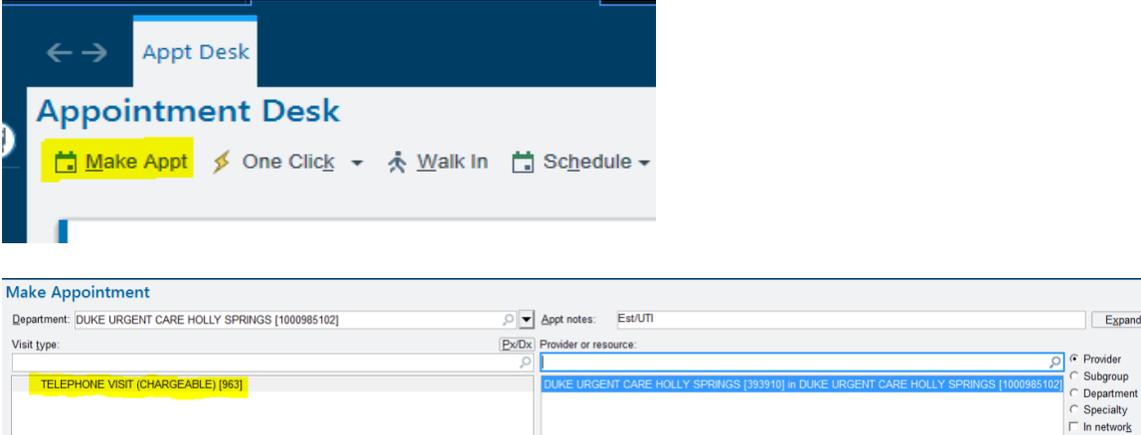


Process for UC Telephonic Visits

This workflow is appropriate for New or Established patients age 10 and up.

Step	Operator	Important Steps	Tools Needed
1	RN/Provider	<p>Patient encounter pathways:</p> <ul style="list-style-type: none"> ➤ Contact Clockwise patients to determine which appointments are appropriate to convert to a telephone visit. ➤ Receive requests from patients seeking other methods of care beyond a clinic visit. 	Clockwise, Telephone (Incoming Clinic Calls)
2	RN/Provider	<p>Ask patient if they are interested in converting their appointment to a telephone visit. <i>(Documentation will begin with provider)</i></p> <p><i>Scripting: Hi [PATIENT NAME]. I'm calling from Duke Urgent Care [LOCATION] about your reservation today at [TIME]. At this time, Duke Health is trying to reduce the number of patients coming into the clinic due to COVID-19. We may have the option of having your appointment over the phone. Would you be interested in a telephone visit if your symptoms meet criteria?</i></p> <p>If patient AGREES to a telephone visit, collect chief complaint from the patient **, place patient on hold and discuss reason for visit with a provider. If the provider determines symptoms are appropriate for telephone visit, the patient is notified that a call will be made to them at/near their reserved time. Update patient name field in Clockwise with "Call" at the beginning of the patient's first name to communicate that visit was changed to a telephone visit.</p> <p>**At this time, if patient meets COVID criteria, inform patient that they will be transferred to a COVID triage line for further evaluation.</p> <p><i>Scripting: Your visit with a provider will take place at [TIME]. An administrative team member will give you a call at/near your reserved appointment time. Can you confirm the best number to reach you for the call?</i></p> <p>If patient does NOT agree to a telephone visit, keep the reservation as a walk-in visit. Update patient name field in Clockwise with "In-person" at the beginning of the patient's first name to communicate that contact with patient was made.</p>	Telephone

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		<p><i>Scripting: We will keep your reservation as a walk-in visit and it will take place at [TIME].</i></p> <p>Inform patient that the provider may ask for their vital signs (weight, temperature, blood pressure and pulse if possible). Also, inform the patient that applicable copayments will be billed for this service.</p>	
3	PSA/CMA	<p>Call patient at/near their reserved time.</p> <p>For New Patients: Before scheduling telephone visit for a new patient, send an email invitation for Mychart to them through Maestro. Once the patient receives this link and registers using the guided instructions, team member follow steps below.</p> <p>Schedule visit in Maestro using Make Appt tab. After entering reason for visit, select Telephone Visit [Chargeable] as the Visit Type and site location for. Continue with remaining scheduling steps as usual.</p>  <p>Verify that the patient still has the same insurance. If their insurance has changed, add the new insurance information and arrive the visit.</p>	Maestro, Telephone

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		Facilitate a warm hand-off call transfer to the provider for the patient.	
4	Provider	<p><i>Recommendation for providers: Wrench in Virtual Progress Note for better accessibility of documentation field when using the Telemedicine tab.</i></p>  <p>Upon accepting the call, provider will begin the visit and should use this dotphrase for documentation:</p> <p>Non-COVID: .XTELEPHONECHARGEABLESOAP</p> <p>COVID: .COVID19PROVIDERTELEPHONENOTEPRIMARYCARE</p> <p>Enter a chief complaint. Enter vital signs as appropriate if able to collect. Document provided vitals using “Patient reported” to start documentation.</p>	Maestro/Telephone
5	Provider	Use the “DPC Chargeable Telephone Visits tipsheet” for additional instructions for documentation.	Maestro
6	Provider	<p>Use the tipsheet for information on Charge Capture. Provider should select one of the codes under Telehealth/Non Video: 99441, 99442 or 99443. Providers should be aware of start/end time for the visit in order to complete charge capture process. Refer to tipsheet.</p> 	Maestro, Telephone

Additional Notes: Recommend that providers use headphones for the telephone visit when possible.