

PRFM Telehealth Workflows



Successful telehealth visits involve the whole team! Here are the steps Post Rock found work best to create, flip and host telehealth appointments with our patients.

Step 1: Flip the Schedule!

- ✓ Review each day's schedule with the physician/NP/PA to determine which patients can be seen using Telehealth services; considerations include reason for the visit, need for physical exam and patient ability to manage the technology. All new appointment requests should be offered the telehealth option.
- ✓ Outreach to all patients who are suitable for Telehealth visits to move them to that platform (same time slot); use "assume yes" language like this: "We are moving your appointment to a Telehealth visit to help keep you safe at home and away from our office; you will see ___ (provider) on a video screen instead of coming here. I am calling to let you know, help answer questions, and get you set up for success." *Best practice: walk the patient through the Telehealth consent process and initiate next steps immediately to allow time for completion.*

Step 2: Prepare!

- ✓ On the day prior to the visit, nursing staff can prep the chart for the visit and connect with the patient to offer an opportunity to test the video connection; this is especially helpful for older patients or those who are less “tech savvy” so they will feel more comfortable on the date of the visit. Nursing staff can use this opportunity to perform medication reconciliation or other visit preparation, if desired.
- ✓ On the date of the visit, the front desk team will verify that each patient with a Telehealth visit has the consent completed and filed to the chart.

Step 3: Launch the Visit!

- ✓ Call the patient about 10-15 minutes before their scheduled appointment to do a phone registration/check in and collect any copay. Steps in this process include verifying whether to send the video link to a cell phone (text) or email, then ensuring that the cell number and/or email are correct and updated in the EHR demographics, as well as communicate if any changes were required to the nurse. The patient will be moved to the “waiting room” in the EHR at that time.
- ✓ When check in is complete, the call will be passed to the nursing team, who will perform medication reconciliation (if not performed the day prior), confirm other visit details, note the contact method and information in the visit note, and “room” the patient (we have created “Telehealth” rooms for each practice) and mark them ready for the provider.

Best practice: nursing staff can monitor the provider schedule and give each patient an estimate of the time between the phone call and when to expect the connection request from the provider.

Step 4: Do the Visit!

- ✓ The provider will login to the Updox webpage (do NOT use remote desktop) and initiate the visit with the patient.
- ✓ The provider (+ scribe, as appropriate) start the visit and document the note AS USUAL in the EHR, just like the patient was in your exam room. There are only two differences: first, hit the “Telehealth Visit” in CC section of the note; and second, the visit may require a modifier to the billing code for some payers.
- ✓ When the visit is complete, end the Telehealth session and send the summary to the EHR, then check the patient out of the telehealth “room.”
Best practice: let the patient know that a member of our team will be calling shortly after the visit to schedule the follow up.

Step 5: Wrap Up!

- ✓ Front desk will monitor the schedule for check out, then call the patient back to schedule any needed follow up (be sure to put that info in your note) and/or collect any deductible not known before the visit.
- ✓ Front desk staff will file the summary (and any photos) to the chart.
- ✓ Billing staff will verify that all Telehealth visits include the correct modifier and will set the place of service to 02 prior to sending the claim.