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**
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

- **Transfer patient call to Clinician**
- **Change** tracking status to **Call Ready**
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**
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
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 clinica durante este momento debido a la pandemia (Corona virus).