Rescheduling Workflow Triage for COVID-19

1. Obtain email
   2. Change appt type

1. Document refill requests, route to nurse
2. Reschedule patient

Make sure A/V telemedicine visits are conducted in a private room

Document in note:
- Telemedicine visit
- Patient consent
- Encounter time

Nurse Triage patient
1. Screen for COVID 19
2. Assess risk
3. Triage needs over phone
4. Route to MD

MD decides:
desktop orders, telemed, or office visit?

Telemedicine visit assessment to decide office visit need.
Shared decision-making

Telemedicine visit

Don’t bill teledem visit

Nurse completes orders and relays to patients

Schedule In-office visit

Please see script telemedicine workflow*
Telemedicine Workflow

1. 2-3 DAYS BEFORE TELEMEDICINE VISIT: Email Notification
   Patients will get email from 2-3 days before to notify them about telemedicine visit as a primary method

   Dear patient,

   Due to the recent COVID-19 pandemic, we are replacing in-person office visits with telemedicine visits in an effort to decrease unnecessary exposure to our patients and staff. Medicare and most insurances are covering these visits, without a copay needed. You will need a working email and a smartphone or laptop with a camera and microphone. We will call you the day before your appointment to answer any questions and ensure you are ready for your visit. Patients with clinical needs that need an in-person evaluation and testing will still be able to come to the office, if absolutely necessary. Please remember that elderly patients with cardiac conditions are particularly at risk if they become infected with COVID-19.

   If you have any questions, feel free to call us.

2. 1 DAY BEFORE TELEMEDICINE VISIT: Phone call
   Patients will be called day before (front desk/call center staff) with script to discuss options and prepare for telemedicine

   a. Offer patient telemedicine visit:

      We are offering telemedicine as an alternative to your office visit to prevent unnecessary exposures to COVID-19. Insurances are covering this service. The doctor will decide if it is necessary for you to come to the office based on this visit. To do the telemedicine visit, you will need a working email and a smartphone or computer with working camera and mic. We also ask that you have a BP cuff and scale at home and measure your blood pressure, heart rate and weight prior to your scheduled appointment.”

   b. Patient must:

      i. Have smart device.
      ii. Finish pre office information
      iii. Have email
      iv. Understand possible need to download an app
      v. Ideal: BP cuff, scale
      vi. If patient has Cardiac Rhythm Management device, ask to do an unscheduled transmission day before visit
3. IF PATIENT DOES NOT AGREE WITH TELEMEDICINE:
   a. Document why and needs (refill, etc.)
   b. Offer to rescheduling
   c. If patient wants to be seen in clinic:
      i. Route to nurse:
         1. Nurse contacts patient
            a. Screen for COVID symptoms/Exposure
               i. Appropriate measures if positive
            b. Discuss with patient their increased risk of mortality if they
               become infected (based on age and comorbidities)
         c. Route to physician to decide next steps
            i. Recommend telemedicine
            ii. Office visit if clinically necessary only

4. IF PATIENT DOES AGREE:
   a. Make sure patient has access to what is required to conduct a visit. Make sure patient's
      email address is correct in registration records.
   b. Schedule the visit as telemedicine appointment type in regular office schedule:
      i. Telemedicine F/U
      ii. Telemedicine hospital return
      iii. Telemedicine New Patient
   c. If you choose to send virtual visit invite in advance of the office appointment, tell
      patient to call if they don’t receive it and login 5 min before scheduled time. This is
      dependent on software used.
   d. If patient has a cardiac rhythm management device, ask them to send in transmission
      before appointment if none on recent chart. Let Device clinic know with a flag.
   e. Tips for success:
      i. When explaining the visit to the patient, set the expectations:
         - Explain what resources they will need, what will happen, and what they
           will see and should anticipate.
         - Provide your contact information and advise the patient to call with
           problems.
         - Notify the patient of any known glitches or problems and how to
           navigate these issues.
         - Patients greatly appreciate a practice session, If possible.
         - Consider training staff to become “customer support” to help patients
           with technology needs
      ii. Ask the patient to prepare for the visit the best they can:
         - Complete any online information needed (surveys, consent to treat,
           review of systems, family history, etc.).
         - Send in any device transmission or biostatistical data before the visit.
         - Record weight, blood pressure and heart rate, if possible.
         - Prepare a list of questions to discuss with the physician.
         - Have medication list (name and dosage) ready for review.
iii. Test your own equipment before time of visit. Anyone involved in the visit should understand the patient user-experience and workflow step-by-step to help the patient troubleshoot and navigate any problems.

iv. Having 2 screens available to conduct the visit works best (one to view patient and one to view EMR and other documents)

5. DAY OF VISIT – NURSE WORKFLOW
   a. Different workflows can be done based on your clinic needs and resources.
   b. Depending on your software, you can send the appointment invite before or at the time of the scheduled appointment.
   c. Easiest is to have nurse perform assessment via phone call and then let provider know when patient ready to start video telemedicine visit
      i. Call patient at the scheduled appointment time
      ii. Complete assessment over phone
      iii. Confirm email
      iv. Once complete, let physician know patient is ready
         • Provide physician with patient’s email and / or phone number if visit invite not already sent to patient.
   d. Alternative is to open a video call (using your preferred software) in a patient exam room with a webcam enabled computer in the room
      i. Call patient at the schedule appointment time
      ii. Initiate video call (using preferred software)
      iii. When nurse finishes, leave video call ON and leave room
      iv. Contact physician, who enters the room to continue the encounter

6. DAY OF VISIT -- PHYSICIAN WORKFLOW:
   a. Video Call Approaches and Documentation
      i. After nurse completes assessment and documentation in office note, initiate video call
         1. Either approach works best if EMR opened in one computer or monitor and Video software in another
         2. If using the “easiest” approach above, use the software solution that nurse had discussed with patient
            a. Open desired software
            b. Send patient email invite when you are ready for telemedicine visit.
            c. Start visit.
         3. If using the “alternative” approach above, simply enter the room where patient is already on the video
      ii. Documentation:
         1. This is a telemedicine evaluation, via videoconferencing (or telephone)
         2. Patient consented to telemedicine evaluation
         3. Total time spent with encounter (face-to-face and completing encounter)

For more information, contact
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iii. Bill as Telemedicine Established Patient or Telemedicine New Patient
   1. Reimbursement for telemedicine has changed rapidly and multiple times over past few weeks, and it changes based on patient’s insurance.
   2. A preferred approach for clinics is to simply “bill” as telemedicine New or Return and then allow billing staff to figure out how to submit appropriate charges based on patient’s insurance.

7. TIPS FOR SUCCESS / TELEMEDICINE ETIQUETTE
   a. Preparation
      i. Be prepared for the visit with all software needed ready to be used.
      ii. Login in advance.
      iii. Have the camera set at eye level, with your face and body centered and the focus of the screen so the patient can read your nonverbal cues and facial expression.
      iv. Make sure your face is well lit. Backlight is undesirable. Try to have a light in front of you to light your face.
      v. Turn off all device pop-ups and notifications!
      vi. Have references and visuals available to "screen share" for education.
      vii. Make sure the environment in which the visit is conducted is private and professional.
      viii. Consider the use of headphone to protect patient privacy.
   b. Patient Interaction
      i. Make sure the patient can hear and see you. Ask them!
      ii. Always notify the patient of anyone else in the room who can hear what is being said.
      iii. Give the patient expectations of how the visit will be conducted. Remember, the patient is trusting you to guide them through this experience.
      iv. When talking to the patient, look into the camera to mimic eye contact.
      v. When looking away from the camera, explain what you are doing.
      vi. Be very clear with post visit instructions and care plan. Send this to them electronically for their reference.

8. POST-VISIT
   a. Ensure patient receives orders, instructions and care plan.
   b. Ensure there is a plan for follow-up.
   c. Ensure referrals and orders are completed.
SAMPLE WORKFLOW USING DOXY.ME

- Doxy.me is a HIPAA compliant, free solution for telemedicine.
- Note that there are other technical solutions, including those provided by electronic health record systems.

Proposed workflow:

1. **Nurse calls patient**
   a. When nursing portion is complete, telemedicine visit can be started by either:
      i. Giving patient the Doxy.me waiting room link
         1. https://doxy.me/####
         2. #### is the name of the “waiting room you choose when creating your free account
      ii. Sending email from doxy.me to patient
         1. Privacy!!
            a. When using free accounts, emails are sent from your email client. Patient will see email

2. **Physician workflow**
   a. Create free doxy.me account
      i. Create your “waiting room name”
   b. After nurse has completed assessment:
      1. Send invite to patient via email or text (paid version)
      2. Nurse tells patient to go to:
         a. https://doxy.me/####
         b. #### is the name of the “waiting room you choose when creating your free account
      3. When patient has “checked in” you will see on the patient queue and you can initiate telemedicine visit

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