Please follow the steps in “Appendix 1.3: Running a Zoom appointment on an iPad” to log in to Zoom.



## Appendix 1.2: Scheduling a Zoom meeting via Outlook

A full rundown of scheduling a Zoom meeting is available here:

<https://collaboration.huttvalleydhsb.org.nz/workspaces/vc/SitePages/Zoom%20in%20Outlook.aspx>

Additional security tips for Zoom meetings are available here.

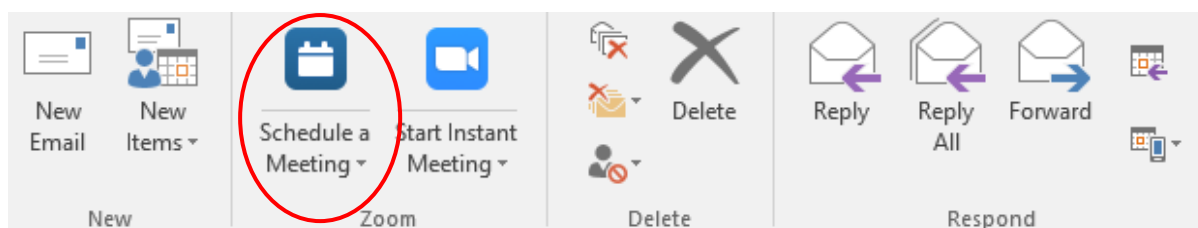
<https://collaboration.huttvalleydhsb.org.nz/workspaces/vc/SitePages/Zoom%20Security%20Privacy%20Information%20v0%201.pdf>

### Notes:

1. You must be on a Citrix terminal, PC, laptop or iPad. Zoom is available on Citrix terminals but video is not enabled. Therefore you can set up appointments on a Citrix terminal but can't do a video consultation from it. It may be convenient to set up the appointment via Outlook on Citrix, and then run the appointment from a Zoom-enabled room, an iPad or cell phone.
2. You must have Outlook installed.
3. You must have Zoom installed (for an iPad)

### Steps

1/ Click on the 'Schedule a Meeting' button in Outlook



2/ In the Zoom pop up, select the following options:

- Meeting ID: 'generate automatically'
- Password: tick 'require password'

Click the down arrow next to 'Advanced Options' and select the following

- Enable Waiting Room
- Untick the box next to 'Enable join before host'

This will ensure that the Zoom appointment will only start when you want it to, reducing the any security risks.

Zoom - Schedule Meeting

Reset to default settings

**Meeting ID**

☒ Generate Automatically ☐ Personal Meeting ID 228-221-8045

**Password**

☐ Require meeting password

**Video**

Host ☐ On ☒ Off Participants ☐ On ☒ Off

**Audio**

☐ Telephone ☐ Computer Audio ☒ Telephone and Computer Audio

Dial in from New Zealand [Edit](#)

**Advanced Options** ^

☒ Enable Waiting Room

☐ Enable join before host

☐ Mute participants upon entry

☐ Only signed-in users can join the meeting: Sign in to Zoom

☒ Force include Join URL in location field

☐ Insert Zoom meeting invitation above existing text

Select a language for meeting invitation: English

☐ Do not show me again Continue Cancel

3/ Click continue and it will return to the meeting scheduling screen in Outlook. You can then email this link to your attendee/s. It will also be in your Outlook calendar for easy reference when it is time for you to have the Zoom appointment.

Notes:

- Select **“Telephone and Computer Audio”** Audio Options as this will give the patient more flexibility.
- When selecting a password, it is best for it to be numbers only as this allows people to enter it using their phone keypad if phoning to join the Zoom meeting. This password will be displayed to the user in their meeting invitation email.
- Unselect **“Enable join before host”**. This will keep patients in the virtual “waiting room” until you join the meeting.
- Leave **“Mute participants upon entry”** unselected. If this is selected, patients will have to work out how to unmute themselves to participate.
- Leave **“Use Personal Meeting ID xxx-xxx-xxx”** unchecked. The Personal Meeting ID is a permanent meeting room assigned to you. If you use this, there is potential for another participant to join the meeting if you have sent them the same meeting room.
- **“Force include Join URL in location field”** is a matter of taste. If this is ticked, the invitation will always include the URL in the “location” field of the emailed event invite even if you delete it before sending the invite.

## Appendix 1.3: Running a Zoom appointment on an iPad/phone

If you do not have access to a dedicated laptop, but you do have access to an iPad, you are able to connect with patients through the Zoom app. However, you will need to text them the meeting ID so that they can join. You must have arranged a time to see the patient and let them know to expect a text shortly before starting.

*Please note, this is an interim measure for the purpose of this pilot. CCDHB expects to develop a business process and/or system to allow integrated booking of Telehealth appointments.*

### Prerequisites:

1. An iPad or smart phone (shared or dedicated)
2. You must have Zoom installed (this should be downloaded from the CCDHB Company Portal app store, rather than the iOS App Store or Google Play Store).
3. You must have a Zoom account. This account can be created via the app, the Zoom website, or Zoom installed on another device.

### Steps:

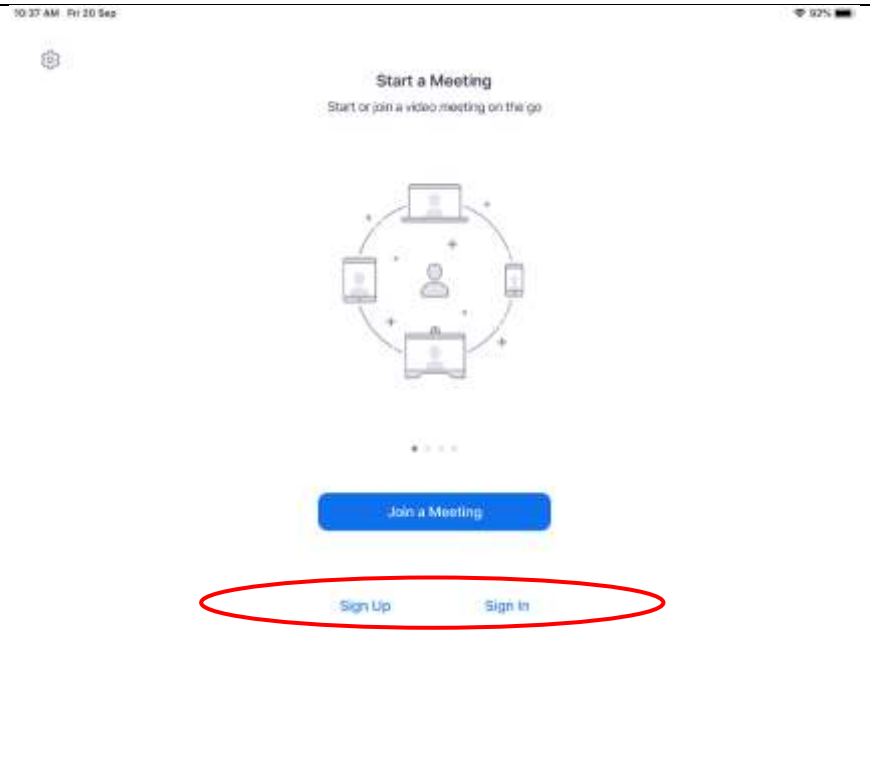
With your device in work mode, select Zoom.



If you have not yet signed in, select “Sign in”.

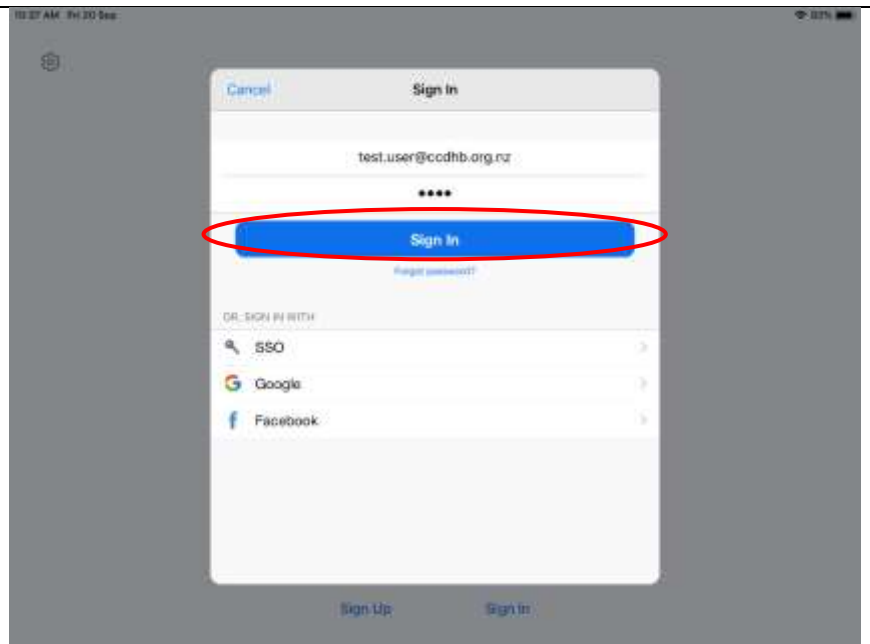
*Note: If you have not previously created an account, select “Sign Up” and enter your details as per Appendix 1.1.*

*If signing up, please ensure that you sign up with your CCDHB email address to avoid confusion of Telehealth consumers.*

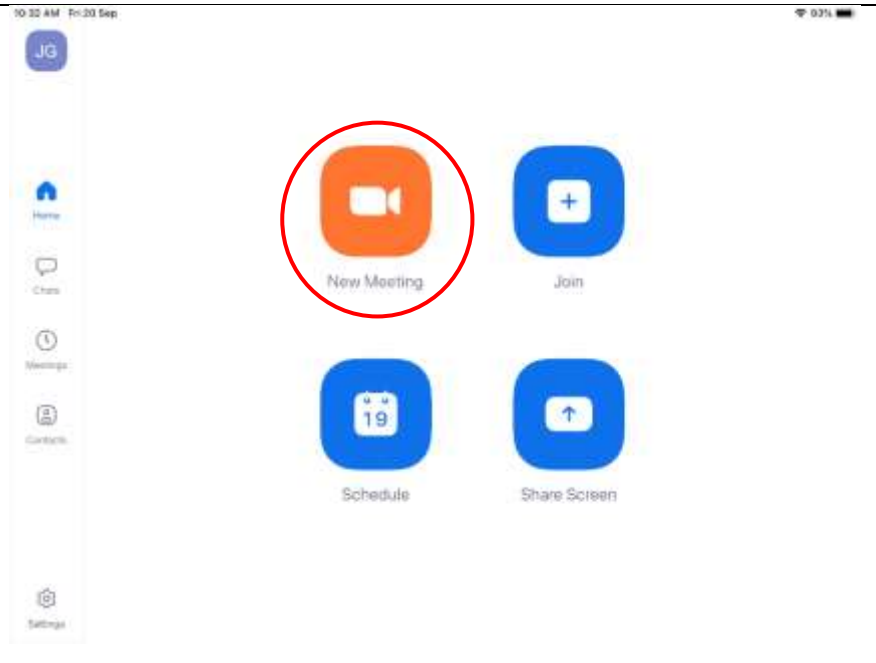


Enter your email and password to sign in.

*Please note: Your Zoom password is independent of your CCDHB password.*

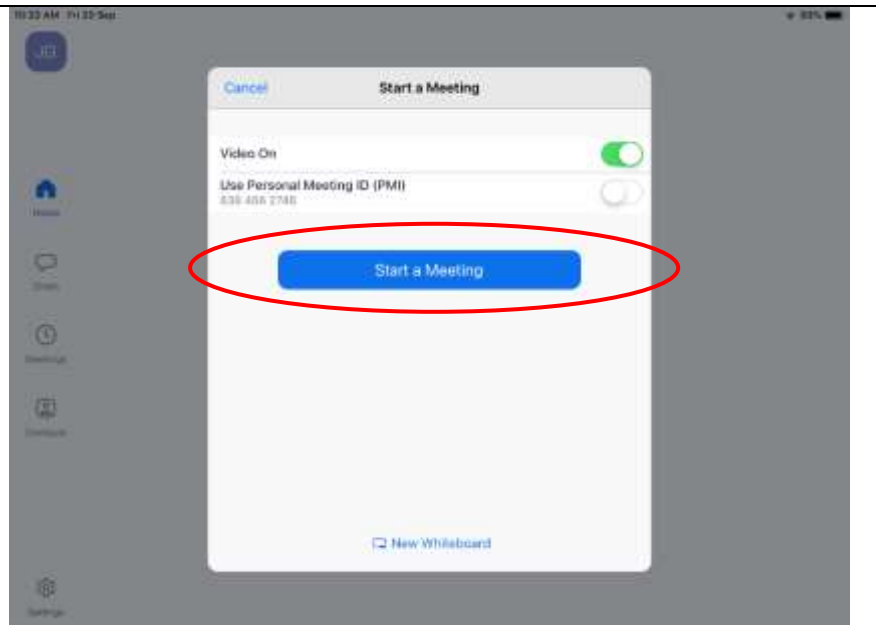


Once you are signed in, Zoom will present you with the “Meet and Chat” screen. From here, select the “New Meeting” button to initiate a meeting.



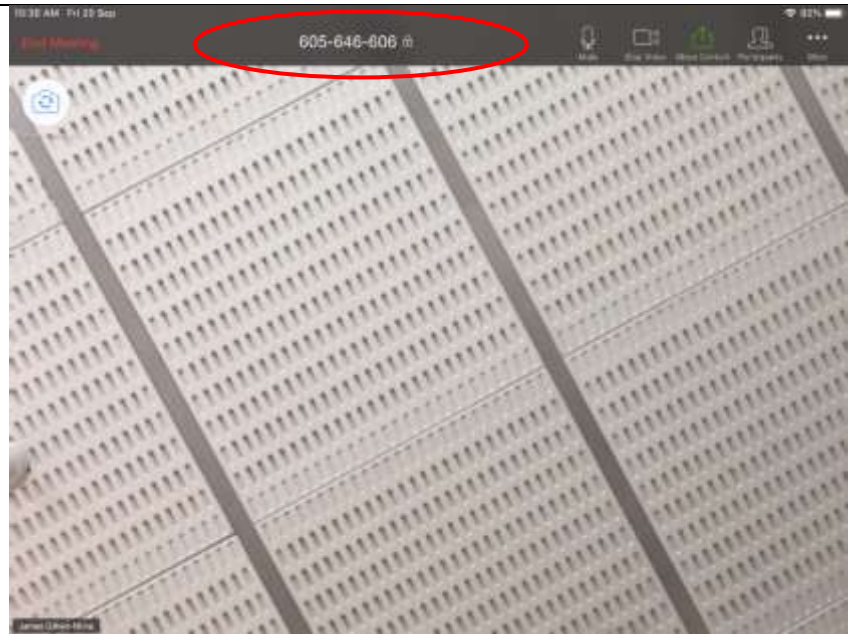
Leave the settings as default (“Video On” selected and “Use Personal Meeting ID (PMI)” unselected). Select “Start a Meeting”.

*Note: if you select “Use Personal Meeting ID (PMI)”, there is a risk that anyone with whom you have shared the ID could join the meeting.*



Zoom will start a video conference. Text the meeting ID (at the top of the screen) through to the patient and they will be able to enter this in Zoom to join the appointment.

*Note: If Zoom requests access to your microphone and/or your camera, please select "OK" as these are essential to running a Telehealth appointment*





## Appendix 2: Joining a Zoom meeting

### Prerequisites:

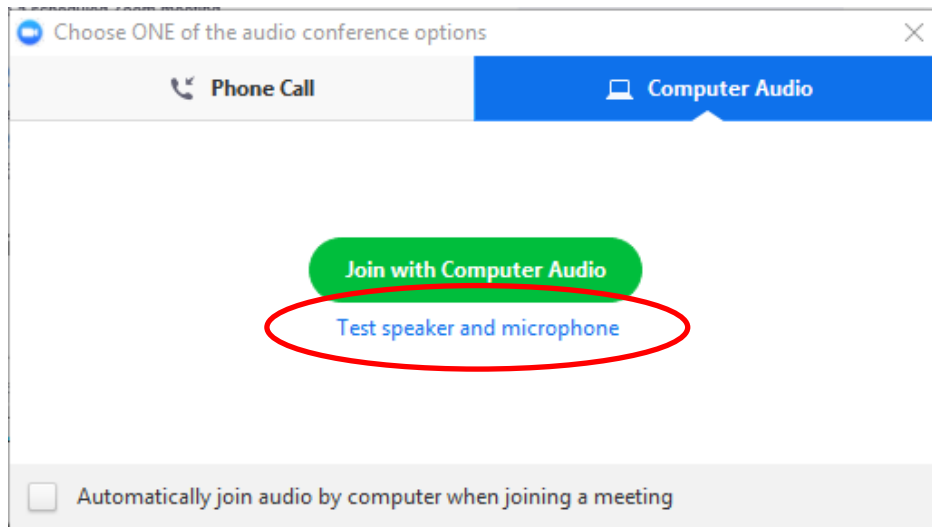
1. You must be on a laptop, desktop or iPad (Zoom with video is not installed on Citrix terminals).
2. You must have Zoom installed.
3. You must have a camera, microphone and speakers on the machine you intend to use for the Telehealth appointment. For laptops and iPads, these will be inbuilt, but you will require this equipment for desktop computers.

### Steps:

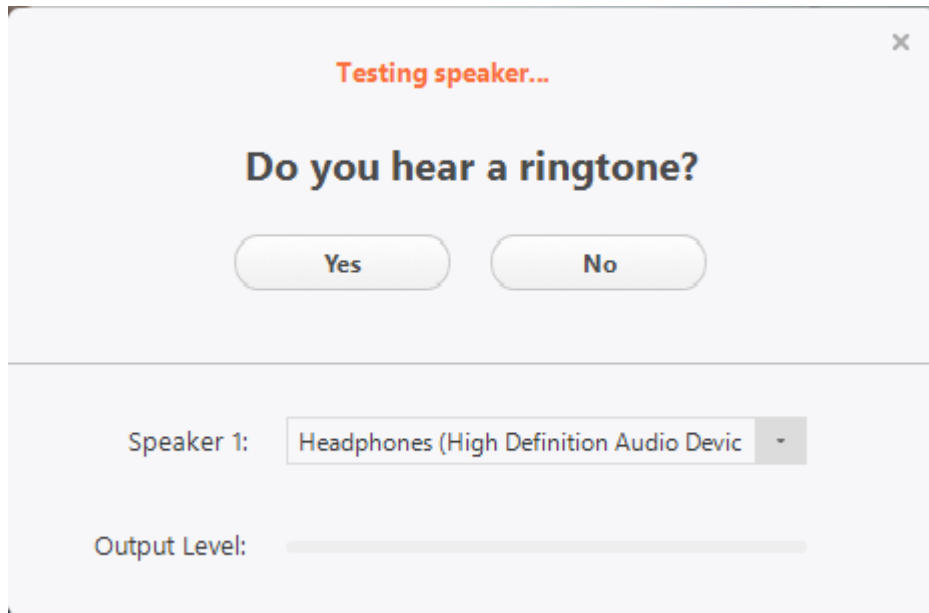
1. Open the meeting invite from your calendar in Outlook. You will be presented with the following information about the meeting:



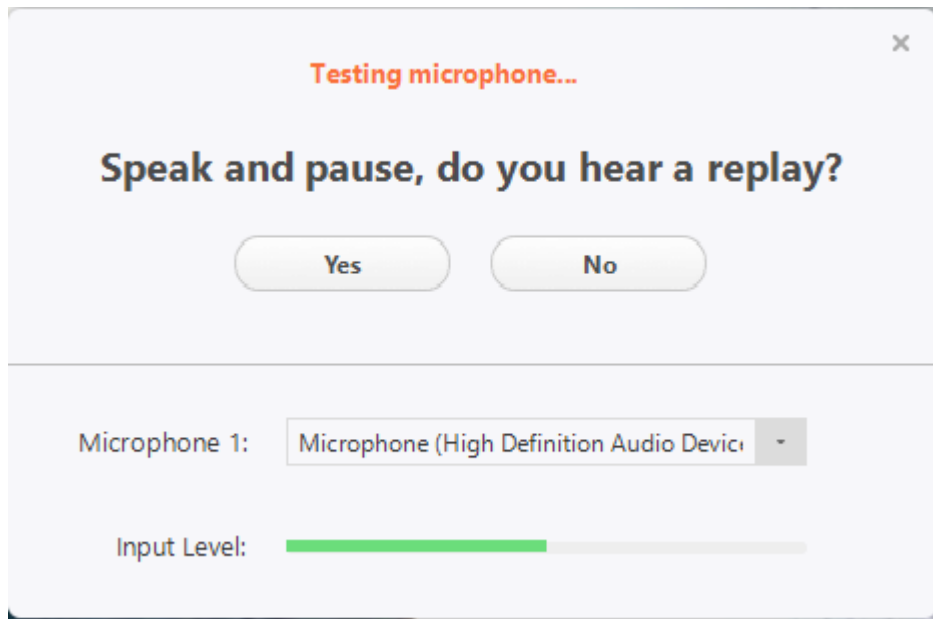
2. Select the “**Join Zoom Meeting**” link or the Meeting URL. This will launch your browser to check that you have Zoom installed, then launch Zoom and open the meeting.
3. If this is the first time that you have used Zoom, or if you have not set it up prior, Zoom will allow you to choose the audio and microphone of your computer. Please complete this as it will ensure that you can hear and be heard.
  - a. In addition to launching the video conference screen, Zoom will display the “Audio options” pop up box.
  - b. Select “**Test speaker and microphone**” circled in red below. This will enable you to cycle through the speakers and microphones attached or built into your computer and choose the correct one.



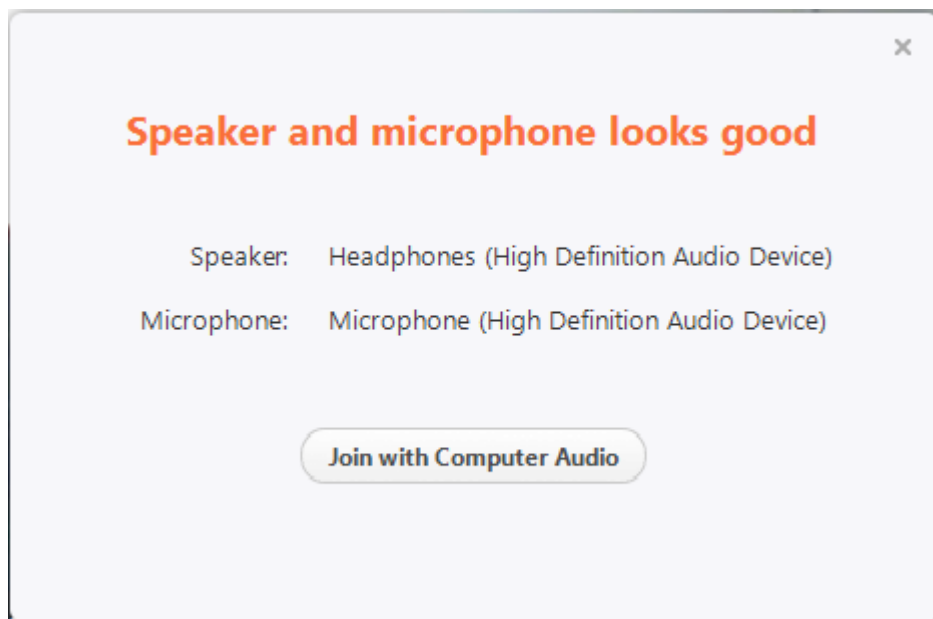
- c. The system will play a tone through your speakers, if you hear it from the speakers or headphones that you want to use, select **"Yes"** otherwise, select **"No"**.



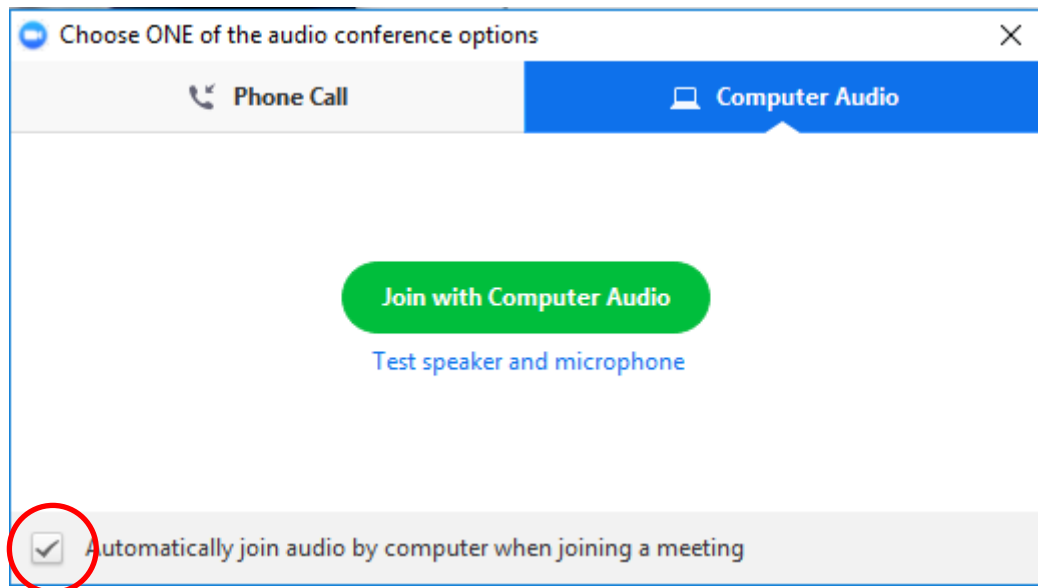
- d. If you select **"No"**, the computer will try another speaker. If you have tried all the available speakers, check your volume levels and cycle through the list again.
- e. Once you have selected a speaker, the system will allow you to test the microphone. The system will present the screen below. Speak a phrase and pause. The system will play the recording back to you. If you can hear the recording well, select **"Yes"**, otherwise select **"No"**



- f. If you select **"No"** the system will cycle through the microphones available. Repeat the process to find the correct microphone. If none of the microphones seem to work, please check the connections, ensure that you are speaking clearly and that the microphone is close to you. You can then cycle through the microphones again.
- g. Once you have the correct speaker and microphone selected, Zoom will display the screen below:



- h. Select **"Join with computer Audio"**
- i. The system will display the Audio options screen again.
- j. Select the **"Automatically join audio by computer when joining a meeting"** checkbox to ensure that you do not need to repeat this process in the future.



- k. Select **"Join with Computer Audio"** to begin the Telehealth appointment.
4. If you have previously completed step 3, the Telehealth appointment should begin immediately.  
*Note: if you need to adjust the speakers or microphone, please follow the steps in [Appendix 6](#).*
5. If you can see the person but cannot hear them or you can see that they have joined but cannot see them, please see the [FAQ section](#) to resolve any issues.

## Appendix 3: Ending a meeting

Once you have completed your appointment, please select “**End Meeting**” in the right hand corner of the Zoom meeting control bar shown below:

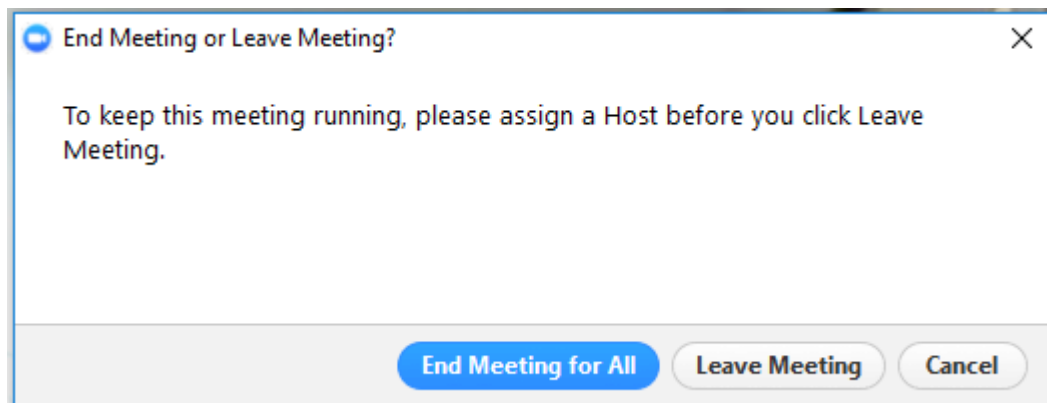
iPad:



Desktop:



Zoom will display the “End Meeting or Leave Meeting” Screen. Select “**End Meeting for All**” to end the meeting for you and the person.



Please ensure that you follow the [“After Telehealth appointment” steps in the Checklist for video consultations](#).

## Appendix 4: Testing audio and video settings in Zoom

### Adjusting your settings:

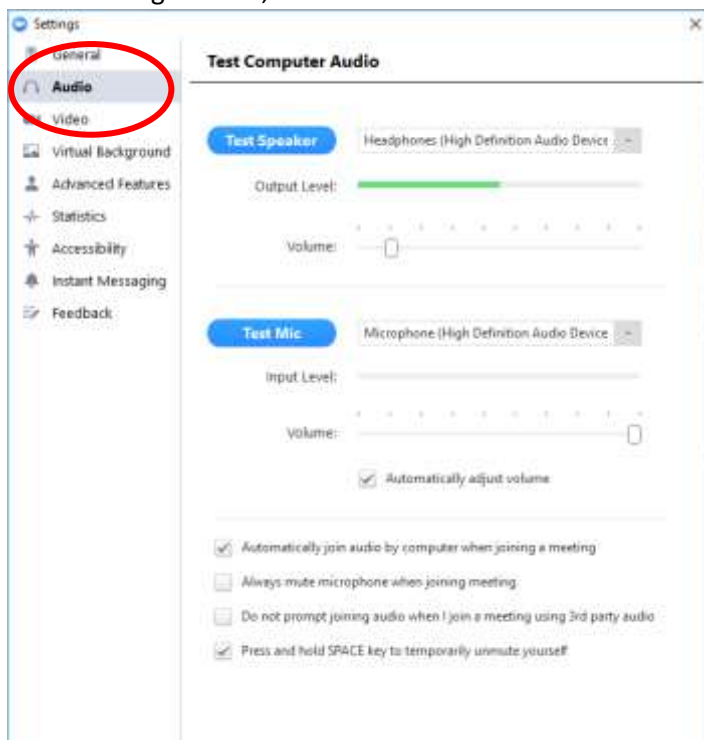
Launch Zoom and select the “Settings” button.



### Audio settings:

If you need to select or adjust your speakers and/or microphone, please follow these steps:

In the settings screen, select the “Audio” sub menu



Select **“Test Speaker”** and Zoom will play a tone through the selected speaker. You can change which speaker is used in the drop down list on the right hand side and adjust the volume using the **“Volume”** slider.

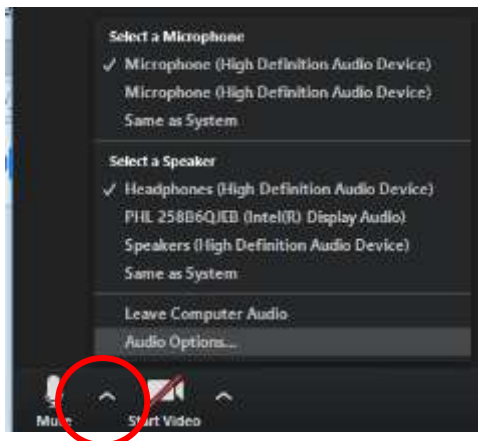
Select **“Test Mic”** to test your microphone. The button will display **“Recording”**. Recite a short phrase then click the **“Recording”** button. The button will display **“Playing”** and the system will play back the recorded phrase. Once the recording is finished, the button will again display **“Test Mic”**. If you did not hear your recording, select another microphone from the dropdown list on the right of the button and try again.

*Note: Before testing the microphone, please ensure that you have the correct speaker selected or you may not hear the recording despite using the correct microphone.*

## Test audio from an active call

Please ensure that you have your audio set up before joining the appointment. You should be prompted to set this up when you join a Zoom call for the first time. However, if you run into any problems, you can also test and adjust the audio settings from inside the call.

You can test the volume by selecting **“Audio Options”** from the pop up list (circled in red below) on the right of the mute button:



Select **“Audio Options”** to launch the Audio Settings and follow the [instructions above](#) to adjust your equipment as required.

## Appendix 5: Statting your Telehealth appointment

### In AHAC:

#### Adding Activity

Check that the correct patient and referral is selected. Patient details and referral information will display at the top of the screen.

1. Select the **type of contact**. The default type is 'Face to Face' – change this to 'Video'.

The screenshot shows the 'Add Activity' screen in the AHAC system. At the top, there is a blue header with a back arrow and the text 'Add Activity'. Below this, a blue box displays patient information: '1 John-Test-1 (38 Yrs)' and 'Male 11/10/1980 ABC1231 5NW/1A'. Underneath, a light blue box shows referral details: 'Ref: 29793044 Type: Diet Date: 16/05/2019' and 'Referral N04 Nutrition support'. Below the referral box, there are three input fields: 'Video' (which is selected and highlighted with a red arrow), 'Select Activity', and 'Select Location'. At the bottom of the screen, there is a 'Done' button and a list of contact types: 'Face to face contact (clinician - many p...', 'Remote telephone', 'Video' (which is selected), 'Non contact (virtual)', and 'Admin'.

2. Select the **type of activity** e.g. Initial Patient Assessment. Refer to your local supporting documents for fuller definitions of each type of activity.
3. Select the **location**. This is the location of the patient, not the clinician. Refer to your local supporting documents for definitions of each location.



← Add Activity

**1John-Test-1 (38 Yrs)**  
Male 11/10/1980 ABC1231 5NW/1A

Ref: 29793044 Type: Diet Date: 16/05/2019

**Referral**

N04 Nutrition support

Video

Follow up

**Patients residence**

Done

Outpatient  
Community  
Patients residence

4. Record your time. There are two ways of doing this:

- Using the **timer**: Press the blue play button to start the timer. The timer will start counting and it will turn to a red stop button. Once you have finished that activity, press the red stop button and it will save your activity.
- Manual entry: Press **Manual Entry**. Select the start time of your activity and then enter the number of minutes. Press the **enter** button on your keypad to finish and save your activity.

## In MAP for Outpatient Appointments

When appointment is made in MAP – edit the Mode of Delivery to “Video Conference”

**Make New Appointment**

Clinic: Speech Therapy - Naomi Bondi

Date: Mon 07 Oct 2019 at 13:00

Visit Type: Routine New

Mode of Delivery: Video Conference

Presenting Problem: Parkinson's disease

Diagnosis: G20 Parkinsons

Once appointment is completed – attend the appointment in MAP and complete outcome as per usual process.

# Appendix 6: Useful tips for Telehealth appointments via Zoom

## Patient/Clinician Safety

- If you have not met the participant face to face before, check their ID by asking them to confirm personal details e.g. date of birth, NHI, full name
- Establish your attendee's physical location. This information may be useful if you need to summon help for the participant during the Zoom session.
- Check who is on the call before sensitive information is discussed
- When everyone you were expecting to join the session has joined, you can lock the session. To do this, select 'Manage Participants' at the bottom of the screen, then when the Participants panel pops up on the right hand side, click 'More' and then 'Lock Meeting'. This will stop any new participants from joining.
- At the end of the session, ask the patient if they would like a summary of the session, including action points for the clinician or patient emailed to them. If so, this email should also form part of your clinical documentation.

## IT Security

- If emailing an appointment in advance, ensure you set up a password when making the appointment
- Make sure that Zoom on your iPad or smart phone is installed via the 'Company Portal' app store
- Use your work email address to sign up to Zoom
- Disable 'Join Before Host' and use the 'Waiting Room' feature to ensure that the appointment only starts when you are ready
- Close down other programs such as Outlook and MAP/Concerto to reduce the risk of your attendee inadvertently seeing confidential information when screen sharing
- Sign into Zoom where possible – this provides additional security
- Only use secure internet access – do not use public WiFi

## Telehealth Etiquette

- Have a pre-videoconference conversation (either via phone or face to face to discuss privacy etc
- Have a technology back up plan – ensure you know the best number to contact the patient on if the Zoom call drops out. At the start of the Zoom session, inform the patient that you will phone them straight away if there are technology issues
- Have a plain background behind you
- Wear your ID badge visibly or show it at the beginning of the session if you are not already known to the patient
- Try to look into the camera rather than at the screen
- Tell your attendee who is in the room with you and find out who is in the room with them
- Explain that they are not being recorded
- Be explicit in questioning emotional responses if you're uncertain, as body language/expression can be more difficult e.g. "you look as if you might be upset by that"
- Dress professionally, avoid strongly patterned clothing as it distracts
- If your patient isn't tech savvy, consider who in their bubble could help