# Telehealth & Teledentistry Guide

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Last Updated: 04/20/2020
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SCHEDULING A NEW TELEHEALTH OR TELEDENTISTRY VISIT

SCHEDULING GUIDELINES FOR TELEHEALTH/TELEDENTISTRY APPOINTMENTS

We have 3 different Telehealth/Teledentistry visit types available for patients:

- **Phone Consult (219):** the visit will be conducted via phone
- **MyChart Virtual Visit (733):** the visit will be conducted via Zoom. The patient will need to have an active MyChart account in order for this visit type to be scheduled. They must download the Zoom software, but do not need to sign up for a Zoom account. They can launch the video from a computer or a device with a camera and microphone.
- **Telemedicine (121):** the visit will be conducted via Zoom through a service called doxy.me. The patient does not need to download any software or create any accounts. They can launch the video from a computer or a device with a camera and microphone. **At this time, this visit type is only to be used by providers if they need to flip a visit.**

Additional Information:
- **Medical:** telehealth appointments are 20-minute blocks for Medical Providers and 30-minute blocks BH, OT, and PharmD Providers
- **Dental:** available appointment slots will have a block called Telehealth and are 30 minutes in length

SCHEDULING AN APPOINTMENT BY PHONE

When a patient calls in to schedule an appointment, use this script to inform the patient that appointments will not be conducted in clinic:

**Medical:** “During the COVID-19 pandemic, we have changed our normal processes to follow the most recent care guidelines. In order to address your concern, we will be connecting you with a provider for a telephone or virtual visit.”

**Dental:** “During the COVID-19 pandemic, we have changed our normal processes. In order to address your dental concern, we will be connecting you with a dentist through Teledentistry. In the absence of x-rays, you will be using a live video chat or be asked to send digital photos. In order to connect you to the dentist, we ask for your verbal consent. By consenting, you understand the dentist is limited to what they are able to diagnose and that you will provide as much detailed information as possible. You also understand if you are experiencing a life-threatening condition, you will be asked to go to the ER or call 911. If you are experiencing respiratory symptoms, you will be asked to contact your PCP, the health department, or (our medical providers).”

Determine if the patient is an established patient or a new patient by asking them if they are a current patient. Once determined, follow the appropriate steps below.
LOOK UP AN ESTABLISHED PATIENT

When searching the patient, request two-patient identifiers – first and last name (including spelling), and date of birth.

From the Patient Lookup window:
1. Enter the patients Name using the 3 comma 3 rule (i.e. zzz, tes)
2. Enter the patients Birth date
3. Click Find Patient

From the Patient Select activity:
4. Click the patient to select them
5. Ask the patient to verify their address, phone number, insurance, if an interpreter is needed, and their preferred language (most of this is viewable in the Preview section)
6. Click Select
Use protocol to screen for flu-like symptoms. If patients screen positive for flu-like symptoms, they should be transferred by a warm hand-off to the Triage RN- skip to the Triage RN section on page 14. If they have no flu-like symptoms, skip to the Schedule Appointment section on page 10.

**LOOK UP A NEW PATIENT**

If the patient is new to Neighborhood Health Center, you will need to search for their chart within all of OCHIN Epic, not just within our Service Area.

From the **Patient Lookup** window:
1. Enter the patients **Name** using the 3 comma 3 rule (i.e. zzz, jas)
2. Enter the patients **Birth date**
3. Remove Neighborhood Health Center from the **Service Area** to search OCHIN Epic globally

![Patient Lookup Window]

From the **Patient Select** window:
4. If a chart is found, click the **Patient Name** to highlight it
5. Verify it is the correct patient using the demographics provided in the preview
6. Click **Select**

![Patient Select Window]
If the chart was not in our Service Area, meaning the MRN started with an E, then you will be prompted to **Break the Glass**. Breaking the glass will pull the chart into our Service Area with our MRN (these start with 49).

From the **Break the Glass** window:
1. Enter a **Reason of Transferring Patient Care** (click the quick button)
2. Enter your Epic **Password**
3. Click **Accept**

If a chart is not found, remove the **Birth date** and search again. If needed, ask the patient for their **SSN** to look them up with. In searching for new patient charts, less is more, so try combinations or **Name, Birth date and SSN**.
10. If a chart is still not found, then complete the Name, SSN, Sex, and Birth date fields. If a patient does not want to provide an SSN or does not have one, enter all 9’s.

11. Click **New**

![Image of Patient Lookup window]

From the **Name Edit** window:

12. Make any changes to the patient’s name and click **Accept**

![Image of Name Edit window]

From the **Appt Desk**:

13. Click the **Patient Demographic** hyperlink to complete a mini-reg

![Image of Appointment Desk window]
From the **Demographics** activity:

14. Enter the patient’s **Address** using all CAPS. If they have an Apt or Ste #, click **Enter** on your keyboard to enter it on a second line.

15. Enter the patient’s **City (or ZIP)** using their zip code.

16. If the zip code has multiple City matches, the **Address Matches** window will prompt; choose the correct City.

17. Click **Accept**

18. Enter the patient’s **Contact information**; you can enter multiple phone numbers.

19. Enter the patient’s **Email**; this will be needed to sign up for MyChart.

20. Complete the **Needs Interpreter** field.

21. Complete the **Pref language** field.

22. Click **Accept**

23. Use protocol to screen for flu-like symptoms. If patients screen positive for flu-like symptoms, they should be transferred by a warm hand-off to the Triage RN. Skip to the Triage RN section on page 14.
SCHEDULE THE APPOINTMENT

From Appt Desk activity:

1. Click Make Appt

2. Select the correct Department
3. In the Appt notes field, add ‘NEW’ (for New Patient), reason for visit, insurance info (i.e. CO1234567), and preferred contact number for the visit
4. Select the appropriate Visit type
5. Select a Provider
6. Review the Instructions to ensure the provider is appropriate to schedule with (i.e. don’t schedule a pediatrician for an adult)
7. Double-click on a day from the Schedule Scanner to search for appointment times
8. If the **Travel Screening** questionnaire prompts and you have the patient on the phone or in person, ask the questions and complete the form. If you are scheduling from a MyChart scheduling request, click **Cancel** to bypass the form.

From the **Provider Schedule** activity:
9. Double-click on a slot to select it
10. Review appointment details and make any changes if necessary
11. Click **Schedule**
From the **Appointment Review** activity:

12. Review the appointment date, time, type, provider, and patient instructions (if there are any) with the patient and advise the patient the appointment can take up to 30-40 minutes

13. Advise patient to expect 2 reminder call/texts:
   a. From an automated system (Televox) 48-hours before their appointment
   b. From NHC staff up to 24 hours before their appointment

14. Click **Accept**

From the **Appointment Information** activity:

15. Enter which number the patient would like their reminder call sent to in the **Appt phone** field. If this field is left blank, the system will contact the patient via phone or text based on a number being marked as primary, if they are enrolled in text messaging alerts, etc.

16. Click **Accept**
From the Registration activity:

17. Click Finish; do not update anything on this screen

18. Scheduling is complete and the appointment is on the Appt Desk under the Future tab. Inform the patient to contact the office to reschedule or cancel if they are unable to attend the visit for any reason.

19. If the patient is scheduled to see a dentist, provide them our email address (dentalinfo@nhcoregon.org) to send their photos to or ask them to send them via MyChart (see Sending Photos on page 54 (Computer) or 70 (Mobile Device))

20. If an interpreter is needed, call Passport to Languages at 503-297-2707 and schedule one
   a. You will receive a Reference Number for the scheduled interpreter; update the Appt Notes with this number (see below on how to do this)

To update the Appt Notes:

21. From the Appt Desk, double-click on the text in the Notes column of the appointment

22. The Appointment Notes window prompts; add the interpreter reference number – REF#XXXXXX

23. Click Accept
TRIAGE RN

When the Triage RN receives the triage call, they will assess the patient and determine if the patient is most appropriate for:

- Home care advice
- A telehealth appointment (see below for scheduling guidelines)
- A face-to-face visit (NO ILI) (see below for scheduling guidelines)
- If red flag symptoms, recommend seeking immediate evaluation at Urgent Care or the Emergency Room

Triage RN will document their assessment, plan of care, and schedule appointments as appropriate

Schedule the patient for a Telehealth visit:

- Appointments are 20-minute blocks for Medical Providers and 30-minute blocks BH and PharmD Providers.
- Visit Types:
  - **Phone Consult (219):** the visit will be conducted via phone
  - **MyChart Virtual Visit (733):** the visit will be conducted via Zoom. The patient will need to have an active MyChart account in order for this visit type to be scheduled. They must download the Zoom software, but do not need to sign up for a Zoom account. They can launch the video from a computer or a device with a camera and microphone.

Schedule the patient for an in-person visit:

- Appointments are 20-minute blocks for Medical Providers and 30-minute blocks BH and PharmD Providers.
- Visit Types:
  - **Medical Provider:** Office Visit Short (1)
  - **Behaviorist:** Counseling Short (18)
  - **Clinical Pharmacist:** Clinical Pharmacist (151)

**NOTE:** Patients with Influenza like Illness (ILI) **CANNOT** be scheduled for an in-person visit at this time
SCHEDULING AN APPOINTMENT BY MYCHART

Patients can request appointments through their MyChart account online or their MyChart Mobile app.

EPIC INBASKET

When the patient sends a scheduling request through MyChart or MyChart Mobile, the request gets sent to the clinic Front Desk Pool. The message will be in the **Pt Schedule Request w/ Responsibility** folder with the patient’s name, requested provider, preferred date and times, reason for visit, and comments.

From the InBasket:
1. Click **Pt Schedule Request w/ Responsibility** folder
2. Click the message to open the preview
3. Review appointment details
4. Click **Appts** to launch the **Appt Desk** to schedule the appointment

![Image of InBasket and Appt Desk]

SCHEDULE THE APPOINTMENT

1. From the **Appt Desk**, click **Make Appt**

![Image of Appointment Desk]
From the **Make Appointment** activity:
1. Select the correct **Department**
2. In the **Appt notes** field, add their reason for visit, insurance info (i.e. CO1234567), and preferred contact number for the visit
3. Select the appropriate **Visit type** (if the patient requested an in-person visit, schedule as a MyChart Virtual Visit and reply to the patient with instructions and our current scripting)
4. Select a **Provider**
5. Review the **Instructions** to ensure the provider is appropriate to schedule with (i.e. don’t schedule a pediatrician for an adult)
6. Double-click on a day from the **Schedule Scanner** to search for appointment times
7. If you receive the **Travel Screening**, click **Cancel** to continue

From the **Provider Schedule** activity:
8. Double-click to select an appointment slot
9. Review the appt details and adjust if needed
10. Click **Schedule**
From the **Appointment Review** activity:

12. Click **Accept**

From the **Appt Information** activity:

13. Enter which number the patient wants their reminder call sent to in the **Appt phone** field. If this field is left blank, the system will contact the patient via phone or text depending on if a number is marked as primary, if they are enrolled in text messaging alerts, etc.

14. Click **Accept**
15. The **Registration** activity opens; click **Finish**
16. Do not update or click on any of the hyperlinks or verifications as these will force you to complete any fields that are hard stopped. These fields are updated and verified at the time of scrubbing and visit confirmation.

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Scheduling is completed and the appointment is on the **Appt Desk** under the **Future** tab

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**REPLY TO THE PATIENT WITH THEIR APPOINTMENT INFORMATION**

After you have scheduled the appointment, go back to the **In Basket** to reply to the patient with their appointment information.

From the **In Basket** activity:

1. In the **Pt Schedule Request w/ responsibility** folder, click the patient to select them
2. Click **Reply to Patient**
From the **Patient Message** activity:

3. Click above the **View-only below this line** to compose your message to the patient. Respond with the appointment information and any pertinent patient instructions.

4. Click **Send**
FLIPPING OFFICE VISITS TO TELEHEALTH/TELEDENTISTRY VISITS

This section covers how to flip a previously scheduled office visit into a Telehealth/Teledentistry visit prior to checking in the visit and how to flip between the different Telehealth/Teledentistry visit types during the visit. It is important to have the correct visit type to ensure the correct encounter type is launched. See more about what these are in the Scheduling a New Telehealth or Teledentistry Visit section on page 4.

HOW TO FLIP A PREVIOUSLY SCHEDULED OFFICE VISIT INTO A TELEHEALTH VISIT

If you need to flip visits for multiple patients on the same day, then pull the Department Appointment Report (DAR) to work from. If you are needing to flip for one or two patients, then you can pull up their individual appointment desks.

ACCESSING THE DEPARTMENT APPOINTMENTS REPORT (DAR)

Open Department Appointments Report (DAR):

1. Select the department for which you are converting visits
2. Under Department, ensure the correct department is listed; add additional ones if needed
3. Under Provider/Resource, ensure All Providers/Resources is checked
4. Under Visit Type, ensure All is checked
5. Under Appointment Status, ensure All is checked
6. Under Date Range, the From date and To date will default to today’s date; change if needed
7. Click Run
All scheduled appointments for the Date Range will display

### Flipping the Visit Type

From the DAR activity:
1. Click to select the appointment and then right-click to get a drop-down menu
2. Click Appt Desk
From the **Appt Desk** activity:

3. Call the patient to verify the visit type change. If they wish to cancel, try and reschedule them for a future date.

4. Confirm the patient’s contact information (address & phone number)

If the patient’s contact information needs to be updated, follow these steps:

5. Click the **Patient Demographics** hyperlink

6. Make updates to the **Address, Contact information** (phone numbers), **Email**, **Needs interpreter?**, and/or **Pref language** fields if needed

7. Click **Accept** when finished

8. Click to select the appointment and then right-click to get a drop-down menu

9. Select **Change Appointment**
From the Change Appointment activity:

10. Update the Visit type field to the appropriate visit type - Phone Consult (219) or MyChart Virtual Visit (733)
11. Change the Date and Start time if needed
12. Click Change

13. If the Travel Screening window prompts; click Cancel
From the **Appointment Review** window:

14. Review the appointment date, time, type, provider, and patient instructions (if there are any) with the patient and advise the patient that the appointment can take up to 30-40 minutes

15. Click **Accept**

From the **Appointment Information** activity:

16. Enter which number the patient would like their reminder call sent to in the **Appt phone** field. If this field is left blank, the system will contact the patient via phone or text based on a number being marked as primary, if they are enrolled in text messaging alerts, etc.

17. Click **Accept**
18. From the Registration activity, click **Finish**. Do not update any additional information on this screen.

19. The appointment will now be updated on the **Appt Desk**. Make sure to confirm the new appointment instructions with the patient- see **Patient Instructions for their New Appointment section on page 26**

20. If an interpreter was scheduled for the office visit, call Passport to Languages at 503-297-2707
   a. Provide the existing interpreter reference number in the appointment note – REF#XXXXX – and request to switch to a telephonic interpreter
PATIENT INSTRUCTIONS FOR THEIR NEW APPOINTMENT

PHONE CONSULT VISIT INSTRUCTIONS

1. Inform patient of Phone Consult appointment date, time, and provider speaking with patient and that the appointment can take up to 30-40 minutes
2. Advise patient to expect 2 reminder call/texts:
   a. From Televox 48 hours prior to their appointment
   b. From NHC staff up to 24 hours prior to their appointment
3. Inform patient to contact the office to reschedule or cancel if s/he is unable to attend the visit for any reason
4. Inform patient that on the day of the scheduled visit a medical/dental assistant will call approximately 20 – minutes before their appointment, if the patient does not answer, the medical/dental assistant will make a second attempt right away. If the patient does not answer on the second attempt, the medical/dental assistant will leave a voicemail letting the patient know they will call back again in 5 minutes for their telephone visit. A third attempt will be made and if the patient does not answer the call, it will be considered a No Show.

MYCHART VIRTUAL VISIT INSTRUCTIONS

1. Inform the patient of the MyChart Virtual Visit appointment date, time, and provider they will be seeing
2. Review the Patient Instructions with them:
   • We strongly recommend using your smartphone for the visit. To do so, download the “MyChart” app on your device and set up with your login
   • Prior to your visit, ensure that you have Zoom (our video software) installed on your desktop or mobile device. To download, go to https://zoom.us/download#client_4meeting
   • Note that it is not necessary to create a Zoom username and login for your video visits
   • Approximately 10 minutes before your scheduled Video Visit, log on to MyChart from anywhere with a reliable internet connection and click on your scheduled appointment
   • You MUST update your information to launch into your video visit. Once you have completed preCheck-In, a link will appear to allow you to start your visit.
   • If you get disconnected or dropped from your video visit, you may reconnect for up to an hour by returning to your appointment in MyChart and clicking the green Begin Visit button
3. Advise patient to expect 2 reminder call/texts:
   a. From Televox 48 hours prior to their appointment
   b. From NHC staff up to 24 hours prior to their appointment
4. Inform patient to contact the office to reschedule or cancel if s/he is unable to attend the visit for any reason
There may be times when you need to switch which type of visit you are having with the patient. **THIS SHOULD ONLY BE DONE IF TECHNICAL DIFFICULTIES CANNOT BE FIXED.** Flipping visits after documentation has been started in the encounter will lock down the encounter type. This means that certain things will not change even if the visit type is flipped, such as the **Display Name** for the **Type** in **Chart Review**.

Visits can be flipped by support staff or providers from the patient’s **Appointment Desk**.

Provide instructions to the patient:
- If changing to a Phone Consult Visit, verify the patient’s phone number and call them to complete the appointment (if you were using computer audio while having the MyChart visit)
- If changing to a Telemedicine Visit, provide the patient with the provider’s waiting room URL for doxy.me. Advise them to type their name in and click Check In once on the website. They will need to allow their browser to use their webcam and microphone and then sit in the waiting room until the provider starts the visit.
- If changing to a MyChart Virtual Visit, advise the patient to log into their MyChart account and ensure they have Zoom installed on their device. They will need to complete their preCheck-In and begin the Zoom visit. If the appointment was more than 60 minutes ago, MyChart will not display the visit for the patient. MyChart only allows launching of the Zoom visit 30 minutes prior and 60 minutes after the scheduled appointment time.

From within the visit encounter:
1. Click **Appts** on the top taskbar
2. The **Patient Lookup** window prompts; click the **Patient Name** under **Open Patients**
From the **Appt Desk** activity:

3. Click the appt to select it
4. Click **Change Appointment** on the bottom taskbar or right-click the appt and select it from the drop-down menu

From the **Change Appointment** activity:

5. Change the **Visit type** to one of the following:
   a. Phone Consult (219)
   b. MyChart Virtual Visit (733)
   c. Telemedicine (121)
6. Click **Change**
SCAFFLING & CONFIRMING APPOINTMENTS

Every morning, the front desk will scrub the clinic schedule for telephonic and virtual visits. For each visit, the front desk will call the patient to confirm their appointment and to verify and update the following information:

- **Demographics:**
  - Name
  - Address
  - Contact Numbers
  - Emergency Contact Name and Contact Number

- **Guarantor Account Info:**
  - Verify guarantor demographics and update if incorrect
  - Verify FPL is current and update if expired
  - Verify patient’s insurance and update if incorrect

- **SOGI:**
  - If due, complete each section

- **Visit Info tab:**
  - Attach correct guarantor to visit
  - Verify and update Homeless Status and Migrant/Seasonal Status

- **Checklist:**
  - Ensure all relevant sections have been verified; correct any errors if needed

- **Verify the visits are scheduled with the correct visit types:**
  - Phone Consult (219)
  - MyChart Virtual Visit (733)
    - If a visit is not scheduled correctly, call the patient to flip the visit (see How to Flip a Previously Scheduled Office Visit into a Telehealth Visit section on page 20)

- **Verify the visit is scheduled for the correct appointment length:**
  - 20 minutes for PCPs
  - 30 minutes for Behaviorists, PharmDs, OT's, and Dentists

- **Verify an interpreter is scheduled for the visit if one is needed:**
  - If the patient needs an interpreter and there is no interpreter scheduled for the visit, call Passport to Languages to schedule a phone interpreter for the phone/virtual visit at 503-297-2707
  - Once the interpreter is scheduled, add the reference number in the appointment notes as REF#XXXXXX

- **Patient has a co-payment due:**
  - If the patient has a co-pay due, ask if they will be paying this at the time of the visit. If they will, make a note on the Appointment Notes that the call will need to be transferred back to the front desk instead of the MA/DA for Check-Out. The front desk will complete the check-out and process the payment (see End of Visit Handoff section on page 33)
PHONE CONSULT VISITS

FRONT DESK

Front Desk will be scrubbing the schedules up to 24 hours in advance to ensure the appointments were scheduled correctly and that a phone interpreter is scheduled if needed. For each visit the front desk will call the patient to confirm the appointment and verify demographics, insurance, attach the visit guarantor account, and complete the visit checklist. To review the detailed workflow, see the Scrubbing & Confirming Appointments section on page 29.

MEDICAL ASSISTANT & DENTAL ASSISTANT

The medical/dental assistant will call the patient for their appointment and complete a modified check-in and rooming workflow. 20 minutes before the patient’s scheduled phone visit with the provider, the MA/DA begins to prepare for the visit:

1. The MA/DA looks to see if the patient requires an interpreter (an interpreter should have been scheduled for the visit if the patient required one). The MA/DA can tell that an interpreter was scheduled by looking in the appointment notes for a reference number (REF#XXXXXX).
   a. Call Passport to Languages at 503-297-2707 and give the representative the reference number
      i. **NOTE:** If the patient requires interpretation and there was no interpreter scheduled, call Passport to Languages and request a phone interpreter for the phone visit
   b. Once the interpreter is on the phone, call the patient at their preferred phone number for the phone visit (this phone number should be listed in the appointment notes)
2. If the patient does not require an interpreter, call the patient at their preferred phone number for the phone visit (this phone number should be listed in the appointment notes)
   a. If the patient does not answer, hang up and try calling back right away
   b. If the patient does not answer on the second attempt, leave a voicemail letting the patient know you will call back again in 5 minutes for their telephone visit
   c. If the patient does not answer on the third attempt, leave a voicemail asking the patient to call the clinic back to reschedule; provide the clinic phone number
   d. Document all attempts to contact the patient in a telephone call encounter; close the encounter
3. If the patient answers, check them in for their telephone appointment (all info should have been verified by the front desk)
4. Ask the patient to consent for treatment via a telephone visit:
   a. "We need to ask for your verbal consent for this telephone visit. Do you authorize treatment for yourself (or your child) via this telephone visit and accept financial responsibility for this service and all treatment? Do you authorize Neighborhood Health Center to provide to your insurance companies all information necessary to process insurance claims and assign Neighborhood Health Center all of the insurance benefits due to you to the full extent of your financial obligation?"
5. Double-click on the appointment from the Schedule to launch the visit
6. If this is a New Patient appointment, attempt to set up Care Everywhere (see How to Request Care Everywhere Records section on page 86)

7. Ask about and input the **Chief Complaint**
   a. “What is the reason for your visit today?”

8. Ask about and input **Allergies**
   a. “Do you have any allergies to medications, foods, etc.?”

9. Perform and document a **Medication Reconciliation**

10. Ask about and enter the patient’s **Preferred Pharmacy**
    a. “What is your preferred pharmacy for us to send medications to?”

11. If Medical: For females of childbearing age, ask and enter the answer to the **One Key Question**
    a. “Are you planning to become pregnant in the next year?”

12. For **New Patients**: ask and input **Medical History**
    a. Unless the provider specifically asks, **Surgical History**, **Social History**, and **Family History** may be deferred until the patient’s next in-person appointment
    b. **Flowsheets** such as SBIRT, PHQ-9, and GAD-7 may also be deferred UNLESS the patient’s chief complaint warrants collecting this information (depression, anxiety, etc.) OR the provider specifically asks for the information to be collected

13. Enter the **Visit Program Area** in the **Quick Question** section:

<table>
<thead>
<tr>
<th>Provider Type</th>
<th>Visit Program Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dental</td>
<td>Dental - 6</td>
</tr>
<tr>
<td>PCP</td>
<td>Primary Care Other - 7</td>
</tr>
<tr>
<td>Behaviorist</td>
<td>BH Integrated - 231</td>
</tr>
<tr>
<td>Pharmacist</td>
<td>Clinical Pharmacy - 232</td>
</tr>
<tr>
<td>Reproductive Health</td>
<td>Family Planning - 1</td>
</tr>
<tr>
<td>Occupational Therapy</td>
<td>Occupational Therapy - 420</td>
</tr>
</tbody>
</table>

14. For your **Note**, use the following SmartPhrase:
    a. Medical: .NHCMAVIRTUALROOMING
    b. Dental: .COVIDTELEDENTAL
    c. Enter any pertinent additional information to your note that you feel is necessary

15. Inform the patient you will be transferring the call to the provider for the telephone visit
    a. Transfer call to provider (see How to Transfer a Call section on page 78)

**MEDICAL PROVIDER**

1. Receives transferred patient call from MA after virtual rooming
   a. NOTE: BH Providers will call scheduled patients and do not have an MA assisting. BH provider to follow pertinent steps in MA flow above for calling patient +/- interpreter, obtaining verbal consent for treatment, checking patient in, and entering visit chief complaint and program area.

2. Note the time the call begins

3. Click into patient encounter in Epic, confirm patient name/DOB
4. Open phone note SmartPhrase in **Documentation** tab (consider creating a quick button; see *How to Create a Note Template Quick Button on page 86*):
   a. PCP/Pharm: (.NHCPHONESOAP)
   b. BH: (.NHBHAPHONE)
5. Conduct patient history/interview
6. Formulate **Assessment and Plan**
7. Enter and sign relevant **Orders**
   a. Send prescriptions as 90-day supply when possible
   b. Lab tests to be sent to outside lab, only order if absolutely necessary in short term (next 6-12 weeks)
   c. If referral needed, attempt Rubicon e-referral 1st
8. Provide patient verbal instructions and counseling
9. Establish follow up schedule and document in visit **Wrap Up** tab under **Follow Up**
10. Route the call to MA (or Front Desk if co-pay is being paid) to check patient out, schedule follow up, and if needed, sign up for MyChart and pay co-pay (see *How to Transfer a Call on page 78*)
12. Complete visit **Documentation**
13. Complete **Patient Instructions** for **AVS (After Visit Summary)**. These are viewable in MyChart for the patient.
14. Select **LOS (Level of Service)** code:
   a. (99441-99443) Telephone evaluation and management service provided by a physician to an established patient, parent, or guardian not originating from a related E/M service provided within the previous 7 days nor leading to an E/M service or procedure within the next 24 hours or soonest available appointment
   b. (98966-98968) Telephone assessment and management service provided by a qualified non-physician health care professional to an established client, parent or guardian. The call cannot originate from a related assessment and management service provided within the previous 7 days or lead to an assessment and management service or procedure within the next 24 hours or soonest-available appointment.
   c. TX1368: If <5 minutes or service provided within the last 7 days or f/u scheduled in the next 24 hours/next soonest apt.

<table>
<thead>
<tr>
<th>Time</th>
<th>MD/DO/PA/NP/CNM/ND</th>
<th>PharmD</th>
<th>BH/OT</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;5 minutes or not billable</td>
<td>TX1368</td>
<td>TX1368</td>
<td>TX1368</td>
</tr>
<tr>
<td>5-10 minutes</td>
<td>99441</td>
<td>99441 (E&amp;M consult) 98966 (MTM)</td>
<td>98966</td>
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<tr>
<td>11-20 minutes</td>
<td>99442</td>
<td>99442 (E&amp;M consult) 98967 (MTM)</td>
<td>98967</td>
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<tr>
<td>21-30 minutes</td>
<td>99443</td>
<td>99443 (E&amp;M consult) 98968 (MTM)</td>
<td>98968</td>
</tr>
</tbody>
</table>

14. Close and **Sign** encounter
1. Receives transferred patient call from DA after virtual rooming
2. Click into patient encounter in Epic, confirm patient name/DOB
3. Opens Documentation tab with pre-loaded note
4. Conduct patient history/interview and review previous x-rays if necessary
5. Update Tooth Chart if necessary
6. Enter and sign relevant Orders (i.e. medication or referral)
7. Provide patient verbal instructions and counseling
8. Establish f/u schedule; document in visit Wrap Up tab under Follow-up
9. Route the call to DA (or Front Desk if co-pay is being paid) to check patient out, schedule follow up, and if needed, sign up for MyChart and pay co-pay (see How to Transfer a Call on page 78)
10. Complete visit Documentation
11. Complete Patient Instructions for AVS (After Visit Summary). These are viewable in MyChart for the patient.
12. Complete Treatment Plan by using bundle SA49 DENTAL TELEHEALTH, select the appropriate codes, and add a Visit Diagnosis
13. Close and Sign encounter

END OF VISIT HANDBOFF

When the provider has completed the phone visit with the patient, the provider transfers the call back to the MA/DA who will check out the patient or the Front Desk if the appointment notes reflect the patient has a co-payment due.

The MA/DA/Front Desk completes the patient visit by:
1. Scheduling the patient for a follow up visit if needed
   a. Medical: If the patient needs a follow up visit before the end of April, only schedule an in-person face-to-face visit if approved by the provider/RN
   b. Medical/Dental: If above does not apply, schedule a phone/virtual visit. This includes scheduling follow up with the BH or PharmD.
2. Sending the patient their AVS via MyChart or mail
   a. Assist the patient in signing up for MyChart if they do not already have MyChart; the patient will be able to view their AVS from here
   b. If the patient declines to sign up for MyChart, print and mail the patient their AVS to their preferred mailing address
3. Collect a co-pay (this must be completed by the front desk):
   a. Document and collect the co-pay in Epic
   b. Complete the transaction using PayJunction and complete these additional fields:
      i. Zip Code- required
      ii. Email Address- can email the patient a copy of their receipt; this also gives them the option of electronically signing it
4. Ensure the patient has no further questions and thank them for their time

**HOW TO CHECK OUT THE PATIENT WITHOUT TAKING A CO-PAY**

From the *Appt Desk* activity:
1. Click the appointment to select it
2. Click *Check Out* in the bottom toolbar or right-click and select it from the drop-down menu

3. **Continue with Check Out?** window prompts; click *Yes*
From the **Check Out** activity:

4. If the patient is requesting an AVS to be mailed to them, click the arrow next to **AVS** and select **Print AVS**

5. Highlight and copy the **Follow-up disposition** in the **Follow-up information** section; you’ll need this if scheduling another appointment

6. Click **Accept**
MYCHART VIRTUAL VISIT

MyChart Virtual Visits allow patients and providers to meet outside of the clinic about certain types of issues – increasing access, convenience and satisfaction, while decreasing patient transportation costs and no-show rates. Virtual visits typically address non-urgent concerns and follow-up questions or concerns.

Patients can schedule or request these visits through MyChart and MyChart Mobile. Camera and audio must be enabled, and the patient must download Zoom onto their desktop or mobile device. Zoom virtual visit is secure, HIPAA compliant, and does not have access to PHI or store transmitted information.

Prior to the start of the visit, the patient will login to their MyChart account and complete a preCheck-In; an electronic check-in process.

The patient will need to complete the following steps before they can launch the video visit:
- Electronically sign an Informed Consent for Telehealth Consultations form
- Review, update, and verify Demographics, Allergies, Medications, History, Pharmacy, and Insurance information

Up until the time the patient arrives, the provider can pre-chart in the visit.

NOTE: Some patients may not feel comfortable updating this information electronically. Even though preCheck-In asks patients to verify the information is correct, patients may have clicked “Yes” simply to get through the preCheck-In process. As always, providers will want to verify the information is correct during the visit.

Once the patient has completed the pre-check in process, they will launch the video visit. Their screen will tell them to wait until the host joins the session, which is the provider.

FRONT DESK

Front Desk will be scrubbing the schedules up to 24 hours in advance to ensure the appointments were scheduled correctly and that a phone interpreter is scheduled if needed. For each visit the front desk will call the patient to confirm the appointment and verify demographics, insurance, attach the visit guarantor account, and complete the visit checklist. To review the detailed workflow, see the Scrubbing & Confirming Appointments section on page 29.

MEDICAL ASSISTANT & DENTAL ASSISTANT

The medical assistant will call the patient if they have not arrived 5 minutes PRIOR to their appointment time to see if they are having any technical issues. If they are, they can aid the patient in troubleshooting; see Patient Experience MyChart Virtual Visits section starting on page 57 (computer) or 70 (mobile device).
STARTING THE VISIT

Once the patient has completed the preCheck-In process, the appointment status on the provider schedule will change from **Scheduled** to **Arrived**. Double-click the appointment to open the encounter.

In the **Office Visit** encounter:

1. Click the **Rooming** activity tab
2. Click **Launch Zoom** from the **Connect** activity to start the video portion of the visit. The Zoom video will open in the web browser.
3. If the patient has not yet launched Zoom, **No one is connected** will appear

**NOTE**: The patient has a 30-minute grace period to arrive **before** their scheduled visit time and a 60-minute grace period to arrive **after** their scheduled visit time. After 60 minutes, **Launch Zoom** will no longer be functional.
4. A web browser with Open Zoom? prompts; click Open Zoom

Zoom launches with a preview of you and an audio conference option window. You can choose to connect by Phone Call or Computer Audio

If connecting by Phone Call:
5. Click Phone Call- Connected and dial one of the numbers; follow the prompts to enter the Meeting ID and Participant ID

If connecting by Computer Audio:
6. Click Computer Audio
7. Click Join with Computer Audio

NOTE: There may be a delay while Zoom is connecting the two participants via video; this is normal
8. The video screen opens, and the provider and patient can now see and hear each other (make sure your computer volume is on); click the upper right corner of the screen to minimize the video.

9. The video preview box of the patient will minimize to a small floating window and can be positioned in the corner of the screen. You can now navigate Epic while conducting your visit with your patient.

**TIP:** If Epic is not displayed, click on the Epic icon from the lower taskbar. The patient video should now be in the upper right corner and the Epic encounter should be full screen.
**ADDING AN INTERPRETER**

If the video visit needs to be conducted with an interpreter, you will need to use a telephone for the audio option and you will need to know how to join an additional caller (i.e., conference call).

1. When the patient’s appointment has changed to the **Arrived** status, double-click to open the patient’s encounter, click on the **Rooming** activity and make sure the **Launch Video** icon is available in the **Connect** section. **Do NOT** click it yet.
2. Call the interpreter from your phone and get him/her on the line (Passport to Languages: 503-297-2707). You may need to provide a reference number unique to each patient, typically found in the patient appointment notes (see *How to Access Passport to Languages on page 85*).
3. Click **Launch Zoom** and then select **Open Zoom**
4. You will still see a video preview of yourself and the box for **audio conference options** displays in the middle of the screen
5. Choose **Phone Call** for the audio option
6. Using the conference call feature on your phone, place the interpreter on hold and dial one of the telephone numbers to join Zoom by phone call (see *How to Conference Call on page 78*).
7. Once the audio is established with the patient, conference the interpreter into the call
8. The visit proceeds as outlined in the steps outlined above
9. When you click **End Meeting**, the patient is no longer connected but **the interpreter is still on the phone** with you. Thank them for their time and end the call.

**ENDING THE VISIT**

1. If you have the video preview box as a small floating window, click the **Exit Minimized Video** (green arrow) in the lower right corner of the patient window to expand the minimized video screen

2. From the full video screen, click **End Meeting** in the lower right corner of the screen
3. The Zoom video visit will close, but this does **NOT** close the Epic encounter. The appointment will display on the provider’s schedule as “**Checked Out**”. Encounter documentation can still be completed after the video visit.

### MEDICAL PROVIDERS: COMPLETE & SIGN THE VISIT

Complete the rest of the clinical encounter, following NHC guidelines, including:

a. Document a **Chief Complaint**
b. Review **Allergies, Medications**, and **History**
c. Review the **Problem List** and update **Visit Diagnoses**
d. Place any **Orders** if needed
e. Complete **Documentation** using Problem-based charting
f. Add a **Level of Service (LOS)** - ***Code as you would for an in-office visit***
g. Add **Patient Instructions** and **Follow Up** if needed
h. Add your normal **Visit Program Area** (see below)
i. **Place of Service** will automatically populate to Telemedicine
j. **Sign** the Encounter

<table>
<thead>
<tr>
<th>Provider Type</th>
<th>Visit Program Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>PCP</td>
<td>Primary Care Other - 7</td>
</tr>
<tr>
<td>Behaviorist</td>
<td>BH Integrated - 231</td>
</tr>
<tr>
<td>Pharmacist</td>
<td>Clinical Pharmacy - 232</td>
</tr>
<tr>
<td>Reproductive Health</td>
<td>Family Planning - 1</td>
</tr>
<tr>
<td>Occupational Therapy</td>
<td>Occupational Therapy - 420</td>
</tr>
</tbody>
</table>

The **After Visit Summary (AVS)** is sent to the patient’s MyChart account once the visit is signed.

1. The visit now shows as **Signed** on the provider’s schedule and the patient is automatically checked out.
Complete the rest of the dental encounter, following NHC guidelines, including:

- Document a **Chief Complaint**
- Review **Allergies, Medications, and History**
- Review the **Problem List** and update **Visit Diagnoses**
- Place any **Orders** if needed
- Complete **Documentation** using the SmartPhrase .COVIDTELEDENTAL
- Complete your **Treatment Plan** using code bundle **SA49 DENTAL TELEHEALTH**
- Add **Patient Instructions** and **Follow Up** if needed
- Add **Dental (6)** for **Visit Program Area**
- **Place of Service** will automatically populate to Telemedicine
- **Sign** the Encounter

**CODING GUIDELINES:** The Telehealth dental code (D9995) should be used in the treatment plan in conjunction with at least one additional code (D0140- Limited Exam or D0170- Limited Follow-up). We get paid the same way for these codes as we do when patients show up in our clinics with a couple exceptions.

- If a patient has a telehealth visit and is scheduled for an in-person visit that same day, the televisit will not be billable
- If the patient shows up on a different date of service, then both visits are billable
- If D0140 was used during the telehealth visit, then this code should not be used for a follow-up visit for the same condition the patient presented with in the televisit
- D0170 can be billed in follow-up visits (either in person or virtual visits), and/or treatment codes that were performed during an in-person visit
- TX452 DENTAL CONSULTATION is considered a “no-charge” code and should only be used if the visit does not count towards a “telehealth” visit. No other treatment codes should be completed if TX452 is used.

The **After Visit Summary (AVS)** is sent to the patient’s MyChart account once the visit is signed.

1. The visit now shows as **Signed** on the provider’s schedule and the patient is automatically checked out.
FAQ AND TROUBLESHOOTING

Q. If I am pre-charting, will I receive a notification that the patient is checked-in and arrived?
A. No, if you are pre-charting and it is nearing the patient’s appointment time, you will need to click back to the schedule view to see if the appointment has changed to the Arrived status.

Q. Can the patient bypass the check-in verifications to go straight to Launch Zoom Visit?
A. No, they are unable to bypass preCheck-In. They must “sign” a consent form and check a box in each section to say the information is correct. However, patients may not be comfortable updating that information during the check-in process, so it is still important to verify the accuracy of the information with the patient.

Q. How long does the patient have to check-in and arrive?
A. The patient can complete preCheck-In up to 3 days in advance. They have a 30-minute window before and a 60-minute window after the scheduled appointment time to launch the video visit. You may complete other tasks or work on other charting, as long as you are watching for the appointment to change to an Arrived status.

Q. What happens after the 60-minute late start window if the patient did not launch the visit?
A. The Launch Zoom button will no longer be selectable, and the patient is marked as a No Show.

Q. What happens if we get disconnected or accidently click “End Meeting”?
A. The patient can launch the visit again from their MyChart account and you will be re-connected.

Q. It is just not working. The visit is not launching, and I do not see or hear the patient. What do I do?
A. As a last resort, the provider can flip the visit to either a Phone Consult or a Telemedicine Visit (see Provider-Flipping Between Visits After Check-In on page 29)

Q. What if I need to write an excuse letter for the patient?
A. The letter will be available to the patient in MyChart under their Messaging tab just like any other letter that you write for a patient who is active on MyChart.
TELEMEDICINE VISIT (DOXY.ME)

Telemedicine visits are non-MyChart virtual visits. This visit type uses a service called doxy.me. This is an online telemedicine solution for when patients do not have MyChart and/or refuse to sign up for MyChart, AND a provider feels it is more appropriate for the visit to be face-to-face virtually.

SIGNING UP FOR DOXY.ME

Providers will need to sign up in order to use the doxy.me service. To sign up:

1. Go to URL: doxy.me
2. In the upper right corner, click on Sign up for free, then click I’m a Provider ->
3. Complete the following fields:
   a. First Name
   b. Last Name
   c. Room Name- The room name will be part of your URL that you can send to patients. Example room name of “DrGregGuffanti”
   d. Email
   e. Confirm Email
   f. Password
4. Click the checkbox for I am using Doxy.me as a healthcare provider, not a patient
5. Click the checkbox for I agree to the Terms and Conditions
6. Click Sign Up

PROVIDER- USING DOXY.ME

1. Click Sign In
2. Enter Email and Password; click Sign In
3. Click on Waiting Room
4. Click on the patient you will connect with (the patient needs to go to your waiting room first)
5. Video chat with patient

PATIENT EXPERIENCE- USING DOXY.ME

The patient will need the URL for your “waiting room” which you can provide by phone. The URL is doxy.me/“waiting room name” (i.e. doxy.me/drgregguffanti). The patient will also need to allow their browser to use their webcam and microphone.

1. Patient opens up web browser (most easily done from a smart phone)
2. Patient enters URL for provider’s waiting room
3. Patient types in their Name and clicks Check In
4. Patient will sit in the waiting room until the provider starts the visit
SCHEDULING FOLLOW UP VISITS

If the visit is over the phone, the recommended workflow is for the provider to transfer the call back to the MA/DA/Front Desk so they can check out the patient, communicate their AVS, schedule any follow up appointments, and collect a co-pay (if due); see End of Visit Handoff on page 33.

If the visit is through MyChart, the recommended workflow is for providers to route their visit encounter to the Front Desk Pool for staff to schedule follow up visits for patients. If the provider decides they want to schedule their own follow up appointment, they can do this through One Click Scheduling or Make Appt.

ROUTING VISIT ENCOUNTERS

Providers have the option of routing their visit encounters to staff for further follow up. In the Follow-up section of the encounter, they can choose to enter a Front Desk Pool and request that they schedule the patient for a follow-up visit.

Within the Visit Encounter:
1. Click Wrap-Up
2. Click Follow-up
3. Complete the Return in or Return on quick buttons/fields
4. Complete the For field
5. Add a Check-out note if needed
6. Enter the clinic Front Desk Pool in the Send Chart Upon Closing Workspace field
7. Complete the Comments field with instructions for the front desk staff (this field is easier to see on the front desk side then the Return in/on and For fields)
8. Click Send Now to route the chart without closing it (this allows you to finish your charting)

(Picture on next page)
Front Desk staff will receive the message in their **CC’d Charts** InBasket folder:

9. Click **CC’d Charts**
10. Click the message to view the preview
11. The **Comments** field that was completed will display at the top of the message
ONE CLICK SCHEDULING

If providers want to schedule a follow up visit themselves, **One Click Scheduling** will save time on a few steps, but if the appointment is more than a week out, **Make Appt** would be a better option. You can switch to Make Appt from One Click Scheduling if needed by clicking **Manual**.

From within the **Visit Encounter**:
1. Click **Appts** from the top taskbar

From the **Patient Lookup** window:
2. Double-click the patient under **Open Patients**
From the **Appt Desk** activity:

3. Click the drop-down arrow next to **One Click**

4. Select a **Visit Type**

From the **One Click** activity:

5. Complete the **Appt Notes** field

6. The available appointment options will start with the soonest available (sometimes same day) and will display for all providers with open schedules

7. Click a **Time** to select an appointment (skip to step 10)

8. If you need a later date than what is displaying, click **More** to continue loading additional appointment times

9. If you need to schedule the patient more than a week or two out, click **Manual** for which provider you want to schedule with to jump to the **Make Appt** screen (see *Schedule the Appointment on page 10* for additional steps)
10. If you receive the **Travel Screening** activity, click **Cancel**

From the **Appt Review** activity:
11. Review the appointment date, time, type, provider, and patient instructions (if there are any) with the patient  
12. Click **Accept**

From the **Appt Information** activity:
13. Enter which number the patient would like their reminder call sent to in the **Appt phone** field. If this field is left blank, the system will contact the patient via phone or text based on a number being marked as primary, if they are enrolled in text messaging alerts, etc.  
14. Click **Accept**

The appointment has been scheduled and will be on the **Future** tab on the patient’s **Appt Desk**
PATIENT EXPERIENCE

Patients can access their MyChart account via computer or mobile device. Below are some of the workflows from a patient view so you can aid in trouble-shooting any issues they may be having.

COMPUTER DEVICE

Website: https://mychart.ochin.org

SIGNING UP FOR MYCHART VIA EMAIL

Patients can sign up for MyChart via email or text message. Neither method will require an Activation code as long as the patient clicks a hyperlink that we send via email or text for sign up. If they go directly to the OCHIN MyChart website or app, they will need to have an activation code to sign up which we provide.

The patient should contact Neighborhood Health Center and request to sign up for MyChart via email.

1. They will be sent an activation email to the account provided from mychart-notification@ochin.org. Click the “Use this link to sign up for MyChart now” hyperlink:

On the MyChart Signup webpage the patient will:

2. Create their Username
3. Create their Password
4. Enter their Date of Birth
5. Click the “I agree to the Terms and Conditions” hyperlink to review them
6. The OCHIN MYCHART TERMS AND CONDITIONS OF USE window prompts; the patient reviews them and clicks the “x”
7. Click the “I agree to the Terms and Conditions” box
8. Click Submit

(Pictures on next page)
9. The patient has now successfully signed up for MyChart. They will need to click the “navigate to the MyChart website” hyperlink to log in.
SCHEDULING AN APPOINTMENT

Patients can send scheduling requests through MyChart. Neighborhood Health Center has not turned on Direct Scheduling, which would allow patients to schedule themselves. When a patient sends a scheduling request, it is routed to the clinic’s front desk pool. Staff will review the message, schedule the patient, and reply to the patient with their appointment information. The scheduled appointment will display under the patients Visits tab in MyChart.

From the MyChart Home Screen:
1. Click Visits
2. Select Schedule an Appointment

From the Schedule an Appointment screen, patients can choose from either a provider or reason for visit. Providers will only display if the patient has seen them within the last 24 months or if they have an upcoming appointment in the next 12 months with them.
3. Click a Provider to select them OR
4. Click a Reason for Visit to select it
If the patient chooses a provider first, they will be prompted to select a **Reason for Visit** next.

5. Under **What kind of appointment are you scheduling?**, select a **Reason for Visit**

6. The patient can see where they are in the process from step indicator. Depending on their choices, the step indicator can change options.

7. At any point in the process the patient can choose to restart by clicking **Start Over**

---

The patient may need to choose a **Location** if a provider is active at multiple sites, meaning they have an open schedule at more than one location (i.e. float providers or RH providers), or if they chose a **Reason for Visit** as **Other**.

8. Under **Which locations work for you?**, click to select the location
Once the patient has chosen a provider, reason for visit, and location, they need to choose their preferred dates and times and provide some appointment details.

9. Review the office visit details; if they need to be changed either click **Start Over** or click **Edit** next to the section that needs to be changed

10. Complete the **Preferred dates**, **Preferred times**, and **What is the most important thing you want addressed during this visit?** sections

11. Click **Send Request**

---

**SENDING PHOTOS**

Patients are able to send photos through MyChart that can be saved in their charts. The most common scenario for this is of their mouths for dental providers or of a mole or rash for medical providers. To do this, a patient must start with sending a MyChart Message.

From the MyChart Home Screen:
1. Click **Messaging**
2. Select **Ask a Question**
From the **Ask a Medical Question** screen:

3. Select a provider from the **Choose a Recipient** dropdown (only providers the patient has seen within the last 24 months or has a visit scheduled for in the next 12 months will be available to select)
4. Select a message type from the **Select a Subject** dropdown:
   - Non-Urgent Medical Questions
   - Prescription Question
   - Test Results Question
   - Visit Follow-Up Questions
5. Write message in the **body** field
6. Click **Attach an Image**

From the patient’s computer files:

7. Click to select the **file (picture)**
8. Click **Open**
9. The image will display under **Attachments** with a **Label** that they can edit. They can also click the red “x” to delete the image.

10. If the patient needs to attach multiple pictures, they can click **Attach Another Image**

11. Once finished, click **Send**
MYCHART VIRTUAL VISITS

A MyChart Virtual Visit provides the opportunity for the patient to have a video visit with the provider through the patient’s MyChart account. The following steps outline the patient experience so staff can help troubleshoot in the event the patient experiences any difficulty with the visit.

AT THE TIME OF SCHEDULING

IT recommendations and requirements:

- The patient will receive instructions at the time of scheduling, telling them they need to have the Zoom application installed on either their computer or mobile device.
- The patient does NOT need to have a Zoom username or password. Only the Zoom application needs to be installed.
- The preferred connection is a mobile device rather than a home computer.

When the MyChart Virtual Visit is scheduled, the patient will receive an email stating they have a message in their MyChart account. The MyChart message contains the SAME patient instructions that were given to them at the time of scheduling and includes a link to download the Zoom application.

The appointment type appears as **MyChart Virtual Visit** in the patient MyChart account.
The patient needs to complete an electronic check-in process prior to their appointment. This can be completed up to 3 days in advance of the scheduled appointment time.

To access preCheck-In and launch the MyChart Virtual Visit, the patient needs to do the following:

1. From their MyChart account, hover **Visits** and then click **Appointment and Visits** from the dropdown

2. Select **preCheck-In** next to the scheduled appointment

Patients are asked to review and update their **Personal Information**

3. Click **This information is correct**
4. Click **Next**

**NOTE**: The patient cannot click the NEXT button until they check the box in each section that states "This information is correct"
5. Click **Review and Sign** to view the **Informed Consent for Telehealth Consultations**

![Informed Consent Window](image)

**Informed Consent for Telehealth Consultations** window prompts

6. Review and click **Click to Sign** to sign the consent; the patient’s name will populate

7. Click **Continue** when finished

![Sign Button](image)

8. From the **preCheck-In Sign Documents** screen, click **Next**
Patients are asked to review and update their Medications. They have the option of removing and adding medications. They are also asked to verify and select their Pharmacy.

9. Click This information is correct
10. Click Next

Patients are asked to review and update their Allergies. They have the option of removing and adding allergies.

11. Click This information is correct
12. Click Next
Patients are asked to review and update their **Health Issues**. They have the option of removing and adding health issues.

13. Click **This information is correct**

14. Click **Next**

Patients are asked to review update their **Insurance Information**. They have the options of updating coverage, replacing insurance card photos, removing coverage, and adding coverage.

15. Click **This information is correct**

16. Click **Submit**

The patient has completed their preCheck-In process
Patients can arrive anywhere from 30 minutes early to 60 minutes late for their appointment. If they are within that window, they can begin their visit after preCheck-In.

1. From the Appointment Details screen, click Begin Video Visit
2. If the patient does not have Zoom downloaded or they want to watch a How-to Guide, they can click the hyperlink
3. Zoom launches; click **Open Zoom**

The patient will see the following screen until the provider joins the video session:

4. Once the provider joins the visit, the patient will see themselves in a video preview; click **Join with Video**

**NOTE**: There is a delay while Zoom connects the two video participants; this is normal
The patient can choose to connect by **Phone Call** or **Computer Audio**

**If connecting by Phone Call:**

5. Click **Phone Call - Connected** and dial one of the numbers; follow the prompts to enter the **Meeting ID** and **Participant ID**

![Image of Phone Call options]

**If connecting by Computer Audio:**

6. Click **Computer Audio**

7. Click **Join with Computer Audio**

![Image of Computer Audio options]
The patient and provider can now see and hear each other, and the provider will conduct the visit.

If somehow the patient and provider get disconnected, the patient can click **Begin Video Visit** again from their MyChart account and be re-connected with the provider.

### ENDING THE VISIT

1. From the full video screen, click **End Meeting** in the lower right corner of the screen.

### AFTER THE VISIT

Once the provider has signed the patient’s **After Visit Summary (AVS)** will be available to them in their MyChart account.

1. Hover **Visits** and click **Appointment and Visits**
2. Under **Past Visits**, locate your appointment and click **View After Visit Summary**
3. If you want to view the providers notes from the visit, click **View Notes**
MOBILE DEVICE

MyChart App in the Play Store: MyChart App once downloaded:

SIGNING UP FOR MYCHART VIA TEXT MESSAGE

Patients can sign up for MyChart via email or text message. Neither method will require an Activation Code as long as the patient clicks a hyperlink that we send via email or text for sign up. If the go directly to the OCHIN MyChart website or app, they will need to have an activation code to sign up which we provide.

The patient should contact Neighborhood Health Center and request to sign up for MyChart via text message.

1. They will be sent an activation text to their mobile phone. Click the hyperlink to be taken to the MyChart Signup webpage:

On the MyChart Signup webpage the patient will:

2. Create their Username
3. Create their Password
4. Enter their Date of Birth
5. Select a Security Question
6. Complete their Security Answer
7. Click the “I agree to the Terms and Conditions” hyperlink to review them
8. The OCHIN MYCHART TERMS AND CONDITIONS OF USE window prompts; the patient reviews them and clicks the “x”
9. Click Submit

(Pictures on next page)
10. The patient has now successfully signed up for MyChart. They will need to click the “navigate to the MyChart website” hyperlink or download the app through their device’s app store.
SCHEDULING AN APPOINTMENT

From the mobile app:
1. Tap the **Appointments** button
2. Select **Schedule an Appointment** from the bottom of the screen

The appointment scheduling window will open
3. Tap **Tell us why you’re coming in**
4. Choose a visit such as **Virtual Visit**
To select an appointment date:
5. Type the dates in the **Preferred dates** fields, OR
6. Tap the **Calendar** icon to choose from calendar view

Next, choose times:
7. If any time during the selected date range works, select **All available times**
8. If not, select **Filter times** and tap the blocks of the time that work

9. The patient must answer **“What is the most important thing you want addressed during the visit?”** to submit the appointment request
10. Once done, the gray **Send Request** button turns green; click to send message
11. After tapping the green **Send Request** button, a notification will popup that the request has been sent
SENDING PHOTOS

**No screenshots available for this**

If patients need to send the provider a photo, they can do this by sending a Message:

1. From MyChart mobile home page, click **Messages**
2. From the **Inbox** screen, click **Send a Message**
3. Select a message type of **Medical Advice**

From the **Get Medical Advice** screen:

4. Click the **To** field and choose a recipient from the drop-down list
5. Click the **Subject** field and choose a subject of either **Non-Urgent Medical Question** or **Visit Follow-Up Question**
6. Click the **camera icon** next to **Add an Attachment**
7. Select **Take a new photo** to take a picture, or click **Select existing photo** to choose from your gallery
8. Once photo is added, click the **Enter a message** field to compose your message
9. Once finished, click the **envelope** in the upper-right corner to send the message
10. A pop-up will say “**Message Sent! Your message was sent successfully.**”

MYCHART VIRTUAL VISITS

A MyChart Virtual Visit provides the opportunity for the patient to have a video visit with the provider through the patient’s MyChart account. The following steps outline the patient experience so staff can help troubleshoot in the event the patient experiences any difficulty with the visit.

AT THE TIME OF SCHEDULING

IT recommendations and requirements:

- The patient will receive instructions at the time of scheduling, telling them **they need to have the Zoom application installed on either their mobile device.**
- The patient does NOT need to have a Zoom username or password. Only the Zoom application needs to be installed.
- The preferred connection is a mobile device rather than a home computer.

When the MyChart Virtual Visit is scheduled, the patient will receive an email stating they have a message in their MyChart account. The MyChart message contains the SAME patient instructions that were given to them at the time of scheduling and includes a link to download the Zoom application.

(Picture on next page)
The appointment type appears as **MyChart Virtual Visit** in the patient MyChart account.

**COMPLETING PRECHECK-IN**

The patient needs to complete an electronic check-in process prior to their appointment. This can be completed up to 3 days in advance of the scheduled appointment time.

To access preCheck-In and launch the MyChart Virtual Visit, the patient needs to do the following:

From their Mobile app home page:
1. Click **Appointments**
   
Upcoming appointments display:
2. Tap the appointment to open it
The patient is notified that they must preCheck-In (formerly eCheck-In) in order to begin the visit.

3. **Tap Go to preCheck-In**

If the patient has not yet signed an **Informed Consent for Telemedicine Consultation**, they will be prompted to do so next during preCheck-In. Once the patient has signed, they will not have to do so before other virtual visits again.

4. **To sign, click Review and Sign**

The **Informed Consent for Telehealth Consultation** form will open. If after reading, the patient wants to continue the visit, they must sign the form.

5. **Draw in the box to Sign**

6. **Tap Continue**
The document window will now show that the Consent Form has been previously signed.

7. To reopen the form, click **Review**

8. To move on, click **Next**

The patient is taken to the preCheck-In activity. Patients need to review Medications, Allergies, Health issues, and Insurance.

9. They can add or remove information when necessary

10. They need to click **This information is Correct** in each section

11. Once clicked, they’ll click the **Next** button and move onto the next section

12. Once the patient has verified all the preCheck-In information, they can tap **Submit**
13. A confirmation screen appears to notify the patient that they have successfully completed the preCheck-In process.

**STARTING THE VISIT**

1. The patient can review the virtual visit Instructions and tap Begin Visit to connect to Zoom. Patients can join the visit up to 30 minutes early and 60 minutes after the start time. The patient will be directed to Zoom. The Zoom app is required to join the meeting.
2. If the patient already has Zoom downloaded onto their mobile device, they can tap Join Meeting.
3. If the patient does not have Zoom when they tap Join Meeting, they are directed to their respective App Store (available through Apple App Store or Google Play).
4. Once installed, the Zoom icon appears on the mobile’s home screen. After installation, the patient should tap on the MyChart app to return to the visit and choose Begin Visit again. They will be taken to the Zoom website to connect.
5. After tapping **Join Meeting**, tap **Open** to access the visit through the Zoom app
6. The patient will wait for the provider to join the virtual video visit. Once the provider joins, the video will start.

**ENDING THE VISIT**

1. From the full video screen, click **End Meeting** in the lower right corner of the screen

**AFTER THE VISIT**

**No screenshots available for this**

How to view the **After Visit Summary (AVS)**:
1. From MyChart mobile home page, click **Appointments**
2. Under **Past**, locate the appointment you want to see the AVS for and click **View After Visit Summary** hyperlink
3. **AVS** is displayed
HOW TO CREATE A NOTE TEMPLATE QUICK BUTTON

If you are using a pre-built note template (SmartPhrase), you can create a quick button to use instead of typing the SmartPhrase every time.

Within an encounter on the Notes activity:
1. Click the wrench icon
2. The Notes Personalization window prompts; search for NHCPHONESOAP in the SmartPhrase field and click Add
3. The new quick button will display at the end of the other quick buttons
4. You can rename the button by editing the Caption field
5. Click Accept

(Continued on next page)
6. Back on the **Notes** activity, click the quick button you created

7. The note template populates in **My Note**
USING YOUR MITEL PHONE

HOW TO TRANSFER A CALL

1. Ensure you are on an active call with the party you wish to transfer
2. Press the Transfer softkey (located below Transfer); the active call is placed on hold
3. Enter the transfer recipient’s number and press the Transfer softkey; the call is transferred

HOW TO CONFERENCE CALL

1. While on the call with your first party, press the Add User softkey (located under Add User); the active call is placed on hold
2. Dial the number of the next party
3. When answered, announce the conference call and then press the Joins Calls softkey (located under Join Calls)
4. If no answer, press the Back to Held softkey (located under Back to Held) to cancel the addition of the 2nd party to the conference call

(Quick Reference Phone View on Next Page)
QUICK REFERENCE PHONE VIEW

Programmable Keys
Up to 72 programmable keys, a maximum of 12 programmable keys per page

These are the softkeys

1. Contacts
   Displays a list of your contacts

2. Call History
   Displays a list of missed, outgoing and received calls as well as My Mobile and Missed calls

3. Voicemail
   Provides access to your voicemail service

4. Settings
   Provides services and options that allow you to customize your phone

5. Volume
   Adjusts the volume of the ringer, handset, speaker, and headset

6. Navigation/Select
   Multi-directional navigation keys are used to navigate through phone menu. Press the center button to select menu options and perform various actions

7. Speaker/Headset
   Toggles the phone's audio between speaker and headset. If you are using a DHSG/EHS headset, ensure that the headset jack adapter is removed from the headset port. See the Mitel MiVoice 6930 IP Phone Installation Guide for more details

Warning!
The headset port is for headset use only. Plugging any other devices into this port may cause damage to the phone and will void your warranty.
EPIC SECURE CHAT

Epic Secure Chat allows you to communicate quickly by sending a secure instant message within Epic, Haiku, and Canto. You can use Secure Chat to convey brief, non-urgent messages or to coordinate amongst staff.

Secure Chat should never be used as a substitute for clinical decision making, placing orders, or official documentation in a patient’s record.

Because Secure Chats are not part of the legal medical record, Secure Chat is not a replacement for information communicated and actions taken via InBasket messages (such as following up on abnormal lab results, responding to refill requests, or managing routed encounters). Secure Chat logs are kept for 14 days and are purged from the system afterwards.

SENDING A SECURE MESSAGE

From the Secure Chat activity:

1. Click the icon
2. In the To: field, enter the name of the user you want to send a message to
   a. If you are needing to send a message to more than one person, continue entering names in the Enter recipient or group name field
3. If you are sending a message about a specific patient, click the Attach Patient button and type the name of the patient (LastName, FirstName) to look up the patient and attach them
4. Type your message in the Enter a message field
5. Click Send
6. After sending your message, the chat will be under your **Conversations** column
7. To view the people in your chat, look under your **Conversation Details** column
8. To add additional people to your chat, click **Add Participants**
9. You can write additional messages in the **Enter a message** field and click **Send**

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**REPLYING TO A SECURE MESSAGE**

1. When you receive a message through **Secure Chat**, you will see a **Secure Chat** box pop up
2. Click **Open Chat** to respond
Your **Secure Chat** activity opens and displays your **Conversations**. Your unread chats will be bolded and have a number displaying how many messages within the chat are unread.

3. Click your **Unread Chat** to view it

4. To view the people in your chat, look under your **Conversation Details** column
5. To add additional people to your chat, click **Add Participants**
6. You can reply to the chat by entering your message in the **Enter a message** field and click **Send**
SETTING YOUR CHAT AVAILABILITY

You can set your chat availability in the Conversations column:

1. In the Set your availability field, click to see the drop-down and choose between Available, Busy, or Unavailable
2. Once you set your availability, the Until field will appear; choose an option from the drop-down
3. To see advanced options for setting your availability, click the gears icon

From the Advanced Options under the Availability section:

4. Click the quick buttons to choose your availability
5. Enter specific dates and times in the Until section
6. Enter a Message
7. Click Accept when finished
**Auto Forwarding Messages When You’re Unavailable**

If you are unavailable and someone will be covering for you, you can set up your messages to be auto forwarded.

From the Secure Chat activity:
1. Click the gears icon under the Conversations column to see the Advanced Options
2. Click Auto Forward Messages under the Auto Forward column
3. Enter the users name you want your messages forwarded to in the Forward To field
4. Specify a date and time in the From field
5. Specify for how long in the Until field by entering a date and time, or use the quick buttons
6. If you do not want to receive notifications, click the Don’t send me chat notifications box
7. Click Accept when finished

![Image of Secure Chat setup](image)

**Use Secure Chat in Mobile Applications**

You can use the Secure Chat activity in Haiku or Canto. You get all of the same functions as you do in Epic on a computer.

1. To view a list of conversations, tap the Secure Chat button at the bottom of the app
2. Tap a conversation to read and reply to messages within that conversation

![Image of Secure Chat in mobile app](image)
HOW TO USE CALL BLOCKING

Placeholder- we will be rolling out a Mitel Phone App for this, but if you are calling a patient from home and wish to block your number, dial *67 and then your number.

HOW TO ACCESS PASSPORT TO LANGUAGES

Passport to Languages phone number: 503-267-2707
When you call Passport to Languages, identify yourself by providing your name and clinic name (i.e. “Hi this is Sally from Neighborhood Health Center”)

SCHEDULING AN INTERPRETER

In general, the Passport to Languages representative will ask for the following information when you are scheduling an interpreter:
- Previous reference number (can be found on past appointments on the Appt Desk)
- Patient name
- Patient date of birth
- Insurance (if they are self-pay say no insurance)
- Patient phone number
- Language needed
- Your call back number (provide the clinic number)

CALLING THE INTERPRETER FOR THE VISIT

- The Passport to Languages representative will ask for a reference number when you call for the interpreter (found on the appointment notes). The reference number allows them to pull up the patient information and which interpreter was scheduled for the visit.
- They will ask you to hold while they conference in the interpreter (depending on the language this may take a few minutes).
- Once the interpreter is on the line, they will identify themselves by name and provide an ID # (you do not need to record this).
- While some interpreters are ok conferencing in the patient, not all will. You will most likely need to conference call in the patient. If you are doing this on your Mitel Phone, see How to Conference Call on page 78.
HOW TO REQUEST CARE EVERYWHERE RECORDS

If a patient was seen at an outside facility that is on Epic, you can request the records through Care Everywhere. In order to request records, you need to be in an encounter. If you are not in an office visit or telephone encounter, you can open an interim note encounter to request records.

Within a patient chart:

1. Click Chart Review
2. Hover the icon and click the Request outside records hyperlink

3. If you are not in an encounter already, and the patient has open encounters in their chart, you will receive an Encounter Selection window, click New

4. From the New Encounter window enter Interim Notes in the Type field
5. If the Provider and Department fields are blank, enter the patient’s PCP/Dentist and clinic location
6. Click Accept
From the Request Outside Records activity:

7. Search for organizations in the Search by organizations city, state, or Care Everywhere ID field OR
8. Check the boxes next to the organizations you want records from
9. Click Query

10. While the records are being requested, the organization will say Querying... Sometimes the system will time out or Epic and the querying organization are having connectivity issues. If that happens, this screen will spin for some time.
If the organizations query says **No matching patients found** and you know the patient was seen there (patient tells you, you receive paper records, etc), follow these steps:

11. Call the phone number listed under the **Query assistance instructions**. When you reach a staff member, state the following: “Hi, I’m Sally at Neighborhood Health center and I need a Care Everywhere ID for a mutual patient”

12. The organization will ask for the patient name, date of birth, SSN, etc in order to look up and verify the patient; you can find all this info under the **Patient**, **Address**, and **Contact Information** sections

13. Enter the **Care Everywhere ID** in the **Enter the patient’s Care Everywhere ID** field

14. Click **Retry**

15. When finished, click **Next** if you have additional organizations to view, or click **Done** if finished

16. Once the query is done, if records were found, the information will be found on the **Care Everywhere Outside Records** activity. If no records were found, you will default back to the **Choose Organizations to Query** activity.