



Standard Operating Procedure

Procedure Title:	Telemedicine
Date:	03.23.2020
Version:	1.0
Department:	CIC: Reception, MA & Provider
Approved By:	Brooke Gregory

Purpose: To outline the process for communicating our telemedicine services with patients, the scheduling process, and the telemedicine session process.

Definitions:

- Telemedicine: A website or mobile app that allows physicians to remotely connect via video-chat with patients for consultation, and assessment.

Telemedicine Procedure:

- **Exclusion Criteria**
 - This is not a crisis service: If patient is in crisis, experiencing life threatening or emergent symptoms; patient should be instructed to dial 9-1-1 immediately.
 - Patient needing to schedule for procedure.
 - Patient needing lab draw.
 - Patient that does not have access to a smart phone, or computer with video and audio capabilities, or does not have the skills to utilize these devices.
- **Inclusion Criteria:**
 - Patient information must be current: Including phone number, insurance cards, address, financial policies and any necessary disclosures or waivers.
 - Patient has ability to utilize telemedicine software via computer or smart phone.
 - New patients establishing care
 - Existing patients needing follow up or office visit that does not require an in-person physical exam.
 - Existing patients needing prescription refills.
- **Scheduling Patients for Telemedicine**
 - NP Scheduling:
 - All standard new patient scheduling protocols should be followed.
 - New patient paperwork **MUST** be emailed or mailed to the patient prior to the patient's telemedicine visit.



- New patient paperwork MUST be completed and returned, along with the patient's current ID and insurance card(s), to CIC via email or mail - prior to the telemedicine visit.
- NP and Existing Patients:
 - Patients should be screened using the inclusion & exclusion criteria above, as well as the standard Covid-19 protections measures currently in place.
 - If the receptionist is uncertain whether or not the patient qualifies for a telemedicine visit, they should consult with an MA.
 - All "urgent" needs should be triaged by an MA prior to scheduling.
 - Patient MUST have the means and ability to utilize the specific software needed to establish a telemedicine video conference. At this time, Complete Care is using "Zoom".
 - At this time, we are not doing "phone conferences" with patients as part of a regularly scheduled visit.
- **Scheduling Telemedicine Appointments**
 - Reception to screen for eligibility of Video Appointment, if applicable:
 - Patients should be scheduled as follows:
 - Video NP – 40
 - Video Follow Up – 30
 - Video Office Visit – 30
 - Verify patients email address for accuracy and inform them we will be sending them an email at the conclusion of this call with:
 - Information for the upcoming Video Appointment
 - A link to the Zoom Meeting to use during the Video Appointment
 - A link to a helpful tutorial on how to use Zoom
 - Appropriate new patient paperwork (if applicable)
 - Note this must be received, via email or mail, prior to scheduled appointment in order to continue with the appointment
 - Inform all patients that they will receive a phone call 30 minutes prior to their visit to confirm that Zoom has been accessed/installed and to collect copays and/or self pay amounts as needed.
 - Reception team member who schedules the appointment is to login to the providers Zoom account, schedule the appointment and copy the link for the meeting scheduled. This link will be included in the above email to the patient.
 - **Scheduling Zoom:** Reception will log into Zoom using provider credentials (which will be stored in OnDrive for team access).
 - Select "Schedule" to begin appointment setup.
 - Type in patient's account number at the top of the screen under "Topic: 189210"



- Select Start Time
 - Duration: Can be left at 30 mins
 - Time Zone: Pacific
 - (Use Personal Meeting ID should be OFF)
 - Require Meeting Password: OFF
 - Host Video: ON
 - Participant Video: ON
 - Audio Option: Telephone and Device Audio
 - Enable Waiting Room: ON
 - Click SAVE
 - COPY "Join URL" invitation link and paste it into the email template stored in OneDrive. Be sure to update the patient name in the email template.
 - All appointments should have detailed appointment notes as to the reason for visit and note they have been prepped for Video Visit. Example: "Follow up hormone labs, patient prepped for video visit, scheduled appointment in Zoom. Brooke"
- **Preparing for Telemedicine Appointments**
 - All patients scheduled for telemedicine should be called 30 minutes prior to the scheduled appointment.
 - Confirm that the patient has been able to access Zoom via their phone or computer (link previously emailed to them by Reception).
 - Confirm the email addressed the patient used to sign up for Zoom. Verify the email is correct by repeating it back to the patient. We will need this information in order to initiate the tele-visit.
 - Collect any copays or self pay amounts at that time.
 - When collecting the \$125.00 self pay deposit, please remind the patient that this is a deposit toward today's appointment and that they can expect to receive a bill in the mail for the remainder of today's tele-visit.
 - Let the patient know to click the invite link previously emailed to them 5 minutes prior to appointment start time and an MA will be connecting with them shortly via Zoom to gather any necessary information and to make sure everything is working properly. Ask patient to be near their device and ready to access Zoom when the MA joins the meeting.
- **Initiating Telemedicine Appointments:**
 - MA will log into Zoom using provider credentials (which will be stored in OneDrive for the team to access).
 - Select the appropriate appointment under Upcoming Meetings and click Start to begin appointment with the patient.



- Connect with patient and patiently walk them through the steps they should take to enable their camera and audio options if they are not fully connected.
 - If the patient is not logged into the meeting, call them via phone to check if they are joining the meeting and if they need any help
- MA will then complete ALL standard rooming tasks (minus vital signs) and enter them into Athena as normally completed in office.
- Once everything is ready for the provider, let the patient know to remain on the chat and that the provider will be in shortly.
 - If for any reason they get disconnected, they can use the same link to reconnect to this meeting.
- **Ending Telemedicine Appointments:**
 - Provider will make recommendations for follow-up, replicating as closely as possible how this is managed in an in-person visit.
 - The telemedicine session is charted with the same level of detail that an in-person visit would be charted.
 - Provider is to document appointment length time in office visit note
 - Provider to create RTO and let the patient know our team will call them shortly to schedule follow up and any lab appointments. Also offer we can mail them any recommended supplements during this time
 - Provider to start HPI with “Patient gave verbal consent to conduct video office visit” and then continue HPI.
 - Reception to call patient after the visit for RTO scheduling and offer to mail any recommended supplements