

Post-Webinar Handouts | Laurie S. Callen | NYIT-COM

These handouts incorporate training strategies and materials also developed by Lisa Culen, MS and Jamie Colvell, MPH at NYIT-COM ICC. They are designed to supplement the presentation for the ASPE Telecommunications Webinar on 4/6/2020 and include:

1. SP Training
 - a. Tech Survey
 - b. Zoom Skills Proficiency Slide
 - i. Role of the Virtual Encounter Leader
 1. Selecting VEL
 2. Role of VEL
 3. Function of Small Groups
 - ii. VEL Payrate
 - c. Adapting Content for SP and Learner
 - i. Setting and Situation
 - ii. Change to CS evaluations?
 - d. Alternatives to In-person PE exams
 - i. Suggested Language for Narrative Style
 - e. Creative training ideas with Zoom
 - i. Social meeting setups for SPs –
 - ii. Social hour meetups
2. Learner Preparation
 - a. Instruction Packet Example for Zoom and SimIQ
 - i. As of 4/7/2020 – moving forward with integrated SimIQ Telemedicine product
 - ii. Could be delivered as document, PPT with voiceover, movie
 - b. Doorway Information / Instruction Sheet
3. Scheduling the Students
 - a. Creating Meeting Links
 - b. Using mail merge to send Zoom links
4. A Note on Slides from Presentation
 - a. 4/7/2020 Update – NYIT-COM will now be recording encounters using SimIQ integrated platform
 - b. Clarification – on Friday 4/3/2020 Zoom removed the “file share during chat” function, but screen share is still available

1. SP Training

a. **Technology Survey Example**, developed by Lisa Cullen <https://forms.gle/ijbnfCbGgCBBQYym7>

b. **Zoom Skills Proficiency Slide**

<u>Proficiency Level</u>	<u>Types of Programs</u>
<ul style="list-style-type: none"> - Basic Zoom Skills for the SP <ul style="list-style-type: none"> - join a call with video and microphone on - toggle video/microphone on/off - schedule a meeting - use chat function to text 	Programs requiring history, narrative physical, feedback <ul style="list-style-type: none"> - Basic A/V problems with learner could be troubleshooted with text function
<ul style="list-style-type: none"> - Moderate Zoom Skills for the SP <ul style="list-style-type: none"> - manage multiple windows - screen share documents - manage waiting room - use chat function to file share ** 	Programs requiring live, dynamic delivery of materials to learner (e.g. patient information, PE results - files, images, audio/video - post encounter exercise, etc), observers
<ul style="list-style-type: none"> - Advanced Zoom Skills for the SP <ul style="list-style-type: none"> - move in and out of breakout rooms - use chat function to file share** - conduct a poll 	Could be employed as Virtual Encounter Leader (VEL) backup facilitator, Zoom skills trainer, observer

- i. **Role of the Virtual Encounter Leader** – Crucial part of process to get quickly prepared
 1. The VELs were selected after identifying SPs who were self-motivated, quick learning, and who demonstrated proficiency and problem-solving
 2. VELs were assigned a group of 6 and asked to facilitate practice meetings.
 3. In a small group, each SP had opportunity to practice virtual encounters and become proficient in skills necessary to host their own encounter. Each group of 6 put on their own Beta Test, which were then attended by SP trainers.
- ii. Information about VEL payrate is not available

c. Adapting Content for SP and Learner

- iii. Setting and Situation
 1. Telehealth
 2. Remote Clinical Encounter
 3. Closure / Next Steps need to be understood for participant
 4. Role of Vitals – Do we need to explain how they're ascertained?
- iv. Changes to CS evaluations? –

1. We are evaluating CS skills in a formative assessment
2. We are reviewing our PARS dimensions to identify what items become obsolete in virtual encounters and how to address issues such as eye contact.
 - a. E.g. interpreting the difference between attempted eye contact (even if not looking straight into lens) and looking into notes
 - b. Training SPs on adjusted dimensions will be in online module

d. Alternatives to In-person PE exams

Suggestions for Physical Exams

During COVID-19:

- Inability to reliably assess psychomotor skills.
- Demonstrating on themselves or others is not safe or recommended.

Other Applications:

- Telehealth/Remote Clinical Encounters could include an in-person rater on whom exams could be done/assessed

So what about right now?

Suggestions for Physical Exams - 2

Rate the participant's demonstration of knowledge of the exam:

- Knows what test: (*"Now I'd like to do a(n) _____."*)
- Knows what test and how: (*"Now I'd like to do a(n) _____ by ____."*)
- Knows what test and how and why:
(*"In order to see x, I'd like to do a(n) _____ by ____."*)

Suggestions for Physical Exams - 3

Delivery of findings to participant could be :

- Written findings card (sent in email or in-meeting file)
- Image, audio, or video file of findings to synthesize, report
- Verbal findings from SP
 - "narrative style" from patient voice (e.g. *"You would see my eyes are swollen and puffy and there is discharge from my right eye."*)
 - "report" style, with jargon
 - Cons: can break patient/participant roles & create awkward remainder of encounter

SP Training for PE Results in Narrative Style

Suggested language

Participant says," Now I would..."	What SP says,"..."
inspect your head/face	I've noticed some swelling around my eyes.
palpate your sinuses	It feels tender at my forehead and cheeks if you press on them.
inspect your eyes	There is no tearing and no discharge; they're a little red.
inspect your nose	I have a yellow, runny nose. (mucus is yellow)
inspect your mouth (or throat)	The back of my throat is dry, cracked and red, and you'd see signs of post-nasal drip.
palpate your neck	Everything's normal
palpate your chest	Everything's normal
listen to your lungs	Everything's normal
listen to your heart	Everything's normal
examine your abdomen	Everything's normal
inspect your extremities	Everything's normal
do a neuro exam	Everything's normal

e. Creative training ideas with Zoom

- i. SP Scheduled Social Meetings
 1. SP demonstrated ability to schedule a meeting, invite others, bring people in from waiting room, screen share, chat (paid 2 hours after meeting completed.)
 2. Created SP lifeline during a difficult few weeks
- ii. Small group meetups with Virtual Encounter Learning

2. Learner Preparation

- a. Instruction Packet Example for Zoom and SimIQ
 - i. As of 4/7/2020 – moving forward with integrated SimIQ Telemedicine product
 - ii. Could be delivered as document, PPT with voiceover, movie
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LEARNER INSTRUCTION GUIDE | Telehealth Encounters 2020 Using Zoom and (non-integrated) SimIQ

For questions please email Contact Name @ Contact Email and include your phone number.

You are encouraged to print this out and have as reference during the encounter.

During this simulated experience you will:

- **Conduct an interview/exam with an SP in 1 telehealth encounter,**
- **Type a 9-minute SOAP note in SimIQ,**
- **Receive SP feedback,**
- **Write a post-encounter reflection.**

This document addresses:

- I. **Important Notes for Telehealth Encounters with the ICC**
- II. **Steps to take from beginning to end**
- III. **Reference: How to Access and Use SimIQ to Write SOAP Notes**
- IV. **Summary of Steps**

I. Important Notes For Telemedicine Encounters with the ICC

- a. Requirements:
 - i. A device with a webcam for video and microphone for audio
 - ii. Strong internet connection
 - iii. A space to work that is well-lit and quiet, with a simple background
 - iv. Basic proficiency with Zoom (must be able to join a call)
 - v. Adherence to the NYIT Integrity Policy
 1. The encounters will not be recorded
 2. NO recording of any kind is permissible
 - vi. Your School ID
- b. Setting:
 - i. You are receiving a video conference call from a patient's home
 - ii. You may introduce yourself as an OMS3 or a PGY1
 - iii. The patient may have access to self-monitoring equipment

II. Step by Step Instructions

- a. **Once you have received the email with your Zoom link,**
 - i. test Zoom on your computer (<https://zoom.us/test>)
 - ii. review telemedicine etiquette (camera position, framing, lighting, noise, no food/drink, neutral/professional clothing)
- b. **5 minutes before your scheduled time –**
 - i. login to SimulationIQ (<http://nyit.simulationiq.com>)
 - ii. minimize the window
 - iii. click on the Zoom link in your email
- c. **at your scheduled time**
 - i. join the meeting
 - ii. you will be pre-briefed by a facilitator where you can ask any questions and we will test your audio
 - iii. the facilitator will “move you” into the SP encounter (3:30pm)
- d. **once in the SP room,**
 - i. read the instructions on the screen
 - ii. say “OK” when done with the instructions
 - iii. read the doorway information – **your 14 minutes begins now**
 - iv. write down any information you will need for your SOAP note
- e. **during the 14-minute encounter,**
 - i. conduct the history portion of the interview
 - ii. demonstrate your knowledge of the physical exam maneuvers by telling the patient what maneuvers **you would do**.
 1. Once you tell the patient what maneuver **you would do**, the patient will respond with the findings.
 - 1) Example A:
 - i. Student: *“At this time I would do a physical examination. I would start by looking into your eyes with an ophthalmoscope.”*
 - ii. Patient: “Everything’s normal.”
 - 2) Example B:
 - i. Student: *“At this time I would palpate your abdomen in the upper left, upper right, lower right and lower left quadrants.”*
 - ii. Patient: “If you palpated deeply in my lower left quadrant, I would wince and report tenderness.”
 - iii. If clinically indicated, demonstrate your knowledge about OMT
 1. Define OMT
 2. Discuss how it might help the patient’s complaint
 3. Discuss what techniques you would use
 - iv. when 2 minutes are remaining, the patient will say, “I have to get off the call in 2 minutes.” (This serves as your 2-minute warning.)
 - v. at the end of 14 minutes, the SP will say, “I have to get off the call now,” and you will hear an alarm.

- f. **After the 14-minute encounter -**
 - i. minimize your Zoom window and click over to SimIQ
 - ii. click “Evaluate” on the SOAP note link that appears
 - iii. this begins the 9:00 minute timer
 - iv. type your 9:00 minute SOAP note
- g. **When you are finished with your SOAP note -**
 - i. verbalize that you are ready to continue the call with the patient to debrief the encounter and the SP will return into view
- h. **When the SP feedback is over,** you will then be moved into a debrief session with the facilitator who will provide you with the post-encounter exercise instructions.

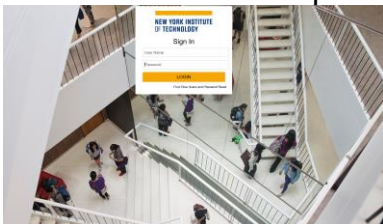
III. How to Access and Use SimIQ to write SOAP Notes

a. Go to SimIQ <http://nyit.simulationiq.com>

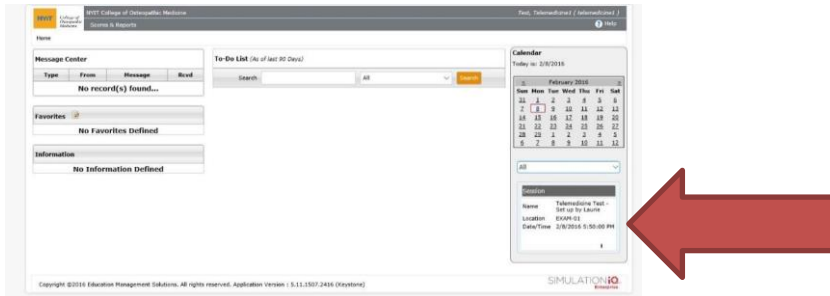
b. Click on the gold horizontal bar “NYITCOM Login”



c. This will take you to the NYIT Single Sign On Page. Use your NYITCOM username and password

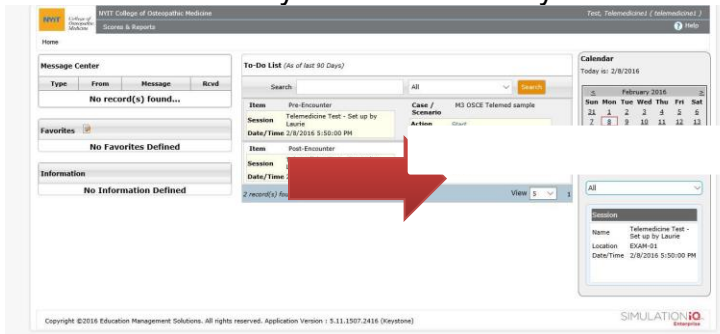


This is the SimIQ homepage which you'll see after successfully logging in through the NYIT-COM site. (The arrow indicates your upcoming scheduled session)

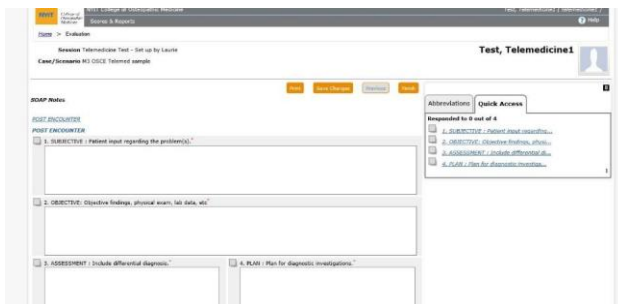


d. At the session time, (but NOT before), you'll see a POST-ENCOUNTER link (RED arrow) appear on the screen (if you don't see it by the time of the scheduled session, refresh your browser)

e. This is what you'll click to start your SOAP note after your encounter



f. You'll have 9 minutes to complete your SOAP.



g. When you have completed the SOAP note,

- click "Finish"
- Return to the Zoom software to continue the video call for feedback

IV. To Review –

- 5 minutes before your scheduled meeting time, login to SimIQ
- Click on the invitation link in the email (check the time of the meeting)

- c. After you connect to Zoom, you'll be prompted to connect audio using your computer. Click OK. This means you'll be using your microphone for audio.
 - d. When you start the Zoom meeting, if you see a message saying "please wait for host to start meeting" it means the ICC hasn't started the meeting yet.
 - e. When the facilitator starts the meeting, you'll be connected
 - f. Pre-brief with the facilitator
 - g. You'll be moved into an "exam room"
 - h. Read the instructions that appear on the screen.
 - i. Say OK
 - j. Read the doorway (Your 14 minutes begins now)
 - k. Conduct a history, go through the physical exam
 - l. You'll hear a 2-minute warning at 12 minutes (*"I'm going to have to get off in 2 minutes."*)
 - m. The SP will alert you when the 14 minutes is up by saying, *"I'm going to have to go now."*
 - n. At the conclusion of the call, do not disconnect
 - o. Go to SimIQ - press EVALUATE to begin your 9- minute SOAP note
 - p. After the SOAP note is completed, return to Zoom for SP feedback (10 minutes)
 - q. When the SP feedback is over you'll have a debrief with the facilitator (10 minutes).
 - r. Following that debrief (10 minutes), hover your mouse on the bottom right of the image. Click on leave meeting then click on leave meeting again.
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b. Doorway Information / Instruction Sheet

Virtual Encounter Instructions	PATIENT INFORMATION
Welcome,	Patient Name
Before you meet your patient, you will have 1 minute to review the doorway information.	Treatment Setting Telehealth Encounter
Transpose necessary information into your notes.	Reason For Visit This 48-year-old female complains of not feeling well.
Once your patient arrives, begin your encounter.	Patient information / Vital Signs / Self-Reported
You will have 14 minutes to take your patient's history and verbalize your intended physical exam. There will be a verbalized 2-minute warning.	<u>Height</u> 5'4"
After leaving this encounter you will have 9 minutes to complete your SOAP note. Login to <u>SimIQ</u> as usual to access your SOAP note.	<u>Weight</u> 215 lbs.
<u>Be sure to start with video. Ensure your microphone is not muted.</u>	<u>BMI</u> 36.9
In compliance with HIPAA, your device and your surroundings should be secure.	<u>BP</u> 110/78
<ul style="list-style-type: none">• No recording or picture taking.• No one else in your room. 	<u>Temp</u> 99.9°F
Please say "Ok" once you have read and understand these instructions.	Directions: You have 14 minutes to examine the patient. Following the examination, you will have 9 minutes to complete a SOAP note.
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3. Scheduling the Students

- a. Creating Meeting Links
 - i. Each SP using NYIT Zoom Account
 - ii. Personal Zoom ID will be their own 'exam room'
 - iii. Students are sent the zoom meeting link and time of encounter
 - iv. SP will need to manage waiting room if student arrives early
- b. Using mail merge to send Zoom links
 - i. Students will be emailed their date/time and Zoom link in a mail merge document

4. A Note about Slides from Presentation

- c. 4/7/2020 Update – NYIT-COM will now be recording encounters using SimIQ integrated platform
- d. Clarification – on Friday 4/3/2020 Zoom removed the "file share during chat" function, but screen share is still available