Guide to Using Zoom (Video Conferencing) for your Telehealth Service with AccuCare

The following is a guide on how to implement and document telehealth services using the Zoom video conference application and AccuCare. This guide is specific to the Zoom Video Conferencing Application. Other similar tools may be used for video conferencing, and may still apply to the basic concept of integrating this method of video conference to support telehealth services with your AccuCare System.

In response to the current COVID-19 healthcare crisis, the regulations for use of telehealth services have been tempered. Please refer to our Guidelines to Telehealth by Orion for information on those regulations.

With that said, **Orion has chosen Zoom as its preferred application** for providing video conferencing to support telehealth services because of these main benefits:

- A **Basic Plan** for the **Zoom** application is **FREE** of charge. The **FREE** Plan includes unlimited meetings and unlimited time on 1-on-1 meetings. There is however a 40 minute time limit on meetings with 3 or more participants. The **Basic Plan does not require a Business Associates Agreement** and an account can be created per provider. Check your federal and state guidelines (see our Guidelines to Telehealth for reference). Additional features can be unlocked with a paid plan (which there are multiple levels)
- The Zoom application is easy to use. You can conduct a telehealth session (video conference) from computer to computer, computer to cell phone, or cell phone to cell phone. Your workstation will need camera and microphone capability. Or a smartphone with front facing camera will also work.
- Zoom is HIPAA compliant, and one of the most widely used applications across the country.
- Implementation can be immediate. Agencies can be offering telehealth services within minutes.
- You only need internet access (direct or wi-fi). (Cell phones using cellular data, instead of wi-fi, to connect to Zoom will be subject their carrier's data usage rules)

NOTE: This is an initial FREE solution. We are looking at other solutions, but in the interim, we believe this option will work. As things change, we will update you. This is a GUIDE on how to implement and document telehealth services using Zoom with AccuCare under current federal guidelines as of 3/19/2020, and you should contact your local/state authority when it comes to telehealth and billing for telehealth.

Zoom to AccuCare Workflow

Implementing video conferencing to your clinical process to offer telehealth services can be simple. It does not even have to involve a fully integrated video conference application. In this guide, we will demonstrate a workflow on how to utilize a video conferencing application (Zoom) and document for audit and billing, in AccuCare.

Simple Workflow Diagram from Zoom to AccuCare

Schedule or Start a Video Conference Session (Zoom) → Send Video Conference Session Invite (via Txt or Email) → Conduct Video Conference Session (Zoom) → Document Zoom Session in Progress Notes (AccuCare) → Generate Reports/Submit Billing for Sessions (AccuCare)
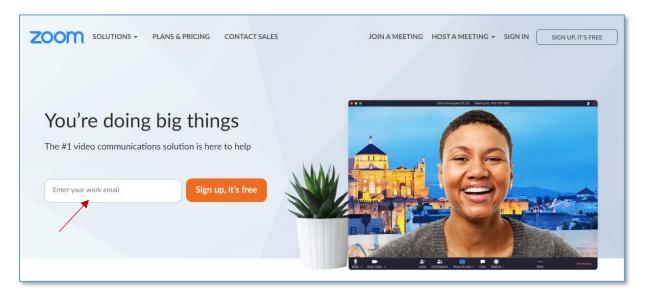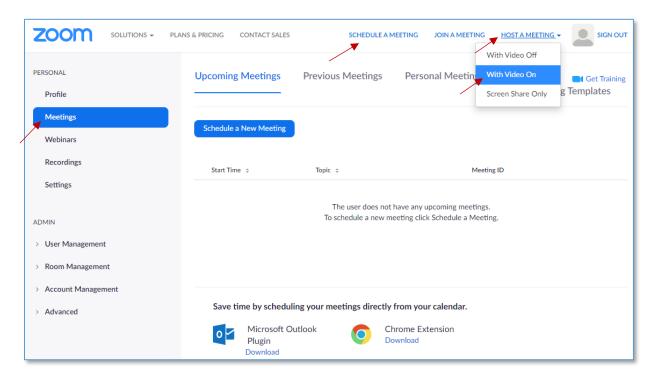
1. **Installing Zoom**

   Getting started with Zoom is easy. In order to begin using, you must first create an account. You can click here to create your user account: https://us04web.zoom.us/

   Choose the Basic Version at no cost. If the other features are of value, the next tier of features starts at $14.99/month. Once you've created an account you can sign into your account.
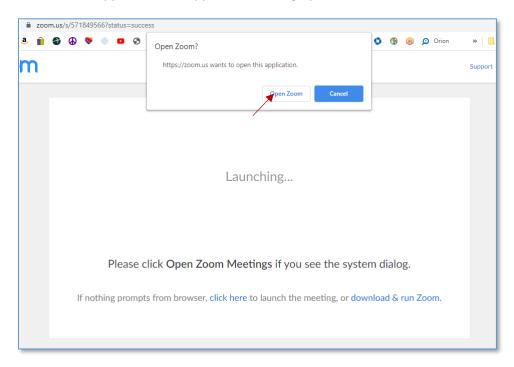

2. **Start or Schedule a Session**

   Once your signed in, you can Schedule a Meeting or Host one immediately. On the left hand menu, you'll see tabs to see other settings and links. To start a session on the spot, select 'HOST A MEETING – With Video On'

Once you start the session "With Video On", you'll see the Open Zoom prompt. Select [Open Zoom] to open Zoom in a standalone application (as opposed to through your browser)

3. Starting the Session with the Client/Participant
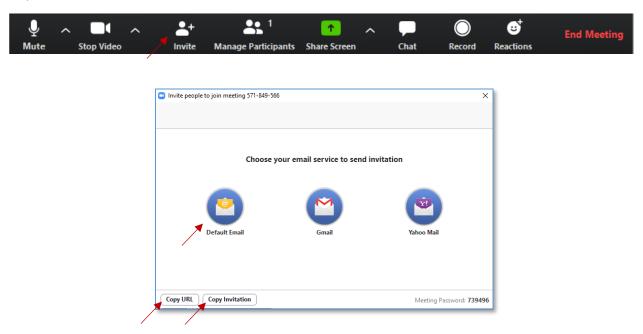
From a Workstation:

Once you start the session, you will see your image on the app screen (from your camera on your laptop or plug-in camera).

On the bottom of your screen, you'll see a tool bar, visible when you hover your mouse over the screen (or on a cell phone, if you touch the screen, the toolbar will appear)
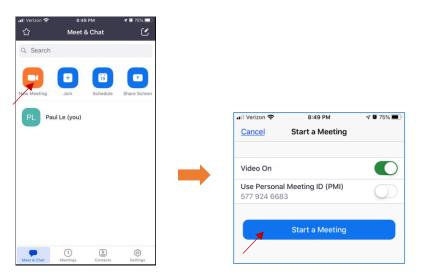
To invite a participant, just click on the invite icon, and choose whichever method is best to send the link to your client.

IMPORTANT: If your client does not have a workstation with audio/video capability (like a laptop with a built-in camera and mic), you can still send the invite to an email address, and the client can open the link by viewing their email from their cell phone.
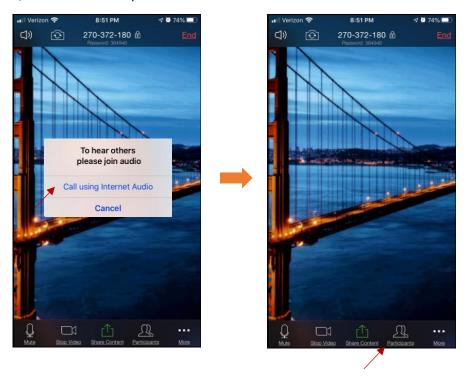
From a Cell Phone:

After you download and install the Zoom App on your smartphone, you can sign in using the login info you used when you created an account. From the Meet and Chat tab, you can select the "New Meeting" button, then Start a Meeting (with Video).
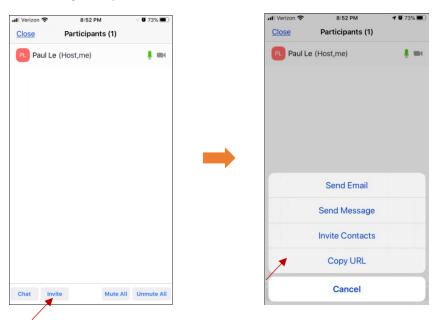
Once your image appears, you can select 'Call using Internet Audio' to ensure the participant is using internet data (can be more consistent and efficient then cellular audio)

To invite your client, select the "Participants" button.

This will show you the list of participants in the session (which at this point is only you). Then select the 'Invite' button. Choose the method of communicating the invite link to your client. If you want to just txt the invite, select the 'Copy URL', then open your Txt app > Select your contact or type in their cell number > then Paste the copied URL into the message body > then send.

4. Receiving the Session Invite and Conducting the Session

Once the client will receive the invitation (via email on their workstation or cell phone or via txt on their cell phone), they can click on the invitation link. If it's their first time opening the link, they will need to go through an install of the app on their workstation or cell phone. Then they'll be able to join the video conference.
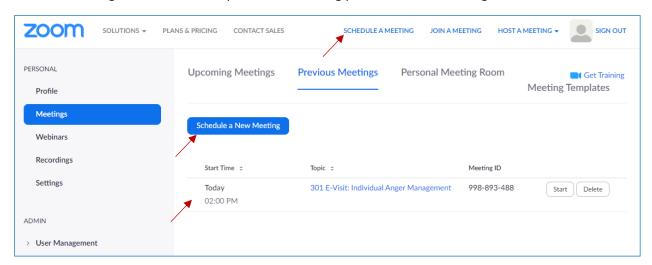
Once the client is connected, you can start your video conference session.

NOTES:

- 1-on-1 sessions are unlimited in time

- Group sessions (3 or more participants), are limited to 40 minutes. So if you are doing a 1-hour session, you may want to have two 30-minute sessions. Otherwise you'll need to upgrade for the paid service of Zoom

- Keep track of the session dates, times, type and meeting ID. You'll need this to enter into AccuCare

- If you conduct a Group session, you will still send the same invite/URL to each member.

USER TIP 1: If you utilize the "SCHEDULE A MEETING" feature, the system will display your meetings along with the meeting ID. This can be helpful for referencing past video conferencing sessions.

USER TIP 2: You can also implement telehealth through staff meetings. Zoom can be used for teleconference between staff members with the ability to share your screen. For example, that could be meetings for staff, regional directors and treatment reviews for clients could easily be accommodated.
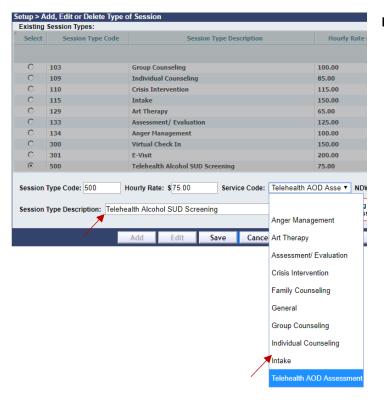
5. Entering Your Session into AccuCare

You should be able to document your video conference/telehealth session as if the client was in the office.

Session Type Setup

First, you will need to have the appropriate session types setup in your AccuCare System:
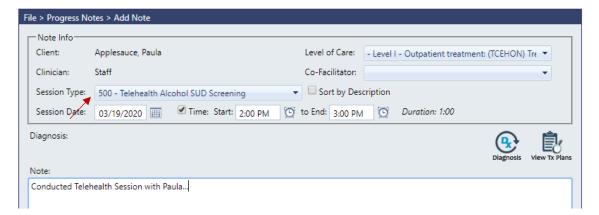

NOTES:

- Check with your payers to identify what session types are allowed for telehealth

- Enter those into your Session Type setup screen

- If you are using AccuCare electronic billing, make sure your service codes are setup as well (contact billing support for assistance)
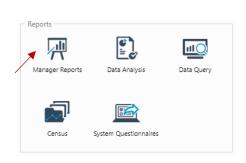
Entering into Progess Notes

After setting up your new session types for telehealth services, you can begin documenting your sessions after you've completed each session. Just enter in the session information and the proper telehealth session type, then save or electronically sign-off and save (if you have access to Chart Management).d
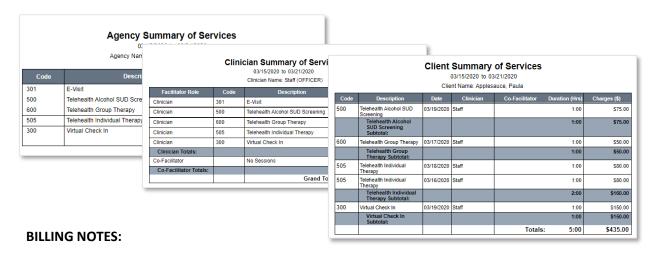
Reporting and Billing

To generate reports on your telehealth services, you can utilize the Manager Reports and select the Clinical Services Reports.

You can view reports by agency, clinician, client or clinician by client.

BILLING NOTES:

- You can use Clinical Services Reports help data entry into your billing system or for auditing
- If you are set up to use electronic billing in AccuCare, you can utilize the Billing Transfer feature, to transfer all of your progress notes (including telehealth sessions) into the billing module, and submit claims electronically to your payers.
- If you are using a Custom Form in AccuCare to track your notes, you can export the data and use to enter into your billing system/process or for auditing

REMINDER: Orion Healthcare Technology does NOT provide customer support for Zoom and its products. This document is meant to provide our customers with a guide on how to implement video conferencing to support their telehealth services. By selecting Zoom for our preferred choice for a video conferencing app, we encourage you to utilize Zoom's support services for any questions regarding the direct use of their products. It is also advised that customers planning on billing for telehealth should check with their payers to ensure proper service codes are utilized.

Other questions? Call AccuCare Support at 800.324.7966 or email support@orionhealthcare.com