



IMPLEMENTING VIRTUAL VISITS

EXPERIENCE FROM THE FIELD

Dr. Sander Gothard & the “Gold Pod” team, Village Health Partners

Dr. Gothard shared **eCW telehealth workflow tips** that VHP and his team has found beneficial. These workflows focus on scheduling appropriate patients NOW as well as MONTHS FROM NOW when their clinic re-opens. Other Catalyst providers, even those not on eCW, may see increased volume and revenue based on these workflows:

FINDING PATIENTS TO SCHEDULE FOR NOW

- Once the patient is identified as a candidate for a Televisit, the Provider or MA should outreach via phone call to the patient.
- If the patient cannot be reached, document in a telephone encounter that a message was left
- If the patient does not respond, call the following day & document with a telephone encounter that a 2nd phone call was made
- If they do not respond, make a 3rd and final phone call, routing the telephone encounter to the provider, who can decide to reach out again or lock the chart

Ways to identify patients needing a Televisit:

- **Work the “T jellybean”:** Patients are calling and emailing for refills or questions, and this is the easiest way to schedule a Televisit
- **Work the “E jellybean”:** Many patients need follow-ups when we receive refill requests.
- **Work the “D jellybean”:** Many patients need follow-ups when reviewing documents.
- **Audit patient charts.** Look back 6 months on a provider’s schedule to see who has not scheduled their 6-month follow up. Once complete, go back 7 months and so on.
- **Social media.** Spread awareness of your availability through your social networks. Many new patients have come over as their doctors are not available for telemedicine or COVID-19 testing.
- **Convert visits.** Have the MA call patients one day before appointment to convert Commercial Physicals to Med Check follow ups. This is important so you *don’t lose patients already scheduled* and are able to provide follow up care they need.

SEEING PATIENTS

- MA calls the patient in advance of visit to prep chart and educate patient on Televisit.
- If there is any confusion with the Televisit portal, we will do a FaceTime when possible using *67 or Doximity when FaceTime is not necessary/possible.
- If the patient has trouble logging on, we immediately call them to start the visit using one of the many Televisit template options
- Provider orders appropriate labs and keeps a manual list per day. When it is safe to do elective labs, schedule a phone call to alert the patient.
- Before you hang-up with the patient, set their expectation that they will get a call shortly from a staff member who will collect for the visit and schedule a follow-up, serving as a virtual “check out” process.
- **LOCK THE CHART** (and all unlocked charts on daily list) so the visit can be billed promptly.

POST-VISIT FOLLOW-UP & SCHEDULING PATIENTS FOR LATER

- Communicate to check-out team that the patient is expecting a call to collect and schedule a follow-up – we use Skype or you may use another method.
- *VHP’s schedules are starting to fill up with physicals and follow-ups for 3 months, or more, from now because of this process.*
- Providers have been looking at patient emails on nights and weekends and doing visits whenever possible.

EMAIL TEMPLATE: APPOINTMENT CONVERTED TO TELEVISIT

Dear **[insert patient name]**,

Our records indicate that _____ has advised a follow up appointment is due. Due to the COVID-19 crisis, we are now offering you the luxury to do your appointment from home via televisit. Please send us an appointment request through the patient portal or call our office at **[insert phone number]** to schedule an appointment.

We are happy to answer any questions you may have about COVID-19 in addition to addressing your other health concerns. Our clinic is also offering COVID-19 testing if your symptoms meet criteria. It is important for us to keep in touch with you about your health and help you to reduce your risk of illness.

Once you have your televisit scheduled, my MA will be calling you a few minutes prior to your appointment time to confirm your past medical history and make any necessary updates to the chart.

Televisit Instructions:

You must log in BEFORE your appointment time or you will not be able to log in.

For detailed instructions on logging in to the tele-visit: Click the link below or copy and paste the link into your browser: [\[insert practice website link or training link\]](#)

Thank you,

[\[insert name\]](#)