

# Montana Pediatrics + Rocky Boy Health Center

## Standard Operating Procedures

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# 01. Refyne Connected Care (RCC) - The Basics

## a. What is Refyne Connected Care (RCC)?

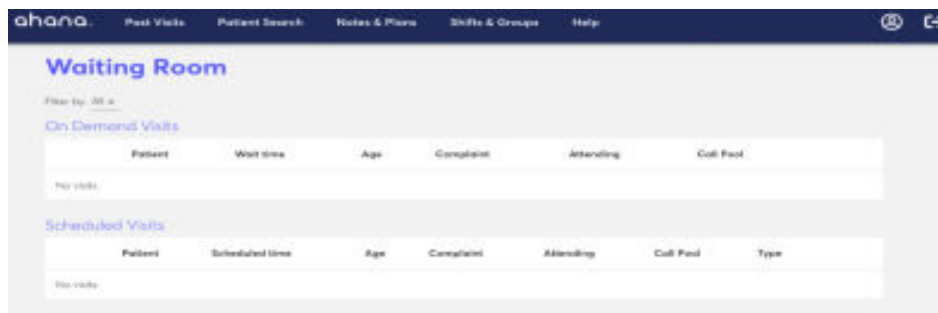
RCC is the telemedicine platform Montana Pediatrics providers utilize to perform a telemedicine visit. It is NOT an EMR. This platform can be used by both professionals (your clinic staff and our providers) as well as guardians of children to request, document, visualize, communicate, and complete a telemedicine visit.

For Rocky Boy Health Clinic, your access point will be located at: [www.rockyboykids.org](http://www.rockyboykids.org).

## b. Logging in to RCC

1. Your administrator will provide you with your clinic's address and password to log into RCC.
2. Navigate to [www.rockyboykids.org](http://www.rockyboykids.org)
3. Click the Log In or Sign Up button
4. You will be guided to the RCC platform
5. Enter in the email address and password associated with your clinic.
6. Congratulations! You are now in the "Waiting Room" of the RCC telemedicine platform

What you will see:



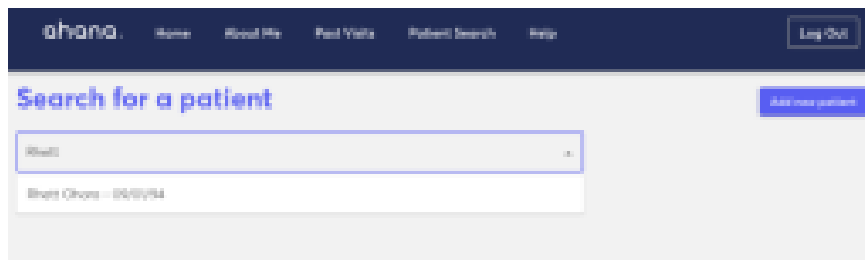
In the "On Demand" section, you can view patients who are waiting for a visit from the Montana Pediatrics (MTP) provider who is on call for telemedicine visits. In the "Scheduled Visits" section you will see any upcoming scheduled visits.

### c. How to search for a patient

1. On the home page, click the “Patient Search” button in the top blue ribbon.
2. Type in at least (3) letters of the first or last name.
3. If the patient is in RCC, the name will appear below the search box. Click on the name to access their profile card.

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What you will see:



If the patient isn't available to choose from, you will have to create a new patient! To do so, you will need access to the patient's basic information in your EMR or check-in paperwork.

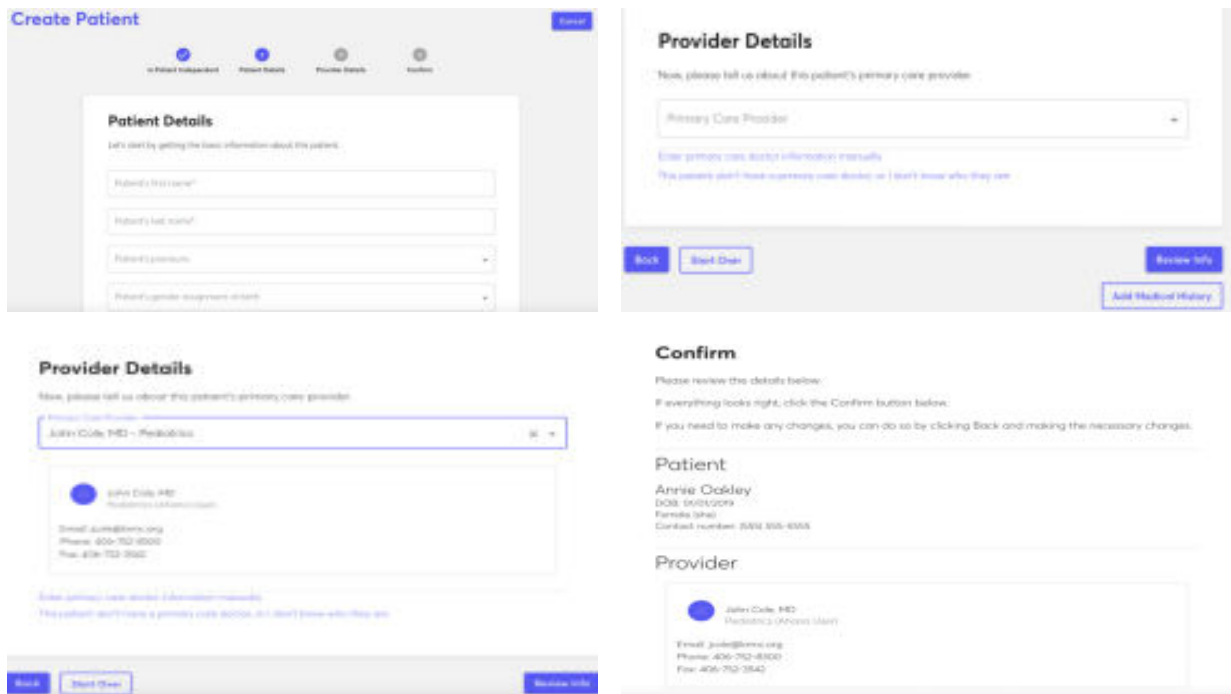
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### d. How to add a new patient

1. Click on the “Add New Patient” button
2. You will be taken to the “Create Patient” screen in which you will be asked to complete a 4 step process to add a patient
3. Step 1: Enter in the patient details
  - a. These details should be readily available to you either in your clinic's EMR or provided by the guardian of the patient verbally
  - b. Click on the “Next” button
  - c. You will be taken to the “Connected Logins” page
4. Step 2: If the patient has a guardian with them, you can ask the guardian for an email address should they want to be connected to the patient electronically. See G for more details. *This step is OPTIONAL. If you do not have access to this information, click the “Next” button and skip to step 3. You will be taken to the “Provider Details” page.*
  - a. Click on the “Add Connected Login” button
  - b. Type in the connected login's (guardian's) relationship e.g. Mom, Dad, Aunt, Uncle, etc.
  - c. Type in the connected login's (guardian's) email address
  - d. Click the “Submit” button
  - e. Click the “Next” button

- f. You will be taken to the “Provider Details” page
5. Step 3: Enter in the patient’s PCP details
  - a. Click in the “Primary Care Provider” box in the center of the screen.
  - b. Type in the last name of the provider who is the child’s PCP
  - c. You may see more than one option, be sure to choose the provider who is at your clinic!
  - d. Click on the “Review Info” button
  - e. You will be taken to the “Confirm” page
  - f. Look over the information and confirm by clicking on the “Confirm” button
  - g. You will be taken to the patient’s information card and you have successfully added a new patient

What you will see:



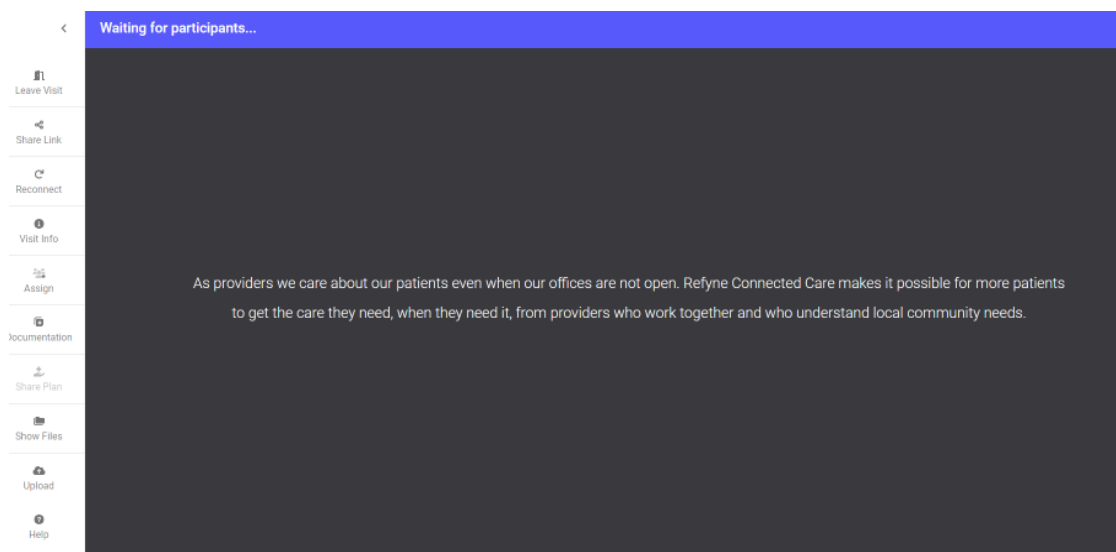
### e. How to request an “on demand” visit

1. Login to RCC
2. Click on “Patient Search”
  - a. Add patient if the patient isn’t searchable
3. Click on the patient name
  - a. You will be taken to the patient information card

4. Click on “Create Visit” below the patient’s card
  - a. You will be taken to the “Create Visit” page
5. Under “Visit Type” click the “On Demand” button
6. Click “Next”
  - a. You will be taken to the “Visit Details” page
7. Fill out as much information as needed. The reason for the visit is typically the chief complaint.
8. Click “Next”
  - a. You will be taken to the “Provider Group” page
9. Click on “Rocky Boy Pediatric Telemedicine” group
  - a. You will be taken to the “Confirmation Page”
10. Click “Confirm” - *This will alert the on-call provider*
  - a. You will be taken back to the “Patient Information Card” page where you will now see the visit listed under the “On Demand” section under the patient’s card.
  - b. You will see the patient name, how long they have been waiting, the age, compliant, attending, provider group, and the telemedicine endpoint, which is RCC.
11. Click on the “Join Visit” button to the left of the patient’s name
  - a. You will be taken to a testing screen where you will be asked to:
    - i. Make sure you can see yourself
      1. Click “yes”
    - ii. Make sure the computer can hear you
      1. Click “yes”
    - iii. Make sure you can hear the computer
      1. Click “yes”
    - iv. You will be taken to the “Exam Room” page

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## What you will see when waiting for a provider



## f. How to set up a “scheduled visit”

1. Login to RCC
2. Click on “Patient Search”
  - a. Add a new patient if the patient isn’t searchable
3. Click on the patient name
  - a. You will be taken to the patient information card
4. Click on “Create Visit” below the patient’s card
  - a. You will be taken to the “Provider” page
5. Click on the drop down and select the Montana Pediatrics provider you would like to schedule with
  - a. Click “Next”
6. Enter in the date, time, and reason for the visit under the “notes” section
  - a. Click “Next”
7. You will be taken to the “Provider Group” page
  - a. Click on “Rocky Boy Pediatric Telemedicine” group
8. You will be taken to the “Confirmation Page”
  - a. Click “Confirm”
  - b. You will be taken back to the “Patient Information Card” page where you will now see the visit listed under the “Scheduled” section under the patient’s card.
    - i. You will see the patient name, when the visit is scheduled for, the age, compliant, attending, provider group, and the telemedicine endpoint, which is RCC.
    - ii. *Ensure that this visit is included in your clinic’s reminder system for patient visits, whether than be a card reminder or a phone call reminder!*

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## What you will see

The screenshot shows a patient information card for 'Test Tester, 5y' with details: Female (she), DOB: 04/04/2018, PCP: Not given, Allergies: Unknown, Patient Id: 5516. Below the card are buttons for 'Create Shared Care Plan', 'View Files', 'All Patient Forms', and 'Create Visit'. The 'On Demand Visits' section is empty. The 'Scheduled Visits' section contains one entry:

Patient	Scheduled time	Age	Complaint	Attending	Provider Group	Telemedicine Endpoint
<a href="#">New visit</a> Test Tester	05/14/2023 5:43 AM	5 years	TESTING	John Cole	Rocky Boy's Pediatric Telemedicine	Ahana

At the bottom of the screenshot, there is a 'Waiting Room' button.

## g. How to add a connected login and what it means

A connected login is a family member's and/or guardian's way of accessing the RCC platform. The login you help create for them can be utilized by the family to seek after-hours care for their child when the clinic is closed.

1. You can add a connected login during the process of creating a new patient during Step 2, the "Connected Logins" step.
2. Click on the "Add Connected Login" button
  - a. You will be taken to the "Invite Connected Login" screen.
3. Enter the connected login's relationship to the patient
4. Enter in the connected login's email address
  - a. Press the "Submit" button
    - i. This will send an invitation email to the connected login, asking them to create an account and password.
    - ii. Remind the guardian that this email will be in their inbox and to follow the prompts to create an account!
5. You can also add a connected login by searching for the patient whom you want to connect a guardian with.
  - a. Choose the correct patient by clicking on the name
    - i. You will be taken to the patient's information card.
    - ii. On the right hand side you will see a "Connected Logins" area with a "Plus" button next to it.
    - iii. Click on the "Plus" button.
    - iv. You will be taken to the "Invite Connected Login" screen. Follow step 2 - 4 to complete adding the guardian to the patient's account.

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## What you will see

Invite Connected Login

To connect a Login to this patient, please enter their email address and relationship description below

Connected Login's Relationship \*

Search for someone already in the system

Enter email for new user

Invite

## 02. Being a telepresenter for Montana Pediatrics' providers

### a. What is telepresenting?

Telepresenting is much like checking in patients for an in-person visit. You will partner with patients and their families while they are seeking care via telemedicine, and you will also help the provider with tasks related to patient care. With Montana Pediatrics providers performing telemedicine in your clinic, you will utilize your own clinic's processes to schedule, check-in, and obtain baseline vitals. You will then hand off the patient to the provider once they join the visit. The telepresenter is a vital piece to telemedicine - the link between the patient and the provider and without whom the visit would not take place.

### b. Checking in a patient

1. On-Demand - ensure that the Montana Pediatrics laptop is charged and ready to use when a walk-in patient arrives at the clinic.
2. The patient should check in just like your regular in-person visits.
3. Walk the patient back to the identified room where the telemedicine visit will take place
  - a. Remember to grab the MTP laptop!
4. Log into RCC
5. Request an "On Demand" visit as referenced in this SOP
6. While waiting for the provider, perform your baseline vitals and gather subjective information just as you would when checking in a patient for an in-person visit
  - a. It may be helpful to document the values of the vitals and reason for visit on paper so you can repeat them easily for the provider once they appear for the telemedicine visit
  - b. Sit with the patient until the provider joins the visit. *This should take no longer than 10 minutes! If it does, please call 406-272-4631 to let us know.*
  - c. Once the provider joins the visit, introduce yourself "Hello, my name is [title followed by your name], this is [patient name with their guardian name] they are here for [chief complaint]" it is also helpful, but not necessary to clarify how the patient is related to the guardian.
  - d. The provider will introduce themselves to the child and/or family members and will ask you to verbally repeat the baseline vitals you took while checking in the patient.
  - e. During the visit, the provider may ask you to perform duties to assist with the exam. These will not exceed your licensure or comfort level.



- f. *There may be times in which a private visit is necessary. If this is requested by the provider and/or minor, please refer to 3b of this SOP.*
7. Check out the patient following your internal procedures.

### c. Accessing a scheduled visit

The physical check in process for a scheduled visit is exactly the same as an urgent care visit. The only difference is how you access the visit. Instead of requesting an on-demand visit, you will locate and join the scheduled visit. Like an on-demand visit, ensure the Montana Pediatrics laptop is on and charged before checking the patient in.

1. The patient should check-in just like your regular in-person visits
2. Log into RCC
3. Access the "Patient Search" page
4. Search for the patient whom is scheduled
5. Select the correct patient
  - a. You will be taken to the "Patient Information Card" page
  - b. Below the patient's information card, you will see a section for scheduled visits
  - c. Locate the visit the patient is in clinic for. To the left of that scheduled visit, click on the "Join Visit" button
  - d. Follow the prompts on the technology screen and click "yes" under each prompt.
  - e. You will be taken to the "Exam Room" page.
  - f. While waiting for the provider, perform your baseline vitals and gather subjective information just as you would when checking in a patient for an in-person visit
    - i. It may be helpful to document the values of the vitals and reason for visit on paper so you can repeat them easily for the provider once they appear for the telemedicine visit
6. Sit with the patient until the provider joins the visit. *This should take no longer than 10 minutes! If it does, please call 406-272-4631 to let us know*
7. Once the provider joins the visit, introduce yourself "Hello, my name is [title followed by your name], this is [patient name with their guardian name] they are here for [chief complaint]"
8. The provider will introduce themselves to the child and/or family members and will ask you to verbally repeat the baseline vitals you took while checking in the patient.
9. During the visit, the provider may ask you to perform duties to assist with the exam. These will not exceed your licensure or comfort level.
10. You should follow your internal procedure for "checking out" a patient when they have completed a visit.

11. *There may be times in which a private visit is necessary. If this is requested by the provider and/or minor, please refer to 3b of this SOP.*

#### **d. Interacting with the providers**

All Montana Pediatrics providers are well versed and very comfortable with telemedicine. They love to teach and interact with staff just like an in-person provider. Interacting with the providers via telemedicine will take some getting used to, but it will not take long before you have a strong professional relationship with our providers through the telemedicine platform.

1. Aiding the provider in a visit
  - a.** Vitals - Blood pressure, pulse oximeter, heart rate, respirations, and temperature are necessary baseline vitals to capture for the telemedicine visit. Develop a system that works for you so you are able to remember the numbers once the provider joins the visit.
  - b.** Additional Testing - some providers may order additional testing. The tests will be very similar to the type of tests an in-person provider might order. Your clinic will utilize your internal process for verbal orders to accomplish this task from the providers.
  - c.** Additional vitals - the provider may ask you to look up the weight or weigh the patient while you are in the room with them. If your clinic does not yet have a telemedicine stethoscope, the provider may ask for a RN to join the visit so they can utilize your clinic's tools to aid in their assessment.
  - d.** Expanding an assessment - In some cases, patients will require more "hands on" interaction to adequately treat the patient. Sometimes, the provider may ask a MA or RN to join the visit to aid in the physical examination of the patient.
2. Honoring the patient's medical home
  - a.** We're not a PCP - Montana Pediatrics providers are not primary care providers. They aid your clinic in expanding your community's access to high-quality pediatric-specific telemedicine.
  - b.** Follow-up care and test result routing - When we see a patient in your clinic, all the notes and follow up recommendations are automatically forwarded to your providers and clinic administration. We prefer that any testing associated with a Montana Pediatrics visit is routed to the patient's primary care provider for review and any follow-up that may be needed.

### e. Specialty provider scheduling

As more of Montana Pediatrics providers are credentialed in your clinic, you will have access to schedule with our specialty providers. A list of those providers will be provided to your leaders as they come onboard. Referrals to our providers can come from Montana Pediatrics providers or Rocky Boy providers.

1. If a referral is requested, navigate to [www.rockyboykids.org](http://www.rockyboykids.org)
2. Under the log in or sign up button, there will be a link to referrals
  - a. Click on “referral request”
  - b. You will be guided to our referral request landing page
3. Fill out all the details on the page and click submit
  - a. This will send an email to our operations team, at which time they will arrange the referral appointment directly with the patient.

## 03. Using the telemedicine tools

Peripherals are stethoscopes, otoscopes, and other telemedicine enabled tools which can be connected to the computer to give providers a more comprehensive assessment of the patient.

### a. Using the JedMed Horus-Scope

The JedMed Horus-Scope information sheet is located in the back of this SOP. Please refer to that document to familiarize yourself with the scope.

1. If the provider requests utilization of the JedMed Horus-Scope, perform the follow steps to assist the provider
  - a. On the left hand side of the exam room screen you will click on the “Share Link” button.
    - i. A popup window will appear with two options at the bottom, Click on “Secure Swap”
      1. You will be guided to the exam preparation room again.
      2. If the JedMed Scope isn’t plugged in already or not powered on, please do so now.
        - a. Wait for the computer to recognize the scope
      3. Click on the drop down under the video screen and choose “UVC Camera”
        - a. The screen will now show the scope’s view
        - b. Ensure the video you see on the screen is being fed from the JedMed camera.
        - c. Click “Yes” if you confirm this

4. For all other inputs, it stays the same as a regular visit.
  - a. Click “Yes” on the rest of the inputs
- b. Enter the exam room
  - i. Follow the directions of the provider and refer to the Jed Med Information page on how to utilize the device for a telemedicine visit.
  - ii. The provider will speak to you and the patient when you are aiding with the exam. Even after the assessment has been completed, they may continue to speak with you on any next steps.
    1. Do not exit the exam room to switch the camera back to the general camera on the laptop.
    2. The provider will end this visit for you

## **b. Using the Think One Digital Stethoscope**

The Think One Digital Stethoscope information sheet is located in the back of this SOP. Please refer to that document to familiarize yourself with the scope.

2. If the provider requests utilization of the stethoscope, perform the follow steps to assist the provider
  - a. On the left hand side of the exam room screen you will click on the “Share Link” button.
    - i. A popup window will appear with two options at the bottom, Click on “Secure Swap”
      1. You will be guided to the exam preparation room again.
      2. If the stethoscope isn’t plugged in already or not powered on, please do so now.
        - a. Wait for the computer to recognize the scope
      3. Click on the drop down under the microphone input and choose “UVC Camera”
        - a. The microphone will switch to the stethoscope
        - b. Ensure the bars on the screen are moving from the stethoscope by lightly tapping on the drum of the scope and watch for the bars to move.
        - c. Click “Yes” if you confirm this
      4. For all other inputs, it stays the same as a regular visit.
        - a. Click “Yes” on the rest of the inputs
- b. Enter the exam room
  - i. Follow the directions of the provider and refer to the Think One Stethoscope Information page on how to utilize the device for a telemedicine visit.
  - ii. The provider will speak to you and the patient when you are aiding with the exam. Even after the assessment has been

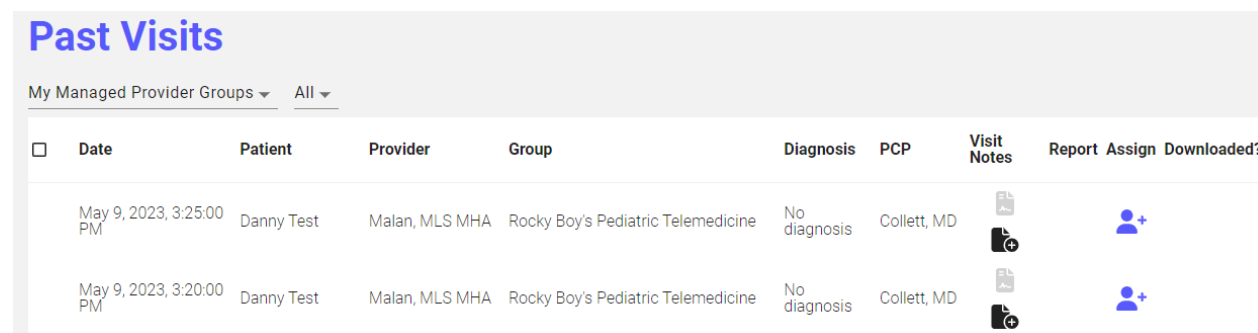
completed, they may continue to speak with you on any next steps.

- iii. Due to the audio input being the stethoscope, you will not be able to speak to the provider through the platform. If needed, call the provider on the phone to speak to him or her (phone numbers located on the resource list on [www.rockyboykids.org](http://www.rockyboykids.org))
  1. Do not exit the exam room to switch the audio back to the general microphone on the laptop.
  2. The provider will end this visit for you

## 04. Managing Montana Pediatrics provider notes

Your clinic representatives will be group managers for Rocky Boys Kids. This means that they will receive a daily email alerting them to completed visits and prompt to log into the RCC system.

1. Log into RCC
2. Along the top of the application, click on the “Past Visits” button
  - a. This will guide you to the “Past Visits” screen
3. Utilizing the dropdown menu under “Past Visits,” choose “My Managed Provider Groups”
4. Leave the second dropdown menu as “All”
  - a. A list will populate with your patient visits who have been seen by a Montana Pediatrics provider in your clinic and are ready for billing



The screenshot shows a web interface titled "Past Visits". At the top, there are two dropdown menus: "My Managed Provider Groups" and "All". Below these is a table with the following columns: "Date", "Patient", "Provider", "Group", "Diagnosis", "PCP", "Visit Notes", "Report", "Assign", and "Downloaded?". The table contains two rows of data, both for a patient named "Danny Test" on May 9, 2023, at 3:25:00 PM and 3:20:00 PM respectively. The provider is "Malan, MLS MHA" and the group is "Rocky Boy's Pediatric Telemedicine". The diagnosis is "No diagnosis" and the PCP is "Collett, MD". The "Visit Notes" column has a document icon with a plus sign, and the "Report" column has a person icon with a plus sign.

<input type="checkbox"/>	Date	Patient	Provider	Group	Diagnosis	PCP	Visit Notes	Report	Assign	Downloaded?
	May 9, 2023, 3:25:00 PM	Danny Test	Malan, MLS MHA	Rocky Boy's Pediatric Telemedicine	No diagnosis	Collett, MD				
	May 9, 2023, 3:20:00 PM	Danny Test	Malan, MLS MHA	Rocky Boy's Pediatric Telemedicine	No diagnosis	Collett, MD				

- b. You will see the date, patient, the MTP provider who saw the child, your group name, main diagnosis, and the PCP (who will more than likely be one of your providers).
    - c. To the right of that, you will see Visit Notes and Report.
5. Click on “Visit” notes next to the patient whom you are getting ready to bill for
  - a. A popup will appear with the visit information.
  - b. Scroll down to the bottom of the screen and click either “Download” or “Print” according to your clinic’s internal procedure for outside visit documentation.

6. Next, Click on “Report” - this will be automatically downloaded.
7. The Visit Notes and the Report combined will be needed to process billing as the visit notes detail the interaction of the visit and the report details the level of visit.
  - a. It may be determined that the “report” isn’t needed in order for your clinic to bill. If that is the case, please disregard number 6.
8. Follow your clinic’s procedure for coding and billing.

## 05. RCC Additional Features

### a. Share Link

A Shared link can be utilized to securely and privately share the visit with another family member or clinician. This can be offered to the family as an option for the other parent to join from a remote location, or if another provider should want to join the visit as well.

1. When in the exam room, look for the share link symbol on the left hand side of the screen.
  - a. Click on the “Share Link” button



Share Link

- b. A pop-up window will appear that contains a secure link to share with anyone who needs access. You can copy and paste it into an email to share.
- c. The individual who has this link will be able to securely join the visit from any device from anywhere!

### b. Secure Swap

Secure swap is utilized only when the provider requests it. It is utilized to lock down the telemedicine platform for when a child is in a visit without a guardian OR a telepresenter present. This is normally utilized for sensitive visits, such as mental health concerns, etc.

1. When the provider requests a secure swap, look for the share link symbol on the left hand side of the screen.
  - a. Click on the “Share Link” button
  - b. A pop-up window will appear that contains two options. Choose “Secure Swap”
  - c. This will guide you back to the exam preparation room. Please perform those checks again and click on the “Enter Exam Room” again

- d. You will be automatically redirected to the exam room. You will notice a reduced amount of buttons on the left hand side of the screen for the child's protection.
  - i. please guide the guardian to the waiting room or nearby sitting area to wait to return to the exam room.
  - ii. Await the end of the exam by staying near the clinic room and check in on the patient periodically until they have completed the visit.
  - iii. Follow any additional requests from the provider should they require it.
- e. The provider will end the visit for you.

### c. Uploading files

RCC allows for file types to be uploaded so the provider can visualize them. These can be videos, documents, or pictures. You can upload files in 2 different ways.

#### 1. Uploading during a visit

- a. While in an exam room, you can upload files. On the left hand side of the screen look for the "upload" button



- b. A pop up will appear, click on "choose file"
- c. Choose the file you wish to upload
  - i. You can only upload files which have already been saved to the laptop
- d. To see the files you have uploaded, click on the "Documentation" button on the left hand side of the screen



#### 2. Uploading to a visit while not in the exam room

- a. When on the patient's information card, you can upload files. Search and select your patient first.
  - i. You will be guided to the patient information page
- b. Click on "View Files" underneath the dark blue card
- c. For general file uploads (those which are not visit specific) make sure you click on the "general" tab

- i. These files will not be visible in the visit exam room and are meant for general information purposes.
- d. Click on the “addition” button to upload a file
- e. For visit-specific uploads, navigate to the “Visits” tab.
  - i. You will see a list of visits associated with this patient
    - 1. Opening the file folder will reveal any previous documents you uploaded
    - 2. To upload to a specific visit, click on the “addition” button
    - 3. Choose the visit you want to upload the file to
    - 4. Follow the prompts to upload your file
    - 5. These files will be available for the provider to view when inside the visit you uploaded them to

## 06. The Rocky Boy landing page

### Navigating your Home Page

1. [www.rockyboykids.org](http://www.rockyboykids.org) is your official landing page where you will find all the information, including this guide, regarding Montana Pediatrics partnership with Rocky Boy Health Center.
2. Resources
  - a. Provider Schedule - Montana Pediatrics is responsible for scheduling providers for shifts. You will have access to visualize the scheduled provider. This is in order to:
    - i. Know who to contact with any questions during the day
    - ii. Communicate with patients on who they will be seeing that day
  - b. Staff Contacts
    - i. We will have all our relevant contact numbers updated here with definitions of who to call for different scenarios
  - c. How-To Videos
    - i. In addition to this manual, you will also have access to “how-to” videos on several different subjects.
  - d. Peripheral Guides
    - i. The information sheets on your peripherals will be located here as well. You can refer to them for troubleshooting and training on the devices.
  - e. Specialist Referral Form
    - i. In order to refer a patient to a specialist, you will utilize this link. Once you submit the form, an alert email will be sent to our offices to help you arrange for a scheduled visit.