

## ACCESSING THE VIRTUAL VISIT TEMPLATE AND LINKING IT TO A VIRTUAL VISIT APPOINTMENT TYPE

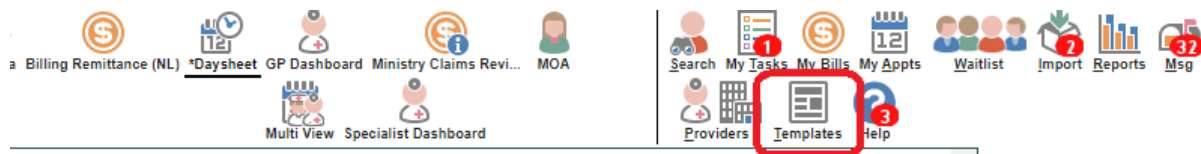
For Virtual Care Appointments (Phone, Video, and/or Secure Messaging, etc.)

Please note that you will only be able to access these routines if Template Admin and Application Admin are set to “Allow” in your Profile – Permissions – General tab. If you do not have access, please contact the appropriate person in your clinic who has ADMIN access.

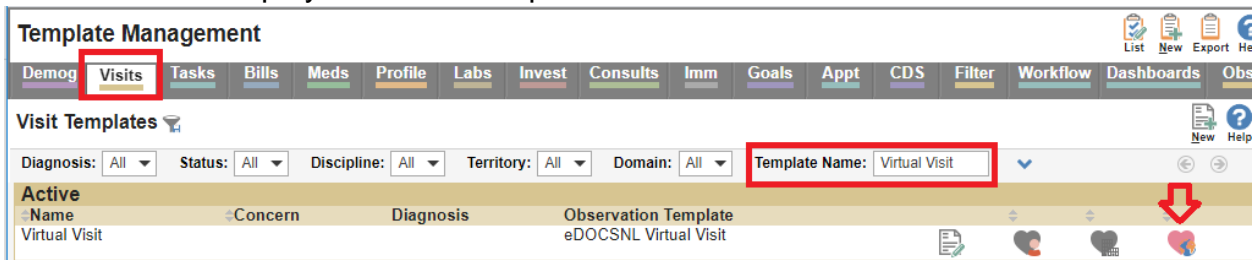
This documentation is based on the visit being done over the telephone (or other virtual technologies) and includes a Virtual Visit Template that is linked to an Appointment Type.

### TO SET UP THE VIRTUAL VISIT TEMPLATE:

1. In Med Access, click on the **Templates** button in the upper right corner of your dashboard:



2. A. Click on the **Visits** tab and type in **Virtual Visit** in the **Template Name** field and Enter. This will display the below template:



- B. Click on the **heart** farthest to the right on this template. It is now a “clinic favorite” and will be available to all applicable users in your EMR.
- C. Return to your main Dashboard by closing the Template screen.

## TO SET UP THE VIRTUAL VISIT APPOINTMENT TYPE(S):

- A. From your Dashboard, click on the **Tools** icon in the right hand corner of the Daysheet (Appointment schedule):



- B. From **Tools**, hover on **Appointment Setup** and then move your mouse over click on **Appointment Types**.
- C. In the **Appointment Types** screen select **New** in the upper right hand corner of the screen:

Appointment Types Management






- D. In the new appointment window name the **Appointment Type** (i.e. **Virtual Visit**) and complete the fields as shown in the screen show below:

Create Appointment Type

Name*	Virtual Visit
Duration*	10 (minutes)
Sort Order	0
Colour	Light Red
Can't Overlap	<input type="checkbox"/>
Max Per Day	
Multi-Patient Appointment	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>
Self-Bookable	<input type="checkbox"/>
Edit Privilege	Public
Use Privilege	Public

**Note:** if required, users can make additional or more specific Appointment Types to meet their clinic's needs, such as a **Virtual Visit by Phone** or a **Virtual Visit by Video** (as examples). For each Virtual Appointment Type, attach the **\*Virtual Visit Template** as instructed in E. below.

- E. The **Visit Template** (\*Virtual Visit) that was made a clinic favorite (above) needs to be attached to this Appointment Type. In the **Visit Template** field in the Appointment Type, click on the pull-down arrow and select the **\*Virtual Visit** Template:

Name*	Virtual Visit
Duration*	10 (minutes)
Sort Order	0
Colour	Light Red 
Can't Overlap	<input type="checkbox"/>
Max Per Day	
Multi-Patient Appointment	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>
Self-Bookable	<input type="checkbox"/>
Edit Privilege	Public
Use Privilege	Public
Resource	
Equipment	
Room	
Facility	 
Billing Template	
Task Template	
Visit Template	*Virtual Visit
Workflow Step	
Concern	
Appointment Notes	
Critical	<input type="checkbox"/>

Save

- F. Click on the **Save** button at the bottom left of the Appointment Type:  
 G. The Appointment Type and Virtual Visit template is now ready to be used.

**IF NECESSARY, PROCEED TO DOCUMENT CALLED “[eDOCSNL VIRTUAL CARE DOCUMENTATION](#)” FOR DETAILED INSTRUCTIONS ON HOW TO USE THE VIRTUAL VISIT TO SUPPORT A PATIENT VISIT OVER THE TELEPHONE**