



# DAWN Clinic VIRTUAL CLINIC WORKFORCE

Telehealth Visit Training Guide

## Dedicated to Aurora's Wellness and Needs

The DAWN clinic serves as an essential primary care home for the underserved and uninsured patients in Aurora. The DAWN Virtual Clinic Workforce was created to serve three purposes:

- 1) To continue to provide essential primary care services for our patients on a virtual basis during the COVID-19 pandemic.
- 2) To provide an avenue for students to continue to interact with patients on a virtual basis and to improve clinical history-taking skills, oral presentation skills, and relaying medical decision-making to patients all while being overseen by licensed preceptors.
- 3) To learn essential virtual telehealth skills which will be necessary for future healthcare professionals in the current healthcare landscape.

## **Purpose**

Due to the global COVID-19 pandemic, unprecedented risks such as asymptomatic transmission of the virus and limited amounts of PPE for protection became apparent. In response, the health professional schools at the University of Colorado Anschutz Medical Campus withdrew students from the clinical setting. Based on these factors, DAWN decided to limit students from delivering in-person care for the foreseeable future. The **DAWN Virtual Clinic Workforce** was therefore created to serve 3 purposes:

- 1) *To continue to provide essential primary care services for our patients on a virtual basis.*
- 2) *To provide an avenue for interprofessional students to continue to interact with patients on a virtual basis and to improve clinical history-taking skills, oral presentation skills, and relaying medical decision-making to patients all while being overseen by licensed physician preceptors.*
- 3) *To learn essential virtual telehealth skills which will be necessary for future healthcare professionals in the current healthcare landscape.*

## **Roles**

As a volunteer with the MD/PA/NP or Nursing workgroup, you will be on an interprofessional team with a licensed supervising clinician. Volunteers must be available to conduct visits on Tuesday from 5:00 – 9:30pm (usually will finish between 8:30 PM – 9:00 PM). On this team, you may be acting in the following roles:

### **I. Student Team Lead**

- **Requirements:** Any rising or current MS3, MS4, PA3, or NP2 is eligible to volunteer in the clinic who has studied the virtual care structure protocol (below) and is qualified to lead an interprofessional student team. Must have current DAWN Epic access.
- **Virtual Clinic Role**
  - Monitor the list of assigned patients on the SharePoint “communication board” and organize virtual meetings with their team as needed.
  - Act as the primary volunteer to ensure comprehensive clinical history taking (working alongside and supporting Student Learner, if present).
- **Scope of Practice**
  - Review the list of assigned patients to the team and understand their entire medical history (i.e. medical problems, prior visits, medications, lab results, etc).
  - Assess and conduct brief patient interviews to determine a patient’s chief complaint and their priority health needs. *Student lead may alternately support a student learner in conducting parts of the visit, aligned with their learning goals and level of training.*
  - Identify patients, per the Triage Policy, that may require a higher level of medical care. Once identified, these at-risk patients should be immediately reported to the nursing preceptor, clinic manager, or medical director.

### **II. Student Learner**

- **Requirements:** Any current Anschutz health professional student who is eligible to volunteer in the clinic. Must have current DAWN Epic access and must be familiar with writing notes in EPIC.
- **Virtual Clinic Role**
  - Must be able to accurately record the virtual encounter with the patient.
  - Must also be able to call interpretation line and link interpreter into virtual call if needed.
  - Expect to participate in clinical visit appropriate to level of training.
  - Expect to set learning goals and work with Student Team Lead and/or precepting team to care for patients and learn in a supportive environment.

- Administrative Role: Maintain an accurate list of action items for each patient.

### Before the Clinic Visit

- 1) **Care Coordinator** will reach out before the clinic visit to teach the patient how to use Zoom.
- 2) **Team Leader +/- Student Learner** will be assigned a set of patients ahead of time. Please be sure to read through your patients' histories ahead of time based on your assigned virtual clinic. You will see 3-5 patients during a full clinic night.
- 3) Plan to be in a secure, private location during clinic and to be logged onto a secure internet connection. Make sure you also have a charged cell-phone (ideally with ear-buds) for being able to call in by phone to the visit if needed.

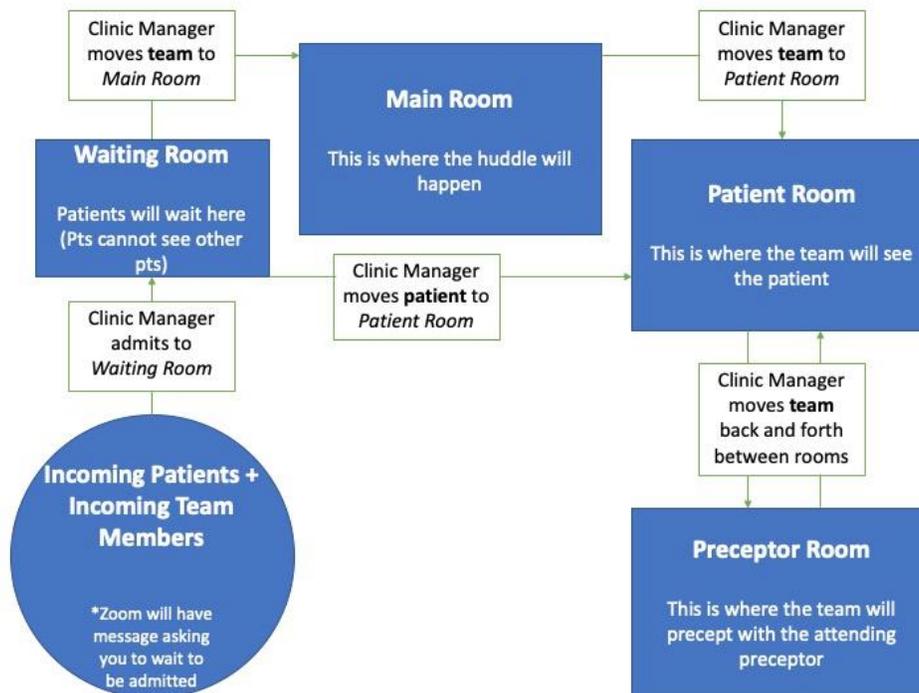
All members of the team should have communication via messaging to avoid confusion and disruption during visit. Please confirm with your team whether you will be communicating via Microsoft Teams or Epic, and make sure you're able to access this platform before the clinic starts.

There will be at least two virtual teams working each night, each seeing 3-5 patients on a full night.

**\*\* PLEASE VERIFY YOU HAVE EPIC ACCESS TO DAWN CLINIC (as account close with 90 days of inactivity). \*\***

### During the Clinic Visit

#### Part I (30 minutes, Pre-visits):



Please log into Zoom 30 minutes before your team's first patient appointment. At this time, the Clinic Manager will accept you from the *Waiting Room* into the *Main Session Room*. Please right click on your Zoom name and rename yourself with name and title in parenthesis (example: John (Interpreter)). At this time, we will have a team huddle that will include the student teams as well as the resident or licensed supervising preceptor for the night. Confirm that you are able to communicate via "Teams" or "Epic" messaging and briefly go over the general workflow and patients for that night. We expect you to have reviewed returning patients' charts so

you can review the general visit plan with the resident and set appropriate learning goals before the first patient arrives. Patient visits will be staggered 1 hour apart within each team to start, with Team 1 beginning at 5:30 and Team 2 beginning at 6:00 (this is based on attending availability).

#### **PART II (~30 minutes):**

- 1) **Patient** will be given a Zoom link to join for the visit and will have a screen that tells them they are in the waiting room.
- 2) **Clinic Manager** will bring the patient in from the waiting room into the *Main Session Room*. The clinic manager will then move you, the patient, and the rest of the care team to the *Patient Room* where it will serve as their exam room.
- 3) **Student Team (based on pre-assigned learning goals/roles)** will conduct the visit in the *Patient Room*.
  1. Start by introducing yourself.
    - a. "Hi [*patient name*], again my name is [*insert name*] and I am a [ \_\_\_ year MD, PA, NP student] who will be gathering your history during this visit.
  2. Include "webside" manner.
    - a. "Thank you for inviting us into your home today. I realize this visit style is new and may present some challenges, thank you for giving it a try."
    - b. "I'm glad you thought of this as an effective way to connect with us about your health concerns."
  3. Address HIPPA:
    - a. "I want to reassure you that we have all worked to ensure we are in quiet and secure places to ensure your privacy. Are you in a private place, or location you feel comfortable conducting your visit? If not, feel free to move to another location you are most comfortable before we start."
  4. Obtain Consent:
    - a. Ask the patient if they consent to treatment over telehealth visit today via video or phone?
    - b. Remind them they can end the visit at any time.
    - c. *You can remind the patient here that if a need for an in-person examination is determined at this visit, a follow-up visit will be scheduled in-person as long as it is safe for the patient and limited clinic staff.*
  5. Set-up expectations for how the visit will go. Let them know how much time you'll have together and which problems can be discussed today and which will need to wait.
    - a. "Just to make everything clear, we have 20 minutes to discuss your top 2 concerns you want addressed today. Once we're done getting your story, I will talk to the resident doctor on our team. Also, to emphasize, our whole team is supervised by an attending physician. So, what brings you in today?"
    - b. Gather history and create assessment/plan. **Student Learner** will be taking notes on Epic.
    - c. Conclude initial visit
      - i. "Do you have any other concerns or issues that you would like to address during this visit?"

#### **PART III (~15 Minutes):**

- 1) Patient will remain in his/her *Patient Room* and several things may happen here:
  - a. **If the supervising resident/preceptor was observing the visit**
    - i. Depending on what you decided in the Huddle →

1. You may discuss and determine the plan at the “virtual bedside” immediately after finishing the history and deliver the plan in a more fluid conversation with the preceptor and patient.
  2. You may be moved to the *Preceptor Room* to discuss the plan and present to the preceptor.
- b. **If the supervising resident/preceptor was not observing the visit**
- i. You will be moved to the *Preceptor Room* to discuss the plan and present to the preceptor.
- c. **Who Presents?**
- i. **Team Leader or Student Learner present** → this is determined by the learner goals and roles you decided on during the Huddle.
- 2) With the supervising resident/preceptor, the Team Leader and the Student Learner will finalize their plan.

NOTE: during this time, the **Care Coordinator** may remain with the patient in the *Patient Room* and screen the patient for socioeconomic status including food, housing, and medication access.

#### **PART IV (~ 10 Minutes):**

- 1) **Student Team:** Discuss the plan with the patient and ask whether the patient has any questions. Be sure to include the following:
- a. Diagnosis and Plan
  - b. Medications needed
  - c. Inform patient that their visit is now done and **Care Coordination** will schedule follow-up appointments and close out the visit

#### **After the Clinic Visit**

**Student Learner:** Create after visit summary for the patient on Epic that includes the plan as above. Message if signing

#### **Tips for Conducting Telehealth Visits**

- It is important that we appear as professional as we would during an in-clinic DAWN encounter. Ensure that you are professionally dressed and that your background is professional. Consider using a plain or blank background to prevent any distractions. Be sure there is adequate lighting since most of these visits will occur in the evening.
- Be aware of your body language and non-verbal communication. A virtual encounter is not as personal as a clinic encounter, so consider smiling more often or increasing your enthusiasm to put the patient at ease. Be extra aware of your facial expressions as this will be a large portion of your non-verbal communication. Consider using hand motions and facial expressions to convey both empathy and concern for the patient.
- Limit movement and maintain eye contact during the encounter to minimize distractions to the patient.
- Consider speaking even slower than you would during an in-person encounter. Due to potential lag time, wait 2-3 seconds after the patient has stopped speaking to ensure that they are finished. If there are audio/video issues, please switch off video/audio to increase bandwidth when you are not talking.
- Continuously use reflective listening and summaries to ensure that you are understanding the patient and addressing their needs. The student provider should use the teach back method as an avenue for ensuring patient understanding.

- Be sure that you are on a secure network and in an environment that is HIPAA compliant (private and quiet setting)

### **DAWN FAQs**

Q: Who is on each care team?

A: Each care team consists of one **Care Coordinator**, one **Team Leader** (MS3, MS4, PA3, or NP2), one **Student Learner** (Nursing Students, MS3, MS4, PA3, or NP2), one **Interpreter**, one **Resident**, and one **Attending** preceptor.

Q: How long does clinic run? How many patients should I expect to see? How Long are visits?

A: Clinic will run from 5:30 until 9:30, and you will be seeing up to 5 patients. Each visit should last a max of an hour.

Q: Are PA1s and PA2s allowed to volunteer?

A: Unfortunately, no. From school policy, these students are not to be involved with any clinical volunteering opportunities at this time (this includes **both** the Team Leader and Student Learner roles).

Q: I'm not very familiar with Zoom. Is it HIPAA compliant? What do I have to do to move around?

A: Because we are using Zoom through CU Anschutz, we are HIPAA compliant. You do NOT have to do anything to move around. All you need to do is log on via the Zoom link meeting you are given. The Clinic Manager will be the person who moves everyone around between the different rooms.

Q: What if my patient asks about COVID 19?

A: Please reference the "COVID-19 FAQs".

Q: What needs to go into the note?

A: Please add the emails and phone numbers of each volunteer on the top of every note. Please format the note as a SOAP note (Subjective, Objective, Assessment, and Plan).

Q: If there is no interpreter available, what should I do?

A: The Care Coordinator on your team will call the interpreter line through University Hospital: (720) 848-0397

Q: How do I get a hold of DAWN Clinic?

A: The clinic phone number is (303) 800-9677