

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

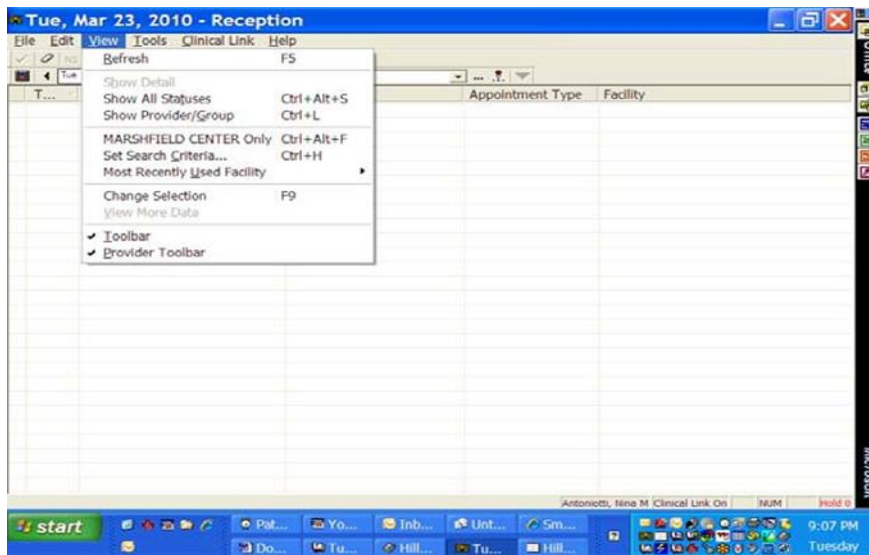
3. PROCEDURE BODY

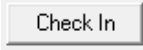
The objective of the procedure for checking patients in for Telehealth appointments is the same as for in-person visits – to ensure that the support staff knows the patient has arrived and that the practitioner knows the patient is ready. This is also to provide guidance for the Telepresenter in order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

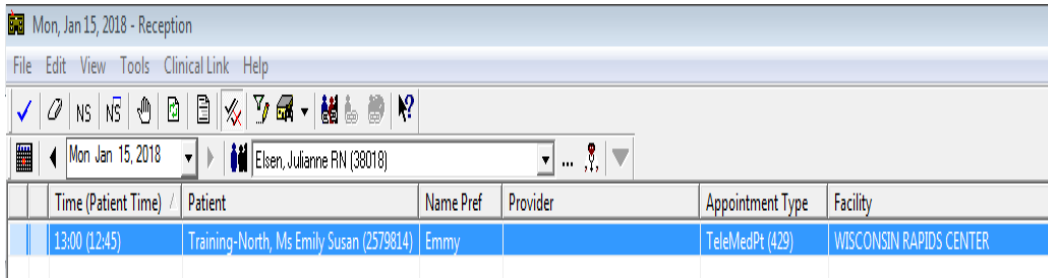
A difference with Telehealth appointments is who checks the patient into which schedule. There are two locations and two providers for every Telehealth patient. It is important to recognize who checks in the patient, to which schedule, and at what time. The process for check-in is designed to ensure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

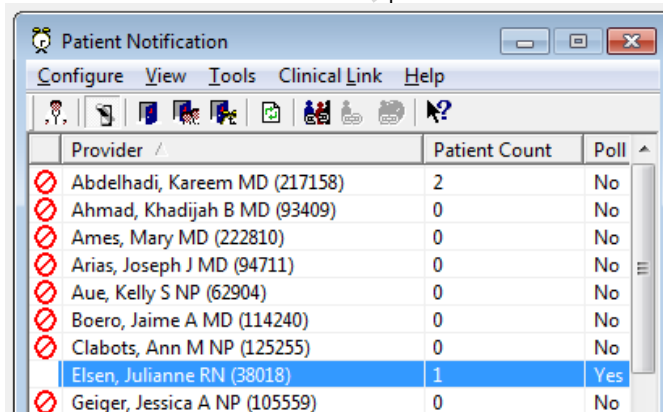




- d. Receptionist will highlight patient appointment and then click on the to check patient in for telepresenter
- Receptionist will verify information for all pop ups during the check in process such as demographics, insurance, personal provider, etc. and then at last pop up screen will chose 



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

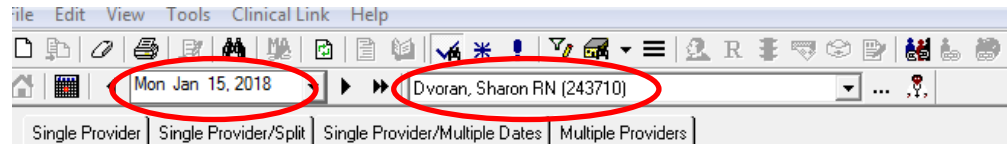


3.3. Presenter Preparation

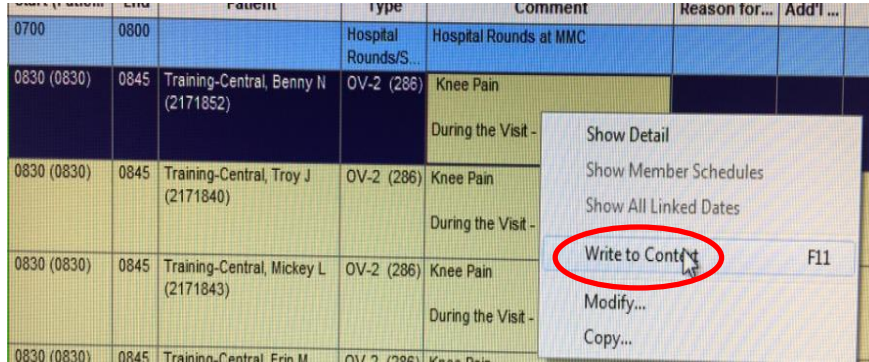
- a. Turn Telehealth equipment on and make sure equipment is working

- 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

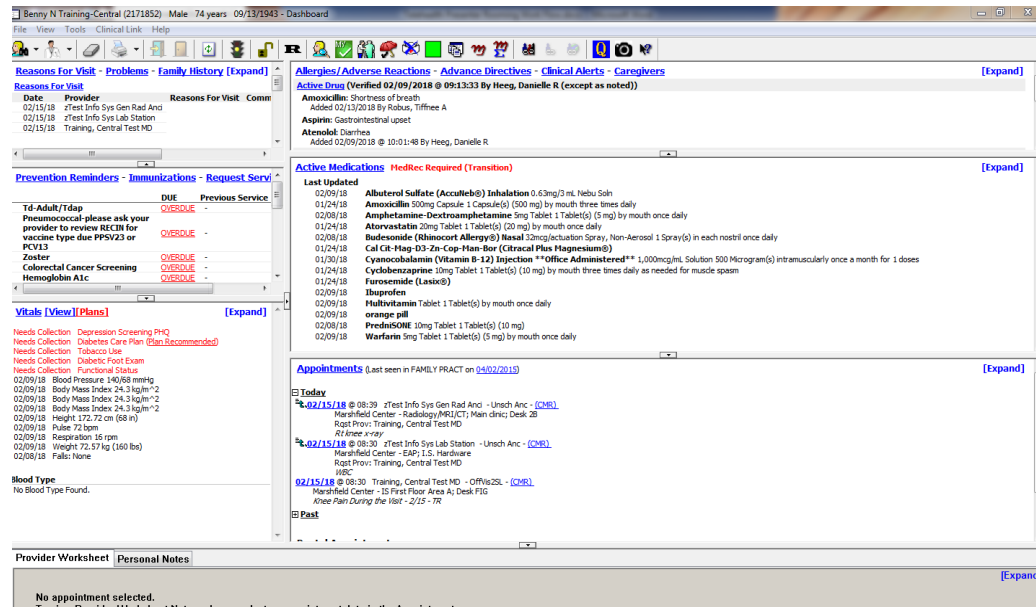
for the correct date. If your name is not in the drop down, add it by clicking on the ... and adding your name or generic schedule name. Make sure the date is correct



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

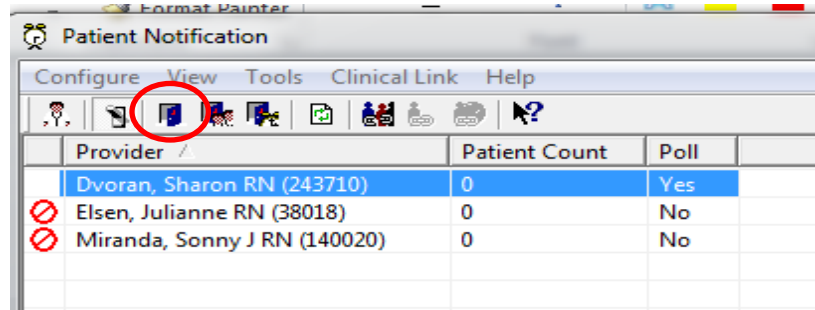
a. When the patient checks in, the alarm clock icon  will shake letting you know that the patient is there


When document is printed it becomes an uncontrolled copy. Please refer to DCS system for most current version.

PROCEDURE

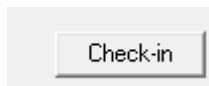
- b. Get the patient from the waiting room and collect the patient's height and weight before bringing the patient to the Telehealth exam room (if applicable per Telehealth visit type)
- c. Make sure the patient (and guest if someone is with the patient for the visit) are framed in view for the provider with the Telehealth equipment

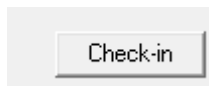
- d. Click on the alarm clock icon (patient notification)  and this screen will pop up





- 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

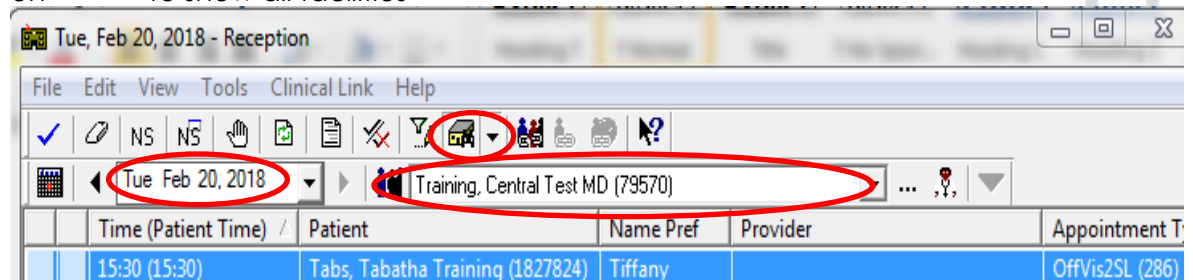
<input type="checkbox"/>	Patient	Name Pref	Appt Time	Since Appt*	Sinc
<input checked="" type="checkbox"/>	Benny N Training-Central (2171852)	Jose	0830	423	497
<input type="checkbox"/>	Troy J Training-Central (2171840)		0830	423	497
<input type="checkbox"/>	Mickey L Training-Central (2171843)		0830	423	496




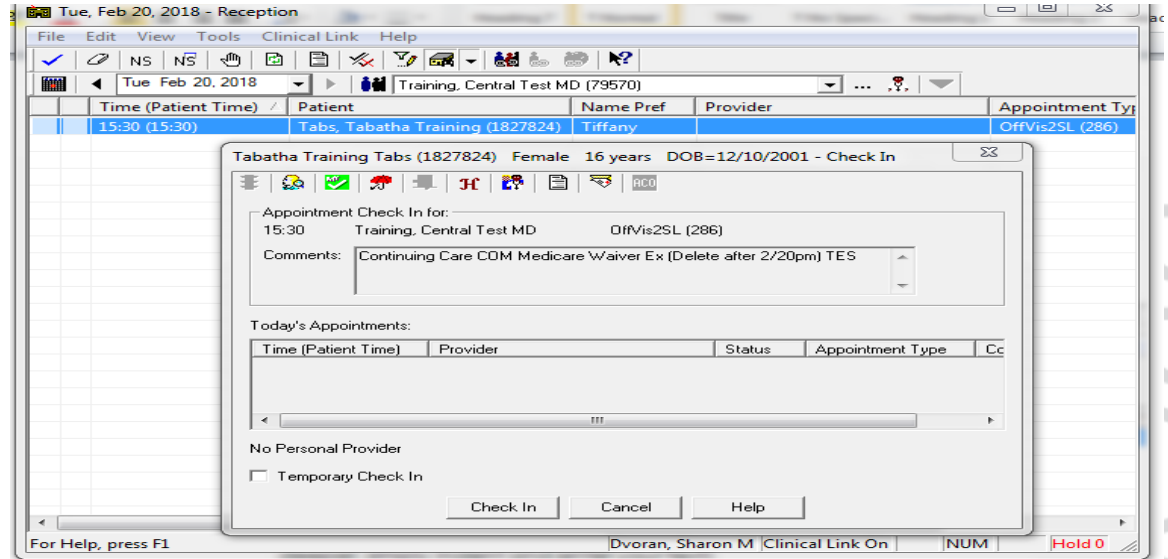
- g. Select the check in button,  this assigns the patient to you

3.5. Provider check in

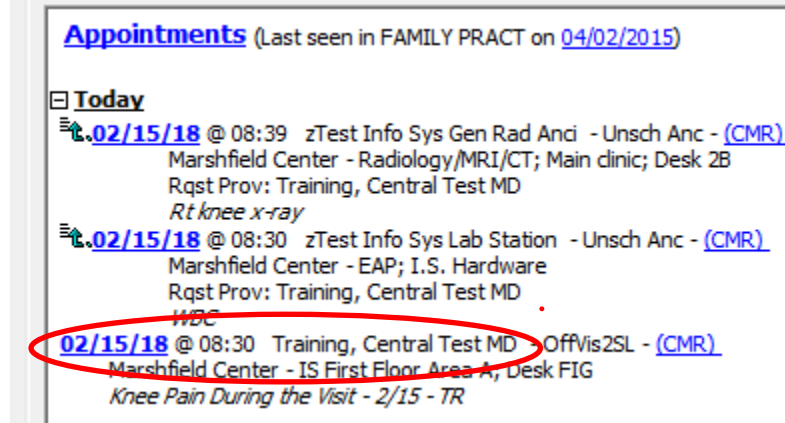
- a. Click on the reception icon . Enter the provider's name in the drop down and verify the correct date. If you don't see your patient's name, click on  to show all facilities



- 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



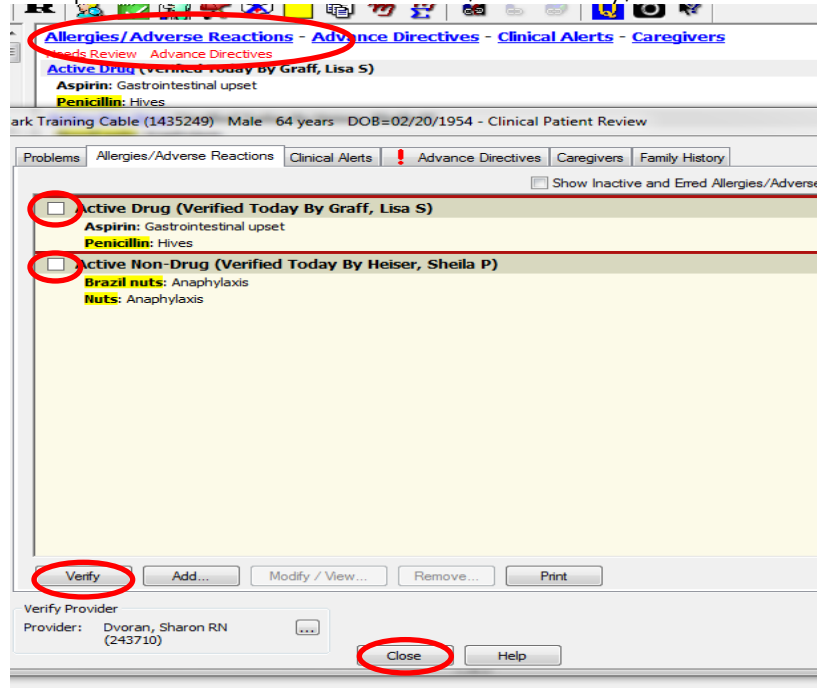
PROCEDURE

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

The screenshot shows a medical software interface with a 'Reasons For Visit' dialog box open. The dialog box is titled 'Clark Training Cable (1435249) Male 64 years DOB=02/20/1954 - Reason For Visit'. It contains a dropdown menu for appointment selection, an input field for 'Enter reason for visit' with 'right knee pain' entered, and a 'Full List' of reasons for visit. The 'Full List' includes: Right knee pain (circled in red), Right anterior knee pain, Right medial knee pain, Posterior right knee pain, Knee pain, right, Knee pain, right anterior, Pain in right knee, Pain of right knee after injury, and Pain of right knee and lower leg. Below the list is a 'Select' button (circled in red) and a 'Delete' button. At the bottom of the dialog box are 'OK' and 'Cancel' buttons (both circled in red). The background shows a patient record with various tabs like 'Reasons For Visit', 'Problems', 'Family History', 'Allergies/Adverse Reactions', 'Advance Directives', 'Clinical Alerts', 'Caregiver', 'Active Drug', and 'Prevention Reminders - Immunizations - Requested'. The 'Prevention Reminders' section shows a table of due dates and previous dates for various tests like Td-Adult/Tdap, Zoster, Colorectal Cancer Screening, etc.

PROCEEDURE

e. Click on Allergies/Adverse reactions in dashboard. Verify information listed with patient and check the boxes, click verify, click close

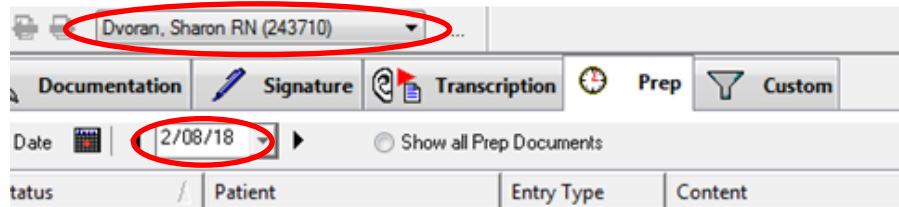


f. Take the patient's vital signs, but do not enter them yet. **Adding vital signs must be the last step in the rooming workflow**

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



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the Entry Type

Status	Patient	Entry Type	Content	Service	Cosigner	Facility
Doc Required	Testing-Ss, Brother O Fifteen...	Structured	Clinic Non-Appnt Docu...	02/19/16	Sundby, Stuart	MARSHFIELD CENTE
Doc Required	Training-Dictation, Dorothy ...	Structured	Clinic Non-Appnt Docu...	05/16/16	Jaenke, Nancy	MARSHFIELD CENTE
Doc Required	Testing-Lab, Dawn (2019809)	Structured	Clinic Non-Appnt Docu...	07/11/16	Jaenke, Nancy	MARSHFIELD CENTE
Doc Required	Monitor, Ms Molly T (1435252)	Structured	Psychiatric/MH Non-A...	05/26/17		MARSHFIELD CENTE
Doc Required	Baker, Ms Gert Testpatien (2...	Structured	Clinic Office Note	12/06/17		MARSHFIELD CENTE
Doc Required	Baker, Ms Gert Testpatien (2...	Image	Consent Form (Clinic ...	12/06/17		MARSHFIELD CENTE
Doc Required	Baker, Ms Gert Testpatien (2...	Multi-Author...	Physician Orders (Clini...	12/06/17	<Multiple Authors>	MARSHFIELD CENTE
In Use By Author	Mouse, Roger Training (1435...	Structured	Clinic Correspondence...	06/08/09	Vogel, June M	MINOCQUA CENTER

- 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

Appointments (Last seen in FAMILY PRACT on 04/02/2015)

Today

- 02/15/18 @ 08:39 zTest Info Sys Gen Rad Anci - Unsch Anc - (CMR)
Marshfield Center - Radiology/MRI/CT; Main clinic; Desk 2B
Rqst Prov: Training, Central Test MD
Rt knee x-ray
- 02/15/18 @ 08:30 zTest Info Sys Lab Station - Unsch Anc - (CMR)
Marshfield Center - EAP; I.S. Hardware
Rqst Prov: Training, Central Test MD
WBC
- 02/15/18 @ 08:30 Training, Central Test MD - OffVis2SL - (CMR)**
Marshfield Center - IS First Floor Area A; Desk FIG
Knee Pain During the Visit - 2/15 - TR

- d. Click on active medications in dashboard

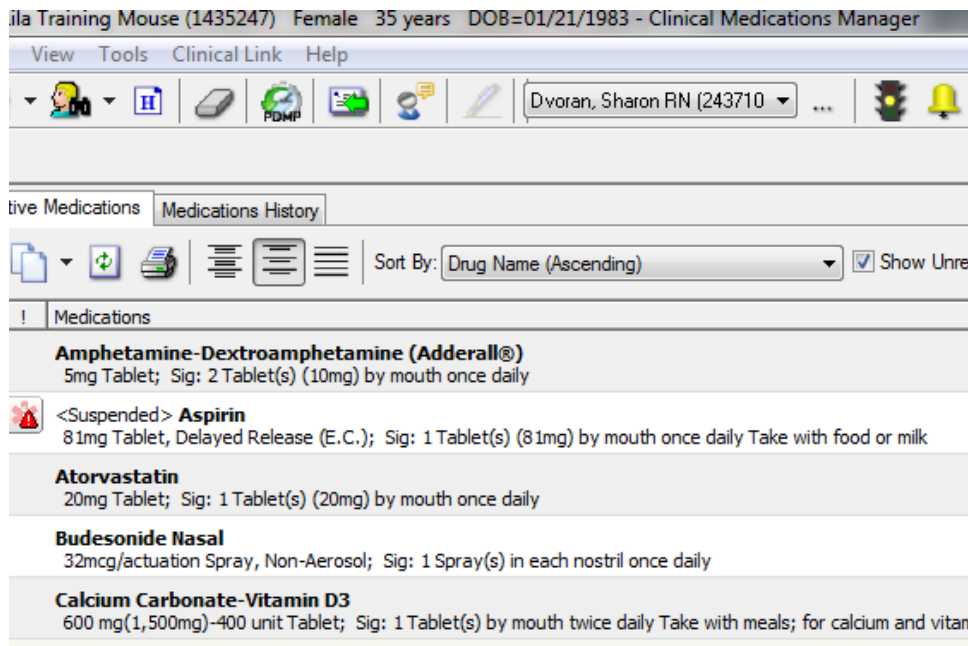
Active Medications MedRec Required (Annual)

Last Updated

01/22/18	Cyclobenzaprine (Amrix®) 15mg Capsule, Sust. Release 24HR 1 Capsule(s) (15 mg) by mouth once daily
02/02/15	Fluticasone (Flonase®) Nasal 50mcg/Actuation Spray, Suspension 1 Spray(s) in each nostril once daily
10/19/17	Glucosamine-Chondroitin 500-400mg Capsule 1 Capsule(s) by mouth once daily
10/20/17	Ibuprofen 200mg Tablet 2 Tablet(s) (400 mg) by mouth as needed
10/19/17	Pantoprazole 20mg Tablet, Delayed Release (E.C.) 1 Tablet(s) (20 mg) by mouth once daily
10/20/17	Warfarin 5mg Tablet 1 Tablet(s) (5 mg) once daily

- Verify or change medications as needed. Make sure you have the correct provider in the window
- Verify patient's pharmacy

PROCESSED

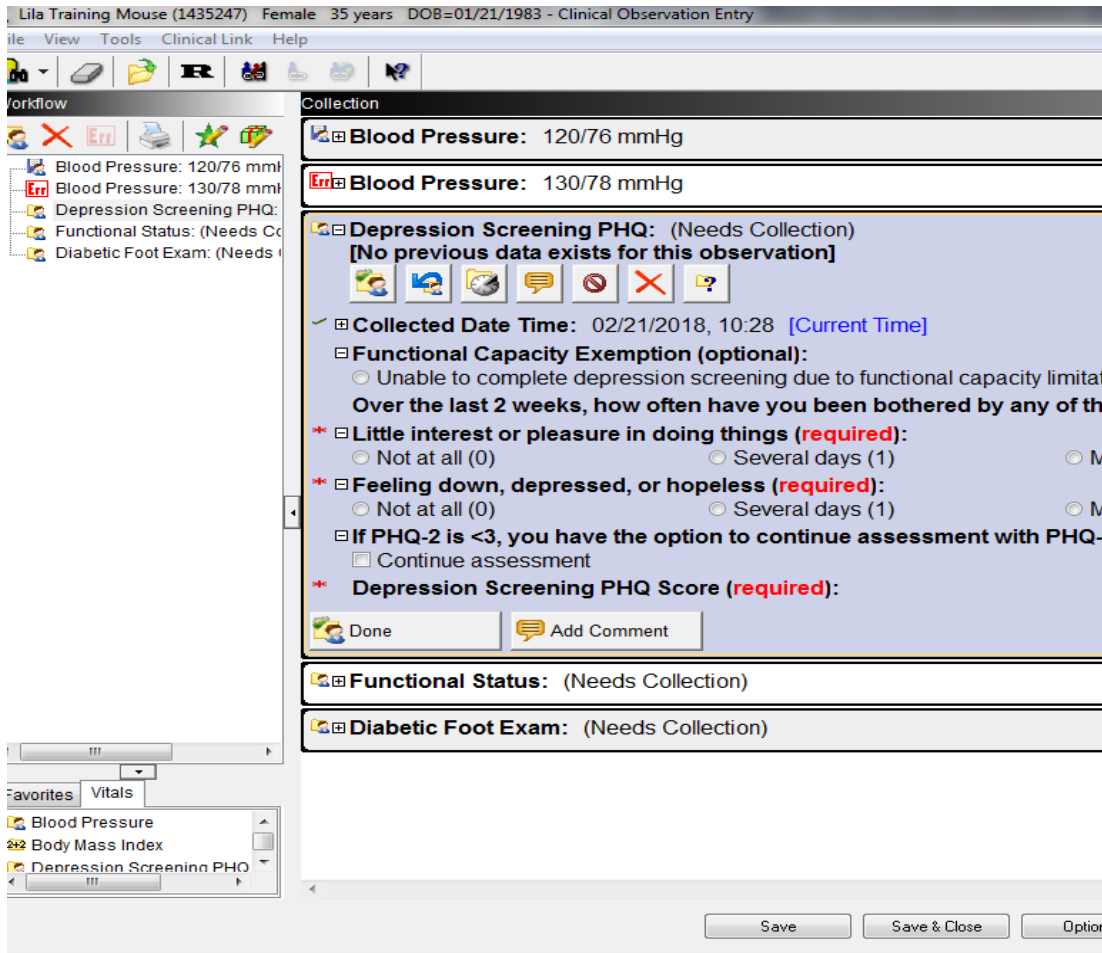


- e. Click on the vitals tab in dashboard. Select the appropriate vitals per the Telehealth visit type and enter them. Complete any overdue screenings Depression, Tobacco, etc. that need to be completed. Click done to advance to the next vital screen. Click the save and close button after entering all vital signs. **This should be the last thing entered into dashboard as this lets the provider know that the patient is ready**





[Vitals](#) [\[View\]](#) [\[Plans\]](#)

Needs Collection Depression Screening F
 Needs Collection Tobacco Use
 Needs Collection Functional Status
 10/20/17 Body Mass Index 71.7 kg/m²:
 Recommended)
 10/20/17 Height 139.70 cm (55 in), 1.00
 10/20/17 Temperature 37.00 °C (98.6 °F)
 10/20/17 Weight 56.70 kg (125 lbs), 62
 10/20/17 Weight 140 kg (308.65 lbs), 9'

PROCEDURE



PROCEDURE

- 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

Provider /	Patient Count	Poll
Abdelhadi, Kareem MD (217158)	2	No
Ahmad, Khadijah B MD (93409)	0	No
Ames, Mary MD (222810)	0	No
Arias, Joseph J MD (94711)	0	No
Aue, Kelly S NP (62904)	0	No
Boero, Jaime A MD (114240)	0	No
Clabots, Ann M NP (125255)	0	No
Elsen, Julianne RN (38018)	1	No
Geiger, Jessica A NP (105559)	0	No
Gilkerson, Kristine L NP (110122)	0	No
Hall, Matthew MD (52295)	0	Yes

d. Provider's office will watch for Vitals to be entered in Dashboard, which is the cue that the patient is ready to be seen and Provider can dial into Telehealth equipment

3.8. Telehealth visit


a. Perform provider directed assessment (i.e. listen to heart, abdominal, lung sounds, etc.)

3.9. After visit

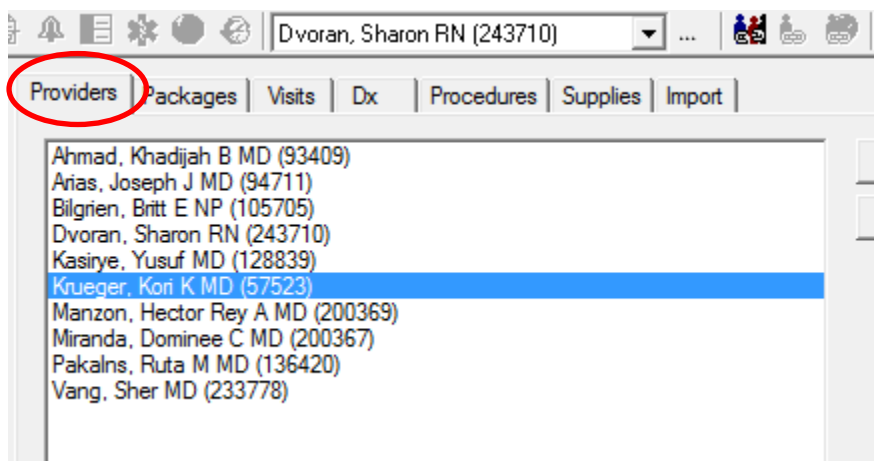
- a. Print AVS and medication list as needed.
- b. Escort patient back to waiting room.

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

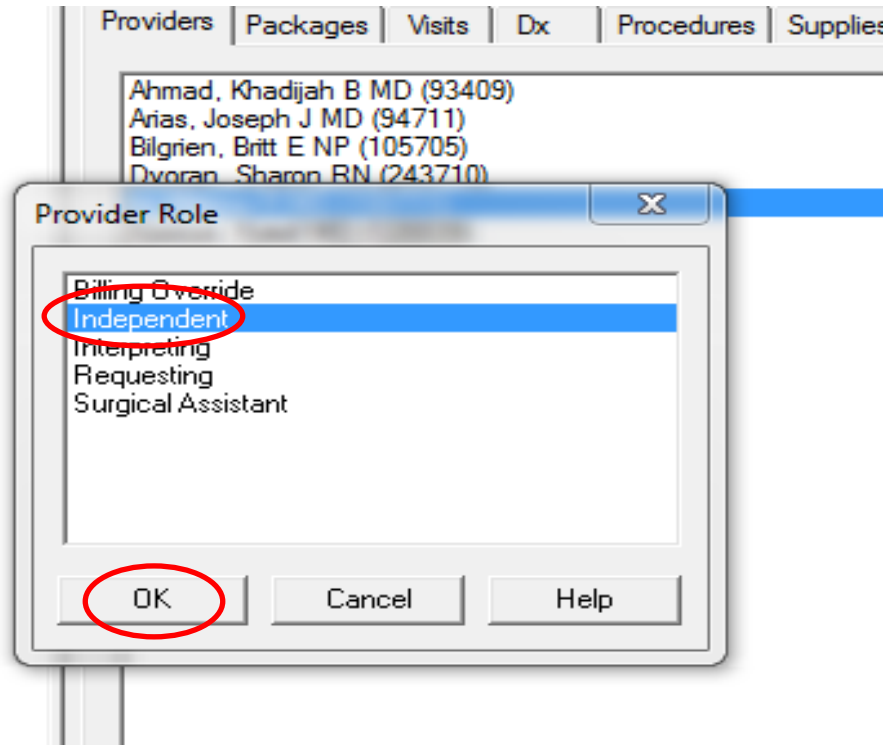
a. Click on the Mecca icon  Make sure your name or generic schedule is in the window

b. Click on Providers tab. Use the provider who is on call at your site

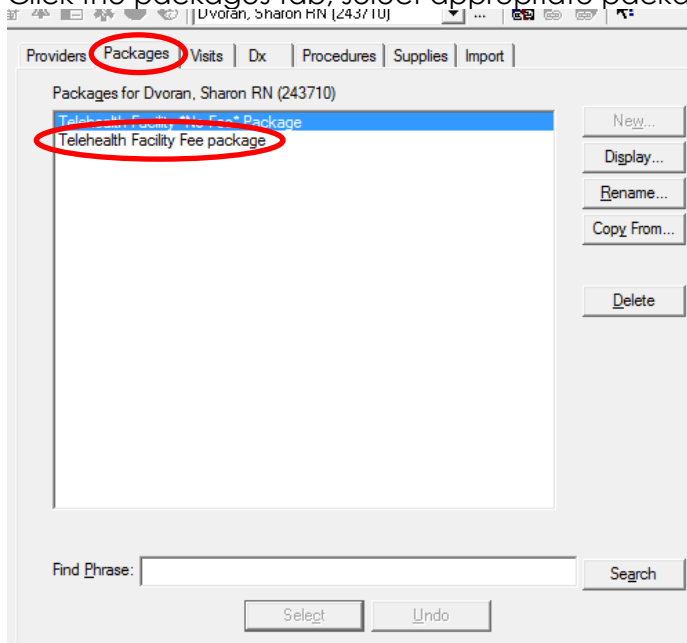


PROCEDURE

c. Click independent, then OK

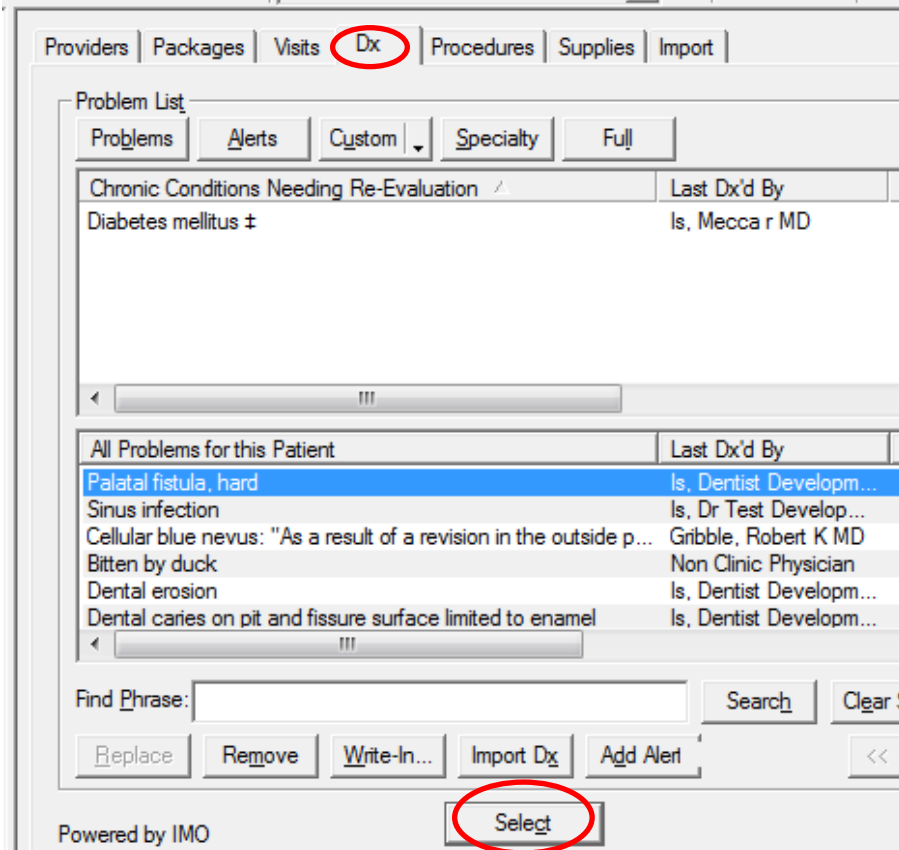


d. Click the packages tab, select appropriate package

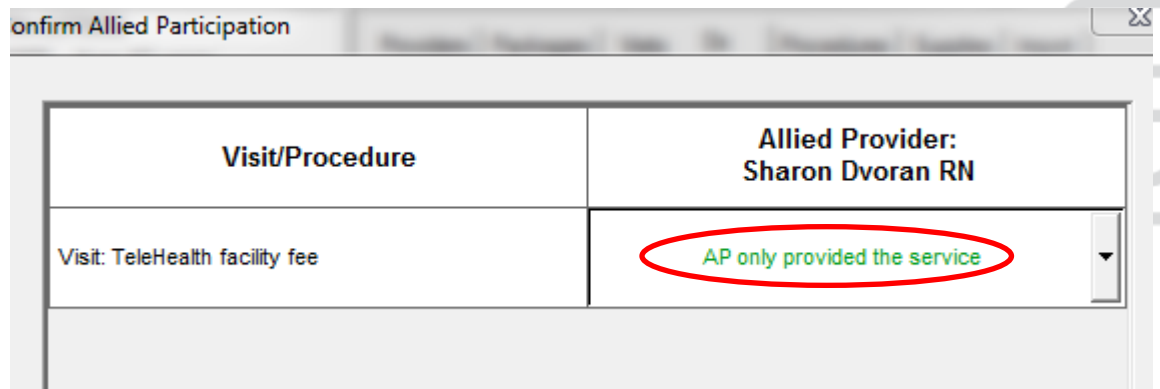


PROCEDURE

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



- f. Click the black arrow } → to send the charges
 Make sure the Allied Provider is green. Select ok



4. DOCUMENT HISTORY

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

Live

PROCEDURE

5. DOCUMENT PROPERTIES

Primary Author: Dvoran, Sharon M

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Approver(s): This document has been electronically signed and approved by: Simon,

Tammy A on: 11/24/2019 5:59:54 PM

This document has been electronically signed and approved by: Krueger, Kori K MD on:

11/27/2019 6:34:11 AM

This document has been electronically signed and approved by: Castellano, James B on:

11/27/2019 1:29:15 PM

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