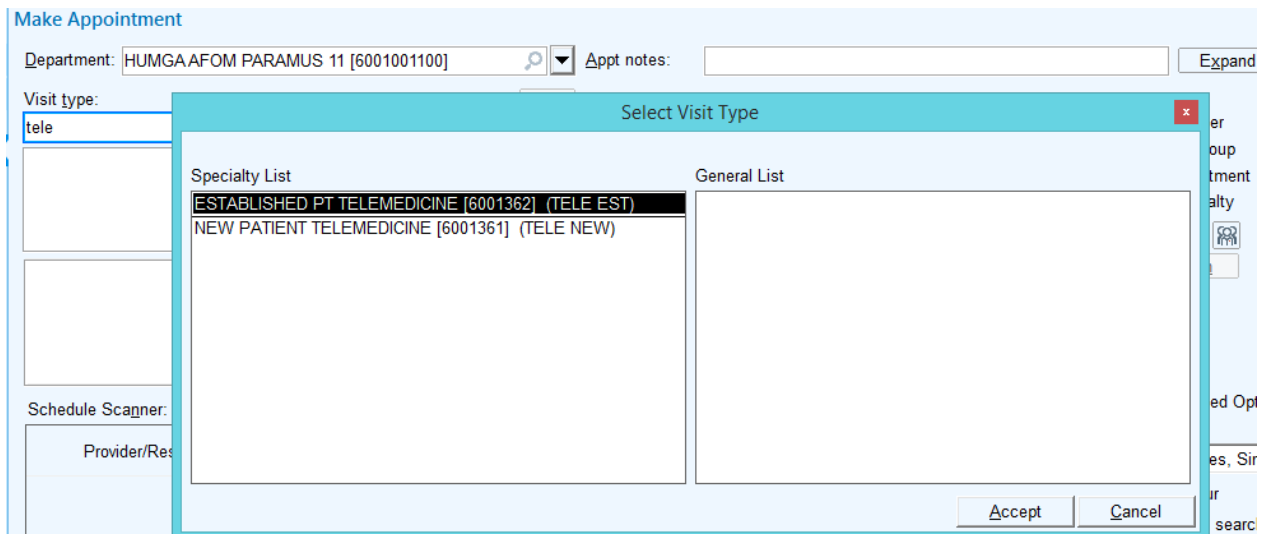


## CADENCE: Telehealth Visits

This Knowledge Builder will direct Front Desk staff on scheduling and checking in Telehealth Visits utilizing the Blue Jeans video conferencing tool. Make sure to follow the instructions to set up Outlook with the Blue Jeans video conferencing tool prior to scheduling any Telehealth Visits. Please refer to the Blue Jeans Knowledge Builder for instructions on video conference scheduling.

### To Schedule a Telehealth Visit

When a patient calls for an appointment and needs to be scheduled for a Telehealth visit, please be aware that this is the standard Make Appointment workflow, however, users will need to select from these two Visit Types for Telehealth visits.



Complete the Make Appointment workflow and confirm appointment has been set on the patient's appointment desk.

RFL	Encounter	Date	Time	Visit Type	Provider	Dept	Appt Notes	INP
		3/20/2020	Fri	0930 ESTABLISHED PT TELEMEDICINE [6001362]	ACANTHITE, FINN- AMBMD [AMBMD01]	HUMGA AFOM PARAMUS 11	testing telemed appt	

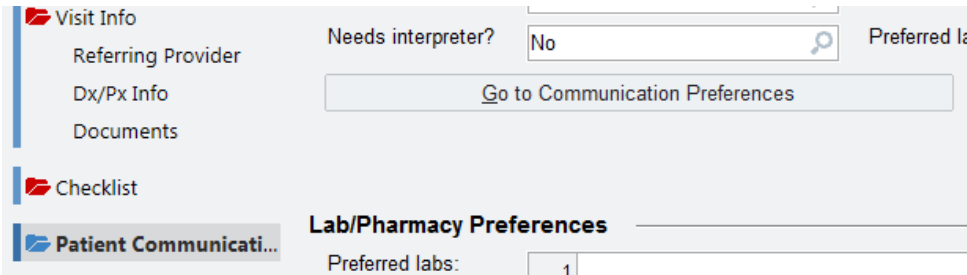
Once the appointment has been set in Epic, users will need to create and send the Blue Jeans invitation to the patient and provider. Please refer to the Blue Jeans How To Knowledge Builder for instructions on video conference scheduling.

**For more information, contact training team**

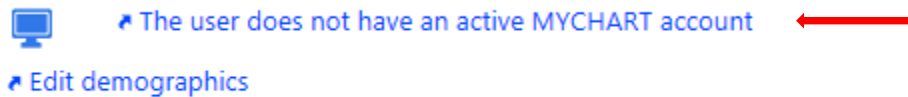
## MyChart activation:

Users should all patient to sign up for MyChart. The process for activating a MyChart account is as follows:

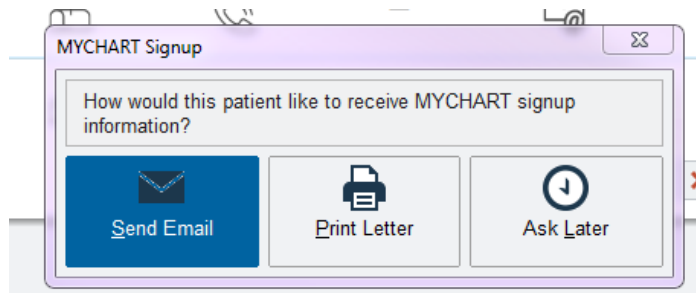
1. Click the Patient Communications tab and then click Communication Preferences.



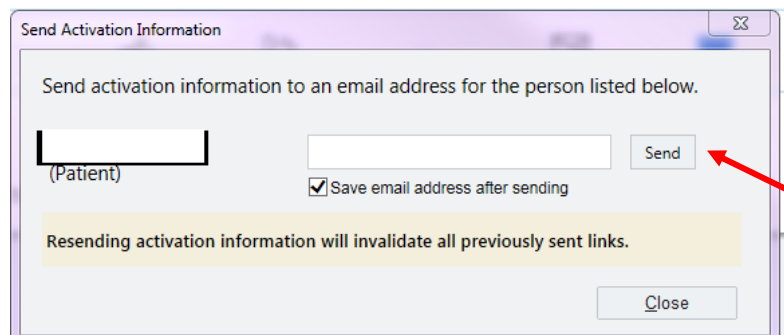
2. In Communication Preferences, users will see if the patient has an active MyChart account. If the patient does not have an active MyChart, click on the link.



3. The MyChart Signup pop-up will appear. Suggest to the patient that an email communication would be the fastest way to receive the needed activation code and create their account.



4. Click the Send Email button and enter the email address. Click Send.



For more information, contact training team

## Validating Patient Information for a Telehealth Appointment

Once the BlueJeans invitation has been sent and the appointment has been made in Epic, users should validate the patient's information.

1. For established patients: users should validate demographic and all registration items along with insurance

The screenshot displays the Epic patient record for 'Aberdeen, Mary Fp'. The left sidebar contains navigation options such as 'Visit Info', 'Checklist', and 'Patient Communication...'. The main content area is divided into sections: 'DEMOGRAPHICS', 'GUARANTORS & COVERAGES', and 'Patient Contacts'. The 'DEMOGRAPHICS' section shows the patient's address (123 Prospect Ave, HACKENSACK, NJ 07601), phone numbers (Home: 201-122-1594), and other details like 'Preferred Pronoun' and 'Launch CareMedic'. The 'GUARANTORS & COVERAGES' section lists 'P/F Aberdeen, Mary Fp [600000497]' as the guarantor, with associated encounter and account balances. The 'Patient Contacts' section shows 'Showing 1 of 1' contact.

2. Complete registration for all new patients at the time of scheduling the appointment. Email or mail new patient packet to patient/guarantor including HIPPA, Consent, Financial Responsibility and all applicable forms. Instruct patient/guarantor to include copy of photo ID and insurance card (front and back) with the completed package mailed/emailed to the office.

## On the day of the appointment:

1. Join the Blue Jeans meeting (see example below) and confirm that the patient has joined.

The screenshot shows a meeting invitation with the following text: 'To join the meeting on a computer or mobile phone: <https://bluejeans.com/0000000000?src=calendarLink>'. Below this, it provides a 'Mobile One-Touch' link: 'tel:+18662264650,,,,0000000000#,,#'. It then asks 'Just want to dial in on your phone?' and lists three steps: '1) +1.888.240.2560 (US - Toll Free)', '2) Enter Meeting ID: 0000000000', and '3) Press #'. The entire content is enclosed in a black-bordered box.

2. Once confirmed that the patient is on the Blue Jeans meeting, check in the patient in Epic and inform the provider to log into the Blue Jean application as well.

**For more information, contact training team**

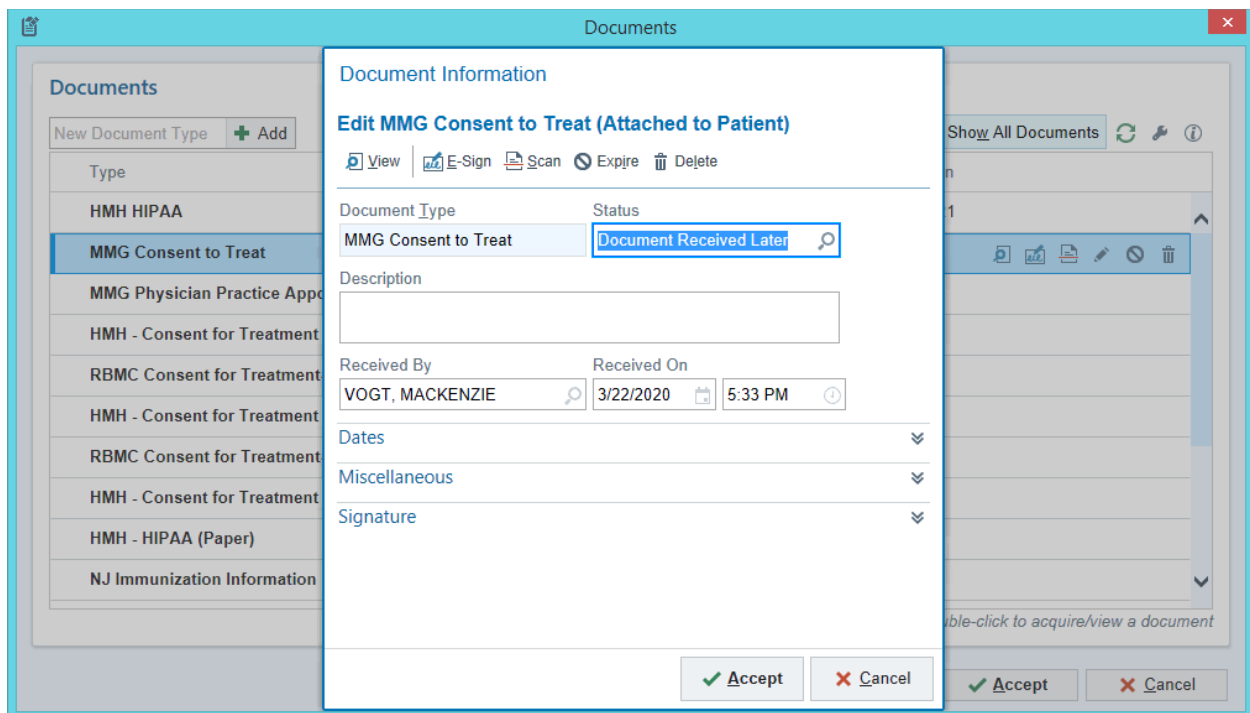
V.3.2022.20

3. When both the patient and provider are in the meeting, click the Leave button to remove yourself.



## Appointment Check-in workflow:

1. Complete check-in processes validating all needed information.
2. To check in **NEW Telehealth visits**, users will need to identify in Documents that the necessary documentation collected for every visit (i.e., Outpatient Consent, Financial Responsibility, Photo ID, etc.) will be collected and scanned at a later time. Click on the pencil and update the status for each of these documents to 'Document Received Later'.



## The 'Scanning' Documents Workflow for Telehealth Visits

1. Practices will run missing documents report to monitor patients pending receipt of registration documents
2. All documents should be scanned at encounter level into patient's chart.
3. Update document status to received and add receipt dates.

For more information, contact training team

## **Patient initiated telephone communication:**

When patients call to discuss medical conditions, consult with providers and schedule applicable Telehealth visit. Complete the BlueJeans scheduling and appointment check-in process for the visits.

## **BlueJeans connectivity issues:**

If any connectivity issues are experienced for scheduled Telehealth visits, confirm with the patient that they are available to speak with the provider at the appointed time.

When the patient calls for the non-video Telehealth Visit, check them in and inform the provider that the patient is only available via telephone. The provider will need to use applicable CPT codes for virtual check-in visits based on documentation to bill for the non-face to face visits.

**For more information, contact training team**

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