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On the day of the scheduled “virtual” appointment, the clinical staff will follow the recommended workflow. This will ensure that the appointment will flow smoothly for the patient and for the entire staff. Following this recommended workflow will ensure that documentation is complete, and charges will drop appropriately.

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### Day of TeleHealth Visit

The documentation will follow the recommended workflow similar to when a patient arrives in person. Utilizing the same tools such as the ambulatory organizer and the nursing MPage will ensure that the right FIN is selected.

- Call the patient just prior to the visit time.
  - Patient will be informed at this time whether the provider is on time.
- “Consent to Treat” and the “Informed Consent” will be obtained verbally over the phone. Please state the following to the patient.
  - We need your verbal permission to do this visit by video and/or telephone.
  - We use a secure Zoom connection, but there is always a very tiny risk that your information could be exposed or hacked.
  - There is also a risk that the information we collect to treat you is not as good as it would be if you were in the office.
  - We will keep a medical record of the visit the same as usual.
  - You have the right to confirm your provider’s identity.
  - You can stop the visit and request to come into the office at any time.

**NOTE:** Please document that you went over the informed consent in the HPI in the Intake form. This will flow to the provider’s office note. The provider will use the autotext, /telehealth\*, to pull that documentation in.

- Complete the Ambulatory Quick or Comprehensive Intake PowerForm.
    - The stated weight needs to be documented in the **Summary** section. This will ensure that the provider can send prescriptions if necessary. In the Vital Signs Comments, please document that this is a stated weight due to a telehealth visit.
    - Blood pressure readings given by the patient will need to be recorded in the **Home Readings** section.
      - *Per CMS, blood pressure readings reported by or taken by the patient are not to be included in quality performance measurement. Documenting blood pressures in the*
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***Home Readings section will allow for the reading to be reviewed without falsely impacting quality performance.***

- Please note that any data recorded in the **Home Readings** section will not flow automatically to the provider's note. The provider must "tag" the vitals from the intake form.

<p><b>NOTE:</b> It is important to document the stated weight in the Summary section and verify Preferred Pharmacy. This will ensure that the provider can send prescriptions if necessary.</p>
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- Instructions to be given to the patient before joining the virtual patient exam room.
  - The time may change due to the provider's schedule. Please have the patient click on the link provided in the televisit email at that time.
  - Please explain to the patient once they click on the link, they are in the virtual waiting room until the provider is ready to "see" the patient.
  - If the patient lose connection, he/she can rejoin using the same link.
  - Please remind the patient to accept audio through the Zoom app if using a smartphone.
- Stay on the line with the patient to ensure that the patient is in the "waiting room".
- Notify the provider that the patient is ready to be "seen" by using the office approved method of communication (i.e., Skype).

**NOTE:** For any technical issues, please have the patient reach out to the office directly. This may need to be converted to a Phone Visit which is provided in the televisit email.