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Switchboard: Overview

Patient-facing meetings should only be conducted via Switchboard or Epic Video Client. The meeting workflows designed in Switchboard include settings, pre-approved by privacy and compliance, which are designed to protect patient information.

Workflows in Switchboard have settings which are listed below.

Corporate Teams accounts do not include these preset settings should only be used in pre-approved instances.

Corporate Teams should be considered if:

1. Telemedicine meetings need one or a combination of settings, not offered by Switchboard, including:
 - a. Hiding participants in meetings
 - b. Strict moderator settings
 - c. Disabling the lobby
 - d. Ability to share/designate meeting hosts
 - e. Additional recording features
2. You have a physical device (e.g. tablet) that isn't compatible with Switchboard

Switchboard Outpatient: Overview

Switchboard outpatient is for patients with scheduled appointments in the outpatient setting.

Switchboard is not a scheduling tool for inpatient meetings. It only offers a meeting room. Users need to make sure they (and patients) are in the same meeting room at the same time.

Switchboard Outpatient: Preset Settings

The default settings for the Outpatient workflow in Switchboard **include**:

- Ability for patients to join without a Teams account**.
- Ability to screen share for patients and providers.
- Ability to mute video and microphone.
- Ability to add background blur.
- Two-way chat capabilities.
- Lobby feature – guests will need to be admitted to meetings.

The default settings for the Outpatient workflow in Switchboard **prevent**:

- Recording (for patients and providers).
- Transcription services.
- Unauthorized users from joining meetings.

*Note**: Patients will need to join either from desktop or by calling in. Patients cannot join from mobile unless they have the Teams app downloaded.*

Switchboard Outpatient: Workflow

1. Once logged into Switchboard, select "CHOOSE OUTPATIENT":

CHOOSE INPATIENT

The **Inpatient View** shows a live directory of available meeting links and devices for each admitted patient, generated automatically at time of admission.

Incorporates **Way To Health**, an automated texting bot that walks patients through Bluejeans setup on their personal devices. Customer support is by the **Patient Experience Command Center**.

CHOOSE OUTPATIENT

The **Outpatient View** shows a live provider's appointment schedule & meeting links and options to invite the patient to start the appointment either on time or even early.

Integrates with the **Patient Visit Guide** which sends appointment confirmations and reminders by email and text message.

2. Sort by provider, department, or operating room.

BY PROVIDER BY DEPARTMENT BY OPERATING ROOM

Enter a provider (last name, first name)

Me

3. Select Video meeting

The screenshot displays a patient's profile in the Switchboard system. On the left, patient details include the name 'MedView | Carellan', age '(40 yo male)', department 'DGEDOU EDOU01X', and status 'myPennMedicine: Activated' and 'Covid: Negative'. A 'Care team' link is visible. In the center, a 'Video meeting' button is highlighted with a red box, with options to 'Send and view pt messages' and 'Send to other'. Below this, telephone call information is shown: 'Patient's personal phone: [redacted] (m)', '> 2 emergency contacts', 'Phone in room EDOU01X: unknown', and 'Unit phone: [redacted]'. On the right, a 'SWITCHBOARD COMMENTS' section contains 'Add comment' and 'Schedule teleconsult' buttons.


4. Select Join meeting


Penn Medicine
Switchboard/Microsoft Teams Outpatient Workflow

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Meeting Code: **2840 3876 0858**

Join meeting





Meeting QR code

Joining Teams Meeting: As the Provider

1. Hit cancel on the open screen.
2. Select joining from either browser or joining via Teams app.

Open Microsoft Teams classic?

https://teams.microsoft.com wants to open this application.

Always allow teams.microsoft.com to open links of this type in the associated app

1

Cancel Open Microsoft Teams classic

2

Join your Teams meeting

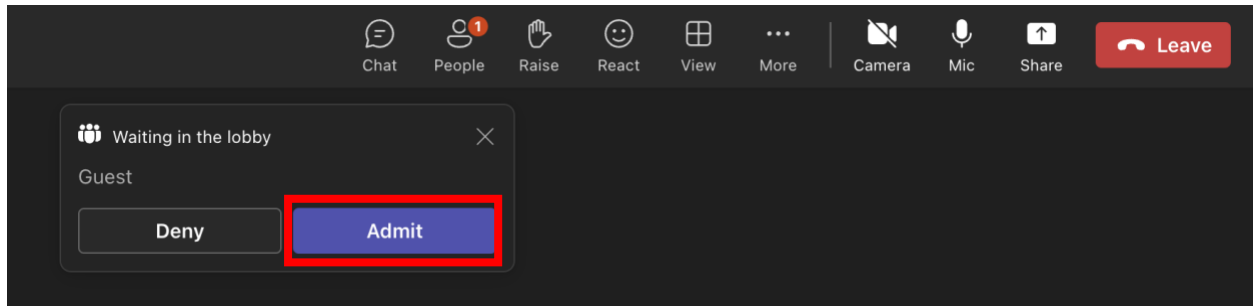
Continue on this browser

Join on the Teams app

Don't have the app?
[Download it now](#)

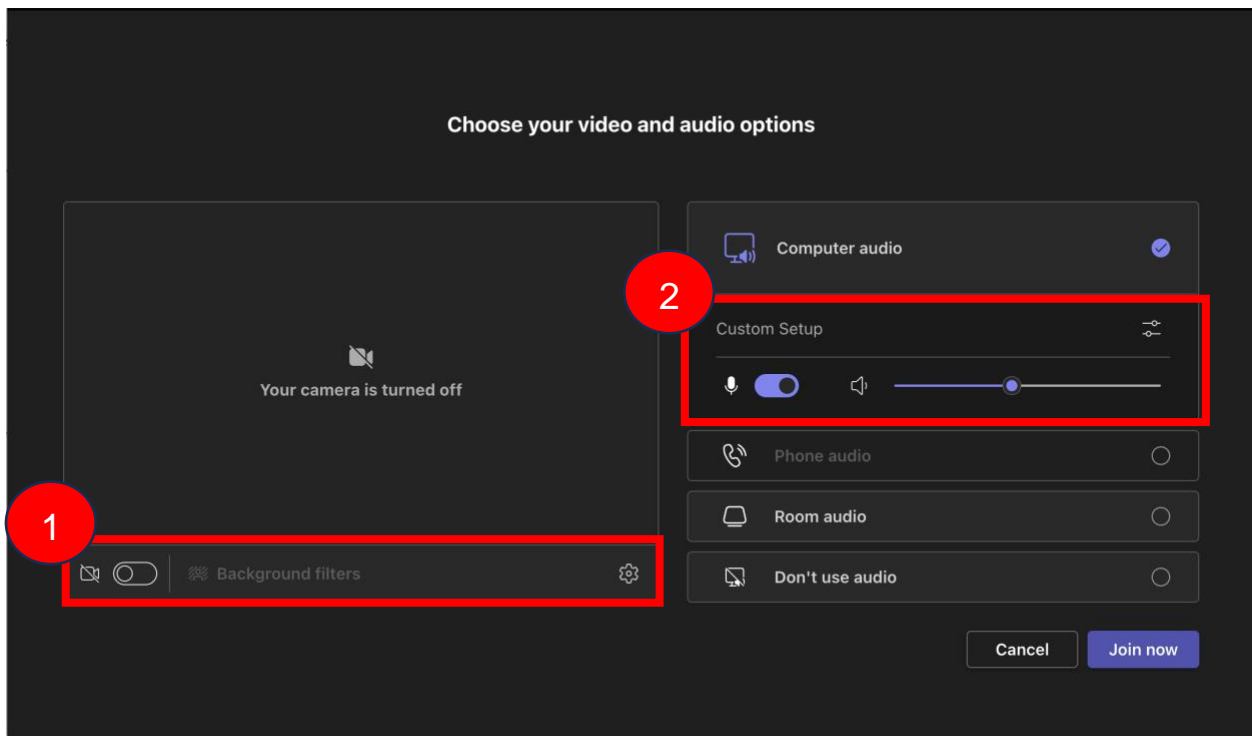
Joining Teams Meeting: As the Patient

1. You, the host, need to join the meeting first.
2. Then, admit the guest once they are joined.

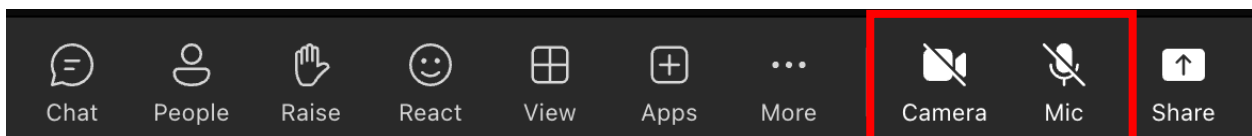


Teams Settings: Audio/Visual Settings

1. Before joining a meeting, you can adjust the following settings:
 - a. Video (1)
 - i. Select the camera icon to preview your video.
 - ii. Preview how you'd like to appear:
 1. Select "Background filters" and choose a custom background or blur.
 - b. Audio (2)

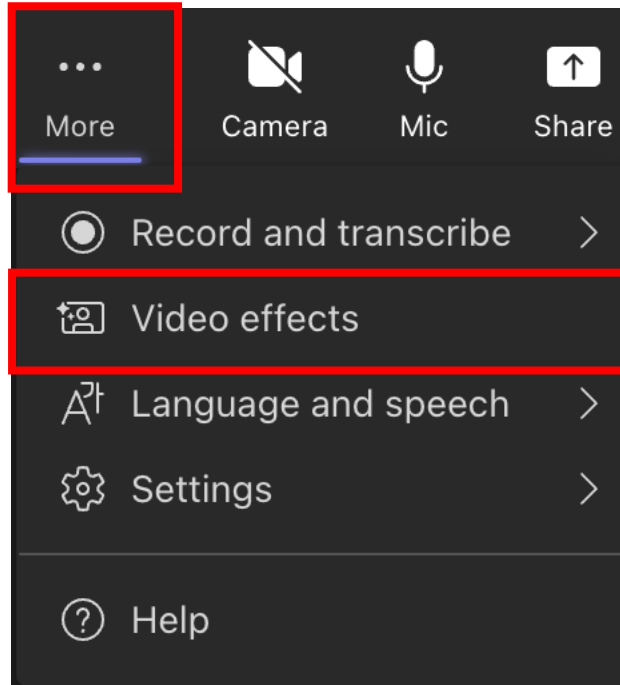


2. Once in a meeting, you can adjust the same settings via the banner at the top of your screen.

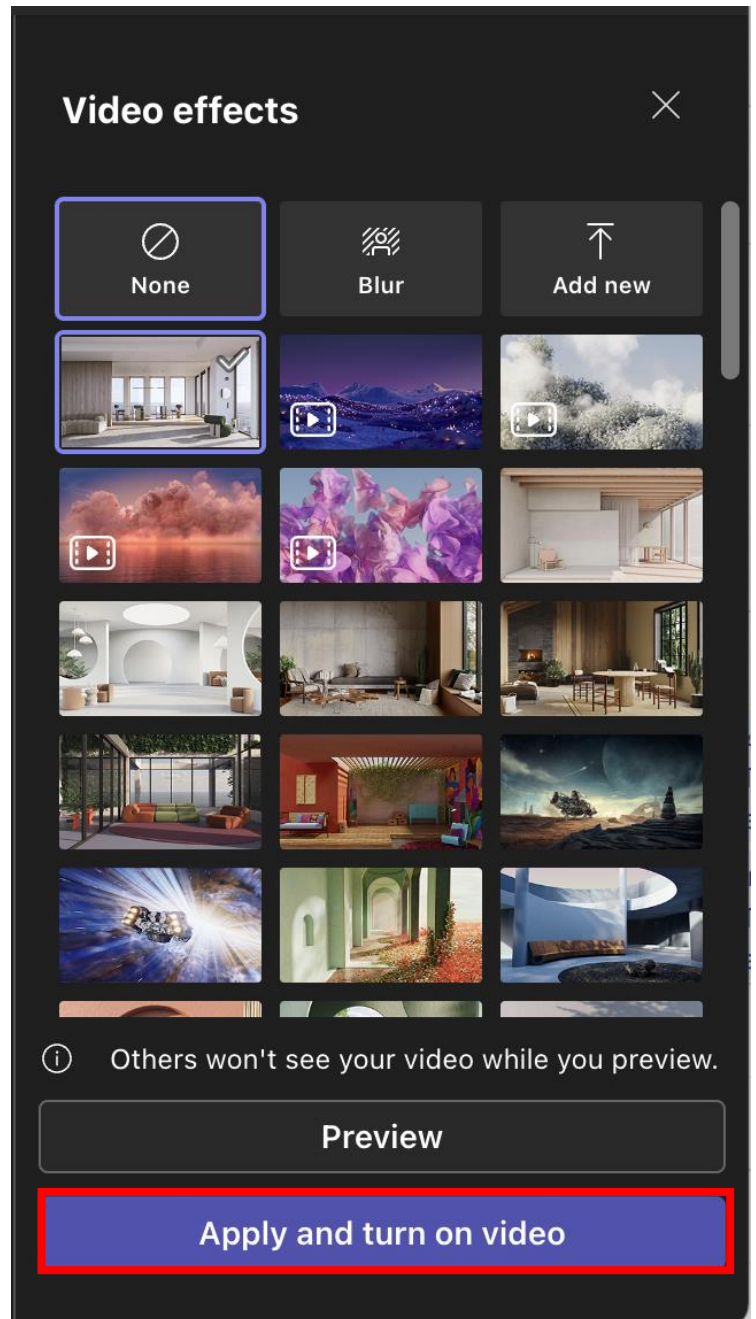


Teams Settings: Virtual Background

1. Once in a meeting, you have the option to change your virtual background.
2. You can adjust your video settings (i.e. blur) by clicking “More” and selecting “Video Effects”.

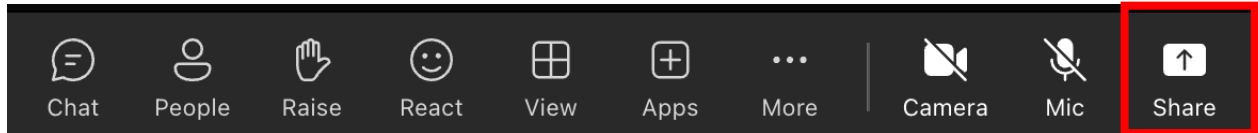


3. Select the background that you would like to use.
4. Select “Apply and turn on video”.



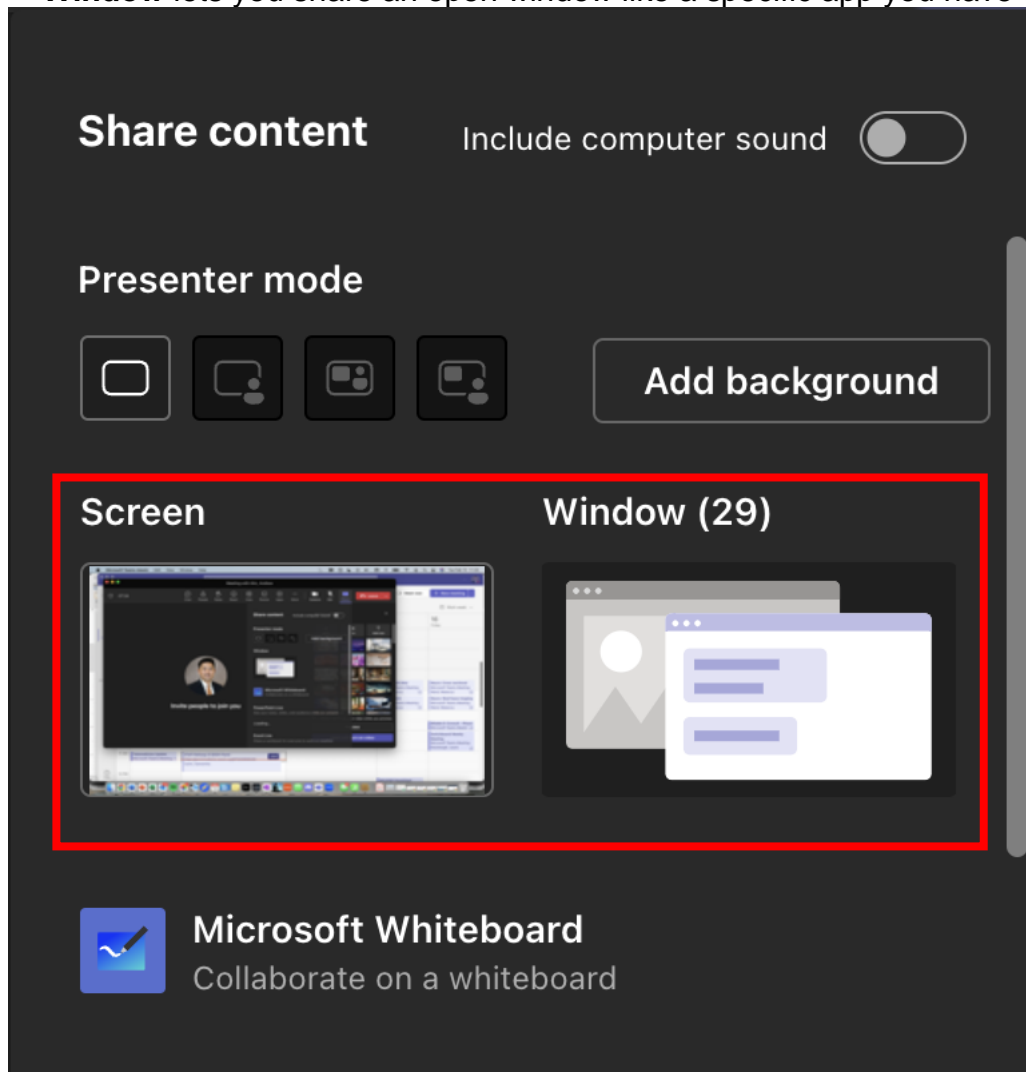
Teams Settings: Sharing Content

1. You can share content by selecting “Share”.



2. After selecting “Share”, you can select your content.

- **Screen** lets you show everything on your screen.
- **PowerPoint Live** lets you share a PowerPoint presentation.
- **Microsoft Whiteboard** and **Freehand** by Invision lets you share a whiteboard where participants can sketch together.
- **Window** lets you share an open window like a specific app you have open.

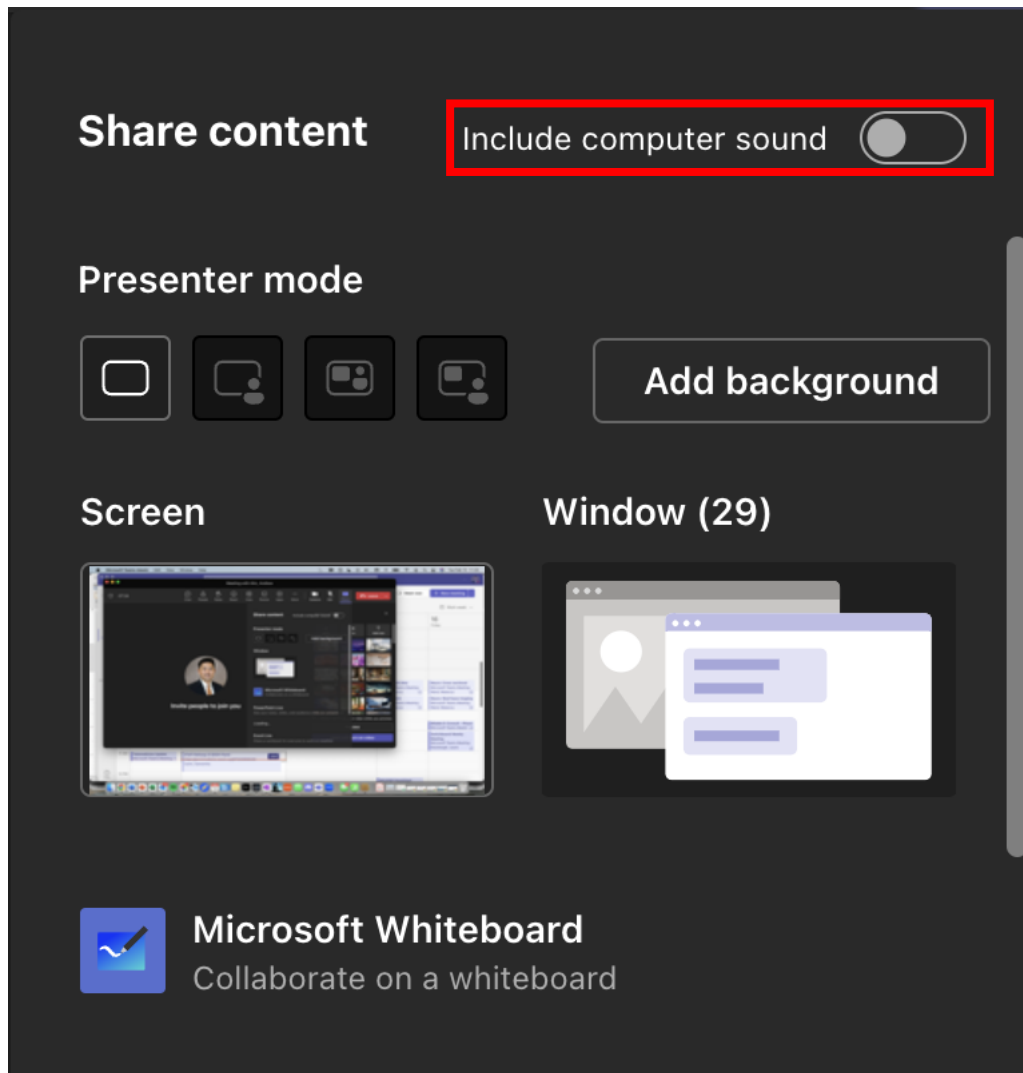


3. After you select what you want to show, a red border surrounds what you're sharing.

Meeting participants won't see any notifications that might come in.

4. Select "Stop sharing" to stop showing your screen.

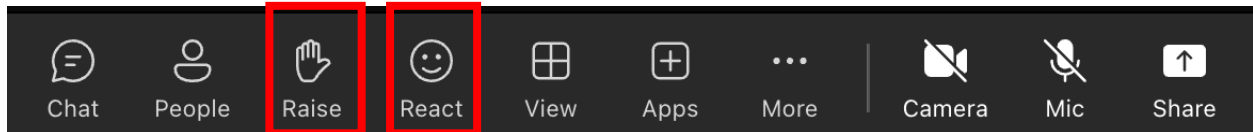
Note: You can choose to include computer sound.



Teams Settings: Raise your hand and show reactions

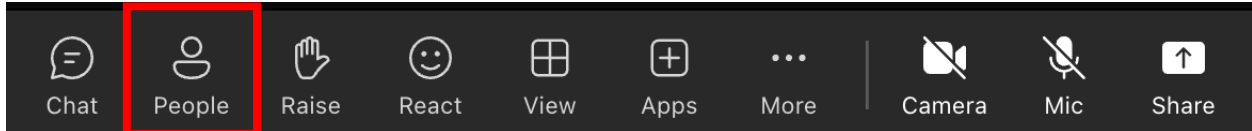
1. Under Reactions, choose how to engage in a meeting:

- a. Select Raise hand to let others know you'd like to speak up without interrupting the conversation.
- b. Choose a reaction like Applause or Heart to show how you feel.

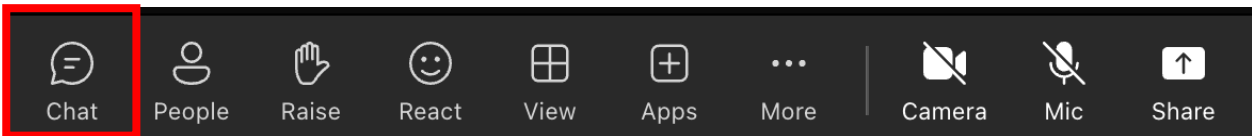


Teams Settings: Other

1. To view other people in the meeting select “People”.



2. To view the two-way chat for the meeting, select “Chat”.



Note: Your chat will be visible to all participants, unless noted otherwise. Chat will only be available during the meeting and will be locked afterwards. As a participant, you must preserve the privacy of other patients in group settings. Chat transcripts and any other information about patients cannot be copied or used beyond the purpose of the meeting.