

Telehealth User Guide

Revised June 27, 2022

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Project Overview

Dear Local Agency Coordinators and Staff,

Your local agency has opted to participate in the telehealth intervention study funded by FNS and administered by Tufts University. The purpose of the study is to implement telehealth NCRD and IBCLC appointments to improve and/or remove barriers that prevent clients from utilizing available WIC services. These barriers include, but are not limited to, long clinic wait times, lost time from work, inconvenient WIC clinic locations and appointment times, and lack of transportation. We will evaluate the effectiveness of the telehealth appointments by having clients complete surveys on their comfortability using telehealth and their satisfaction with the telehealth appointments. The enclosed packet contains training materials for local agency and clinic staff including a Narrative of the process for telehealth appointment, Operational Maps, Zoom settings guide, templates for On-Demand messages, survey promotional language and other potentially helpful resources. This accessibility for clients is made possible because of you, if you have any additional questions regarding the telehealth training packet please contact Tara Fischer FischerT1@michigan.gov or Julie Lothamer Lothamerj@michigan.gov.

Thank you for all that you do for WIC.

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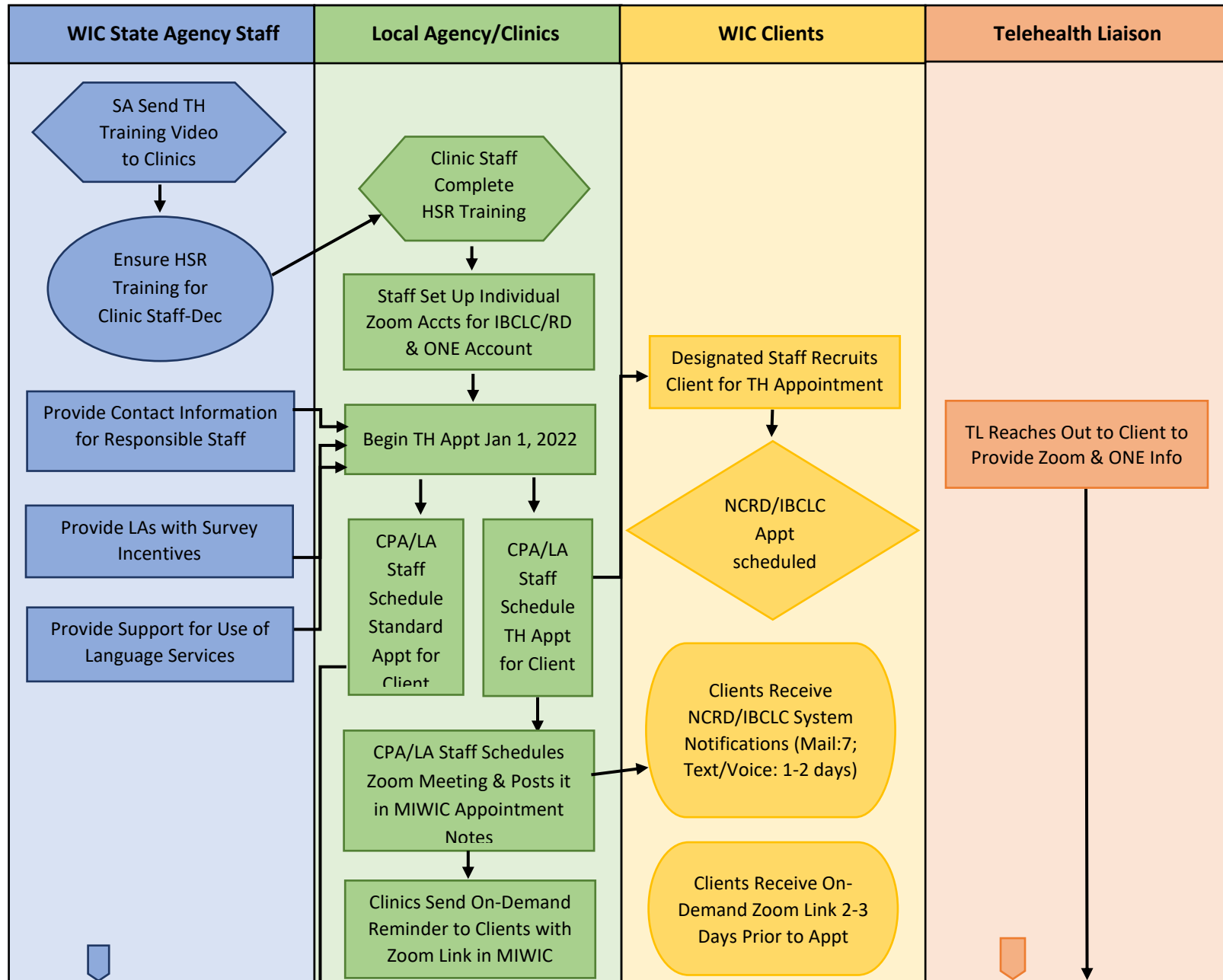
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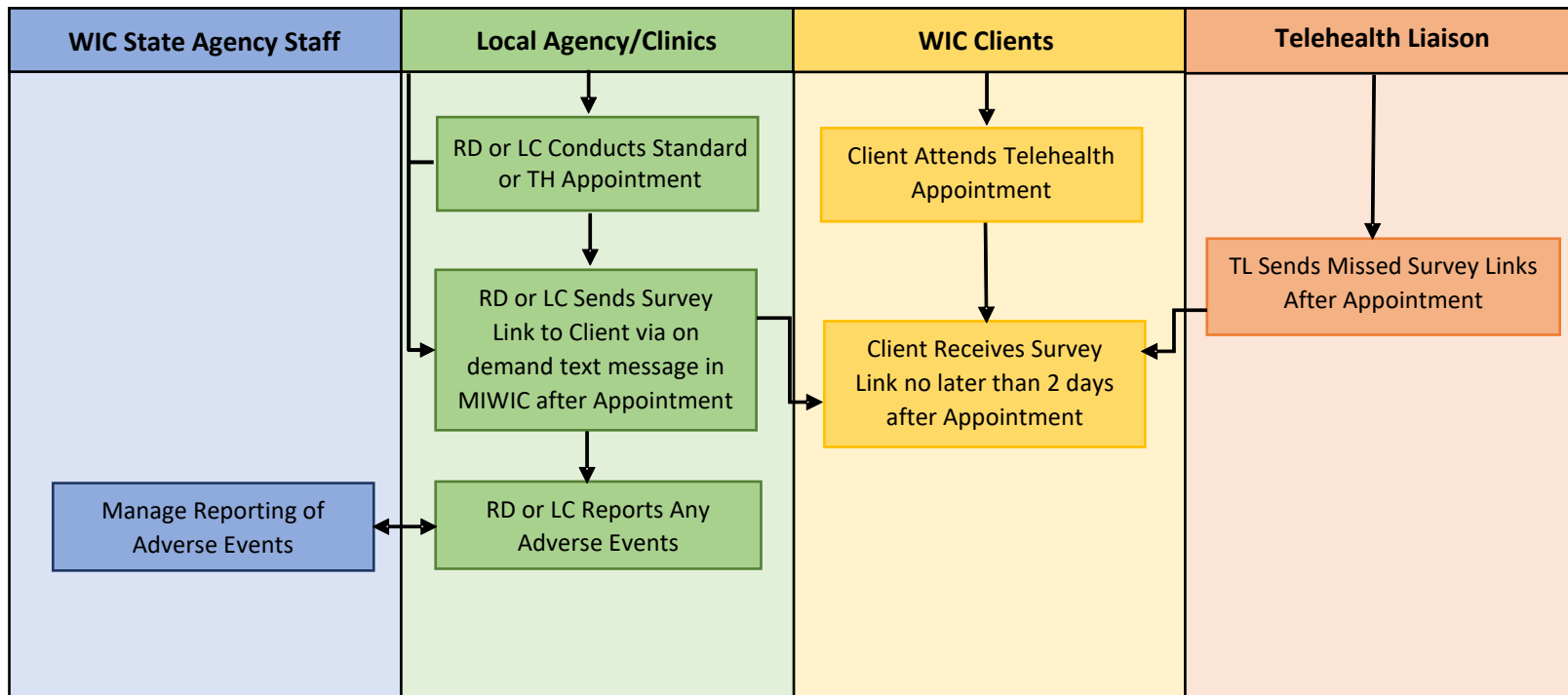
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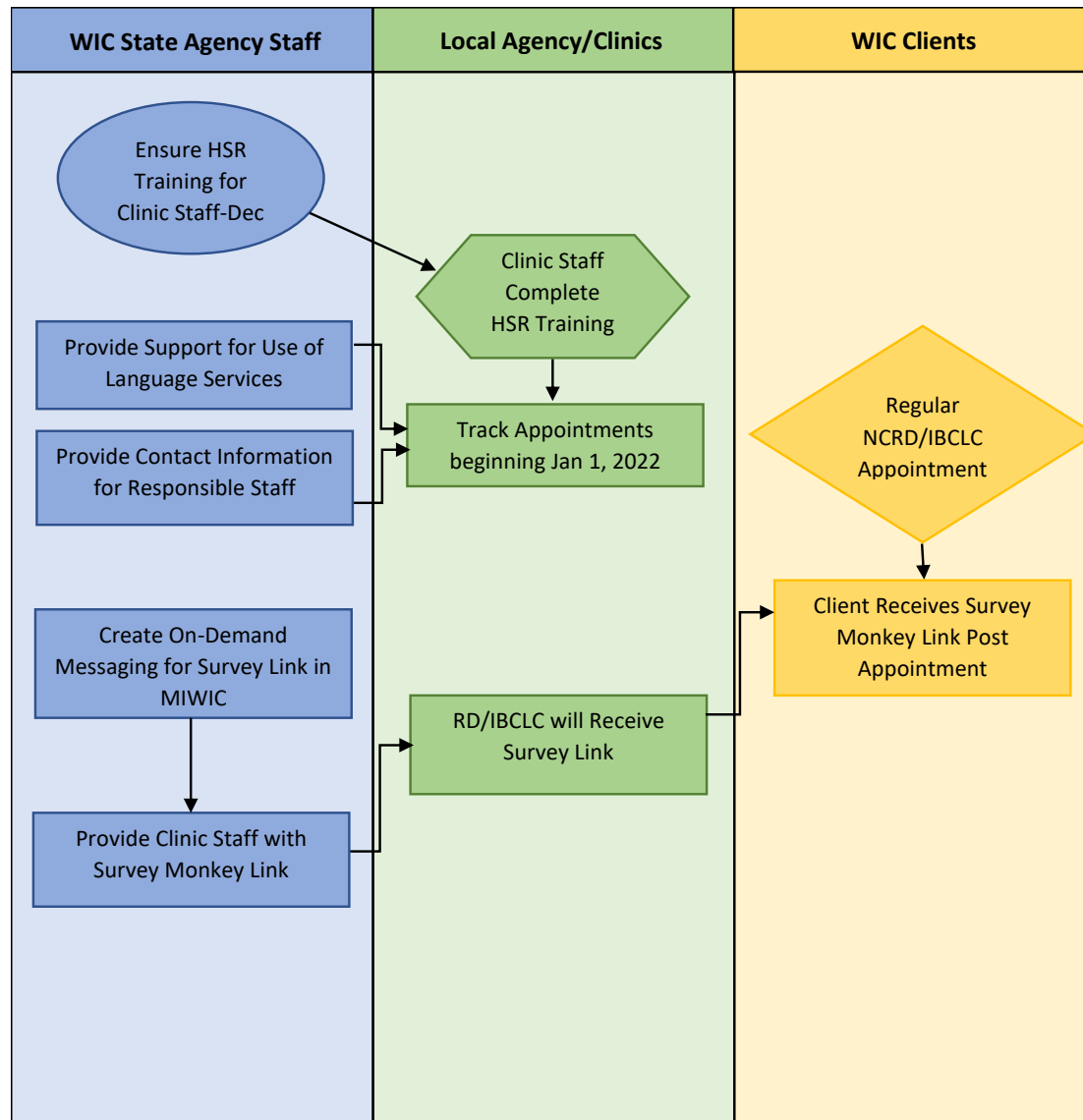
Marji Cyrul

TELEHEALTH OPERATIONALIZATION MAP: Intervention Group






TELEHEALTH OPERATIONALIZATION MAP: Control Group



Telehealth Appointment Narrative: Intervention Group

1. Client is assessed to need an RD or IBCLC appointment
2. Staff discusses option of having appointment through Zoom
 - a. Shares information regarding appointment and post survey
 - b. Informs client that participation or refusal will not impact WIC services or benefits.
 - c. Handout and video are available to share with client.
 - d. If client is in person, staff can provide incentive, cell phone holder, if a Zoom appointment is selected.
3. If client declines the TH appointment, note on the MI-WIC Nutrition Education screen
4. in the text box the following message **TH offered and declined.** 
5. In MI-WIC, NCRD-TH or IBCLC-TH is scheduled using normal scheduling process. Zoom meeting will be scheduled at a later date by the RD or IBCLC using their Zoom account.
 - a. Appointment notifications should be enabled for these appt types and will be sent on the standard notification timeframes
 - i. Mail- 7 days prior
 - ii. Phone/Text- 1 day prior
6. Telehealth Liaison will reach out to families using on demand text in MI-WIC 7-10 days before their appointment. The text will contain liaison direct phone line to be able to reply and set up a time to practice Zoom, answer any questions and set up ONE platform.
7. RD/IBCLC will create a Zoom meeting for each client appointment at least 7 days prior to appt date. The Zoom link will be placed in the MI-WIC appointment note for the client.
8. Refer to attached document for setting up Zoom appointment.
9. 2-3 days prior to appointment, WIC staff will send an On-demand message including the Zoom link to the client. (LA can also continue to use any established process for appointment reminders, such as day before phone calls).
10. System generated notifications (phone call or text) will be sent 1 day before. Language will include phone number to call if Zoom link has not been received.
11. Use Zoom link in appointment note to join the meeting.
12. Conduct telehealth appointment. (Refer to Tips for Telehealth visit)
 - a. ONE is a resource available for you to use as part of the counseling session. If client doesn't have a ONE account, the RD/IBCLC can add. (See ONE Quick Start Guide)
13. At the end of the session, inform client a link to a survey will be send in a text message. (If client prefers, the survey link can be sent by email). This survey about their experiences with WIC and telehealth. Ask that they please take time to complete. (Please reference THIS-WIC Client Survey Promotional Language)
14. Immediately following appointment, cut and paste the specific template language provided into an On Demand Message or email. If sending link via email, please

document “telehealth survey link sent via email” in Family note section) No additional follow-up is required.

15. Two days post appointment the Telehealth Liaison will verify a survey link was sent. If not sent by WIC staff, the Liaison will send the On Demand message.

NCRD and IBCLC- Virtual or In-Person: Intervention Group

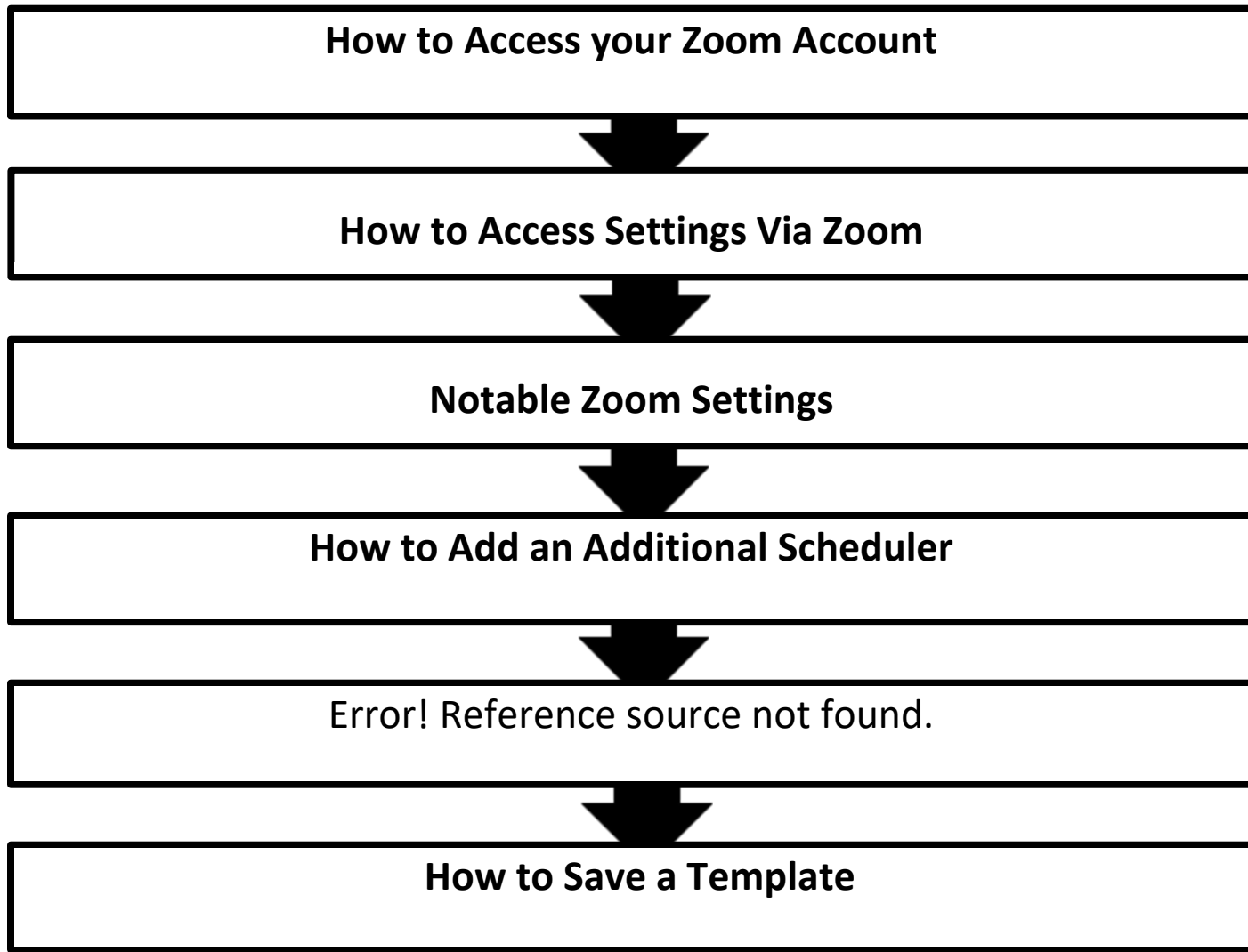
1. RD/IBCLC conducts appointment.
2. At the end of the session, inform client a link to a survey will be send in a text message. (If client prefers, the survey link can be sent by email or direct text message). The survey is about their experiences with WIC and is voluntary. Ask that they please take time to complete.
3. Immediately following appointment, cut and paste the specific template language provided into an On Demand Message, email or text. If sending link via email or direct text, please document “telehealth survey link sent via email/text” in Family note section) No additional follow-up is required.
4. Two days post appointment the Telehealth Liaison will verify a survey link was sent. If not sent by WIC staff, the Liaison will send the On Demand message.

NCRD & IBCLC Appointment Narrative: Control Group

1. RD/IBCLC conducts appointment.
2. At the end of the session, inform client a link to a survey will be send in a text message. (If client prefers, the survey link can be sent by email or direct text message). The survey is about their experiences with WIC and is voluntary. Ask that they please take time to complete.
3. Immediately following appointment, cut and paste the specific template language provided into an On Demand Message, email or text. If sending link via email or direct text, please document “telehealth survey link sent via email/text” in Family note section) No additional follow-up is required.
4. Two days post appointment the Telehealth Liaison will verify a survey link was sent. If not sent by WIC staff, the Liaison will send the On Demand message.

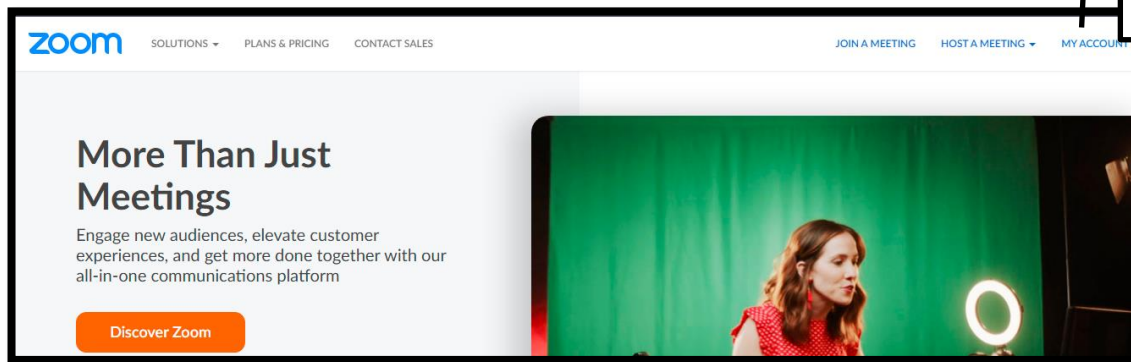
Zoom Settings Guide

Error! Reference source not found.

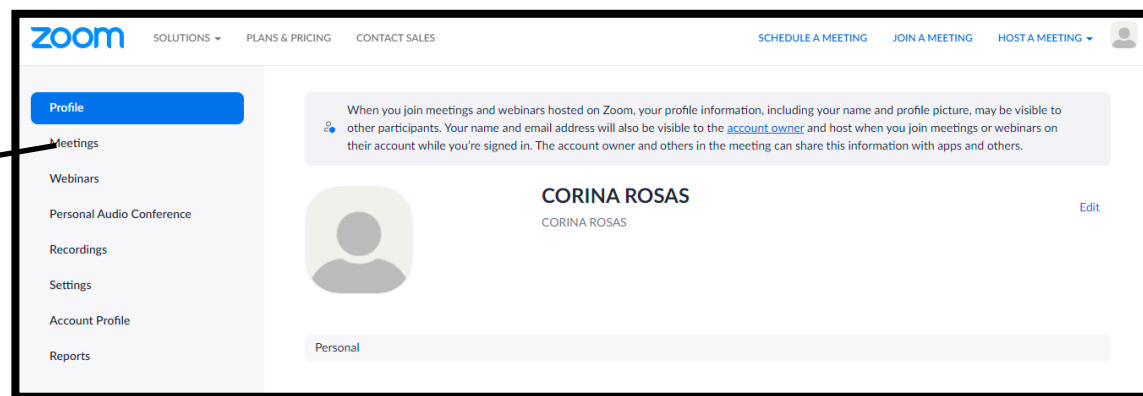


How to Access your Zoom Account

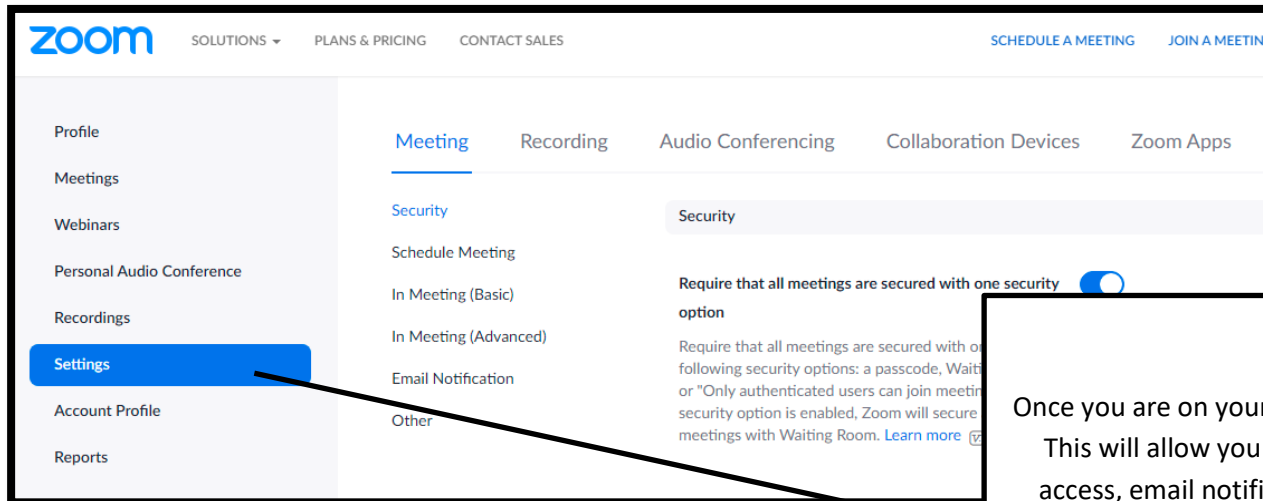
Select “My account” to access your profile, schedule meetings and adjust meeting settings



On the left side you will see Profile, Meetings, Webinars, Personal Audio Conference, Recordings, Settings, Account Profile, Reports



How to access Setting controls Via Zoom



Once you are on your account page Select Settings. This will allow you to adjust the zoom security access, email notifications, other and meetings settings such as: adding surveys, access remote control, video options, joining options, allow cohosts, and assign schedulers.

Notable Zoom Settings

Embed passcode in invite link for one-click join

Meeting passcode will be encrypted and included in the invite link to allow participants to join with just one click without having to enter the passcode.



Enabling “embed passcode in invite link” This settings allows you to send an invite with a passcode already encrypted. Clients will not have to type it in.

Waiting Room

When participants join a meeting, place them in a waiting room and require the host to admit them individually. Enabling the waiting room automatically disables the setting for allowing participants to join before host.

Waiting Room Options

The options you select here apply to meetings hosted by users who turned 'Waiting Room' on

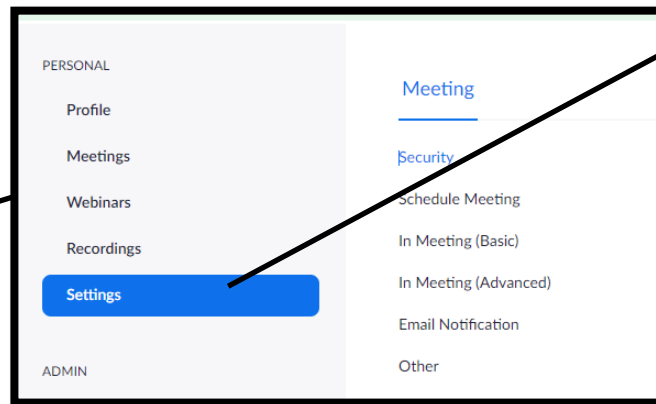
✓ Everyone will go in the waiting room

[Edit Options](#) [Customize Waiting Room](#)



Waiting rooms provide you space to gather yourself, necessary meeting items and send out messages allowing clients to know you will be with them shortly. Once you are ready you can allow them in and you can start your meeting.

How to Add an Additional Scheduler



Under the Meeting tab go to other. Scroll down to schedule privilege. There is currently no limit to how many schedulers you can add. This Settings also allows the scheduler to host the meeting incase those who they are scheduling for cannot make it.

Schedule Privilege

You can assign users in your account to schedule meetings on your behalf. You can also schedule meetings on behalf of someone that has assigned you scheduling privilege. You and the assigned scheduler must be on a Paid plan within the same account.

Assign scheduling privilege to +
No one

I can schedule for

doylek5@michigan.gov X

How to Schedule a Meeting

Schedule Meeting

Schedule For:

Topic:

When:

Duration: hr min

Time Zone:

Recurring meeting

Registration: Required

Meeting ID: Generate Automatically Personal Meeting ID 790 868 2114

Template:

Security

Passcode:
Only users who have the invite link or passcode can join the meeting

Waiting Room
Only users admitted by the host can join the meeting

Require authentication to join

Video

Host: on off

Participant: on off

Audio

Telephone Computer Audio Both

Options

Hide

Allow participants to join anytime

Mute participants upon entry

Automatically record meeting

Approve or block entry to users from specific regions/countries

Alternative Hosts

- **Schedule For:**
 - Here you can select who you would like to schedule the meeting for.
 - Input time, date, and duration of meeting
- **Select Template**
 - If you have a specific meeting topic recurring such as a meeting description and duration. (EX: staff meeting, weekly breast feeding supports, counseling, nutrition, etc)
- **Video:**
 - Preset to off for host and participant to allow you space to prepare yourself before going on camera.
- **Audio:**
 - Select both so when individuals need to attend via phone call.

Options:

- Here you can add your alternative host.

Client Resources

[ONE Client Brochure English](#)

[ONE Client Brochure Spanish](#)

[Telehealth Infographic English](#)

[Telehealth Infographic Spanish](#)

[Introduction to Telehealth Video English](#)

[Introduction to Telehealth Video Spanish](#)

[Tips for Telehealth Video English](#)

[Tips for Telehealth Video Spanish](#)

Message Templates

On-Demand Message (ODM) to Clients with Zoom Link:

Please join your telehealth Wic appt on (date) at (time). Click the link to join {insert Zoom meeting link} Call us at {Designated phone number} if you cannot connect to the Zoom meeting or if your plans have changed to reschedule.

On-Demand Message or Direct Text to clients with survey link:

Your voice matters. Please tell us about your recent WIC appointment and how we can do better by taking this survey <https://www.research.net/r/N2S92SC> (147 characters)

Email to clients with survey link:

Your voice matters. Please tell us about your recent WIC appt and how we can do better by taking this survey <https://www.research.net/r/N2S92SC> It will only take a few minutes to complete. If you choose not to take the survey, it will not impact your WIC benefits. The survey will help us understand your WIC experience and findings from the survey will also help inform the WIC program at the national level.

Spanish Translations

On-Demand Message (ODM) to Clients with Zoom Link:

Por favor únese a su cita WIC de telesalud en (date) a (time) haga clic en el enlace para unirse {Zoom link} contactenos a {Designated phone number} Si no se puede conectar a la reunión zoom o si sus obligaciones cambiaron, para reprogramar su cita. (277 Characters)

On-Demand Message or Direct Text to clients with survey link:

Tu voz importa. Por favor cuéntenos sobre su visita más reciente a WIC y cómo podemos mejorar, completando esta encuesta <https://www.research.net/r/N2S92SC>.

Email to clients with survey link:

Tu voz importa. Por favor cuéntenos sobre su visita más reciente a WIC y cómo podemos mejorar, completando esta encuesta <https://www.research.net/r/N2S92SC>. Sólo le tomará unos minutos. Sus beneficios WIC no serán afectados si decide no participar. La encuesta nos ayudará a entender su experiencia con WIC y los resultados permitirán informar al program de WIC a nivel nacional.

MICHIGAN WIC TELEHEALTH APPOINTMENTS FOR BREASTFEEDING AND NUTRITION

TIPS FOR A SUCCESSFUL TELEHEALTH VISIT



BEFORE THE APPOINTMENT

Install Zoom Licensed Account

- **Zoom Account Activation:** You will receive an email with an embedded link to activate your Zoom account.
- Once activated, check out these [how-to videos](#) to learn the basic functionality of Zoom.

Appropriate Setting

- **Privacy** - Close your door to keep the appointment confidential.
- **Background** - Use a filter or ensure an appropriate, uncluttered space behind you.
- **Lighting** - Try to reduce glare or shadows.



Ready, Set, Zoom!

- Open the Zoom link and be sure the client also has it.
- Test your audio to make sure there is no echo.
- Develop a back-up plan in case you get disconnected. Make sure you have the client's contact number available, in case you need to switch to a phone call.
- Contact the telehealth liaison for technical assistance.

DURING THE APPOINTMENT

Make a Personal Connection

- Make sure the client is comfortable with Zoom and telehealth in general.
- Turn on your camera and encourage the client to do the same
- Discuss the importance of privacy and ask if anyone else is in the room.
- Create eye contact by looking into your camera lens and not at the clients face.
- If you are going to take notes, or will be looking down for an extended time, let the client know ahead of time.
- Be upfront about technology issues, let the client know what to do if you are disconnected or having technology issues.

ADDITIONAL TIPS

- Treat a telehealth appointment as if you are walking into the clinic room.
- Wear professional clothing, include your nametag or logo if possible.
- Introduce yourself and have the client introduce themselves.
- Remove distractions - close or mute other tabs and applications on your computer.
- Silence your phone or other devices.
- If you are using the ONE platform, have the tab open and ready on your computer.
- Remind your client that telehealth is their choice! They will receive their WIC benefits no matter how they receive services.

THIS-WIC Client Survey Promotional Language

Recruitment for Telehealth- Utilize Introduction to Telehealth Videos and Telehealth Infographic

- Michigan WIC is now offering nutrition and breastfeeding telehealth appointments.
- Telehealth is an online appointment where you and the WIC staff can see and hear each other on Zoom.
- Telehealth is more flexible because you can have your appointment online instead of going into the WIC clinic. You can avoid driving in bad weather, heavy traffic, parking and viruses.

Here is some example language for local agency staff to use to promote the client survey.

Feel free to tailor the promotional language below to your specific State Agency needs (e.g., survey provision process, if you're providing an incentive).

Also, encourage staff to edit talking points to their usual speaking style and preferences.

The talking points are organized by the four main points to emphasize during the promotion, with bulleted talking point concepts under each main point.

1. The Survey is Important to [Local Agency/Clinic Name] and for the WIC program at a National Level:
 - ✓ Before we let you go, we want to remind you your feedback always matters to us.
 - ✓ It allows [local agency/clinic name] to improve your WIC experience.
 - ✓ That's why we are conducting an ongoing survey. It will only take a few minutes to complete.
 - ✓ The survey will help us understand your WIC experience after each appointment.
 - ✓ Findings from the survey will also help inform the WIC program at the national level.
2. Your Survey Responses will be Connected to Already Collected WIC Information:
 - ✓ The survey will ask for personal information to simply link existing information the WIC program already has about you and your family.
 - ✓ Connecting that information with survey responses will help WIC understand how services impact different participants.
 - ✓ Still, no [local agency/clinic name] WIC staff will see your individual responses. Your survey responses will be anonymous to [local agency/clinic name].
 - ✓ The survey is hosted on a secure platform to ensure your privacy, too.
3. It's an Optional Opportunity and Does Not Impact Your WIC Benefits:
 - ✓ If you don't choose to take the survey, you will not lose your WIC benefits.
 - ✓ Nor will there be any negative consequences for not participating.
4. This is How You Will Receive The Survey:
 - ✓ You will receive the survey link in a text message.

- ✓ If you have any questions, please feel free to reach out to the contact information listed with the survey.
- ✓ Thanks again for your time and consideration!



Quick Start Guide

Currently, Michigan WIC is using ONE to support client learning during nutrition counseling and breastfeeding support telehealth appointments in select agencies as part of the Tufts THIS-WIC Grant Project.

Log into ONE at www.nutrition-one.com.

ONE will work best on a new internet browser like Chrome, Safari, Edge, or Firefox.

home page



1. Connect to a client's ONE account.

Type the client's name or WIC ID number into the Search Bar.

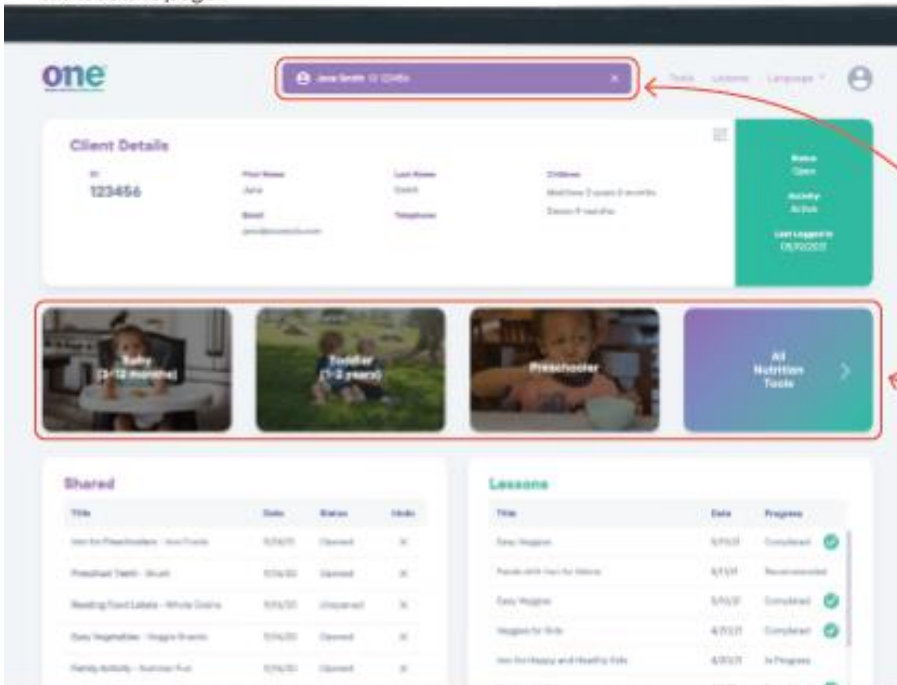
OR

Click on **All Clients** in the search bar to see a list of all your clinic's clients.

Add a new client or locate the client in the list. Click on the icon in the Select Client column.

Once selected, your client's name will be highlighted in purple.

client details page



2. Find a Nutrition Tool. After you have completed a health and diet assessment, find a Tool to support nutrition education based on your client's needs and interests. Click on a category or **All Nutrition Tools**.

categories page

1. On the **Categories** page, click on a category for a list of topics. Click on a topic. This will open a set of Nutrition Tools.
ONE Nutrition Tools are organized by: Category - Topic - Tool

3. Choose a Language for your client to see on the visual Tool.

4. Use Tools to support your nutrition and breastfeeding counseling and education.
Full screen: Click this icon to maximize the Tool and help your client focus on the visuals.
Share your screen with the client.
Tool features for WIC staff:
Information: Shows talking points and sample questions for you to reference before sharing your screen with the client.
Interactive: Describes what is interactive and is only on Tools that have interaction.

nutrition tool page

6. If appropriate, recommend a **ONE Lesson** that supports your client's goal by clicking on 'Recommend'. You can reverse this by clicking on 'Remove'.

5. Share education to the client's **ONE account** when you have completed your counseling, nutrition education and goal setting. Pick the topic that best supports your client's goal(s). This is comparable to handing your client a printed handout.

7. Exit a client's account. Click the X in the search toolbar.

ONE Words to Know

- Nutrition Tools:** Visuals on the clinic interface to use during counseling or nutrition education with clients.
- Share:** When you Share a topic, corresponding education is sent to the client's ONE account.
- Lessons:** Short self-paced online lessons a client can complete in between WIC appointments.



Staff Video Resources -

Introduction to Telehealth (Spanish) <https://youtu.be/u3lS5ozoyO8>

Introduction to Telehealth (English) <https://youtu.be/JuS0f7GltWo>

Tips for Telehealth (Spanish) <https://youtu.be/c9s4WqJPOj0>

Tips for Telehealth (English) <https://youtu.be/nyT8TTndFeM>

Past trainings and office hours meetings can be found on SharePoint and [MPHI Webcast catalog](#)

Frequently Asked Questions

1) What if client joins by phone?

A: If the client uses the phone number to join, this will not be considered a telehealth appointment for research purposes. A note should be made in client record and do not send a survey link.

2) What if the connection was too poor to complete the appt?

A: If the appointment was established through Zoom but unable to be completed, a survey should still be sent. It is important to provide clients with an alternate phone number to contact if unable to connect through Zoom. At the beginning of the Zoom appointment, staff should establish a process if there is poor call quality, such as can I call you at XXX-XXXX if the call is dropped?

3) What if the client changes their mind and doesn't want a telehealth appt?

A: The appointment type should be changed in MI-WIC to reflect the preference of the client.

4) What if a proxy completes the appointment? Who gets the survey link?

A: The survey link should be sent to the number listed as preferred on the family screen.

5) What if I have multiple telehealth appointments over a short period of time, do I keep sending surveys?

A: For IBCLC appointments that may have subsequent follow-up in a short period of time, only one survey should be sent after the initial appointment. Clients that may have RD appointment during a new certification while in the grant period (January 2022 to June 2023) should be provided a new survey.

6) Does a client have to create a ONE account?

A: The Telehealth Liaison, RD or IBCLC must create an account for the client. Once the account is created the client can log in and create a password. Please reference ONE Quick Guide.