Telehealth Presenter Rooming Work Flow

1. SCOPE

1.1. MCHS Hospital-Based Ambulatory Care
    • Telepresenters
1.2. MCHS Clinic Ambulatory Care
    • Telepresenters
1.3. Facilities and departments included in the scope listed above are further defined in the Scope Definition Resource Guide if not specifically outlined above.

2. DEFINITIONS & EXPLANATIONS OF TERMS

2.1. Abbreviations
    • BMI: Body Mass Index
    • CMR: Combined Medical Record
    • MCHS: Marshfield Clinic Health System
    • MCIS: Marshfield Clinic Information Systems
    • PCP: Primary Care Provider
    • TH: Telehealth
    • AVS: After Visit Summary

2.2. Definitions
    • Codec: The video conferencing system
    • Telehealth Consult: is used interchangeably with Telehealth visit. It refers to any Telehealth Appointment
    • Telepresenter: is an RN, LPN or MA who is trained to use technology, such as digital stethoscope, otoscope, examination camera, etc, to facilitate comprehensive exams under provider guidance
    • Polycom: refers to the clinical video conferencing device or software. Used interchangeably with Codec.
    • Dashboard: Cattails application for entering data for patient visits
    • Telehealth Room: Any location in which the patient is prepared to see a provider using Telehealth video equipment
    • Telehealth Provider: any medical professional such as MD, DO, PA, NP, RN, etc, trained to deliver virtual medical, health, and education services
3. PROCEDURE BODY

The objective of the procedure for checking patients in for Telehealth appointments is the same as for in-person visits – to ensure that the support staff knows the patient has arrived and that the practitioner knows the patient is ready. This is also to provide guidance for the Telepresenter in order to room a patient for a Telehealth visit.

A difference with Telehealth appointments is who checks the patient into which schedule. There are two locations and two providers for every Telehealth patient. It is important to recognize who checks in the patient, to which schedule, and at what time. The process for check-in is designed to ensure that the patient is ready for the practitioner at the time of the appointment and that the practitioner support staff knows when the patient is ready.

3.1. The patient will have multiple appointments for one Telehealth encounter:
   a. A Telepresenter appointment
   b. A Telehealth room appointment, if needed
   c. A provider appointment

3.2. Telepresenter Reception check-in
   a. Patient will present to facility where Telepresenter is located
   b. Reception staff at the patient site will check in patient for the Telepresenter
      using the Reception Icon
   c. Reception must be set to view all appointments by setting the VIEW on the top toolbar to view all appointments. UNCHECK the telepresenter’s home site (for example Marshfield should have no check in front of the name) you can see all appointments for provider by making sure the facility icon is NOT depressed

When document is printed it becomes an uncontrolled copy. Please refer to DCS system for most current version.
d. Receptionist will highlight patient appointment and then click on the check to check patient in for telepresenter
   - Receptionist will verify information for all pop ups during the check in process such as demographics, insurance, personal provider, etc. and then at last pop up screen will chose

3.3. Telepresenter patient notification check-in
   a. Telepresenter must be polling for themselves or generic telepresenter provider number in order to see patient notification alert
   b. Telepresenter’s patient notification will shake when patient is checked in under reception for telepresenter
   c. Telepresenter will click on patient notification
   d. Telepresenter will chose either their own name or generic telepresenter provider number they are working under and then click the MA check in Icon

3.3. Presenter Preparation
   a. Turn Telehealth equipment on and make sure equipment is working
   b. Click on provider schedule icon and make sure your name or generic Telehealth schedule is in the provider window so you can see your patient list

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for the correct date. If your name is not in the drop down, add it by clicking on the … and adding your name or generic schedule name. Make sure the date is correct.

c. The patients in your schedule will populate. Find the correct patient, right click on the mouse, and click on write to context.

d. Select the dashboard icon in Cattails. This screen will pop up:

3.4. Presenter check in

a. When the patient checks in, the alarm clock icon will shake letting you know that the patient is there.
b. Get the patient from the waiting room and collect the patient’s height and weight before bringing the patient to the Telehealth exam room (if applicable per Telehealth visit type)

c. Make sure the patient (and guest if someone is with the patient for the visit) are framed in view for the provider with the Telehealth equipment

d. Click on the alarm clock icon (patient notification) and this screen will pop up

e. Select your name and click on the open door icon (MA check in)

f. Ask the patient to verify their name and date of birth. Select the correct patient

g. Select the check in button, this assigns the patient to you

3.5. Provider check in

a. Click on the reception icon. Enter the provider’s name in the drop down and verify the correct date. If you don’t see your patient’s name, click on to show all facilities
b. Click on patient, then the blue check mark. Then click on the check in tab. This lets the provider know that the patient is there and checks the patient in for the provider.

c. In Dashboard, under the correct date, click on the PROVIDER appointment.
d. After collecting the reason for visit, click on reason for visit from the list or enter reason for visit if not there, click select, click ok
e. Click on Allergies/Adverse reactions in dashboard. Verify information listed with patient and check the boxes, click verify, click close.

f. Take the patient's vital signs, but do not enter them yet. **Adding vital signs must be the last step in the rooming workflow**

3.6. Patient Forms

   a. Click on the Document Manager icon.

   b. Make sure provider and date are correct.

   □ Click on the Documentation tab. If there are forms the provider wants filled out prior to their visit, they will be under the patient’s name with Image as
c. Click on correct PROVIDER appointment in dashboard. It is important to click on the provider's appointment before any information. This allows the information to flow into the provider's note.

<table>
<thead>
<tr>
<th>Appointments</th>
<th>(Last seen in FAMILY PRACT on 04/02/2015)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>02/15/18 @ 08:39</strong></td>
<td>Test Info Sys Gen Rad Anci - Unsnc Anc - (CMR)</td>
</tr>
<tr>
<td></td>
<td>Marshfield Center - Radiology/MRI/CT; Main clinic; Desk 2B</td>
</tr>
<tr>
<td></td>
<td>Rqst Prov: Training, Central Test MD</td>
</tr>
<tr>
<td></td>
<td><em>Rt knee x-ray</em></td>
</tr>
<tr>
<td><strong>02/15/18 @ 08:30</strong></td>
<td>Test Info Sys Lab Station - Unsnc Anc - (CMR)</td>
</tr>
<tr>
<td></td>
<td>Marshfield Center - EAP; I/S. Hardware</td>
</tr>
<tr>
<td></td>
<td>Rqst Prov: Training, Central Test MD</td>
</tr>
<tr>
<td></td>
<td><em>PRL</em></td>
</tr>
<tr>
<td><strong>02/15/18 @ 08:30</strong></td>
<td>Training, Central Test MD - OffVis2SL - (CMR)</td>
</tr>
<tr>
<td></td>
<td>Marshfield Center - IS First Floor, Area A; Desk FIG</td>
</tr>
<tr>
<td></td>
<td><em>Knee Pain During the Visit - 2/15 - TR</em></td>
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</table>

d. Click on active medications in dashboard

**Active Medications**  MedRec Required (Annual)

<table>
<thead>
<tr>
<th>Last Updated</th>
<th>01/22/18</th>
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<tbody>
<tr>
<td></td>
<td>Cyclobenzaprine (Amrix®) 15mg Capsule, Sust. Release 2-4 HR. 1 Capsule(s) (15 mg) by mouth once daily</td>
</tr>
<tr>
<td></td>
<td>Fluticasone (Bronase®) Nasal 50mcg/Actuation Spray, Suspension 1 Spray(s) in each nostril once daily</td>
</tr>
<tr>
<td></td>
<td>Glucosamine-Chondroitin 500-400mg Capsule 1 Capsule(s) by mouth once daily</td>
</tr>
<tr>
<td></td>
<td>Ibuprofen 200mg Tablet 2 Tablet(s) (400 mg) by mouth as needed</td>
</tr>
<tr>
<td></td>
<td>Pantoprazole 20mg Tablet, Delayed Release (E.C.) 1 Tablet(s) (20 mg) by mouth once daily</td>
</tr>
<tr>
<td></td>
<td>Warfarin 5mg Tablet 1 Tablet(s) (5 mg) once daily</td>
</tr>
</tbody>
</table>

- Verify or change medications as needed. Make sure you have the correct provider in the window.
- Verify patient's pharmacy.
e. Click on the vitals tab in dashboard. Select the appropriate vitals per the Telehealth visit type and enter them. Complete any overdue screenings Depression, Tobacco, etc. that need to be completed. Click done to advance to the next vital screen. Click the save and close button after entering all vital signs. **This should be the last thing entered into dashboard as this lets the provider knows that the patient is ready**

**Vitals**

- Needs Collection
- Depression Screening
- Tobacco Use
- Functional Status
- Body Mass Index: 71.7 kg/m^2
- Height: 139.7 cm (55 in), 1.00
- Temperature: 37.00 °C (98.6 °F)
- Weight: 56.70 kg (125 lbs), 62
- Weight: 140 kg (308.65 lbs), 9
3.7. Provider Patient Notification Check In

a. Provider’s patient notification will shake when patient is checked in under reception for Provider

b. Provider’s staff or provider will click on patient notification

c. Provider’s staff or provider will choose the provider’s name and then click the MA check in Icon to check patient in
3.8. Telehealth visit
   a. Perform provider directed assessment (i.e. listen to heart, abdominal, lung sounds, etc.)

3.9. After visit
   a. Print AVS and medication list as needed.
   b. Escort patient back to waiting room.
      □ If a follow up appointment is needed, the provider’s office will call the patient to schedule the next appointment.

3.10. Charge for visit
   a. Click on the Mecca icon. Make sure your name or generic schedule is in the window
   b. Click on Providers tab. Use the provider who is on call at your site
c. Click independent, then OK

d. Click the packages tab, select appropriate package
e. Click the DX tab, select all of the appropriate diagnoses from the provider that saw the patient. Then click select.

![Image of the DX tab interface]

- Make sure the Allied Provider is green. Select ok.

f. Click the black arrow to send the charges.

- Make sure the Allied Provider is green. Select ok.

![Image of the Allied Provider interface]

Visit/Procedure: TeleHealth facility fee

Allied Provider: Sharon Dvoran RN

AP only provided the service.
## 4. DOCUMENT HISTORY

<table>
<thead>
<tr>
<th>Version No.</th>
<th>Revision Description</th>
</tr>
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<tbody>
<tr>
<td>1.0</td>
<td>New Document. 3/30/18 SD Conversion from Policy Handbook to Document Control. Procedure #3796.1</td>
</tr>
<tr>
<td>2.0</td>
<td>Removed Marshfield Clinic Logo, Updated Quick Part in Header, Reformat of Section 2. Updated policy with current process and updated screen shots</td>
</tr>
</tbody>
</table>
5. DOCUMENT PROPERTIES

Primary Author: Dvoran, Sharon M  
Co-Author(s): Elsen, Julianne M  
Approver(s): This document has been electronically signed and approved by: Simon, Tammy A on: 11/24/2019 5:59:54 PM  
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