

Vocera is the preferred HIPAA-compliant clinical communications tool across Northwestern Medicine. Physicians are expected to actively manage their availability in the app and respond to communications while on-shift.

<p><b>When to use Vocera</b></p>	<ul style="list-style-type: none"> <li>• Send HIPAA secure texts that include PHI and images.</li> <li>• Request consults (verbally verify correct physician first).</li> <li>• Call or message a nurse or ancillary staff about a patient.</li> </ul>
<p><b>Download Vocera Collaboration Suite and log-in</b></p> 	<ul style="list-style-type: none"> <li>• Download the app from <a href="#">Google Play</a> (Android devices) or <a href="#">App Store</a> (Apple devices). Follow all prompts to install Vocera:             <ul style="list-style-type: none"> <li>○ Allow access to microphone.</li> <li>○ Allow to send notifications.</li> <li>○ Always allow location services.</li> <li>○ Select “Personal Device” as your device type</li> </ul> </li> <li>• Log-in using your NM username and password.</li> <li>• Select vcs.nm.org as “Server Name”</li> <li>• Create a 4-digit PIN (to be used after 30 minutes of inactivity).</li> <li>• When on-campus, always connect to NMMOBILE Wi-Fi network, and forget other networks, like NMDATA and NMGUEST. This is necessary to make Vocera work properly. If you are not on NMMOBILE while on-campus, you will appear as “unavailable” and Vocera calls will not come through.</li> <li>• Call MyNM Service Center if you need help: <b>312.926.4357</b>, press 3.</li> </ul>
<p><b>Set your availability status</b></p>	<ul style="list-style-type: none"> <li>• A contact’s availability shows in the “To” field when composing a message, indicated by a colored circle around the profile picture.             <ul style="list-style-type: none"> <li>○ <b>Available (green)</b>: Calls and texts will come through. </li> <li>○ <b>Do not disturb (orange)</b>: Silences calls and texts. </li> <li>○ <b>Unavailable (red)</b>: You will not receive calls or texts. </li> </ul> </li> </ul>
<p><b>Find contacts</b></p>	<ul style="list-style-type: none"> <li>• <b>Search by name.</b> Select “Global” as the site to find all NM physicians.</li> <li>• <b>Search by role:</b> For example, “RMG admitting hospitalist: Delnor,” or “Emergency Medicine: NMH”</li> <li>• <b>Search by group:</b> Select specific site where the group is located.</li> <li>• <b>Search for residents and fellows:</b> Select McGaw Medical Center as site.</li> <li>• <b>Search for care team members:</b> Toggle to Patients module.</li> </ul>
<p><b>Attach patient information to a text</b></p> 	<ul style="list-style-type: none"> <li>• Tap pencil icon  to start a new message</li> <li>• Choose <b>New Text</b> or select from <b>Templates</b></li> <li>• Add a recipient from <b>Favorites</b> or <b>Contacts</b> by scrolling or using the search field.</li> <li>• Tap  to add a contact</li> <li>• <b>Do NOT put PHI into the subject line</b> because it is not secure.</li> <li>• Add patient information, if needed</li> <li>• Search for patient from “My Patients or “All Patients”</li> <li>• Patient name, DoB, age and location will appear</li> <li>• Type the message in the gray bar and tap “send”</li> <li>• Tap ellipses to change the message priority, attach images or take a picture.</li> <li>• Once a message is sent with patient information, it can’t be removed.</li> </ul>

## Quick Start Guide for Physicians, continued

<b>Add someone to an existing text string</b>	<ul style="list-style-type: none"> <li>• Click the information button </li> <li>• Click Add Participant. The Select Recipients dialog box appears.</li> <li>• Select the Favorites tab to display favorites only, or select the Contacts tab to display all contacts.</li> </ul>
<b>Make a Vocera call</b>	<ul style="list-style-type: none"> <li>• <b>On-campus:</b> Tap  on the Call Log screen. Use Genie  voice command or keypad to make a call.</li> <li>• <b>Off-campus:</b> Tap  on the Contacts screen.</li> </ul>
<b>Transfer a call</b> 	<ul style="list-style-type: none"> <li>• While on a call, tap the transfer button</li> <li>• Select “Transfer to Number”</li> <li>• Enter a 10-digit number or 5 digit extension</li> </ul>
<b>Forward a call</b> 	<p><b>Calls</b></p> <ul style="list-style-type: none"> <li>• Forward calls to a User or Group, or Other Phone. <b>Do not</b> forward to Voicemail</li> <li>• Options appear to forward All Calls, Unanswered Calls, or When I am Offline</li> <li>• Enter the number to forward your calls.</li> <li>• When you are not working or if you are on vacation, turn off call-forwarding to your cell phone and log-out of Vocera to avoid unwanted calls.</li> </ul>
<b>Hospital-based providers start-of shift reminders</b>	<p>Place yourself in a temp role for your shift using the Staff Assignment feature. This will enable you to receive calls and messages for this role. Add yourself to a temp role using one of the following options:</p> <ul style="list-style-type: none"> <li>• Say “hey Vocera” then “add me to __ role). For example, “Add me to nocturnist.”</li> <li>• Go to Vocera Staff Assignment on NMI &gt; App launcher &gt; Vocera Staff Assignment. Use your NM username and password to log-in.</li> </ul>
<b>Hospital-based providers end-of-shift reminders</b>	<ul style="list-style-type: none"> <li>• Log-out if you will be out for an extended period of time (like a weekend or vacation).</li> <li>• Forward calls and texts to whomever is covering the next shift.</li> </ul>
<b>Communications guidelines shared with nurses</b>	<ul style="list-style-type: none"> <li>• Contact physicians for rounding and routine communications.</li> <li>• Urgent calls are for emergencies only. Urgent calls break through other calls.</li> <li>• The sender gets a read receipt, so there is no need to reply after clinical information is exchanged.</li> <li>• View <a href="#">Communications Etiquette Guidelines</a>.</li> </ul>
<b>Tips to preserve battery life</b>	<ul style="list-style-type: none"> <li>• Connect to NMMOBILE and “forget” other networks while on campus.</li> <li>• Log-out at the end of your shift instead of swiping up to close the app.</li> <li>• Reduce screen brightness and close apps you’re not using.</li> <li>• View <a href="#">battery optimization tips</a></li> </ul>
<b>Do NOT use Vocera for:</b>	<ul style="list-style-type: none"> <li>• Placing orders: Order in Epic only</li> <li>• A substitute for phone or verbal orders</li> <li>• ED admissions</li> </ul>
<b>Other communications tools</b>	<ul style="list-style-type: none"> <li>• Web paging will still be available.</li> <li>• Vocera will not impact your ability to use other apps on your own device, such as Epic Haiku and Canto, Dragon and Spok Mobile.</li> </ul>

### Vocera Resources

- View mini-tutorial videos on Physician Forum > [Vocera Resources \(scan QR code\)](#)
- Find NM tip sheets and links to videos in the Vocera app: Vocera > Content > Vocera Resources
- View Vocera Resources on NM Interactive: NMI > Departments > Information Services > [Vocera](#).
- View Vocera tutorials in Vocera: Navigate to “More” at the bottom of the Vocera screen > Help

