Welcome To Your Cisco Extended Care Experience

Cisco Extended Care will allow you and your care team associates to conduct video consultations with your patients through the use of a two-way video (and audio) connection available over various video connection devices, including high-quality video monitors, personal computers, tablets, and smart phones. Your patients can advance schedule their appointments with you or request an unscheduled appointment with any care team member currently in an on-call queue. Cisco Extended Care supports the entry and storage of patient personal healthcare readings and connects your patients with other healthcare resources that your organization elects to embed via Extended Care integration resources.

During an appointment, you can record appointment notes, review historical health readings, and type "chat" messages with your patient. You or your care team can also design patient performance questionnaires that will help you track your patients' self-care behavior.

Warning **Cisco Extended Care is not intended for use in emergency situations. In the event of an emergency, call 911 or your local emergency response system.**

The Appointment Workflow

Follow the sequence of events below to get a general understanding of the appointment work flow between yourself and your patients. "How to" instructions will be presented later in this document.

The Patient Requests the Appointment

Step 1 The patient logs in to Cisco Extended Care.

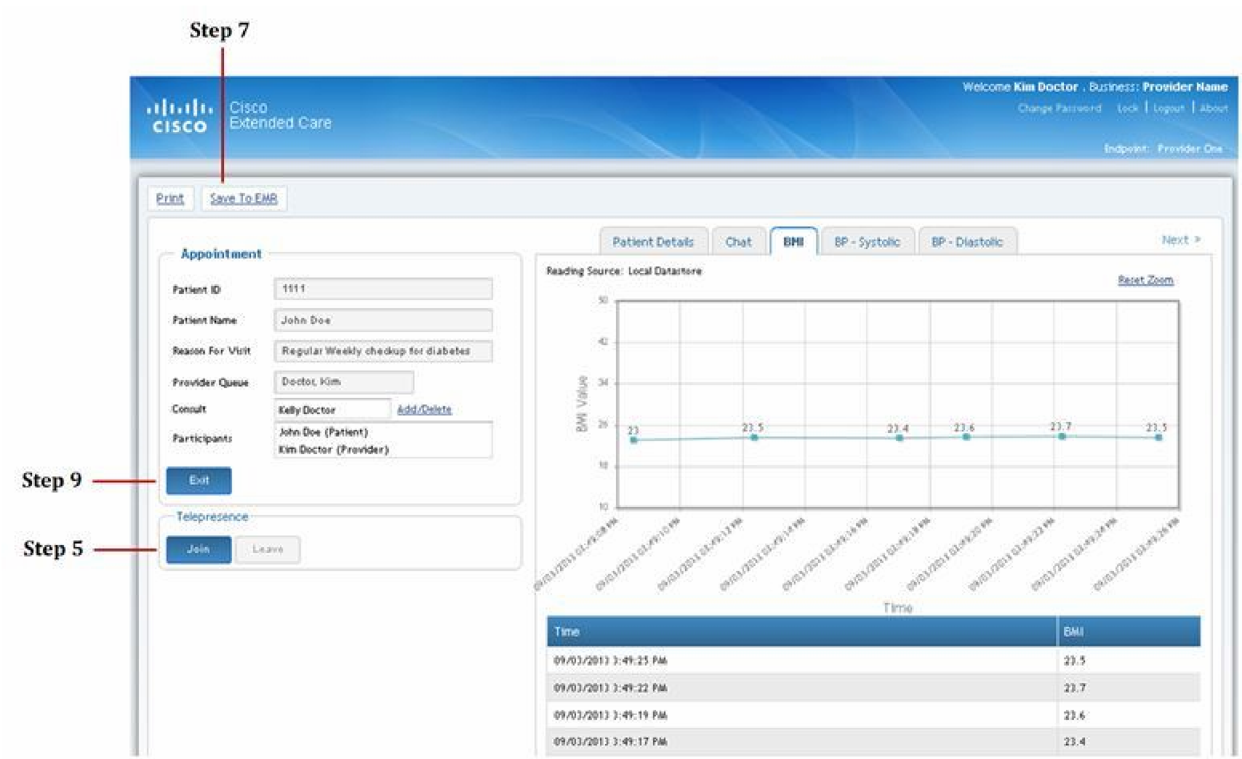
The patient has access to Calendar, Messages, video-based Education, personal healthcare Readings, and personal performance health Questionnaires. Some organizations also provide a link to an application of their own. In the below screen shot, Healthy Living is such a link.

Step 2 The patient can start either a scheduled or an unscheduled (Quick Connect) appointment. Extended Care places the patient in a "virtual waiting room" and alerts the care team provider of the waiting appointment by placing the patient's appointment on the provider's Ready Appointments list.

The Provider Logs In and Selects a "Ready" Appointment

Step 3 The provider logs in to Cisco Extended Care and is presented with a list of "ready" appointments, which may come directly to them or to all members in the patient's Provider Group.

Step 4 When the provider clicks an appointment he or she wants to join, the patient's appointment data and health data are displayed, including a history of health readings and appointment notes. This data is preparatory: no direct interaction with the patient will occur until Step 5 is taken.

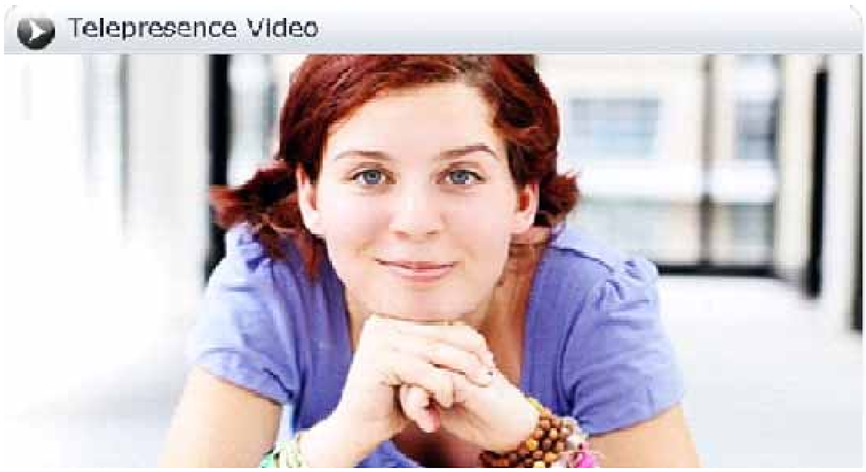


The Provider Joins the Waiting Patient

At this point, the provider should be sure their video device is ready for use.

Extended Care supports the use of multiple video viewing devices, including some high-end devices that do not provide log-in capabilities. If the video device of choice is different than the device that was used to log in to Extended Care, then the provider needs to use the Extended Care screen to select a video device from a drop down menu. For more information, see Getting Your Devices Ready to Connect to Extended Care, page -7.

Step 5 The provider clicks the **JOIN** button to launch the video connection with the patient.



At any time, the provider may close the video window, while still keeping the appointment connection active and the appointment data available for use. When the provider leaves the video call, the patient is placed back in a virtual waiting room and neither the patient nor the provider can see or hear each other. (Live “chat” is still available.)

- To leave the video call, the provider clicks the **Leave** button.
- To restart the video connection, the provider clicks the **Join** button once again.

The Patient Ends Their Connection

Step 6 The patient ends their connection to the appointment.

The Provider Records Notes and Exits the Appointment

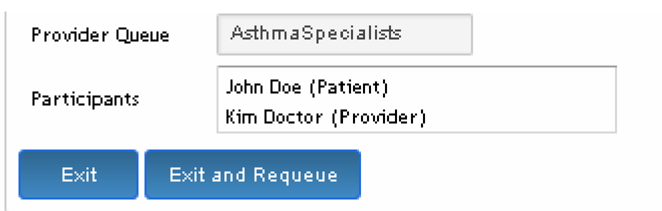
The provider may stay in the appointment screen to complete appointment notes or to send a follow-up message to the patient.

Step 7 The provider *must* save the appointment notes to an external EMR before exiting the appointment; otherwise *the current appointment's notes will be lost.*

Step 8 Before exiting the appointment, the provider may print any of the following appointment items:

- Appointment data
- Chat messages exchanged during the appointment
- Appointment notes
- Patient wellness readings
- Patient's response to the patient performance questionnaire.

Step 9 The provider exits the appointment.



Support for Your Extended Care Experience

Your organization will provide you with contact personnel that will advise you on how to use Extended Care. For the purposes of this document, those contact personnel are referred to as the user/site administrator. The user/site administrator is also responsible for configuring resources in Extended Care that support your experience.

Getting Your Devices Ready to Connect to Extended Care

Before you can access Extended Care, you will need to be sure your video monitor, desktop computer, tablet, or smartphone can communicate with the Extended Care system. For most of the devices you use, your organization will likely have that set up for you. However, if your organization supports mobile devices, and you use a personal mobile device that is compatible with Extended Care, you may need to make some adjustments to ensure the device's performance. Your user/site administrator will help you with that.

You access Extended Care like you would most any web-based application: you enter a web address and enter your Extended Care username and password. Once you are logged in to Extended Care, you will be participating in video conferences with patients and care team members. Connection to these video services is provided by devices that Extended Care refers to as a video "endpoint".

Video Devices (Endpoints)

Cisco supports many types of video endpoints, and the system is designed to allow a care team member to have more than one. Your choice of endpoints will be determined by where you will be conducting your video conferences and also by what endpoints your organization has chosen to make available to you. Once you are inside Extended Care, you will be able to choose from a drop-down list of the endpoints assigned to you.

Some of the endpoints may only be used to connect to your video conference and cannot also be used to log in to Extended Care. These are hardware-based, higher quality video devices that may lack the web browsers required to log in to Extended Care. To use these devices, you will first need to log in to Extended Care with a browser-based device. Once you've logged in, you turn on your higher quality endpoint and then join your video conference.

Note A few of the higher quality hardware endpoints also provide browser capabilities. It is possible that they may give you Extended Care log-in capability, but they have not been tested by Cisco and so *the user employs them at their own risk.*

There is another class of endpoints that is software based. The software endpoints load video access software onto laptops, tablets, and smartphones that you may then use to both log in to Extended Care and to also engage in a video conference.

Get Your Personalized Connection Data

Contact your provider office and ask them for the following personal connection data and record it below. Be sure to keep this information confidential.

Web page address: ____

Your username:____

Your password: ____

Your organization's user/site administrator: ___________________________

Things to Know Before You Log In

Your account will automatically log out of the Extended Care connection if your computer is inactive for too long. The inactive period for your entire installation is set by your user/site administrator. To prevent that from happening, follow these steps.

- Click the **Lock** button in the top right portion of your screen.
  This will lock other people out but allow you to resume where you left off.
- To resume your session, type in your username and password and click **Unlock**.

Tip It is good practice to always lock your open Extended Care window when you leave your computer. This prevents unauthorized access to the application. It also prevents anyone else from seeing patient data. You can unlock the application when you return. You will return to your same location in the application.

Caution If another Extended Care user clicks the Unlock button and types in their own name and password, any active appointment will end and you will be automatically logged out.

Password Issues

Tip If you forget your password, contact your user/site administrator.

To change your password, follow these steps:

Step 1 Click **Change Password** at the top right of the screen.

Step 2 Type your current password, new password, and retyped new password in the boxes provided.

Step 3 Click **Save**.

How To Connect to Extended Care

Step 1 Get Your Personalized Connection Data.

Step 2 Open a browser window and enter the web page address provided by your user/site administrator.

Step 3 When you see the Cisco Extended Care log-in screen, enter your username and password.
Then click **Login**.

- You are now logged in to Extended Care.
- If your video device needs to be manually turned on, do so now.

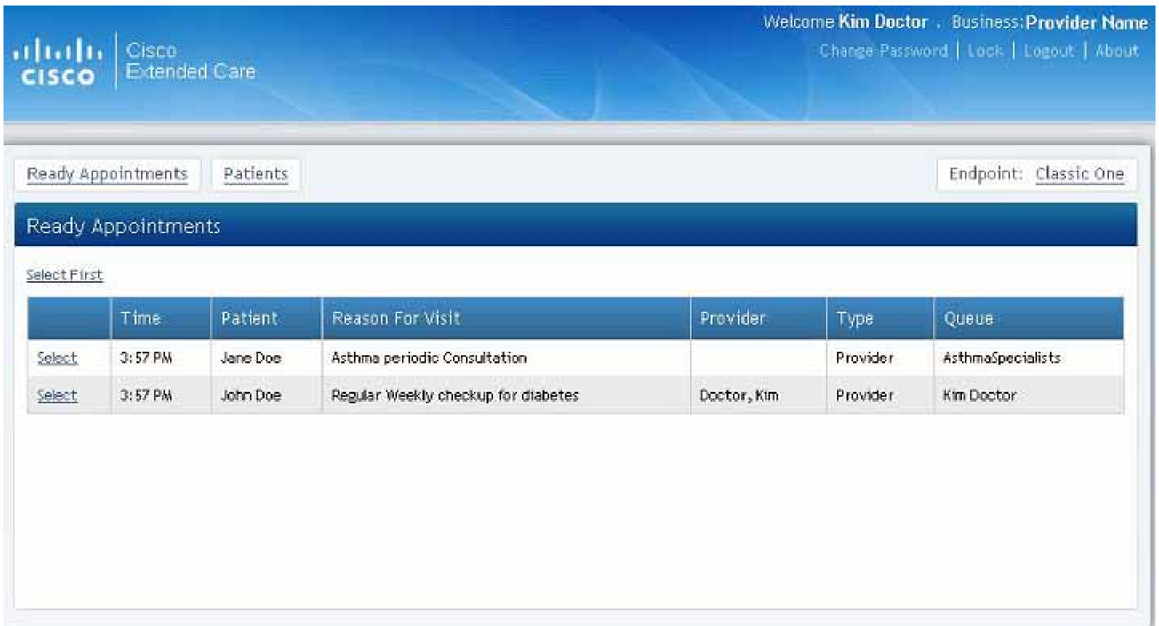
Step 4 Some providers may be provisioned with multiple video viewing devices in different locations.

- If you use only one device to conduct video appointments, then you are fully connected, turned on, and ready to launch a video appointment.

- If you use more than one video device, go to your home screen and find the Endpoint button located in the top-right region just above the Ready Appointments bar.

  Click the **Endpoint** button and select an endpoint from the drop-down list.

What's the First Thing I See?



Endpoint Button (video connection devices)

If your account is configured to allow you video conferencing access from more than one video device, click the **Endpoint** button in the top right corner of your screen and select the endpoint you wish to use. Click **OK** and then **Close** to complete your selection.

Notes:

- Contact your user/site administrator for information about your personalized endpoints.
- For more information on endpoints, see Video Devices (Endpoints).

Ready Appointments Button

The Ready Appointments screen displays waiting patients that are scheduled specifically for you or whom have requested an unscheduled Quick Connect appointment. Quick Connect appointments are displayed in your Ready Appointments screen if the patient is assigned to any of the Provider Groups that you belong to.

Note If your user/site administrator has configured you for email notifications, you should receive an email notification when patients are waiting in either your queue or the Provider Group queue.

The Ready Appointments screen allows you to choose an appointment based on the following criteria:

Select First -	Selects the appointment that was waiting the longest.
Time -	Shows when the appointments are scheduled.
Reason for Visit -	Describes the reason why the patient has scheduled the appointment.
Provider -	• Your name displays here if an appointment was scheduled directly with you. • It is blank if this is an unscheduled "Quick Connect" appointment waiting for someone in the Provider Group to pick it up.
Type -	Displays who's conducting the appointment (provider, presenter etc.) Please see Provider-to-Provider Video Conferencing for more information.
Queue -	• Your name displays here if an appointment was scheduled directly with you. • The relevant Provider Group name displays here if the patient requested an unscheduled Quick Connect appointment.

Patients tab

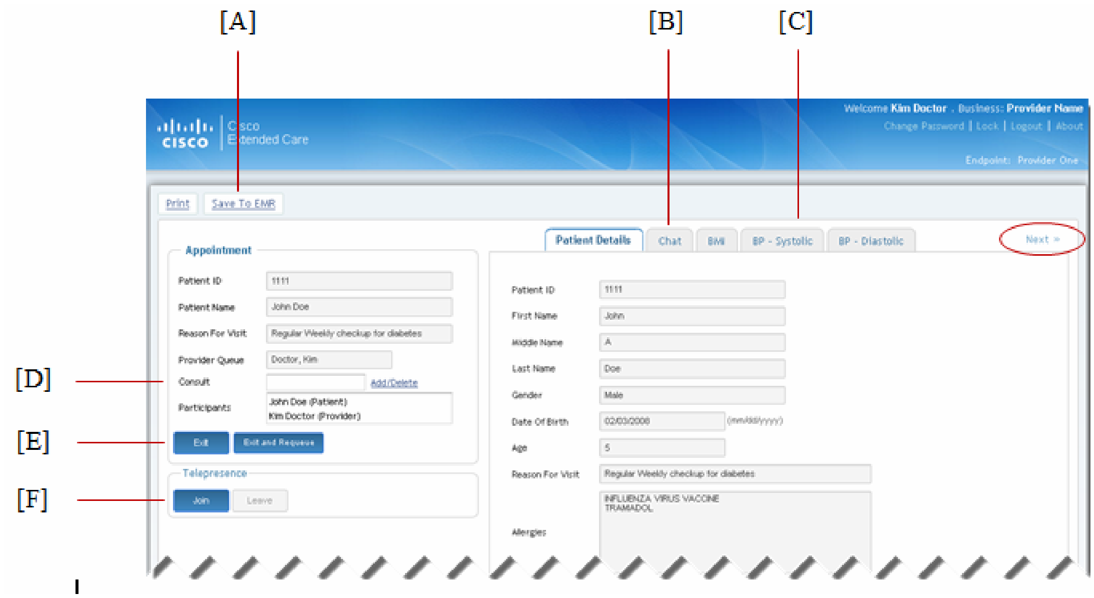
This tab displays the Find Patient screen, which allows you to search and access patient data that is relevant to your Extended Care workflow. The patient data is stored in a database that is external to Extended Care and which is secured and managed by your organization or an affiliate.

You may search on the following criteria:

- Patient ID (This is the ID the external database uses to identify the patient.)
- First Name
- Last Name
- Gender
- Date of Birth

What Can I Do in An Appointment?

The appointment screen displays when you respond to either a scheduled appointment or an appointment that's been placed in your on-call queue (see Managing Your Extended Care On-Call Schedule). The appointment screen provides many appointment resources and patient data. Depending on the resources your organization provides, you may need to open a second screen to see them all. To open a second screen, click the **Next** button (circled) to the far right of the tabs. Two screens are shown in the following explanations.



The features available in the provider's appointment screen are the following:

[A]	**Save To EMR** - You *must* save the appointment notes to an external EMR system before exiting the appointment; otherwise *the current appointment's notes will be lost.*
[B]	**Chat -** Use this tab to exchange text conversations during the appointment. These conversations may be saved to EMR.
[C]	**Historic Wellness Readings -** If Extended Care has been configured to support wellness readings, patients can manually enter health status measurements they have personally collected. See Viewing Historic Wellness Readings.
[D]	**Consult** - If Extended Care has been configured to support this, you may add other members of your care team to the video conference. See Adding Consult Providers to the Appointment for details.

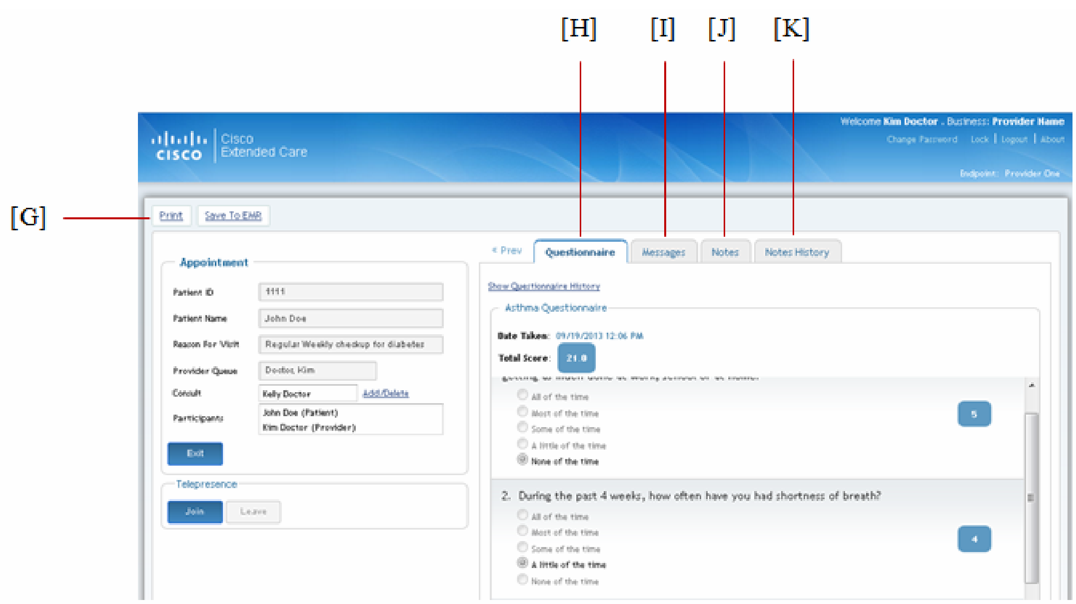
[E] Exit / Exit and Requeue

- When you have saved your appointment information to EMR and you are ready to end the appointment, click the **Exit button.**
- Click **Exit and Requeue** to exit the appointment and return the appointment to the Provider Group so that someone else can pick up the appointment.

[F] Join / Leave - Click the **Join** button to open the video conference window. Click the **Leave** button to close the video conference window. The appointment window and appointment data remain active until you **Exit** the appointment.

Notes:

- If this is your first time participating in a video appointment, the Extended Care application may request to download a software application to allow you to use the video services. It will provide instructions to accomplish this. The software you download will provide secure and encrypted video communications.
- The Join button will not be shown if your installation is configured to automatically start when you select an appointment.



[G]	**Print** - Click this button to print any of the following: – Chat dialog – Appointment Notes – Historic Wellness Readings – Performance Questionaires
[H]	**Questionnaires** - If your Extended Care installation has been configured to support questionnaires, you can review a history of patient answers to all posted questionnaires. For more information, see What Is a Patient Questionnaire?
[I]	**Messages -** These are one-way emails from you to the patient. Unlike the live Chat function, the messages are automatically saved for your future review.
[J]	**Notes** - Appointment notes are an optional feature and will be visible if your Extended Care installation has been configured for this.
[K]	**Notes History** - This will also be visible if your Extended Care installation has been configured for Notes.

Managing Your Extended Care On-Call Schedule

Your patient on-call schedule for Extended Care video appointments is actually created and managed in the appointment management system used by your organization. Be sure to consult this system to ensure that you are available to respond to adhoc appointment requests during your Extended Care on-call schedule. If you have any problems with your Extended Care schedule, contact your user/site administrator.

Adding Consult Providers to the Appointment

If your organization has configured Extended Care for multi-party calling, you may add other care team members, or an entire Provider Group, to an appointment. You may add consulting providers before you join the video conference or while you are in the video conference.

Step 1 Find the Consult option in the Appointment window and click **Add**/**Delete**.

Step 2 Select **Provider** or **Provider Group** and add your preferred group or attendees.

Step 3 Extended Care will automatically invite your selected attendees to join you and the patient.

Note If you have consultants on your appointment, the appointment will only terminate when all the participants end the consult call.

Transferring a "Quick Connect" Patient to Another Care Team Member

If you are in an on-call (Quick Connect) conference with a patient and you need to transfer that patient to another on-call provider, follow the steps described below. Note that this feature is only available to organizations that have configured Extended Care for multi-party calling.

Step 1 Check to see if someone is available in the on-call queue. To do this:

a. Find the Consult label in the Appointment window and click **Add**/**Delete.**

b. Click **Add a Provider as Consult** and verify someone is available in the queue.

c. Click **Cancel**.

Note See Adding Consult Providers to the Appointment if you need more details.

Step 2 Notify the care team member that you will be transferring the patient to them by placing the patient back in the on-call queue.

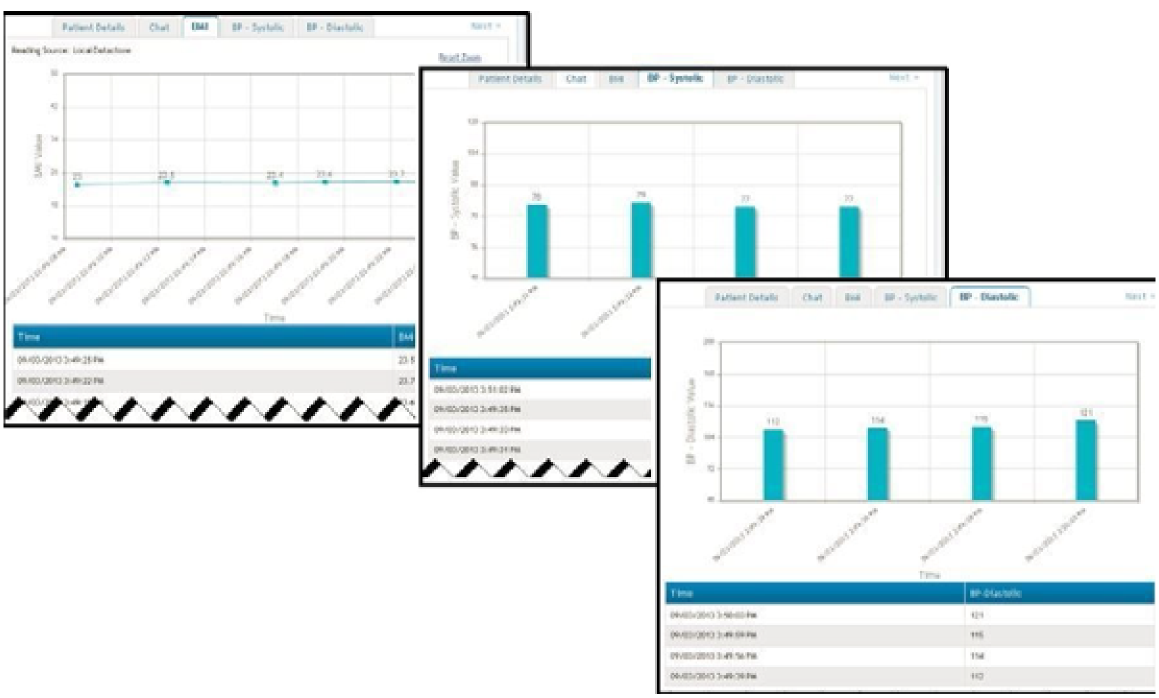
Step 3 Once you are sure someone is available for your patient, click the **Exit and Requeue** button in the Appointment window.Your patient's appointment request will be placed back in the on-call queue and the other care team member can select the appointment.

Note The Exit and Requeue button does not display for scheduled appointments.

Viewing Historic Wellness Readings

An appointment will have historic wellness readings as an option if that feature is configured for your organization. Patients enter wellness readings into Extended Care by manually entering health status measurements they’ve collected, using devices that may be provided by your organization or acquired on their own. (Devices are not provided by Cisco Inc.)

Organizations may create multiple wellness reading types.You will see a separate tab for each. An example with three historic wellness readings tabs is shown in the following figure.

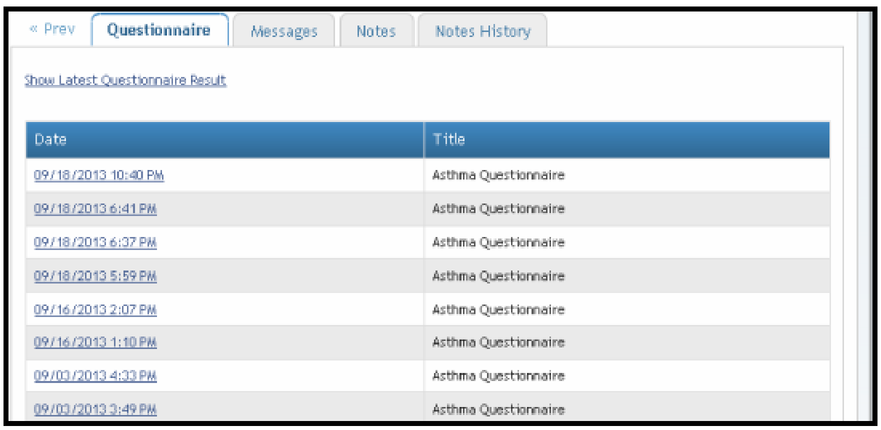


What Is a Patient Questionnaire?

Patient questionnaires can be designed by you and your care team to help you track your patients' self-care behavior and experiences. If the questionnaires function is configured for your organization, a patient will be presented with the option to fill out a questionnaire when they start their appointment. When you select an appointment, you will be able to review the answers to their current and previous recorded questionnaires.

Each Provider Group is allowed to feature one questionnaire at a time. Questionnaires are posted by your user/site administrator. If you would like to design a new questionnaire for your Provider Group, contact this administrator.

The Questionnaire tab appears when you select a patient appointment. When you click on the tab, the Questionnaire screen allows you to view your patient’s most recent responses (Latest Questionnaire) or to view their answers to previous questionnaires.



Printing Options

While the patient appointment window is still active, you may print any of the following items by clicking the **Print** button:

- Chat dialog
- Appointment Notes
- Historic Wellness Readings
- Performance Questionnaires

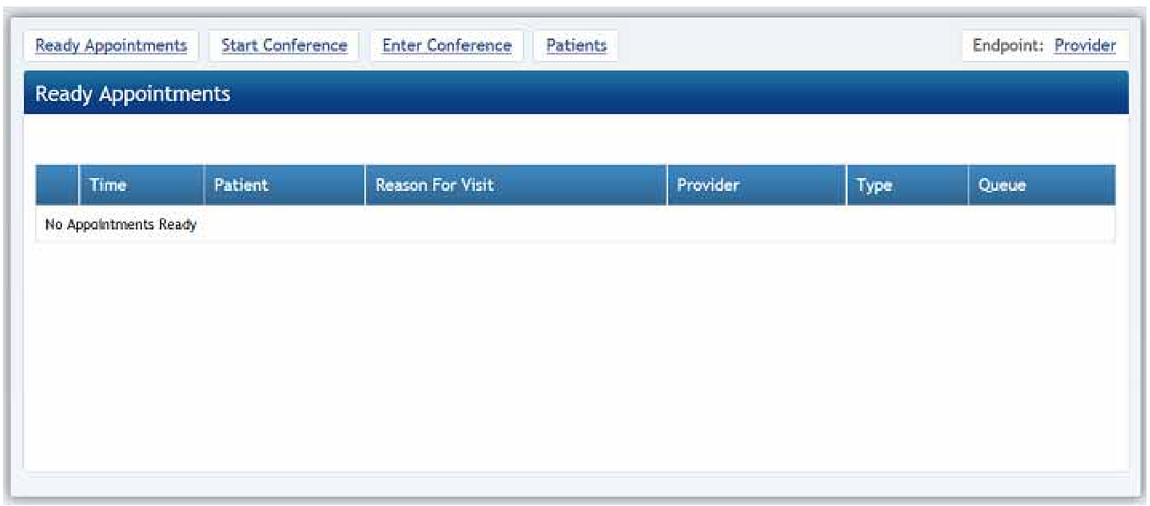
Provider-to-Provider Video Conferencing

If your organization has configured Extended Care for multi-party calling, you can initiate video conferences with other providers in your organization. These are private video conferences without patient attendance. In order for you to participate in a provider-to-provider, multi-party video conference, your user/site administrator will need to assign you one or both of the following Extended Care user roles.

Presenter -	This person can initiate a provider-to-provider, multi-party video conference.
Participant -	This person can attend a provider-to-provider, multi-party video conference.

In the following screen sample, the provider has been assigned both "participant" and "provider" roles.

- To start a provider-to-provider conference, click the **Start Conference** button.
- To join a provider-to-provider conference, click the **Enter Conference** button.



Prior to starting a conference, all potential attendees:

- must have been assigned "participant" status,
- must be logged in to Extended Care, and
- must have been notified of the conference ID number.

You may need to have some prior communication with your attendees to be sure they meet both the above criteria by the time your conference begins.

Starting a Conference

Note Before you can start a provider-to-provider conference, your user/site administrator must grant you "presenter" status, which is an Extended Care user role.

Step 1 Click the Start Conference button at the top of your home screen.

Step 2 Enter a Conference ID number of your own choosing. Then click a second Start Conference button that displays below the Conference ID. (You will refer to this ID number when inviting attendees.)

- A conference screen will display.

Step 3 On the right half of the conference screen, manually input any patient details you want to share with your conference participants. (If you don't want to discuss a patient, skip this step.)

- Be sure to enter the "Reason For Visit," as this will display on the participant's invitation screen.
- Click the **Update** button to be sure the patient details will be displayed for the conference members.

Step 4 The patient ID, patient name, and the reason for the visit will display in the Appointment window, which is located in the left half of the screen. This functions much like the Appointment window that is displayed with a patient appointment, except that the participants are exclusively care team members.

Step 5 When you are ready to begin the conference, click the **Ready** button at the bottom of the Appointment window.

- Extended Care lists your name as "presenter," plus any care team providers that have requested conference attendance.
- You may put the conference "on hold" by clicking the **Not Ready** button.
- You may end the conference by clicking the **End** button.

Step 6 When you are ready to start the Cisco Telepresence video window, click the **Join** button.

Entering a Conference

Note Before you can enter a provider-to-provider conference, your user/site administrator must grant you "particpant" status, which is an Extended Care user role.

Step 1 Click the **Enter Conference** button at the top of your home screen.

Step 2 Enter the conference ID number provided to you by the conference presenter. Then click a second **Enter Conference** button that displays below the Conference ID.

Step 3 The **Appointment** (conference) screen will display.

This functions much like the Appointment window that is displayed with a patient appointment, except that the participants are exclusively care team members. If the presenter will be discussing a patient, the Appointment window will identify the patient and the reason for their visit.

Step 4 Below the Appointment window is the Cisco Telepresence video window.

- Click the **Join** button to start your televideo connection.

Step 5 You may close the televideo window (without ending the conference) by clicking the **Leave** button.