

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

The screenshot shows the 'Edit Appointment' window with the following details:

- Date:** 03/20/2020
- Time:** 5:00 P
- Event/Event Chain:** Phone Consult (highlighted with a red box)
- Duration:** 15
- Resources:** Guefen MD, Uri CLX (15 min)
- Service Location:** Callexico Clinic
- Description:** Testpatient, Adult Female
- Details:** Test Phone Consult
- NextGen Dialog:** Reason for appointment reschedule: Provider Reschedule (highlighted with a red box)
- Patient Information:** Last: Testpatient, First: Adult Female, Middle: Test, Birth Date: 06/29/1987, Age: 32 yrs, Sex: Female, Address: 1166 K St, State: CA, Zip: 92227-
- Buttons:** Delete, OK, Cancel

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

The screenshot shows the 'Create Encounter - Test, Labcorp' form. The 'Patient Type' dropdown menu is open, showing options: '<none>', 'Established', 'New Patient', and 'Telehealth'. The 'Telehealth' option is highlighted in yellow. The form includes various fields for dates, times, codes, and patient information. The 'Providers' section shows 'Rendering' as 'Rendering'. The 'Incident-To Bill Encounter' checkbox is unchecked. The 'Encounter Types' section shows 'Billable;Clinical' selected. The 'Print Encounter On Statements' checkbox is checked. The 'Homeless Status' is set to 'No'.

Billable Date: 03/20/2020, Billable Time: 10:30 AM, Occurrence Code: Illness, State: , Onset Date: , Onset Time:

General | Clinical | Billing & Collections | Encounter Specifics | UB | Claims | Marketing | History

Patient Type: <none>, Established, New Patient, Telehealth

Condition Related to Employment: ☐ Same/Similar Date: , Date Last Seen:

Practice Specifics: BCM: , CBE:

Admit Date: , Admit Time: , Initial Treatment Date: , Discharge Date: , Discharge Time: , Discharge Status:

Facility:

Guarantor: Test, Labcorp, Relation: Patient

Encounter Types: Billable;Clinical, Case: , Case Date:

☒ Print Encounter On Statements, ☐ Patient is Homebound, ☐ Exempt from Outsourcing, ☐ Initial Enc in Series

Homeless Status: No, Service Type:

Providers: Rendering, Referring: , Referring Facility: , Supervisor: , Service Location: Brawley Clinic

☐ Incident-To Bill Encounter

OK Cancel

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

The screenshot displays a patient record form with a sidebar on the left containing the following menu items: Demographics, Status, Client Defined, Privacy, Employer, Relations/Role, UDS (highlighted in blue), Ext, and History. The main form area is divided into two sections. The top section contains demographic fields: Social Security (displaying "--"), Birth Date (02/16/2020 with a calendar icon), Current Gender (Female), Gender Identity (Female), Sexual Orientation, Preferred Pronoun, and an "Exempt from Person Merge" checkbox. The bottom section, titled "UDS", contains various status fields: Homeless Status (Not Homeless), School Based Hlth Center, Tribal Affiliation, Descendancy, Migrant Worker Status (Not A Farmworker), Race (White (uds)), Blood Quantum, Primary Medical Coverage (CHDP Gateway MediCal), Language Barrier (Yes), Ethnicity (Hispanic (uds)), IHS Eligibility Status, and a "Self Pay" checkbox. A yellow highlight box is positioned over the "Consent To Treat" checkbox, which is checked, and the "Consent to Treat Date" field, which shows 03/16/2020 with a calendar icon. At the bottom of the UDS section, there is a "Sliding Fee Schedule Verification" checkbox.

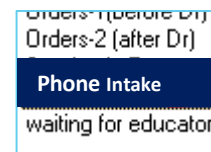
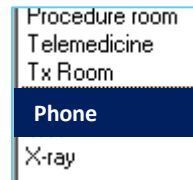
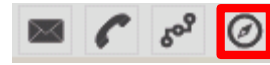
- ▶ **Transfer Patient Call to MA**

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



The screenshot shows the 'Today's Patient Tracking' window. At the top, it displays 'Appointment date: 11/15/2017'. Below this, the 'Appointment information' section shows '8:00 AM Donnelly MD, Kevin Reason: Abdominal Pain'. The 'Room' field is set to 'Phone' and the 'Status' field is set to 'Phone Intake', both highlighted with red boxes. A note '(Entries uploaded on "Save and Close".)' is visible next to the status field. The 'Patient Tracking' section contains a table with columns: Appt Time, Room, Status, Time, and Documented By. The table is currently empty. At the bottom of the window, there are four buttons: 'Task', 'EHR Appointments', 'Save & Close' (highlighted with a red circle), and 'Cancel'.

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**

The screenshot shows a software interface for entering patient information. The main window is titled "Reason for" and has a tabbed interface with "Reason for Visit" and "History of Present Illness". A list of medical conditions is on the left, including asthma, back pain, chest pain, chronic conditions, depression, diabetes, fatigue, GERD, headache, hyperlipidemia, and hypertension. Below this list is an "Other" field and an "Add" button. A blue arrow points from the "Intake" button in the top right corner of the main window to the "Intake Comments" dialog box. The "Intake Comments" dialog box has a text input field with the placeholder text "Enter Reason for visit (phone consultation)". A blue arrow points from the "Save & Close" button in the bottom right corner of the dialog box to the "Save & Close" button in the main window.

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**

The screenshot displays the 'Contagion Risk' interface. At the top, there's a navigation bar with 'Specialty' set to 'Family Practice' and 'Visit Type' set to 'Office Visit'. A 'Contagion Risk' button is highlighted with a red box. Below this is a tabbed interface with 'Intake' selected. The main content area shows the 'Contagion Exposure' form. On the left, a list of exposure types includes 'traveled to high risk area', 'Anthrax', 'Bird Flu', 'Cholera', 'COVID-19 (Coronavirus)' (highlighted with a red box), 'Ebola', 'Lyme Disease', and 'Malaria'. The main form area is titled 'Contagion Exposure' and has three radio buttons: 'Detailed document', 'Reviewed, updated' (selected), and 'Reviewed, no change'. The 'Last update/detailed doc' is '03/16/2020'. The form fields are as follows:

Exposure:	Incubation:	Exposure detail:	Risk:
COVID-19 (Coronavirus)	2-14 days	Traveled to high risk area	some risk

Below these fields, there are sections for 'Where' (State/Country), 'Exposure date', 'Travel arrival', 'Travel departure', and 'Duration of exposure'. The 'Where' field is set to 'Florida'. The 'Exposure date' is set to '//'. The 'Travel arrival' is set to '02/11/2020' and 'Travel departure' is set to '02/14/2020'. The 'Duration of exposure' is set to '//'. There is a checkbox for 'Patient declines to answer' and a 'Deactivate' button. At the bottom of the form, there are links for 'http://www.cdc.gov', 'Web', 'Zika Pregnancy Screening', and buttons for 'Add', 'Update', and 'Clear All'. Below the form is a 'Contagion Exposure History' table with columns: Exposure, Risk, Where, Exposed, Arrival, Departure, Duration, Incubation, and Exposure. The table is currently empty. At the bottom of the interface, there are sections for 'Contagion Exposure Log' and 'Travel History', both with dropdown arrows. The bottom right corner has 'OK' and 'Cancel' buttons.

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**

The screenshot shows a software window titled "Today's Patient Tracking". At the top, it displays "Appointment date: 11/15/2017". Below this is a section for "Appointment information:" with a text box containing "8:00 AM Donnelly MD, Kevin Reason: Abdominal Pain". Underneath, there are two fields: "Room:" with a dropdown menu showing "Phone" and "Status:" with a dropdown menu showing "Call Ready". A note "(Entries uploaded on 'Save and Close'.)" is next to the status field. Below these is a section for "Patient Tracking:" which contains a table with the following columns: "Appt Time", "Room", "Status", "Time", and "Documented By". The table is currently empty. At the bottom of the window, there are four buttons: "Task", "EHR Appointments", "Save & Close", and "Cancel".

Appt Time	Room	Status	Time	Documented By
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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**

One Page - Physical Exam

Constitutional:

Overall ☐ Norm:

Eyes: **Vision**

Coniunctiva R ☐ Norm:
L ☐ Norm:

Pupil R ☐ Norm:
L ☐ Norm:

Fundus R ☐ Norm:
L ☐ Norm:

Ears **Nose/Mouth/Throat**

External R ☐ Norm:
L ☐ Norm:

Canal R ☐ Norm:
L ☐ Norm:

TM R ☐ Norm:
L ☐ Norm:

Hearing R ☐ Norm:
L ☐ Norm:

External ☐ Norm:

Ins/teeth/gum ☐ Norm:

Oropharynx ☐ Norm:

Tonsils ☐ Norm:

Neck/Thyroid: **Lymphatic:**

Neck ☐ Norm: Thyroid ☐ Norm:
Neck ☐ Norm: Lymph ☐ Norm:

Breast:

Breast ☐ Norm: Breast ☐ Norm: ☐ Breast exam defer

Respiratory

Effort ☐ Norm:

	Side	Location	Findings:
Inspection	<input type="checkbox"/> Norm: <input type="text"/>	<input type="checkbox"/> Norm: <input type="text"/>	<input type="checkbox"/> Norm: <input type="text"/>
Auscultation	<input type="checkbox"/> Norm: <input type="text"/>	<input type="checkbox"/> Norm: <input type="text"/>	<input type="checkbox"/> Norm: <input type="text"/>

Cardiovascular

Auscultation ☐ Norm: ☐ EKG

Default

Vascular: **Extremity** **Diabetic Foot**

Pedal ☐ Norm: Canillarv ☐ Less than 2 secon
Edema: ☐ No ☐ Yes: ☐ Greater than 2 secon

Abdomen:

Inspection ☐ Norm:

Auscultation ☐ Norm:

Neck Pos: ☐ Abdominal tenderness

☐ Hepatic enlargement cm below ☐ Crosses midline

☐ Spleen enlargement cm below ☐ Crosses midline

☐ Hernia

Genitourinary: **Rectal**

External ☐ Norm:

Urethra ☐ Norm:

Cervix ☐ Norm:

Uterus ☐ Norm:

Adnexa ☐ Norm:

Sphincter ☐ Norm:

Diagnostic fecal occult ☐ Negative ☐ Positive ☐ Not indicate

Musculoskeletal

Extremities ☐ Norm: **Skin:** ☐ Norm:

Neurological

Motor ☐ Norm:

Cranial ☐ II - XII grossly intact ☐ I is grossly intact [Details](#)

DTRs ☐ Norm:

Sensor ☐ Norm:

Psych:

☐ No ☐ Yes ☐ No ☐ Yes

☐ Oriented to person, place, time, situation ☐ Poor judgement

☐ Appropriate mood and affect ☐ Poor insight

Comment ☒ Carry forward comment

Phone Visit, Patient not present

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Save & Close

Cancel

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**

Evaluation and Management Coding

Medical Decision Making [View MDM Guidelines](#) | [View Risk Table](#)

☐ Straight forward ☐ Low complexity
☐ Moderate complexity ☐ High complexity

Counseling
✦ [Counseling Details](#)
Total visit time (minutes):
Total counsel time (minutes):
☐ Counseled greater than 50% of time and documented content

Evaluation and Management Code *User may select a code from the Visit Codes Service Category by clicking in the 2nd or 3rd Visit code field*

Visit code:
Modifier(s):

Calculated EM code:
Submitted code:

✦ [Additional E&M Code](#) | ✦ [SNOMED Visit Type \(optional\)](#) | ✦ [Medicare Preventive Codes](#)

New patient:	Established:	Consultation:	Preventive new:	Preventive established:	Preventive counseling:	Post Op:
<input type="radio"/> 99201	<input type="radio"/> 99211	<input type="radio"/> 99241	<input type="radio"/> 99381	<input type="radio"/> 99391	<input type="radio"/> 99401	<input type="radio"/> 99024
<input type="radio"/> 99202	<input type="radio"/> 99212	<input type="radio"/> 99242	<input type="radio"/> 99382	<input type="radio"/> 99392	<input type="radio"/> 99402	
<input type="radio"/> 99203	<input type="radio"/> 99213	<input type="radio"/> 99243	<input type="radio"/> 99383	<input type="radio"/> 99393	<input type="radio"/> 99403	
<input type="radio"/> 99204	<input type="radio"/> 99214	<input type="radio"/> 99244	<input type="radio"/> 99384	<input type="radio"/> 99394	<input type="radio"/> 99404	
<input type="radio"/> 99205	<input type="radio"/> 99215	<input type="radio"/> 99245	<input type="radio"/> 99385	<input type="radio"/> 99395		
			<input type="radio"/> 99386	<input type="radio"/> 99396		
			<input type="radio"/> 99387	<input type="radio"/> 99397		

Behavioral Health:

☐ 90791 (Initial eval, no med services)
☐ 90792 (Initial eval, w/ med services)
☐ 90832 (Psychotherapy, 30 minutes)
☐ 90834 (Psychotherapy, 45 minutes)
☐ 90837 (Psychotherapy, 60 minutes)
☐ 90845 (Psychoanalysis)

☐ 90846 (Family/Couple therapy, w/o patient)
☐ 90847 (Family/Couple therapy, w/patient)
☐ 90853 (Group therapy)
☐ 90882 (Case consultation)

✦ [Additional Behavioral Health Codes](#)

25 Significant, Separately Identifiable E & M Service by the Same Physician on the Same Day of Px
57 Decision for Surgery
24 Unrelated Evaluation and Management Service by the Same Physician During a Postoperative Period
32 Mandated Services
95 Telemedicine Services
U1 SWYC Dual 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).