# TeleHealth: General Workflow

**Overview of workflow for a typical patient referral to telehealth specialist services.**

**November 9, 2017**

<table>
<thead>
<tr>
<th>PCP</th>
<th>Telehealth Coordinator</th>
<th>Specialist</th>
<th>Medical Records</th>
</tr>
</thead>
<tbody>
<tr>
<td>Referral is ordered</td>
<td>Create referral packet and fax to specialist, if specialist is not credentialed</td>
<td>Schedule patient</td>
<td>Refer to Visit Details workflow</td>
</tr>
<tr>
<td>Refer to Referral and Scheduling workflow</td>
<td>Confirm patient two days before</td>
<td>Prep room and equipment on day of appointment</td>
<td>Log off system</td>
</tr>
<tr>
<td>Refer to Visit Details workflow</td>
<td>Take vitals to give to specialist</td>
<td>Log into system and verify connection with specialist</td>
<td>Verify correct patient with specialist and report vitals</td>
</tr>
<tr>
<td>Place orders per recommendations, as needed</td>
<td>Discuss findings and recommendations with PCP</td>
<td>Interview and examine patient with assistance from TC, if needed</td>
<td>Document visit and send to PCP site</td>
</tr>
<tr>
<td>Document visit</td>
<td>Log off system</td>
<td></td>
<td>Transfer records into system and notify PCP</td>
</tr>
<tr>
<td>Review visit notes and follow up with patient, as needed</td>
<td></td>
<td>Document visit</td>
<td></td>
</tr>
</tbody>
</table>

**Referral and Scheduling workflow**

**Visit Details workflow**

**Medical Records**
TeleHealth: Referral and Scheduling for TeleHealth patients

Creating referral for telehealth specialists and scheduling patient for appointment
November 9, 2017

PCP

- Referral is ordered
- Order labs and/or tests
- Review Referral Guidelines for this Specialty
- Create referral packet and fax to specialist, if needed
- Notify provider of requests for labs/tests
- Schedule patient to complete orders
- Stress importance of coming to appointment
- Does patient want to see equipment?
- Yes: Schedule time to show patient site and discuss
- No: Schedule patient for telehealth appointment

Telehealth Coordinator

- Send referral for traditional face-to-face visit
- Receive referral for traditional face-to-face visit
- Yes: Send referral for traditional face-to-face visit
- No: Is referral appropriate?
  - Yes: Receive and evaluate patient referral
  - No: Are labs/tests needed?
    - Yes: Order labs and/or tests
    - No: Notify provider of requests for labs/tests

Specialist

- Receive and evaluate patient referral
- Is referral appropriate?
  - Yes: Receive results and send to specialists
  - No: Are labs/tests needed?
    - Yes: Schedule patient to complete orders
    - No: Stress importance of coming to appointment

- Call patient about referral and explain telehealth
- Schedule patient for telehealth appointment
- Send referral for traditional face-to-face visit
TeleHealth: Detailed Telehealth Workflow

Workflow for a typical patient referral to telehealth specialist services from reminder calls through specialist visit.

November 9, 2017

Two days before, look at schedule

Call patient to confirm

Did patient answer?

Leave voicemail to call back to confirm

Did patient call back?

Was this the 2nd attempt?

Cancel patient and schedule another in slot

Reiterate importance of attending appt

On day of, review schedule with PCPs and support staff

Prep room and turn on equipment

See patient has arrived on schedule

Take vitals and escort patient back to waiting room

Fax vitals to specialist

Is this the first appointment of the day at your site?

Check that prior appointment is complete

Leave room

Is this a psychiatry or psychology appointment?

Escort patient to room

Give report to specialist, if appropriate

Verify correct patient and vitals were received by specialist

Log into system and verify connection with specialist

Assist specialist, as needed, during visit

Interview and examine patient with assistance from TC, if needed

Notify TC when ready to speak to PCP

Discuss findings and recommendations with PCP

Document visit and send to PCP site

Place orders per recommendations, as needed

Review visit notes and follow up with patient, as needed
Workflow for creating a referral for dermatology using Store-and-Forward processes.
November 9, 2017

**PCP**
- Patient is seen for dermatological issue
- Determines dermatology referral is needed
- Completes referral questionnaire
- Asks medical assistant or nurse to take photos
- Follows up appropriately with patient
- Reviews specialists notes

**Telehealth Coordinator**
- Takes photos of dermatology issue on designated camera
- Drop off camera with medical records department

**Medical Records**
- Uploads photos and questionnaire to send to specialist
- Erases photos from memory and cleans camera to return to clinic staff
- Receives findings and recommendations from specialists
- Uploads specialist’s notes to EHR and sends to PCP
<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Start or End</td>
<td>Indicates the start and end points of a process</td>
</tr>
<tr>
<td>Process Step</td>
<td>A specific process step, task or activity that is performed</td>
</tr>
<tr>
<td>Decision Point</td>
<td>A point in the process where a yes/no question is required</td>
</tr>
<tr>
<td>Reference Point</td>
<td>Indicates a reference or connection to another workflow</td>
</tr>
</tbody>
</table>

- **Indicates Meaningful Use Reporting**
- **Indicates UDS Reporting**
- **Indicates a Reference Point that is not part of a Decision Point**