

Targets: Front Desk, Scheduler, Roomer (Nurse/CNA)

Quick Reference: Scheduling and Registering Patients for Telehealth Visits



Established patients requesting/needing appointments, who do not require being seen in person, can now schedule a Telehealth appointment with their provider using a Video Conferencing Platform (VCP).

Creating and Converting Current Appointments to Telehealth

1. "Good morning/afternoon, my name is *{name}*. I am calling from *{organization name}*. May I please speak with *{patient name}*?"
2. "You are scheduled for an appointment *{day, month, date}* at *{time}* with *{provider}*. We are working with our patients to offer them the opportunity to have their appointments with their regular provider through telehealth. If you would be interested in this option, I would like to make your appointment a telehealth appointment."
3. Explain what telehealth is:
 - a. You will see your usual provider using the camera on your cell phone, tablet or computer, or a computer with a webcam.
 - b. You will spend the same amount of time with your provider with telehealth that you would if you were in the office.
 - c. There is no additional cost for the visit.
 - d. If you have a copay, it will be billed to you.
4. If patient **declines** Telehealth, continue with the call.
5. If patient **accepts** Telehealth:
 - a. Ensure the patient's device has a camera and a microphone. Ask if the patient has any hearing or visual impairments.
 - b. Ensure that the patient has unlimited data or Wi-Fi to support a video call without accruing extra charges from their cell phone company.
 - c. Verify the patient's demographics for pre-registration.
6. "To confirm, your appointment is on *{date}* with *{provider}*."
7. Provide the patient with the VCP information needed to attend their telehealth appointment on the appropriate date/time.
8. Ask the patient if they have a few moments to review their demographic information. If so:
 - a. See page 2.
9. "Please call us at *{phone number}* if you are having any issues with the telehealth visit information."
10. Closing, "thank you, have a great day".

Next Steps for the Scheduler

1. Schedule the appointment into your VCP.
2. Change the visit type to a Telehealth encounter in the EMR.
3. Add the link or meeting ID into the scheduled appointment notes for the patient. Include instructions on how the provider and patient should reconnect in the case of technology or connectivity issues.



Register the Patient for Telehealth Appointment

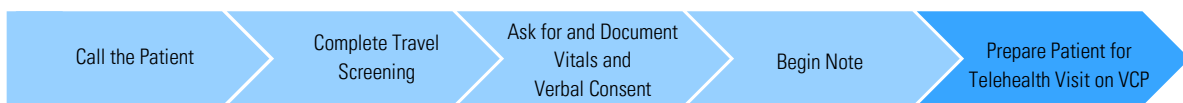
1. Verify patient demographic information
 - a. Address, Phone, Interpreter, Preferred Language, Email, SSN, PCP, Emergency Contact, Employer, Guarantor, and Insurance coverage as applicable.
2. For patients with Medicare, the MSPQ is required to be completed.
 - a. Review the questions with the patient as you would in person and complete based on the patient’s responses.

Confirm with Patient 24-48 Hours Prior to Appointment

1. Confirming the telehealth appointment with the patient is recommended 24-48 hours prior.
2. “Good morning/afternoon, my name is *{name}*. I am calling from *{organization name}*. May I please speak with *{patient name}*?”
3. “I am calling to confirm your appointment on *{date}* with *{provider}* and to make sure you received the instructions I emailed you with the link so you can join the videoconference at *{time}*.”
4. “If you haven’t downloaded the software, I thought we could do that together today and test the link to be sure you’re ready for your appointment I’ll also confirm that you have your phone nearby in the case that have any challenges with technology or the connection, so the provider can call you to reconnect.
5. After you have downloaded the VCP and tested the link successfully, remind the patient that all they’ll need to do the day or their appointment is use the link to join the meeting. Remind the patient:
 - a. The visit is scheduled 30 minutes before the provider joins to confirm the connection and complete registration.
 - b. You will initiate the visit in the VCP so the patient need only use the link or add the meeting number in the box if prompted to join the visit.
 - c. Join with video and join with computer audio.
6. Ask the patient if they have any questions or concerns and thank the patient.

Day of Appointment

1. It is recommended to check in all patients who are scheduled for Telehealth that day at the same time in the EMR, regardless of their appointment times.



Front Desk Initiates the Visit

1. Thirty minutes before their appointment, initiate the visit in the VCP.
2. Once the patient logs in, admit the patient to the waiting room (if necessary).
3. Confirm the connection, and resolve any issues.

4. Confirm patient's identity
5. Complete registration
6. Confirm patient will be billed the co-pay (if applies).

Room the Patient

7. Notify the nurse/CAN 10-15 minutes before their encounter, call the patient at their preferred contact number.
8. Start note in the EMR
9. If you have a travel screening in place, complete the screening with the patient.
 - a. Ask all questions and enter their responses.
10. Ask the patient if they have any vitals to report that they may have taken at home.
 - a. Document the patient's encounter as usual in the EMR.
11. Continue with the standard rooming workflow in the EMR.
12. Document patient's consent to the telehealth visit in the EMR.
13. Open the progress note and document that the verbal consent was provided as shown below.
 - a. *Obtained patient's verbal consent to treat them and their agreement to <org's initials> financial policy and NPP via this telehealth visit during the Coronavirus Public Health Emergency.*
 - b. If the standard procedure for rooming patients at your clinic includes starting a note and completing the Review of Symptoms (ROS), do so during Telehealth visits as well.

Prepare Patient for Telehealth Visit

1. At the time of the appointment, verify the patient has the Telehealth visit information and their phone nearby so the provider can call them if technology or connection challenges require that option.
2. Notify the provider that the patient is ready for the encounter.
3. The provider will enter the appointment in the VCP to see the patient and will document from here.

