BREAKOUT SESSION C: MAXIMIZING THE CARE TEAM DURING TELEHEALTH VISITS

WHERE DID EVERYBODY GO?

Finding and maximizing your care team in the virtual world

What are some of the tasks that have shifted to the provider for telehealth visits that other care team members do/did during in person visits?

What strategies has your team used to address this problem?

Worksheet for telehealth visits

PROCEDURE	IN PERSON VISIT	VIRTUAL
Registration for a new patient		
HIPAA notification		
Insurance verification		
Completing the patient's medical history at the time of registration		
Completing a regular medical consent/consent for treatment		
Completing a consent for telehealth		
Identifying/triaging patients or conditions appropriate for telehealth		
Collecting a visit co-pay		
Completing a ROI- release of information for medical records		
Obtaining hospital discharge records or ED notes		
Scheduling the first visit		
New patient- adding medications		
Scheduling a follow up visit		
Collecting a preferred pharmacy		
Verifying patient identification for telehealth visit		
Checking the PDMP		
Checking an HIE- CRISP		
Pre-visit check list		
Obtaining notes from specialists and diagnostic studies		
Updating the medical history prior to each visit		
Updating the medication list prior to each visit		
Recording a chief complaint		
Managing the waiting room		
Tracking Follow up orders (meds, follow-up appointments, other)		
Prescribing medications		
Documenting the visit (provider notes)		
Ordering and scheduling referrals- specialty		
Ordering and scheduling referrals- diagnostic ie CT scan, x-ray		
Ordering and follow up of labs		
Scheduling a follow up visit		
Giving patients written visit summary		
After visit questions to the provider		
Tracking results- notifying the patient with results		

How to use the worksheet:

Everyone will be sent a copy of this template and it will be available on integratedcaredc.com

For each step in the workflow- identify who- by name or by role, is responsible for each step first for the in-person visits, then for the telehealth visits.

Helpful to have team members work on this individually, then come together to compare answers, and problem solve.

Document is in "word" so you can add or delete steps in the workflow.