SCHEDULING THE PHONE TELEMEDICINE VISIT

TEAM/ Panel Manager/ Central appointments

1) Offer patient a telephone visit based on these guidelines

APPROPRIATE REASONS FOR TELEPHONE VISITS

- Chronic disease management, motivational interviewing, support patient self-management goals
- Discussion of minor illnesses that may not require in-person visits (e.g. cold symptoms)
- Outreach (to address care gaps)
- Medication refills
- Laboratory and diagnostic test results, along with next steps for care
- Follow up after emergency room visits or hospitalization
- Care Coordination (e.g., referral management)
- Patient no shows and agrees to Phone Telemedicine Visit
- Established patient unable to attend in person or prefers Telephone Visit
- Dental Urgent needs

**NO PHYSICAL EXAMS, **NO CHRONIC PAIN

SCRIPT FOR SCHEDULING THE TELEPHONE APPOINTMENT

Good morning (afternoon) Ms./Mr. __________. This is __________ from Providers Name office at Mid County Clinic.

I'm calling to offer you a telephone appointment. Many conditions can be taken care of over the phone by your provider or another physician if it's medically appropriate. Examples might be to Follow up on your recent labs. Would you be interested in taking care of this over the phone?

There are phone appointments available on __________ (Schedule selected time)

I want to verify that this is a telephone appointment and Providers Name will call between (give window of time and date) Will this time work for you? (If not find the next available time)

This is a telephone visit where (Providers Name) will call you. May I have the best phone number to reach you at this time? And is there a backup number if that one is busy?

Thank you for choosing this option, here are just a few reminders. This is a brief follow up telephone appointment to discuss (reason for your appointment). Give patient appointment time and date again. We are happy to offer you the convenience of this option & it just might save you a trip into the doctor's office.

Do you have any further questions about this appointment?

2) Schedule Appointment

   a. In appointment notes type: *PHONE VISIT* patient phone number & reason for visit

3) Verify patient phone number and inform patient approximate time to expect call
SCHEDULING THE PHONE TELEMEDICINE VISIT

► Click Make Appt from patient appointment desk ► Choose Telemedicine Visit (121) or OB Telemedicine Visit (952) as visit type ► Select provider ► In Appointment notes type: *PHONE VISIT* pt phone # and reason for visit ► Select designated Phone Visit block. There will be multiple appointments available in the template for the block. Any remaining slots will show up in blue. (*DO NOT CHANGE THE DEFAULT of the APPOINTMENT LENGTH*)

*DO NOT CHANGE THE DEFAULT of the APPOINTMENT LENGTH*
PHONE TELEMEDICINE

DAY OF THE PHONE TELEMEDICINE VISIT

CMA/Support Staff/Provider

1. Select patient from Provider Schedule & Open Appointment Desk (DO NOT CHECK IN)
   ✓ If interpreter is needed- Use Telephone Interpretation Guide.
     https://commons.multco.us/health-center-operations-0/telephonic-interpretation

2. Call client. (if client is not available, DO NOT check in appointment)

<table>
<thead>
<tr>
<th>If Patient is available</th>
<th>If Patient is NOT available</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Explain that this the telephone appointment with their provider</td>
<td>✓ Open Telephone encounter to document attempts to reach patient</td>
</tr>
<tr>
<td>✓ Verify 2 identifiers</td>
<td>✓ Call again during the day 3 times minimum</td>
</tr>
<tr>
<td>✓ Explain they may receive a call to participate in a survey</td>
<td>✓ If patient not reached close telephone encounter</td>
</tr>
<tr>
<td>✓ Check in Appointment</td>
<td>✓ DO NOT check in appointment</td>
</tr>
</tbody>
</table>

3. If client is reached, Check in appointment

4. Transfer call to provider

5. Keep record of the length of the call from the time the provider takes the call to end

6. Complete Chief complaint

7. Complete Quick Questions = Program Area = Telemedicine

8. Complete Quick Questions = Place of Service = Telemedicine

9. Use smart-phrase .MCPHONEVISITMA to document in Progress note

10. Schedule any follow up appointments (i.e. with provider, labs, imaging, etc.) while provider is still on the call. When provider is close to end of the call, start the next patient’s phone visit process.

PROVIDER (Dental – Chief Complaint, review meds, allergies, history)

1. Receive call & Conduct visit

2. Document Visit **The length of the call must be documented in your progress note. Smartphrase available:
   - Primary Care - .MCPHONEVISITPROVIDER
   - Dental - .MCTELEDENTISTRY
   - BH - .MCBMSOAP

3. Complete Visit DX, and
   - Primary Care – LOS
   - BH - enter Order
   - Dental – Treatment Plan
**CHECK-IN PHONE TELEMEDICINE VISIT**

► Select patient form provider schedule and Open appointment desk ► Select Check-in; message box appears; Select Yes ► In Registration Checklist sidebar Click Verify at Patient, Guarantor, Member and Encounter level ► Click Continue Check In ► Click Accept

**CHARTING THE TELEMEDICINE VISIT**

**CMA/BH/RN/Support Staff**

Open Chart/Visit navigator for Telemedicine Visit, Complete Chief Complaint, Quick Questions-Visit Program Area and Place of Service will auto fill, Use SmartPhrase:

- Primary Care - .MCPHONEVISITPROVIDER
- Dental - .MCTELEDENTISTRY
- BH - .MCBMSOAP

**Quick Tip**

STD, CDS, HIV, BH, MH & Family Planning – Visit Program Area – Telemedicine should be entered in 2nd place after your regular program area.
** Primary Care Provider including Clinical Pharmacist Medication Review visits  

Complete Visit DX, LOS & Progress Notes (Smartphrase available .MCPHONEVISITPROVIDER)

The **length of the call must be documented in your progress note** and only the following LOS codes can be used:

- 99441 - 5-10 MINUTES
- 99442 - 11-20 MINUTES
- 99443 - 21-30 MINUTES

**Clinical Pharmacist Disease Management Visit**  

Complete Visit DX, LOS & Progress Notes (Smartphrase available .MCPHONEVISITPROVIDER)

The **length of the call must be documented in your progress note** and only the following LOS codes can be used:

- 98966 - 5-10 MINUTES
- 98967 - 11-20 MINUTES
- 98968 - 1-30 MINUTES

**Dentist**

Complete Visit DX & Progress Notes (Smartphrase available .MCTELEDENTISTRY)

The **length of the call must be documented in your progress note** and only the following Procedure codes can be used:

- D0140 or D0170 with D9995 (phone or video) or D9996 (picture)

**BH Add Order for applicable service**

Complete Visit DX, LOS & Progress Notes

The **length of the call must be documented in your progress note** and the following Order codes must be used:

- 98966 - 5-10 MINUTES
- 98967 - 11-20 MINUTES
- 98968 - 1-30 MINUTES

**RN**

Complete Visit DX, LOS & Progress Notes

The **length of the call must be documented in your progress note** and only the following LOS codes can be used:

- 98966 - 5-10 MINUTES