Telephone Visits: Workflow Examples
CP3 Toolkit: Expanding Access

Two workflows provided by San Mateo Medical Center outline processes for scheduling telephone visits initiated by a patient and phone visits conducted by either a provider or a nurse.

Sample Workflow 1: Scheduling a Visit Initiated by a Patient

Start: Patients call clinic with need

PSA determines the need (appointment, refill, advice, sick, etc.)

If the following symptoms are given, schedule phone appointment with provider or nurse:
[specific symptom list should be determined by provider at each site]

Assign appropriate visit type:
- Tele-PROV
- Tele-RN

For all phone appointments, verify demographics

In GENERAL NOTES:
- Add telephone number for call back
- Note if patient needs interpreter
- Note if patient could NOT be reached for pre-registration and needs registration after the telephone visit

Educate patient that the provider/nurse will call within a 30-minute window of their scheduled appointment.

END
Sample Workflow 2: Conducting the Phone Visit

START: Double click on appointment slot in the schedule (within 30 min window on either end of appointment time)

Call patient at preferred number

Is patient reached?

Document no answer: "n/a and time" in billing notes

Did patient answer?

Call patient 2nd time within 10 minutes, or after next appointment

Document no answer: "n/a and time" in Billing Notes

- Leave voicemail according to script "This is [your name] from [your clinic], calling for our scheduled phone visit. Please call [clinic phone number] to reschedule your appointment.”

END

Change status from "PEN" to "ARRIVE" in appointment window

Close patient appointment window

Right click on appointment, click on "view progress note"

Merge phone visit template (to search, parameters should be generic)

Verify patient identity by asking name and DOB

Complete appropriate E&M code:
- Provider phone visit 5-10 min
- Provider phone visit 11-20 min
- Provider phone visit 21-30 min
- Nurse phone Visit 5-10 min
- Nurse phone Visit 11-20 min
- Nurse phone Visit 21-30 min

To document time spent: Under Treatment, click browse-9 search for Phone-Based Care, enter minutes

Documentation requirements:
1. Patient consent
2. Participants on the call
3. Chief complaint/reason for visit
4. Relevant history, background, and/or results
5. Assessment
6. Plan and next steps
7. Total time spent on call

Change status to "CHECKED OUT" in appointment window, unless PSA support is needed

END