

Telehealth Guide – Scheduling and Check-In

What's Different?

- This process eliminates the need for any check-in to occur at the time of the appointment.
- Insurance entry and encounter pre-creation will occur at the time of scheduling.
- We still need to obtain consent forms for new patients, we do not need to for established patients.
- New Telehealth visit/event types have been created in NextGen.
- New *Locations* have been created for each clinic in NextGen for encounter creation/billing.
- Self-pay (non-insured) patients can be scheduled too and credit card information should be taken over the phone.
Self-pay (non-insured) patient pricing: New patient: \$135.00 / Established patient: \$99.95

How to Schedule:

1. Telederm can be offered for general dermatology appointments including follow ups, med refills, rash, acne and spot of concern.
2. At the time of scheduling a patient, this scripting should be utilized:

ALL Patients: *"Thank you for calling! In light of COVID-19, our Physicians/PA's/NP's are offering telehealth visits to our patients. These online visits will be hosted via an interactive video-chat platform such as FaceTime (or Zoom if clinician is providing). While many health plans are changing to give our patients the extra support, for commercial plans if you have questions or concerns regarding coverage for this visit please contact your insurance."*

Minor patients (under 18 or under 19 in AL): *"a parent or legal guardian needs to be present at the start of and throughout the Telehealth visit to verbally consent to the visit and any recommended treatment."*

New Patients: *"As a new patient, we need to have you read and sign our new patient forms which include our Patient Communication and Financial Policies, Consent to Clinical Procedures, and HIPAA Notice of Privacy and Acknowledgement. These forms will be e-mailed to you with instructions."* Note: Patients do not need to have print / scan capabilities. Forms can be completed electronically and returned via a PC but not from a phone at this time.

Patients requiring interpreter services (Green Bay Interpreter Services accommodates Zoom for Spanish, Russian, and Somali): *"I'd be happy to schedule you. Let me arrange with our Interpreter services."*

Patients requiring sign language service or other accommodations: *"Let me take all of your information and we will give you a call back and try to arrange an appointment with an interpreter / accommodation".* Contact your supervisor or Laura Rosenfeld for assistance – Laura.Rosenfeld@forefrontderm.com.

3. Obtain or verify patient's email address and cell phone number and enter into NextGen.
4. Ask patient if they have access to an Apple device or Android device
 - Apple = FaceTime
 - Android = Zoom

****Note-** some clinicians may use Zoom for all devices and some may use other platforms – Duo, Doxy.me, Doximity. Check preferences of your clinicians.

5. Use the following scripting based off of audio/video platform:
 - a. **All platforms:** *“We recommend that you are in a quiet, private, and well-lit area of your home prior to the video call. Just like in-office visits, our physicians/PA/NP’s strive to stay on time, but please make yourself available for up to 30 minutes before and after your scheduled appointment time. Also, please note these applications potentially introduce privacy risks, and we have enabled all encryption and privacy modes available. It’s recommended that you do the same with your device.”*
 - b. **FaceTime:** *“We have a reference guide available on our website at forefrontdermatology.com if you have any questions on how to use FaceTime. Would you like the physician/PA/NP to contact you by your phone number or email address on FaceTime?”*
 - Email is needed for iPads without cellular data
 - Phone number can be used for iPhone or iPad with cellular service
 - c. **Zoom:** *“You will receive an email with instructions and a code to connect for your appointment. You can also refer to our website at forefrontdermatology.com for information.”*
6. Schedule patient with the event type of Telehealth- New or Telehealth – Established.
7. Leave the location on the appointment screen as the regular clinic location.
8. Type the following information into the **Details** field of the appointment:
 - Apple or Android
 - Platform (Zoom, FaceTime, other)
 - Indicator of phone vs email for FaceTime
 - Self-pay (if un-insured)
9. Have patient provide insurance payer name, policy, and group number.
10. Enter or verify insurance in the *Ins/Diag* tab of the appointment screen.
TIP: This works and looks the same as entering insurance in the auto-flow check-in process
11. Instruct patient to take a photo of the front and back of insurance card and email to patientbilling@forefrontderm.com.
12. Create a future encounter in NextGen PM and adjust to the correct date and time of the appointment.
13. Save the encounter and attach insurance to it.

****No action needs to be taken at the time of the appointment in NextGen PM. Do not check-in/create encounter****

Schedule Telehealth visit with Details:

The screenshot shows a scheduling form with the following fields and values:

- Date: 03/31/2020
- Time: 1:15 P
- Event/Event Chain: Telehealth-Established
- Duration: 5
- Resources: [List of resources]
- Service Location: Pensacola, FL - 530 Fontaine St.
- Description: Test, Laurie - Acne Follow-Up
- Details: Android / Zoom / Self-Pay
- Procedure with Resident:
- Confirmed:

Add or verify insurance in appointment screen:

The screenshot shows the 'Edit Appointment' window with the 'Insurance Information' tab selected. It displays a table with the following data:

Patient	Payer	Policy Nbr
UnitedHealthcare AL		686666866

Red arrows point to the 'UnitedHealthcare AL' entry and the 'Insured' button on the right side of the window.

Create future encounter and attach insurance (it will ask if you want to attach insurance after encounter is saved):

The screenshot shows the 'Encounter Maintenance - Encounter' window. A yellow callout box contains the following instructions:

- Click norton button to create new encounter.
- Enter date and time of Telehealth appointment.
- Choose your clinic's Telehealth service location.

Red arrows point to the 'New' button, the 'Bilable Date' and 'Bilable Time' fields, and the 'Service Location' dropdown menu.

The screenshot shows the insurance selection dialog box. It has two panes: 'Available Insurance' and 'Selected Insurance'. The 'Available Insurance' pane shows:

Payer	Policy Nbr
Anthem BCBS WI	Q000065555555

The 'Selected Insurance' pane is currently empty. A yellow callout box says: 'Move insurance over to the right (primary first, secondary next if applicable)'. Red arrows point to the 'Anthem BCBS WI' entry and the arrow button between the panes.

** Note- if the note is being scribed into EMA, please ensure that the facility in the manage visit settings is the new Tele clinic locations (listed under T's). If you don't see these facilities/locations in manage visit settings – your preferred facilities in preferences will need to be adjusted.

The screenshot shows the 'Visit' facility selection dropdown menu. The selected facility is 'Pensacola, FL - 530 Fontaine St.'. The dropdown list includes the following facilities:

- Tele Ankeny, IA - N Ankeny Blvd
- Tele Ann Arbor, MI - E Eisenhower Pkwy
- Tele Ann Arbor, MI - W Huron St
- Tele Arlington, VA-Fairfax Dr.
- Tele Atlanta,GA-Peachtree Dunwoody Rd
- Tele Bay Minette,AL-Hand Ave
- Tele Berwyn, IL-Harlem Ave.
- Tele Bethesda, MD - Old Georgetown Rd
- Tele Birmingham, AL - Inverness Center
- Tele Bolingbrook, IL-E. Boughton Rd.
- Tele Cary,NC-Carpenter Fire Station Rd
- Tele Castle Rock, CO - Meadows Blvd
- Tele Chicago, IL-Lincoln Park