Dear Colleagues,

The following tip sheet shows how to do a potential billable office visit via telephone or telehealth.

**For example:** A patient calls for an office visit, and instead we believe we can accomplish that visit via telephone or video. We would use this workflow to replace an office visit with a telephone or video encounter.

Please be aware that this workflow is generally not used for a routine call that you would have performed, which is not a billable visit.

**For example:** I am calling the patient to briefly tell them their lab results or review a negative pathology result. For this, you should use whatever workflow you already are performing to document these visits.

**It is critical that you understand this difference.** It would create a lot of needless work for your billing office, if you use the workflow below for the types of brief routine calls you are having already with patients. Again, the workflow below is for the replacement of an OFFICE VISIT with a visit by TELEPHONE or VIDEO.

I urge you to start with telephone visits. They are easier to perform and will enable your schedulers, staff and yourself to get used to the workflow. It is also best for most cases to be handled with a “Phone First” concept, because national and local internet bandwidth can be challenged by video usage.

As we are in a time of resource constraints, I’m unable to answer specific questions about these workflows, but will defer to learning in your specialties. Billing issues are also not answerable currently, and your business directors are aware.

Thanks,

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Phone/Video Visit Encounters

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Phone/Video Visit Encounters

The following Quick Start Guide outlines the workflows for both scheduled and nonscheduled phone/video visit encounters. These encounters can be used as an alternative to in-person clinic visits.

Scheduled Phone/Video Visit Encounter

This workflow should **NOT** be used for routine calls by an RN/MA, as this workflow is potentially billable. (Conceptually, they are meant to replace an office visit.)

1. The patient’s scheduled appointment for a Phone/Video Visit will appear on the schedule.
   a. The patient will **NOT** be arrived on the schedule – the Status column will show as **Scheduled**.
   b. A new visit type of **BJCMG Phone/Video Visit** or **WU Phone/Video Visit** will appear as the visit type.

2. Double click on the patient’s appointment to open the encounter.

3. Since the patient has not been arrived on the schedule, click **Start the Visit** from the Pre-Charting screen. This will start the visit.

4. As you speak to the patient, document the appropriate information for the encounter like a regular office visit.
   a. Visit Diagnosis
   b. Medications and Orders

5. Navigate to the Notes activity and complete a note by using a favorite SmartPhrase or typing.
   a. You must use the Video/Telephone Virtual Visit SmartPhrase. Type **AMBVIDEOTELEVISIT** into your note and press Enter when the SmartPhrase appears.
   b. To favorite the SmartPhrase, click the star to the left of the SmartPhrase.
6. F2 through the note to complete the Wildcards (*** and the SmartList (list “location” options included below in screen grab).

![Screen grab of note completion]

7. Next, navigate to the Wrap-Up activity. In the Level of Service section, document the LOS.

![Screen grab of Level of Service]

8. Finally, click **Sign Visit**.

![Sign Visit button]
Unscheduled Phone/Video Visit Encounter

This workflow should **NOT** be used for routine calls by an RN/MA, as this workflow is potentially billable. (Conceptually, they are meant to replace an office visit.)

1. Click the **Epic** button on the Hyperspace Toolbar.
2. Then click **Encounter**.

![Epic button on Hyperspace Toolbar]

3. Type the patient’s name into the Name/MRN field and press Enter or click **Find Patient**.
   a. Including other identifying information such as DOB or phone number, will help narrow down the patients to select from.

![Patient Lookup]

4. Select the correct patient.
5. Click **Select**.
6. In the Encounter Selection for (patient’s name) window, click **New**.

7. The New Encounter for (your patient’s name) window opens. Type “telemedicine” in the Type field.

8. Click **Accept**.
9. The Telemedicine encounter opens. As you speak to the patient, document the appropriate information for the encounter like a regular office visit.
   a. Visit Diagnosis
   b. Medications and Orders
10. Navigate to the Notes activity and complete a note by using a favorite SmartPhrase or typing.
    a. You must use the Video/Telephone Virtual Visit SmartPhrase. Type **AMBVIDEOTELEVISIT** into your note and press Enter when the SmartPhrase appears.
    b. To favorite the SmartPhrase, click the star to the left of the SmartPhrase.

![SmartPhrase Example]

11. F2 through the note to complete the Wildcards (*** and the SmartList (list “location” options included below in screen grab).

![SmartPhrase Example 2]

12. Navigate to the Wrap-Up activity and the Charge Capture section, select a charge. These charges will be held by the CBO until they determine the potential billing.

13. Finally, click **Sign Visit.**

![Sign Visit Button]
Add the .AMBVIDEOTELEVISIT SmartPhrase as a Speed Button

Create a speed button for the .AMBVIDEOTELEVISIT SmartPhrase. With just one click of this button, you can add the SmartPhrase into your note!

1. Navigate to the Notes activity.
2. Click the wrench in the notes section.

3. The My Notes Settings window opens. In the SmartPhrase field, type “ambvideotelevisit” and press Enter or +Add.

4. The AMBVIDEOTELEVISIT button appears, click Accept.
5. The AMBVIDEOTELEVISIT speed button now appears above your note.

6. Click the AMBVIDEOTELEVISIT button to add the SmartPhrase into your note.

**Add Encounter to the Hyperspace Toolbar**

Add the Encounter button to your red Hyperspace Toolbar to quickly create a new encounter.

1. Click the wrench on the red Hyperspace Toolbar.

2. Click Encounter and drag and drop it on the “red Hyperspace Toolbar”.
3. Once it has been placed on the red Hyperspace Toolbar, click **Accept**.

4. Encounter now appears as a button the red Hyperspace Toolbar.