Day Before Patient's Appointment

▶ Clinic Identifies Patients to Call from Next Day's Scheduled appointments

▶ **Clinician** will **identify,** during **HUDDLEs** with Medical Assistant(MA) and Patient Representative(PR), patients for a phone consultation

▶ The PR will take note which patients will have a phone consultation

▶ The PR will call the patient to remind him/her and educate about the phone consultation using *script provided by his/her manager

▶ The PR can Confirm **Eligibility and Insurance**

Update Event Type to Phone Consult – PR

▶ On existing appointment, change the Event/Event Chain to **Phone Consult**

▶ Enter **Provider Reschedule** in Reason for appointment reschedule

Appointment Day – Encounter Patient Type - PR

▶ Confirm MA is ready for call with patient

▶ Follow check-In process:

- **Call the Patient**

- **Confirm Eligibility and Insurance**

- Update **Demographics**

- Change the Patient Type to **Telehealth** on the Encounter

Appointment Day – Consent to Treat - PR

▶ Check the **Consent to Treat Box** with Current Date from UDS Tab

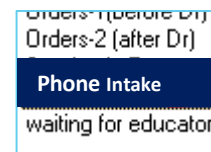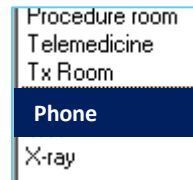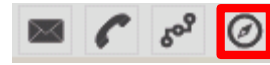▶ Tracking Status is changed to **KEPT** when Check-In is completed

▶ **Transfer Patient Call to MA**

Appointment Day – MA & Intake

▶ **Open** the Patient's Chart

▶ Do **Four Point** Check

▶ Select **Specialty**: Family Practice, Pediatrics, GYN

▶ Select **Visit Type**: Office Visit

Track the Patient - MA

▶ Click on the Track Patient Button

▶ Select Phone in the Room Picklist

▶ Select Phone Intake in the Status Picklist

Appointment Day – MA & Intake Comment

▶ Determine if an **interpreter** will be needed

▶ Add the **Historian**: Example: Self

▶ Add reason for visit in the **Intake Comments**

▶ Select **Save & Close**

Contagion Risk - MA

▶ From the Intake, Click on **Contagion Risk**

▶ Select **COVID-19** from the Exposure section

▶ Fill in as much details as possible and click **Add**

Complete Intake - MA

▶ **Reconcile** Medications

▶ Add/Review **Allergies**

▶ Update **Histories**

   • Medical/Surgical/Interim History

▶ Document **PHQ-9**

▶ Generate **Intake Note**   [Intake Note]

▶ Transfer patient call to **Clinician**

▶ Change **tracking** status to **Call Ready**

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Appointment Day – Clinician

▶ Perform **Four Point Check**

▶ Change **tracking** status to **Doctor-IN**

▶ Update **SOAP** Template

- • **HPI, ROS**

- • **Review History**

▶ **Physical Exam**: Using the One Page exam, document in the comment box **Phone Visit, Patient not present**

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Appointment Day – Clinician - Complete SOAP

▶ **Assessment/Plan:** Add Diagnosis

▶ **AP/Details:** Document in patient plan under patient details, a

  • Add **follow-up** as needed.

▶ **Labs, Referrals, Diagnostics**: Order as needed

▶ **Medications:** Prescribe/refill medications as needed – It is recommended to provide a 90-day supply for chronic medications

▶ **Patient Education:** Send through patient portal, if the patient is enrolled. If the patient does not have portal offer to mail documents

Appointment Day – Clinician & Finalize

▶ **Finalize**

- Select the appropriate medical **decision-making**

- **Calculate** code

- Add 95 modifier – **Telemedicine Services**

- Select **Submit Code**

▶ Change Tracking status to "**Done-DR**"

*Phone Call Script

▶ * Hello, this is (**employees name**) from Clinicas de Salud del Pueblo, calling to confirm your appointment for tomorrow at (**TIME**), your provider will be doing a **telephone consultation.** You are not required to come to the clinic at this time due to the pandemic (Corona virus).

▶ Hola, mi nombre es _____ llamo de Clinicas de Salud del Pueblo para confirmar su cita de mañana a las _____, su cita sera una consulta via telefono. Usted no require venir a la clínica durante este momento debido a la pandemia (Corona virus).