Workflow for completing a telemedicine referral from a primary care provider (PCP).

Shasta Community Health Center – Future State: Telemedicine Referral

November 13, 2018

Shasta Provider

Create telemedicine referral

Telemedicine Staff

Receive referral in NextGen Inbox → Open clinical tasking → Accept task → Review referral in Order Management → Call patient to schedule telemedicine visit

Was this 2nd attempt to contact patient?

Able to reach patient?

Add patient to worklog

Send follow-up letter to patient

Send message to PCP → Cancel referral

Update status to Scheduled

Add patient to schedule in NextGen

Complete reminder calls for next day’s appointments

Complete patient pre-registration

Refer to Prep workflow

Front Desk

Call yesterday’s DNKA patients to reschedule

Update status to Scheduled

Did patient arrive for appointment?

Check-in patient

Refer to TM Visit workflow

Did patient arrive for appointment?

Change appointment to DNKA

Complete patient pre-registration
Workflow for preparing for a telemedicine appointment.
November 13, 2018

**Telemedicine Staff**

1. **Begin prep 2 weeks in advance**
   - Open NextGen to ensure schedule is full
   - Utilize waitlist, worklog, or DNKA report to contact patients to fill empty slots

2. **Is schedule full?**
   - Yes: Iris Telehealth (adult psych) or Clinicians Telemed (adult neuro and endo)
   - No: Proceed with next step

3. **Is schedule full?**
   - Yes: Complete paper Clinic Schedule Form
   - No: Proceed with next step

4. **Utilize waitlist, worklog, or DNKA report to contact patients to fill empty slots**

5. **Open patient’s last visit note**
   - Review requirements for follow-up
   - Print labs, diagnostic tests, etc.

6. **Review patient’s last telemed note and follow-up accordingly**

7. **Print telemed referral from NextGen**

8. **Fax all patient information to UC Davis**

9. **Fax request for disc to MD imaging**
   - Yes: Receive disc and mail to UC Davis
   - No: Proceed with next step

10. **Update Outlook calendar**

11. **Email updated schedule day prior to clinic**

12. **UC Davis?**
   - Yes: Complete Referral Request Form (RRF)
   - No: Proceed with next step

13. **Print master IM from NextGen**

14. **Print master IM from NextGen**

15. **Print telemed referral from NextGen**

16. **MRI for neuro or bone age for endo?**
   - Yes: Proceed with next step
   - No: Proceed with next step

17. **Update Outlook calendar**

18. **Email updated schedule day prior to clinic**

19. **Follow-up on outstanding labs or diagnostic tests**

20. **UC Davis?**
   - Yes: New UC Davis patient?
   - No: Proceed with next step

21. **Print patient demo form**

22. **Print telemed referral from NextGen**

23. **Print master IM from NextGen**

24. **Print labs, diagnostic tests, etc.**

25. **Fax all patient information to UC Davis**

26. **Update Outlook calendar**

27. **Email updated schedule day prior to clinic**

28. **Does patient need to be rescheduled?**
   - Yes: Call patient to reschedule
   - No: Proceed with next step

29. **Print materials based on patient schedule order**

30. **Scan and create file**

31. **Email file to TM2U**

32. **Update Outlook calendar**

33. **Fax request for disc to MD imaging**

34. **Receive disc and mail to UC Davis**

35. **Email updated schedule day prior to clinic**

36. **Update Outlook calendar**

37. **Email updated schedule day prior to clinic**

38. **Does patient need to be rescheduled?**
   - Yes: Call patient to reschedule
   - No: Proceed with next step

39. **Print master IM from NextGen**

40. **Print telemed referral from NextGen**

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120. **Follow-up on outstanding labs or diagnostic tests**
Shasta Community Health Center – Future State: Telemedicine Visit

Workflow for rooming and completing a telemedicine appointment.

November 13, 2018
Appendix

Specialist/Specialties/Company:

- Dr. Daniel O'Connell  Adult Neurology  Clinicians Telemed
- Dr. Laura Adler  Adult Psychiatry  Iris Telehealth
- Dr. Michael McManus  Pediatric Psychiatry  Psychiatric Centers at San Diego
- Dr. John Lowry  Pediatric Psychiatry  Psychiatric Centers at San Diego
- Dr. Diana Albay  Adult Endocrinology  TeleMed2U
- Dr. Melissa Butts  Adult Rheumatology  TeleMed2U
- Dr. Celica Chang  Pediatric Neurology  UC Davis
- Dr. Abigail Fruzza  Pediatric Endocrinology  UC Davis

Worklog Subject line:

- F/u for follow up appointments
- NP for new patient appointments
- Peds Psych
- Peds Neuro
- Peds Endo
- Adult Neuro
- Adult Endo
- Adult Psych
- Rheum