

TELEHEALTH PROTOCOL FOR THE PRIMARY CARE NETWORK

Note: This is a high-level workflow that applies to all practices in the PCN

ZOOM Telehealth Platform:

ZOOM is a video communication platform that CHOC is using to facilitate Telehealth visits with our patients. ZOOM can be accessed from your computer or any mobile device and is very intuitive to use. Please click this link to see a video on [how to use ZOOM](#).

Patients Eligible for Telehealth Visits:

- 1) Acute care visit / same or next day appointment
- 2) Chief complaint of: Runny nose, eye discharge /redness, cough/cold symptoms, vomiting or diarrhea, rash
- 3) Parent preference
- 4) *NOTE: Not eligible for a Telehealth visit if chief complaint is: abdominal pain, headache, ear ache, limb injury*

Scheduler, Front Office PSR or Nurse Triage:

Offer to schedule a telehealth appointment

When a parent/patient calls for an appointment or has a question about if the child should be seen, the scheduler offers the option of an in-person or telehealth video appointment. The scheduler will explain that telehealth visit allows for a face to face encounter with one of our providers and allows the provider the opportunity to take the child's history and do a visual exam of their child, which is helpful as they give clinical advice. If the parent is not sure if the child should be seen, the scheduler recommends that a telehealth visit be scheduled, and if during that visit the provider recommends an in-office visit, they will be scheduled to be seen in the office later that day.

If a patient already has an appointment, you can offer to convert it to a telehealth appointment as well.

Click [here](#) to see an example scheduler phone script.

Schedule a telehealth appointment

The scheduler should schedule the patient for visit using a telehealth visit type (15 minute slot) with a specific provider. Note: Do not cancel the visit, but instead convert to a different visit type.

The actual scheduling process will vary by practice based on the EHR you are using.

Cerner WIN-32: For practices on Cerner WIN-32 (CMG), please click the links below to view a video and a hot sheet explaining the process of scheduling and registering a patient with the telehealth visit type.

[Video - WIN 32 Scheduling](#)

[Hot sheet - WIN 32 Scheduling](#)

Cerner CPM: For practices on Cerner CPM (SeaView, SOCPA, PAM, Los Alamitos, ODKT), please click the links below to view a video and a hot sheet explaining the process of scheduling and registering a patient with the telehealth visit type.

[Video - CPM Scheduling](#)

[Hot Sheet - CPM Scheduling](#)

Legacy Non-Cerner EHR: For practices still on their legacy EHR (*Pomona Peds, Premier Peds and Total Peds*) add a telehealth visit type and schedule the appointment as you normally would.

Give parent instructions to join the telehealth visit

The scheduler will ask for the parent/patient's email address. The scheduler will explain that they will be receiving an email with the invitation to the ZOOM telehealth appointment. If this is the first time they are using ZOOM, they will be asked to create a user name and password. Once they do, the link will connect them to the provider's waiting room. The scheduler will ask the parent to arrive a few minutes early for the scheduled appointment, explain that they will wait in a virtual waiting room until admitted by the provider into the patient room, and that the appointment is for 15 minutes.

NOTE: In piloting the process, it was suggested that we email the provider meeting room number that the family can enter into ZOOM, rather than the URL link. We can update this step as needed.

Please click to see the [telehealth email instructions](#) that will be sent to the parent/patient.

If they have any technical issues, they can call the telephone number in the email to help. If they have any questions for the office, they can call the office directly. They are not able to respond to the email as it does not accept replies.

Note: Ask to sign the patient up for the patient portal if the child is under 12 or over 18 years of age and is not already signed up on the patient portal.

Email the parent/patient with ZOOM and appointment instructions

After the scheduler has scheduled the appointment in the EHR, and explained to the parent what to expect when logging in for their visit, the scheduler will hang up the phone with the parent, and create an email message to the parent with instructions for the visit. The following links will take you to hot sheets that explain how to create an outlook template and how to add a group email to your outlook.

[Creating an Outlook template](#)

[Adding a group email to Outlook](#)

- The scheduler will go to their CHOC email through Microsoft Outlook.
- At the top, click on "From" and type in choctelehealth@choc.org.
- Type "Telehealth appointment" in the subject line.
- Enter the text for the email from your template (if already saved), or create a new one by cutting & pasting from the word document [telehealth email instructions](#)
- Type in the provider personal meeting ID (PMI) and/or paste the unique provider URL link to their waiting room.
- Attach 2 ZOOM hot sheets: [Patient ZOOM mobile device instructions](#) and [Patient using ZOOM for telehealth](#)
- Send message to patient.

Eligibility Verification

This can be done by the scheduler at the time of the appointment, or shortly afterward by a billing verifier. Once eligibility of insurance is verified, the patient should be "checked in" on the schedule which indicates that billing eligibility is done.

Updated 3/20/20

Provider

Zoom Conferencing

Providers open their ZOOM account prior to the meeting from their "PERSONAL MEETING ROOM" at any time that day. (The meeting will time out after 2h of inactivity)

- At the pre-scheduled time, the patient will log into their ZOOM app, and click "Join a meeting" by Inputting the provider's "Personal Meeting ID" or clicking the link sent to them in the email.
- Once the ZOOM app completes the connection, the provider will be notified via an ALERT from the APP, that the patient has arrived, and is in the virtual waiting room. You can also see a patient is waiting for you in the bar along the bottom
- A patient may enter into the waiting room before the provider has started the meeting and may wait there. In this case, the provider will be notified quickly after starting the meeting that the patient has already arrived.
- The Provider will then "Admit" the patient into their virtual meeting room. The patient/parent Interview will commence virtually.

The actual documentation process will vary by practice based on the EHR you are using.

Cerner Documentation

Documentation and orders if generated will occur within CERNER as with any other visit, with several notable exceptions:

- The CHIEF COMPLAINT field must be completed. Normally this is done by the MA/nurse, but in this case, no MA is involved.
- There are no vital signs, and the intake form will NOT be completed
- The Physical exam will be limited to any observations which occur over the video or audio streams.
- Electronic Orders are completed for outpatient labs or meds

Note creation: Choose Sick Visit (Telehealth) Note type

(If you do not see it at the bottom left of the workflow, click on "More" to view additional options

Billing: Go to PCN Quick Orders and choose either Outpatient Established or New for Telehealth Billing.

Follow-up order: There is a specific ORDER for Follow up to schedule a Telemedicine Visit if indicated, which can be placed via the PCN Quick orders page. Once generated, it will be routed to the appropriate queues to call the family to schedule it.

Click the links below to view a video and hot sheet for documenting a telehealth visit in Dyn-doc.

[Video - DynDoc telehealth visit](#)

[Hot Sheet - DynDoc telehealth visit](#)

Paper Charting Documentation

Document as you normally would and use the telehealth billing modifier on your superbill to add a modifier 95 to the E&M code. These details will be communicated at the practice level.

Legacy Non-Cerner EHR

Document as you normally would and use the telehealth billing modifier in your billing to add a modifier 95 to the E&M code. These details will be communicated at the practice level.

SPECIAL TOPICS**Devices**

The provider can use ZOOM from any electronic device (computer/laptop, ipad, smartphone). You can minimize ZOOM and Powerchart so that you can use both simultaneously on your laptop/computer.

Multiple users

Up to 100 users can be on a Zoom call at one time.

To invite another user (eg, specialist, nutritionist, therapist, etc), they can use the provider's email or ID to get access to the same video session (eg, if planned ahead of time). They can also be instantly by the provider clicking within the video session on the lower part of the screen to "invite participants". Then copy the URL to the clipboard and paste into an email to the invited parties