**Provider**

*Scrub schedule 48 hours in advance of appointments and use dot system to indicate appt changes/type; ie. add Green Dot for video visit; see below.*
*Route patients to reschedule or do not need visit to PAS Pool.*
*Huddle each session with assigned MA - use page and Skype - to plan for phone vs virtual visits.*
*Communicate visit delays to MA via your discussed method.*

**MA**

*Scrub schedule of assigned Provider at least one day in advance to confirm visits are video, phone or in-person. Review for dots to convert visit and notify patient.*
*Ensure patient has MyChart app installed if Video Visit.*
*Document in phone encounter all phone calls made.*
*Day of Visit - huddle with provider.*
*Day of Video Visit - Prep patient and conduct VV Rooming/Check-In process*

**TC**

*Outreach to patients on schedule with inactive MyChart at least 3 days in advance to sign up. Ensure patient installs MyChart app for Video Visits.*
*Assist in day before/day of schedule scrub for visit conversion.*
*Provide MyChart help to patient/staff day of appointment*

**PAS**

*Convert visit type or reschedule patients to different day/appointment.*
*Assist patients with MyChart enrollment and instruct to install app for Video Visits.*

**DOT SYSTEM**

GREEN = Provider advises Video Visit
YELLOW = Provider advises Phone Visit
BLACK = Call and cancel appointment per provider