

Telehealth Virtual Visit (Zoom audio and video conferencing)

1. **Front office** calls patient to inform that we can reach them for their next appointment by telemedicine/virtual visit instead of face to face due to COVID-19. The patient will need the following to be eligible
 - Wi-Fi/internet to connect to during the appointment
 - Use a phone, tablet or laptop with web cam and voice capabilities
 - Download the Zoom app or go to the zoom website
 - A valid email address to send instructions (update in registration).
 - Be sure they know this is still billable to their insurance. NO co-pay will be collected.
 - Ask if we can send an invite by email to Mychart
2. **Front office** Log in to Zoom <https://zoom.us/>
3. Enter User name and Password:
4. **Front office** Schedule the zoom appointment
 - Select “schedule a meeting”
 - **Topic** : document the Patient Name
 - **Description**: document the provider name, apt type
 - **When**: date and time of appointment
 - **Duration**: put the length of the appointment
 - **Schedule for**: select the appropriate provider

The screenshot shows the Zoom meeting scheduling interface. The following fields are highlighted with colored boxes:

- Topic**: A text input field containing "MRN 123456 : 1pm" (highlighted with a blue box).
- Description (Optional)**: A text input field containing "Maria Barbara Will BH 1pm" (highlighted with a green box).
- When**: A date and time selector showing "03/20/2020" and "1:00 PM" (highlighted with a purple box).
- Duration**: A selector showing "1 hr 0 min" (highlighted with a blue box).
- Time Zone**: A dropdown menu showing "(GMT-4:00) Eastern Time (US and Canada)" (highlighted with a light blue box).
- Registration**: A checkbox labeled "Required" (highlighted with a light blue box).
- Schedule For**: A dropdown menu showing "Mariabarbara Will (Mariabarbara.Will@reidhealth.org)" (highlighted with an orange box).

5. **Front office** Email telehealth instructions and copy and paste the Zoom link to the patient with the NHC support email
6. **Front office** While the patient is on the phone verify demographics and insurance information. Document in appointment messages that demographics/insurance verified.
7. **Front office** Change the visit type to telemedicine.

8. **Front office** On the day of the appointment the front desk will call the patient and check in the apt 5 min before the start time, if the insurance and demographics were not verified the front desk will do so.
9. Patient will be checked in, then phone call will be transferred to the **medical assistant**.
10. **Medical Assistant** will begin the “rooming process” in OCHIN answering information about updated medications, allergies, and chief complaint.
11. **Medical Assistant** will instruct the patient to begin the zoom call online and will hang up the phone call.
12. **Provider** will begin meeting on Zoom.
13. **Provider** will obtain verbal consent form the patient to perform a telemedicine visit or parent/legal guardian if required to perform a telephone visit. *If the visit is for a minor, consent must be obtained by the guardian and documented in note.*
14. The visit program area will be Telemedicine (121) for PC and Telepsych (495) for BH.

Quick Questions

Adv	Question	Answer	Cor
	PROGRAM AREA		
	Visit Program Area	Telepsych [495]	
	[More]		
	INTERPRETER		
	Interpreter for Today's Visit?		
	[More]		

15. **The provider must start their note with the following dot phrase .SA190 Telemedicine**
16. The provider will document in the EHR system as normal with their regular office visit CPT code.
17. At the end of the apt in the wrap up the provider will use their usual LOS code. Billing will adjust on the back.
18. The visit will be closed as normal.
19. If the patient needs a follow up appointment, the Medical Assistant will send a task to the Front Office to call patient to schedule.
20. After Visit Summary (AVS)
 - If patient has MyChart, they automatically receive this. IDEAL – Get those patients set up with MyChart!
 - Can email securely – notify Sarah or a manager and we will send securely.
 - Snail mail – should be sent by certified mail, notify Sarah or a manager and we will send securely.