

Telehealth Visit Conversion Quick Guide

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

