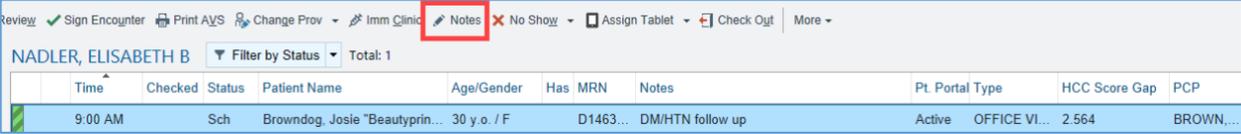
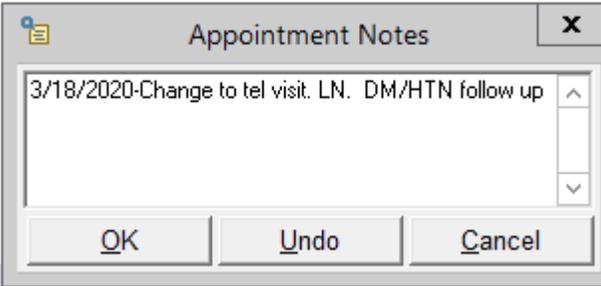
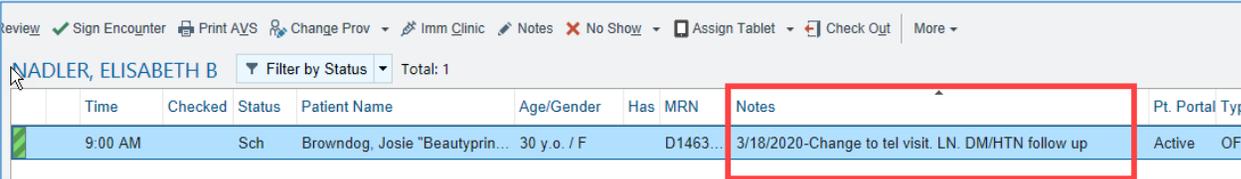
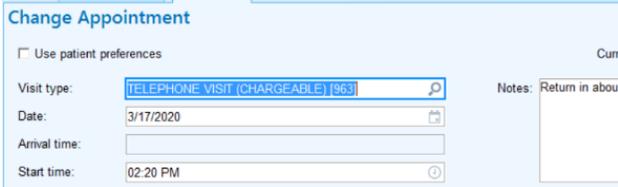
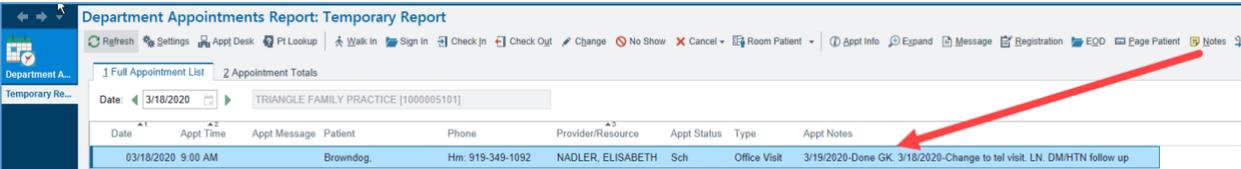


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Process: Converting Scheduled Office Visits to Telephone Visits

Step	Operator	Important Steps	Tools Needed
1	Provider	Scrub schedule to determine which appointments are appropriate to convert to a telephone visit (ideally this should occur 1-2 days prior to the appointments)	Maestro
2	Provider	<p>Click the Notes tab above the multiprovider schedule.</p>  <p>In box, type date of request, what is needed and your initials:</p>  <p>You will now see this in Notes column on your schedule.</p> 	Maestro
3	PSA, CMA	<p>Contact patients on the schedule marked “Change to telephone visit.” Ask patient if they are interested in converting their appointment to a telephone visit. <b>Follow standard work to verify patient ID (two identifiers).</b></p> <p><i>Scripting: Hi [PATIENT NAME]. I’m calling from Duke Primary Care about your appointment on [APPOINTMENT DATE AND TIME]. At this time, Duke Health is trying to reduce the number of patients</i></p>	Telephone

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		<p>coming into the clinic due to COVID-19. I would like to offer you the option of having your appointment over the phone with [PROVIDER NAME]. Would you be interested in the provider calling you for your appointment instead of coming into the practice?</p>	
4	PSA, CMA	<p>If <b>patient AGREES</b> to a telephone visit, convert the appointment from “Office Visit” to “Telephone Visit [Chargeable]” under appointment type. Confirm the date and time of the appointment and the best phone number to reach the patient, and notify the patient that a provider or CMA will call within 30 minutes of their scheduled appointment time.</p> <p><i>Scripting: Your telephone appointment with [PROVIDER NAME] will take place at [DATE AND TIME]. [PROVIDER NAME] or his/her medical assistant will give you a call within 30 minutes of your scheduled appointment time. Can you confirm the best number to reach you for the call?</i></p>  <p>Verify that the patient still has the same insurance. If their insurance has changed, the PSA will need to add the new insurance information. If the PSA is not the one making this call, notify the patient that a PSA will call back to collect this information.</p> <p>Inform patient that the provider will likely ask for their vital signs. Ask patient to weigh themselves and take blood pressure and pulse if possible.</p> <p>Mark that you have contacted the patient by updating the Appointment Notes with today’s date, “Done” and your initials. For example:  “3/18/20-Done GK”</p> 	Maestro, Telephone

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5	PSA, CMA	<p>If <b>patient does NOT agree</b> to a telephone visit, please keep the appointment as an office visit.</p> <p><i>Scripting: We will keep your appointment as an office visit. Your office visit appointment with [PROVIDER NAME] will take place at [DATE AND TIME].</i></p>	Telephone

**Additional Notes:**

1. Do NOT change the visit to a “Telephone Encounter.” Ensure that you are changing the appointment to a “Telephone Visit [Chargeable].”
2. You may receive a warning about the visit type duration (15 minutes vs 20 minutes). Please bypass this warning.
3. All copayments are waived for this service.