



## Quick Start Check-list for when YWHO Virtual Hub Appointment is Requested:

### Part 1: What to do when a virtual Request is received?

1. Review the appointment card in the Requested swim lane, by checking the youth's name and information
2. Check to see if youth already has a record in My Wellness Passport (Dacima), review the service they are requesting and the time. If everything looks okay, then move the card to the **Confirm** swim lane
3. In the **Confirm** swim lane, if this is a new youth, then select on "Create Client", if this is an existing youth, select "Link Record"

**Note:** Once the card is moved to the **Confirmed** swim lane, a new client record is created for the new youth and a YWHO Virtual Hub - Virtual Visit in My Wellness Passport (Dacima) is automatically created for the youth

4. The next step is to go into My Wellness Passport (Dacima) to verify that the YWHO Virtual Hub Visit was created with the correct date the appointment is scheduled for
5. After the YWHO Virtual Hub - Visit is created in My Wellness Passport, you are now able to push the forms to the Youth using their preferred method of communication

Please refer to page 2 for Part 2, What to do after forms have been pushed?



## Quick Start Check-list for when YWHO Virtual Hub Appointment is Requested Continued:

### Part 2: What to do after forms have been pushed?

1. After the forms have been pushed, you can now manually move the appointment card to the **Form Sent** swim lane.
2. After the forms have been completed, you will then need to move the appointment card to the **Appointment Start** swim lane. When ready to start the Zoom session, select on the **"Start"** button.
  - **Note:** Make sure to review the forms completed by the youth on My Wellness Passport (Dacima) before the start of the appointment.
3. When the session is completed, you can now manually move the appointment card to **Appointment End** swim lane
4. Following the session, use My Wellness Passport (Dacima) to:
  - a. Push the VSWS and SRS form to the youth
  - b. Complete and validate the End of Visit form.

### Part 3: What to do if an Appointment has been cancelled or a No Show?

The process for cancelled virtual appointments is to complete the **End of Visit Form** on the My Wellness Passport platform. Since the Virtual YWHO Hub – Visit record was created, the End of Visit form will be available to be completed and validated to close the visit.

- a. Open the End of Visit form in My Wellness Passport
- b. In the End of Visit form please select the "Select if Client did not receive services as planned/intended" option, then if you want you can then indicate "appointment was cancelled" in the open text field.

### Part 4: What to do if there is a duplicate record created in My Wellness Passport?

If there is a duplicate youth record on the My Wellness Passport platform, please reach out to the helpdesk at [mwp@ywho.ca](mailto:mwp@ywho.ca) for support. The helpdesk team will advise on what the steps are for resolving the duplicate.