

Phone or Zoom Telehealth Scheduling Process

- **XPN (Phone New PT)** = New patient appointments using phone or other video technology
- **XPR (Phone Return PT)** = Established patient appointments using phone or other video technology

Current Process For Scheduling Virtual Visits (Version 4 – 3/27/20)

All virtual appointments are to be arrived each day at beginning of day, with final reconciliation happening at close of day.

Step 1: Providers to review patient list of scheduled patients identifying eligible virtual visit patients.

Step 2: Provider will send list of patients to be seen virtually to local clinic PARs/clinical team member. (Include practice administrator)

Step 3: Local clinic PARs to contact patient a minimum of 24 hours before appointment to discuss the need to convert visit to virtual appointment at the request of the provider. For patients who agree, PAR's convert in-person visit to XPR/XPN appointment type. Local clinic PARs will request email, confirm insurance, confirm demographics, and instruct patient to download zoom app. (If app is unavailable, provider will conduct phone call with patient. If patient refuses video/phone visit, local clinic PAR to escalate to provider for guidance).

(Helpful Hint: Use comment section of IDX to denote VCU Health Anywhere, Zoom, Phone Visit)

Step 4: Clinical team member to call patient 15-20 mins prior to visit to check-in; confirm Zoom or phone visit, ask for weight, BP, concerns, med refills etc. (Clinical team member ensures patient has been arrived in IDX).

Step 5: (If needed) Provider will send ZOOM invite to patient through email while they are being checked in by the clinical team member.

Step 6: Provider documents visit encounter under in-person encounter using .telemed_COVID dot phrase for Zoom appointments or .telemed_phone-only for telephone appointments.

Please Note: Virtual Visit PAR Pool is only to be used for the VFU visit type. Further messaging concerning these pools will be provided at a later date.

VFU (Virtual Follow-Up)= Established patients booked via VCU Health Anywhere / AmericanWell / AmWell appointments only (Requires provider training)