



COMMUNITY HEALTH WORKER GUIDE TO TELE-HEALTH BEST PRACTICES

A Partnership between NMPP, NYP, and University at Albany

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CHW Telehealth Best Practice Manual

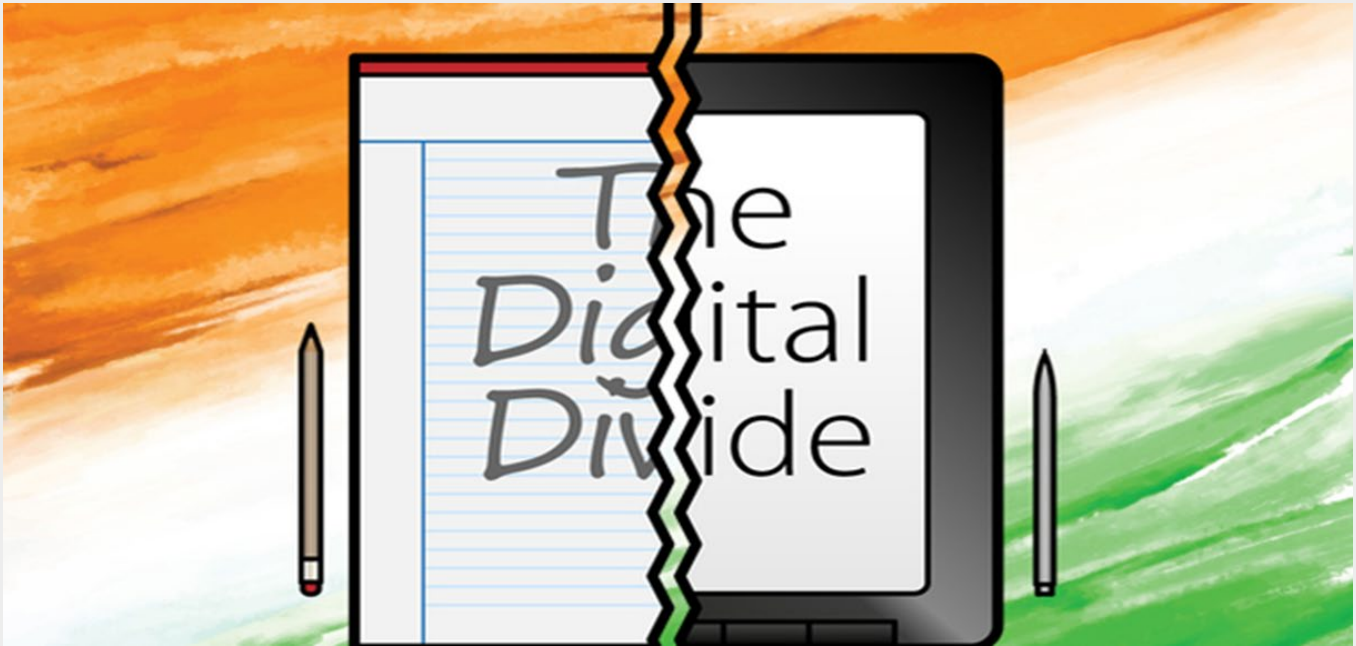
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Introduction

The purpose of this manual is to outline how Community Health Workers use telehealth when working with patients. The manual provides all job aides and guidelines patient use the MyChart patient portal. The primary audience for this manual is CHWs.

What is



The digital divide refers to the gap between those able to access technology during the digital age and those who experience challenges and barriers. People without access are unable or less likely to obtain digital information.

Who is Affected?

While remaining connected is critical on so many levels, internet access is not universal – more than 500,000 households in New York City lack internet access – and digital inequities are preventing the city’s most vulnerable populations from accessing financial and food supports, education, and needed health and behavioral health services in this time of crisis. (CCC of New York, 2020)

A lack of internet access impacts populations in particularly severe ways • More than 130,000 New Yorkers who reported TANF/cash assistance reciprocity in 2019 live in households without internet. • More than 300,000 New Yorkers who reported SNAP reciprocity in 2019 live in households without internet. • More than 400,000 New Yorkers who reported enrollment in Medicaid/other low-income insurance plans in 2019 live in households without internet. (CCC of New York 2021)

Your Role in Readiness Assessment

Goal: To determine patient readiness to adopt technology-based systems to access health care (MyChart) and social needs (remote schooling, remote therapies, HRA).

Areas to Evaluate Patient Technology Readiness

- Hardware
- Connectivity
- Usability/Access
- Comfort/Confidence

Evaluating Technology Readiness – web-based tool

<https://survey.alchemer.com/s3/6351891/Tech-Readiness-Assessment>

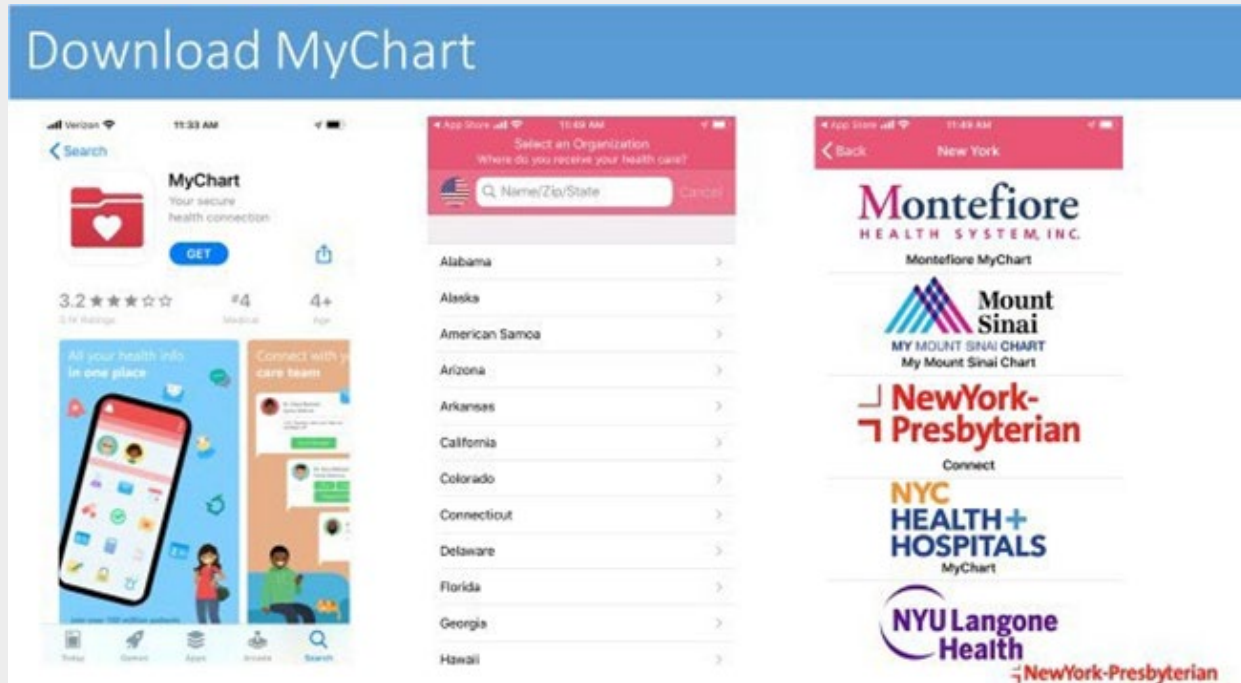
1. **HARDWARE: Do you have a Smartphone, tablet, or computer/laptop? Yes, No, I don't know.**
 - a. If yes, proceed to #2.
 - b. If no, review community resources to assist with providing hardware.
 - c. If not sure, then ask what devices patient has in the home related to hardware.
2. **CONNECTIVITY: Do you have Internet (Wifi, hotspot)? Yes, No, I don't know.**
 - a. If yes, proceed to #3.
 - b. If no, review community resources to assist with providing Internet capabilities.
 - c. If not sure, then ask what devices patient has in the home related to Internet service providers.
3. **USABILITY/ACCESS: Do you have an active email address? Yes, No, I don't know.**
 - a. If yes, then no further action is needed.
 - b. If no, assist creating an email address, noting email passwords, how to use, etc.
 - c. If not sure, then troubleshoot by assessing other apps the patient might use and assist the patient in creating a new email, and noting the logon details in an accessible, secure location.
4. **COMFORT/CONFIDENCE: Have you sent an email in the last month? Yes, No, I don't know.**
 - a. If yes, no further action is needed.
 - b. If no, then ask why not to determine comfort level.
 - c. If not sure, ask for more details to determine comfort level.

MyChart Guide

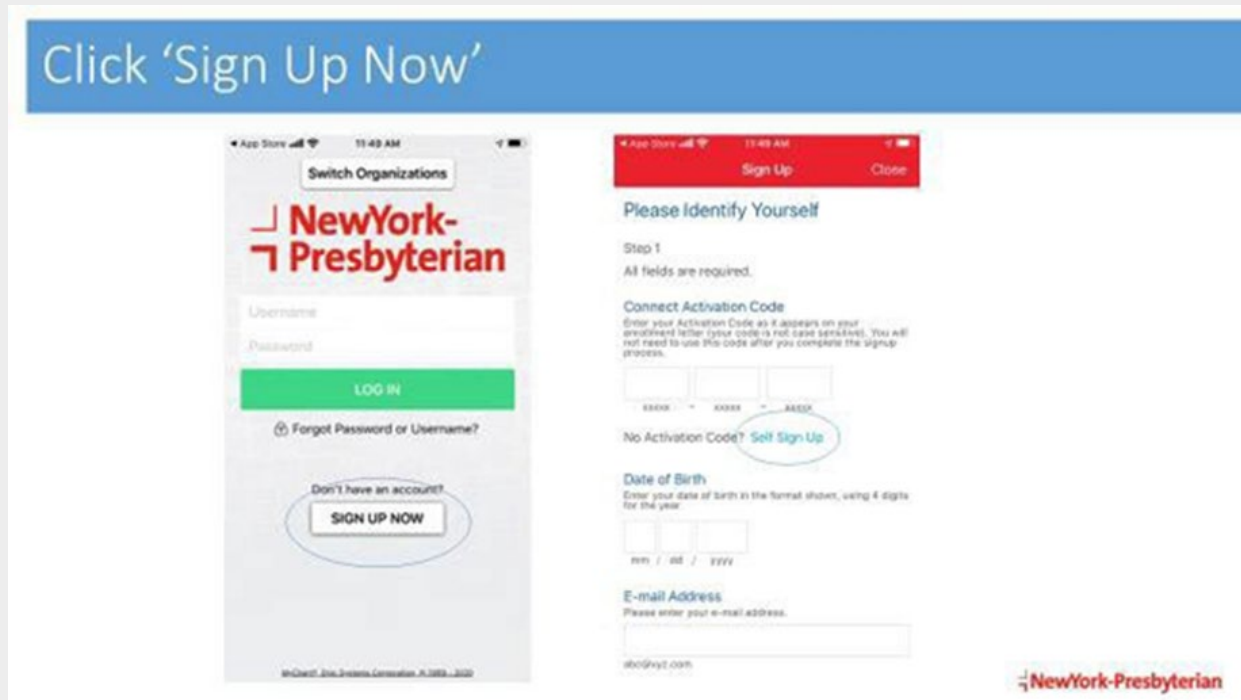
The following pages are a step-by-step guide to assist patients with downloading MyChart and setting up the ability to have video visits with CHWs using the MyChart app.

Instructions for Downloading MyChart

Step 1: Go to Apple App Store or Google Play Store – Search “MyChart”



Step 2: Use activation code to sign up



Step 3: Enter information (please remember to write it down)

Create Account

Connect Signup

Username

Create Password SHOW

Date of Birth

mm dd yyyy

Phone Number

xxx-xxx-xxxx

Security Question
--Choose a security question--

Secret Answer

Cannot include your password

I agree to the Terms and Conditions.

SUBMIT


NewYork-Presbyterian

Step 4: Now that your account is created you will be able to have Video V


When it's time for the appointment:

- Once you log in please click "Appointments" when it's time for you're video visit


Step 1: Log into your Connect account and click "Appointments"



Step 2: Click on the appropriate Video Visit appointment



Step 3: Once green, click the "Begin Visit" button at the bottom of your screen



*Do not click on the Stethoscope "E-Visit" icon as this is an entirely different tool and is not used for video visits

NewYork-Presbyterian

Confidentiality Protocols

Source: <https://telehealth.hhs.gov/patients/telehealth-privacy-for-patients/>

For patients, it is important to discuss confidentiality and privacy practices when completing a telehealth or virtual visits with a provider.

Standard confidentiality and privacy protocols

1. Connect securely using appropriate applications, software links using a device that has video and audio. Providers will send video links or instructions on how to connect. Make sure to join the video or telephonic visit by following the instructions provided by the provider or the health care office. Website links should be secure by having a lock icon on the address bar.
2. Ensure privacy by joining from a safe, confidential location. Make sure you are in a private location where you feel you can safely connect with the provider. This may mean you are away from other people such as a private room or quiet location.
3. Before the appointment
 - a. Confirm the patient knows the date and time of their appointment. Confirm they have the proper devices and internet access to join with minimal issues. Once this is completed, review general confidentiality and privacy with the client.
 - b. Work with clients to prepare for their appointments. Gather all medications, write down questions or concerns.
4. After the appointment
 - a. Complete follow up care instructions, like setting up a follow up appointment. Call the office or use the patient portal to set up appointments with other providers, such as new referrals. Make sure to obtain new prescriptions.

Strategies & Best Practices for Engaging Patients in Telehealth

CHW Consent Forms


Advice for CHWs:

- Ask the patient to use speaker to make sure they can navigate the app while you show them instructions
- Ask patients to turn their phone to landscape mode by tilting the phone horizontally. This will help enlarge the text and image so that they can correctly navigate the app to sign the consent form

How to use QR codes

- ***A QR code is a scannable image that can instantly be read using a smartphone camera. They are more common now for quick and easy access to go to a link or virtual meeting*** Open camera on your phone. Hold the phone up to the QR code as if you were going to take a picture. You will see a notification to open a web browser. Click on the web browser

Internet Passwords

- Save your password by writing it down somewhere safe like a notepad
 - **Using links and knowing when to right-click**
- A link or hyperlink will open a new webpage. You will find that links are underlined and usually in blue text. This is an indication that the text is a link. When you hover over the link, a hand cursor will appear. If you hover for a few seconds, you will see the weblink text appear 
- The right click option will provide additional information, properties, or options.

Best Practices & Successes

- Other household members who are technologically savvy can assist a participant that may require additional assistance.
- Ask the participant to listen to their calls on speakerphone if possible. If they have a computer, laptop, or tablet they can enter the website on that separate device. This helps them “multi-task.” If participant accesses the website rather than downloading the app, they are able to change the language.
- Send CHW activation code in addition to Epic generated email with that code.
- Ask participant if she/he/they are an NYP patient, for accessing a child’s record who is under the age of 5 (?), enrollment requires two activation codes. One for participant and one for child.

- Work with multiple participants at once by requesting activation codes for all. The generated Epic email may be sufficient for some participants, while additional follow up is required for others.
- Overall, most CHWs state the Connect IT hotline is helpful when participants/CHWs/CCHN team is unable to assist. Confirmed that the hotline is available in English (*Chinese-interpretor services through hotline TBD*).
- Work on participant first before enrolling other members of the household.
- Review steps one by one with participant.
- Review slides for Spanish translations; not intuitive translations.
- CHW should understand any proxy information child is 12 or older as long as it is documented in the child's chart by her/his PCP.
- First, assist participants to get a simple email address if they are creating a new one for this process. Make sure that they can write down email information including password.
- With some participants, it will be helpful if you send them pictures of what they may see once they go apple store or play store depending on what type of phone they have. There will be time that asking a parent to take a screen shot will be possible. Make sure you ask if they know how to do it before you start the process.

Challenges & Barriers

- Possible lack of technology experience from the parents. Be sure to provide guidance as appropriate to increase usability by providing step-by-step instructions, etc.
- If CHW is conducting a telephonic encounter to help patient navigate MyChart, it is best when possible, to understand what the patient sees. There is a limitation due to privacy issues as the patient cannot send screen shots. When possible, conduct in-person or virtual visit with another devices. Otherwise, it is challenging to visualize and walk through the steps with the patient especially when patients speak other languages besides English and Spanish.

Resources

Universal Broadband for NY

- [Broadband Benefit](#)
- [NYC Internet Access](#)
- [NYC Mesh](#)

Free or low-cost Phone Providers

- [Assurance Wireless](#)
- [Safe-Link Wireless](#)
- [Access Wireless](#)

Lifeline Discount Companies in New York

- [T-Mobile Lifeline Assistance](#): Discounted services for qualifying customers
- [Verizon Lifeline Assistance](#): Discounted services for qualifying customers

Free Wi-Fi throughout NYC

- [LinkNYC](#)
- [NYC Affordable Connectivity Program: free Internet for NYCHA residents](#)
- [Big Apple Connect](#)

Enhancing Digital Literacy

- [Coursera](#)
- [NYC DOH](#)
- [NYPL](#)

Additional resources:

- [iPads and School Devices](#): Free iPad devices for school-aged students from NYC DOE

Appendix

1. Connect Patient Guide – MyChart Features – Appendix A

- a. [English](#)
- b. [Spanish](#)
- c. [French](#)

2. Connect Patient Guide – MyChart Account – Appendix B

- a. [English](#)
- b. [Spanish](#)
- c. [French](#)

3. Connect Patient Guide – Launch Video Visit via Smartphone – Appendix C

- a. [English](#)
- b. [Spanish](#)
- c. [French](#)

4. Connect Patient Guide – Launch Video Visit via Computer – Appendix D

- a. [English](#)
- b. [Spanish](#)
- c. [French](#)

5. Connect Patient Guide – Patient eCheck-In – Appendix E

- a. [English](#)
- b. [Spanish](#)
- c. [French](#)

6. [CCHN CHW Virtual Visit Guide](#)

7. [NYP Connect Patient Guide](#)

8. [Connect Patient Guide – Scheduling an Appointment Online](#)

9. [We Ask Because We Care](#) – *NYP's pledge to give every patient the best care possible regardless of race, ethnicity, gender identity, sexual orientation, cultural background, or language. NYP will strive to make sure all patients have equal access to the highest quality of care. To support this mission, we will ask you questions about your background and preferred language. You can update your information today at www.myconnectnyc.org.*

10. [Manage your medications](#)
11. [View a summary of your health information](#)
12. [Respond to questionnaires from your clinic](#)
13. [Customize your notification preferences](#)
14. [Change your Connect password or update your security](#)