

Telehealth Presenter Rooming Workflow Procedure

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

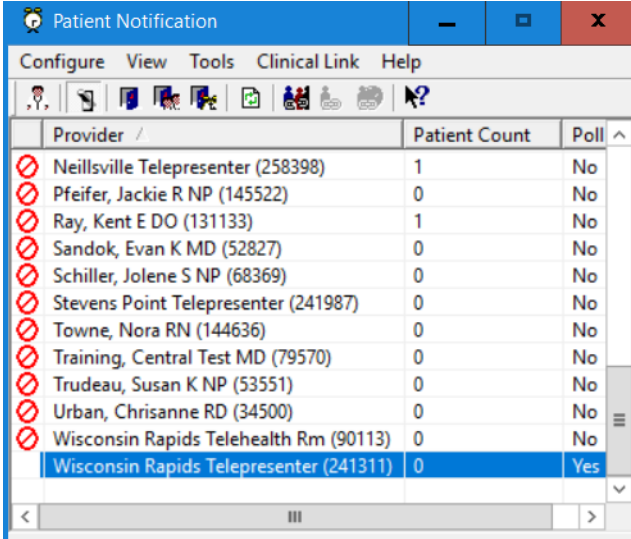
- 2.1. Abbreviations
 - AVS: After Visit Summary
 - BMI: Body Mass Index
 - CMR: Combined Medical Record
 - MCHS: Marshfield Clinic Health System
 - MCIS: Marshfield Clinic Information Systems
 - PCP: Primary Care Provider
 - TH: Telehealth
- 2.2. Definitions
 - Codec: The video conferencing system
 - Dashboard: Cattails application for entering data for patient visits
 - Polycom: refers to the clinical video conferencing device or software. Used interchangeably with Codec.
 - Telehealth Consult: is used interchangeably with Telehealth visit. It refers to any Telehealth Appointment
 - Telehealth Provider: any medical professional such as MD, DO, PA, NP, RN, etc, trained to deliver virtual medical, health, and education services
 - Telehealth Room: Any location in which the patient is prepared to see a provider using Telehealth video equipment
 - 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

3. PROCEDURE BODY


Purpose Statement: 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.

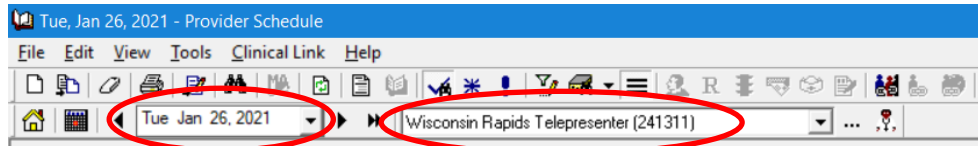
A difference with Telehealth appointments is who checks the patient into which schedule. There are two locations and two providers for every Telehealth patient. It is important to recognize who checks in the patient, to which schedule, and at what time. The process for check-in is designed to ensure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

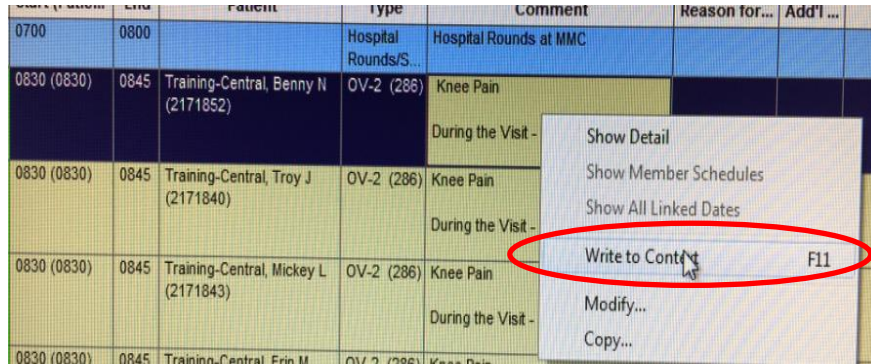


Provider /	Patient Count	Poll
Neillsville Telepresenter (258398)	1	No
Pfeifer, Jackie R NP (145522)	0	No
Ray, Kent E DO (131133)	1	No
Sandok, Evan K MD (52827)	0	No
Schiller, Jolene S NP (68369)	0	No
Stevens Point Telepresenter (241987)	0	No
Towne, Nora RN (144636)	0	No
Training, Central Test MD (79570)	0	No
Trudeau, Susan K NP (53551)	0	No
Urban, Chrisanne RD (34500)	0	No
Wisconsin Rapids Telehealth Rm (90113)	0	No
Wisconsin Rapids Telepresenter (241311)	0	Yes

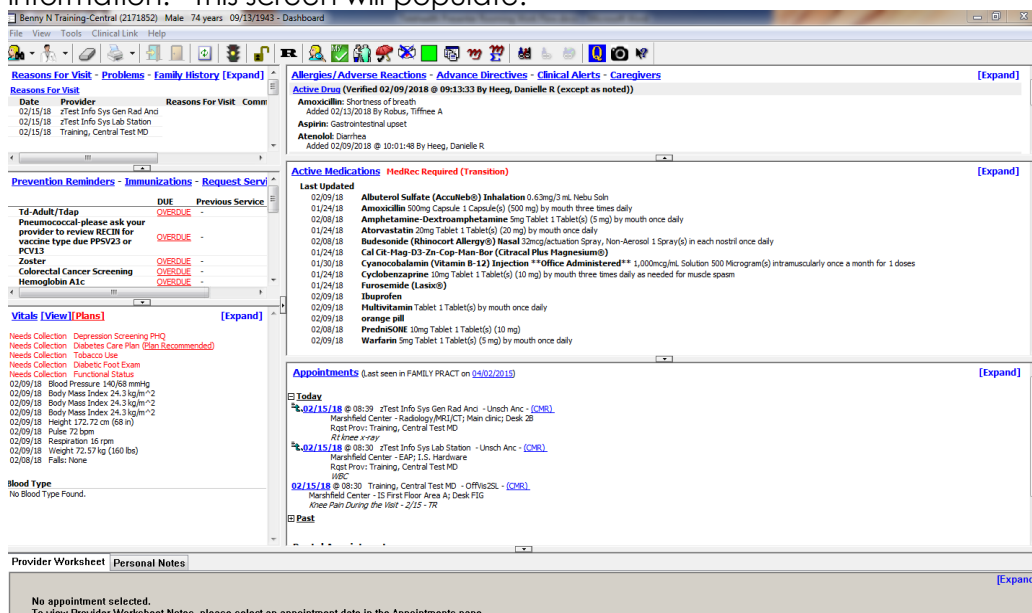
- 3.3. Telepresenter Preparation
 - a. Turn Telehealth equipment on and make sure equipment is working
 - b. Click on provider schedule  icon and make sure generic Telehealth schedule is in the provider window so you can see your patient list for the correct date. If generic telepresenter is not in the drop down, add it by clicking on the ... and adding it to Provider Schedule. Make sure the date is correct



c. The patients in the 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 and verify it is the correct patient's information. This screen will populate.




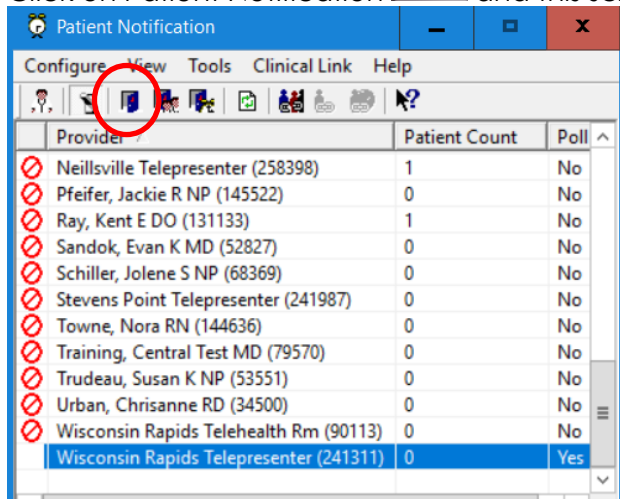
3.4. Presenter Rooming

- Call the patient from the waiting room.
- Ask the patient to verify their name and date of birth.
- Collect the patient's height and weight before bringing the patient to the Telehealth exam room (if applicable per Telehealth visit type)
- 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

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

PROCEDURE

e. Click on Patient Notification  and this screen will pop up



f. Select the generic telepresenter provider and click on MA Check In 

g. Select the correct patient

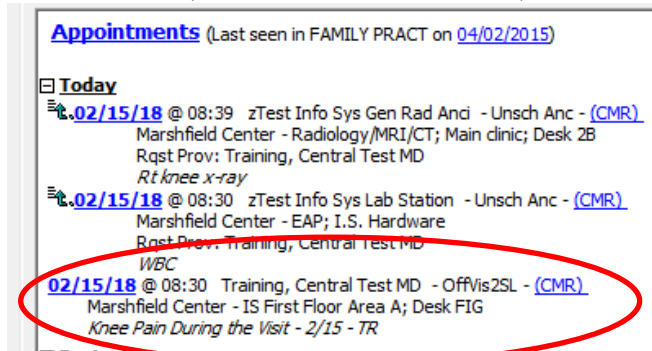
<input type="checkbox"/>	Patient	Name Pref	Appt Time	Since Appt*	Sinc
<input checked="" type="checkbox"/>	Benny N Training-Central (2171852)	Jose	0830	423	497
<input type="checkbox"/>	Troy J Training-Central (2171840)		0830	423	497
<input type="checkbox"/>	Mickey L Training-Central (2171843)		0830	423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

h. Select the check in button, . This assigns the patient to you

3.5. Provider check in

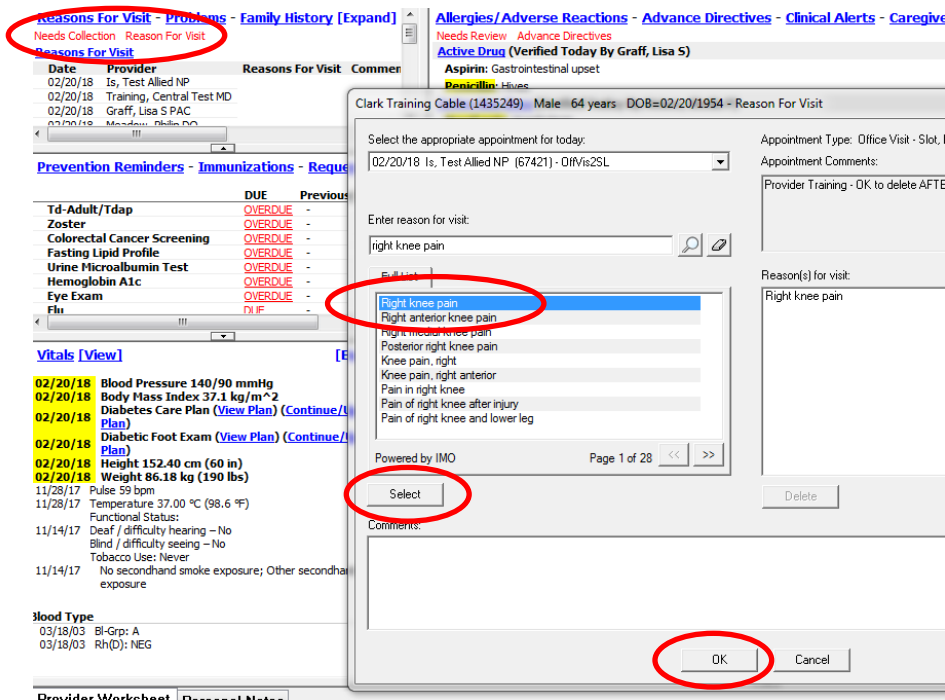
a. Complete [Telepresenter Soarian Check In](#) for the Providers appointment. This lets the provider know that the patient is there and checks the patient in for the provider

b. In Dashboard, under the correct date, click on the PROVIDER appointment

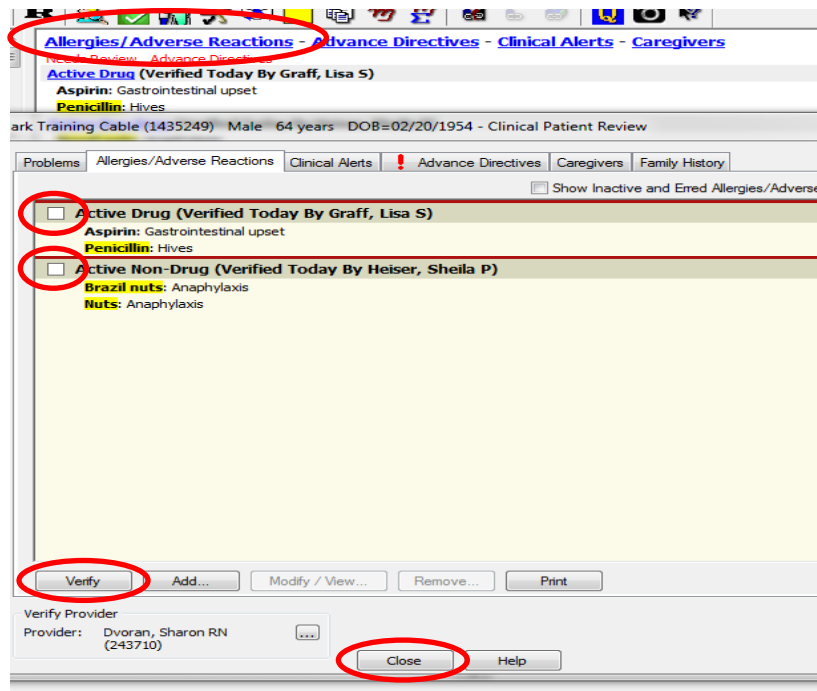


c. Collect the reason for visit if it needs Collection. Click on reason for visit from the list and enter reason for visit, click select, click ok

PROCEDURE



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



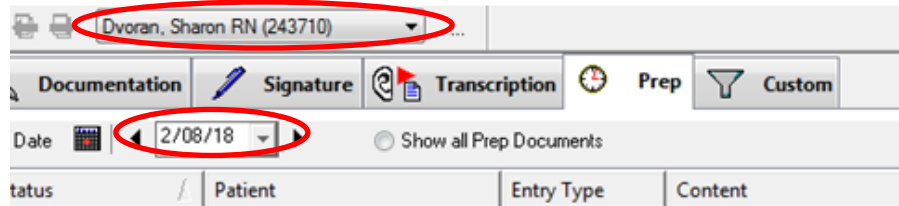
e. Take the patient's vital signs, but do not enter them yet. **Adding vital signs must be the last step in the rooming workflow**

PROCEEDURE

3.6. Patient Forms

a. Click on the Document Manager icon 

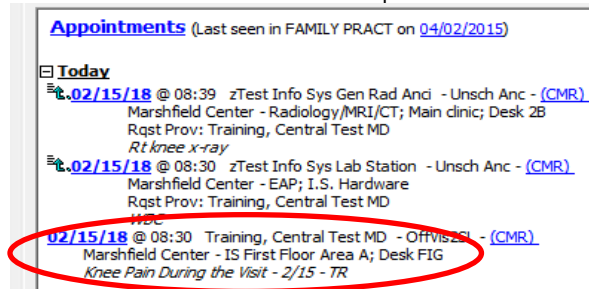
b. Make sure provider and date are correct.



c. Click on the Document tab. If there are forms the provider wants filled out prior to their visit, they will be located under the patient's name with Image as the Entry Type

Status	Patient	Entry Type	Content	Service	Cosigner	Facility
Doc Required	Testing-Ss, Brother O Fifteen...	Structured	Clinic Non-Apprt Docu...	02/19/16	Sundby, Stuart	MARSHFIELD CENTE
Doc Required	Training-Dictation, Dorothy ...	Structured	Clinic Non-Apprt Docu...	05/16/16	Jaenke, Nancy	MARSHFIELD CENTE
Doc Required	Testing-Lab, Dawn (2019809)	Structured	Clinic Non-Apprt 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

d. Click on the 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.



e. Click on active medications in dashboard

Active Medications MedRec Required (Annual)

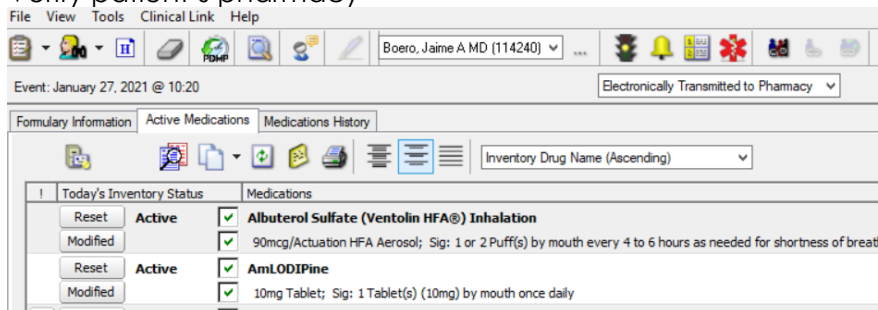
Last Updated

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



- 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

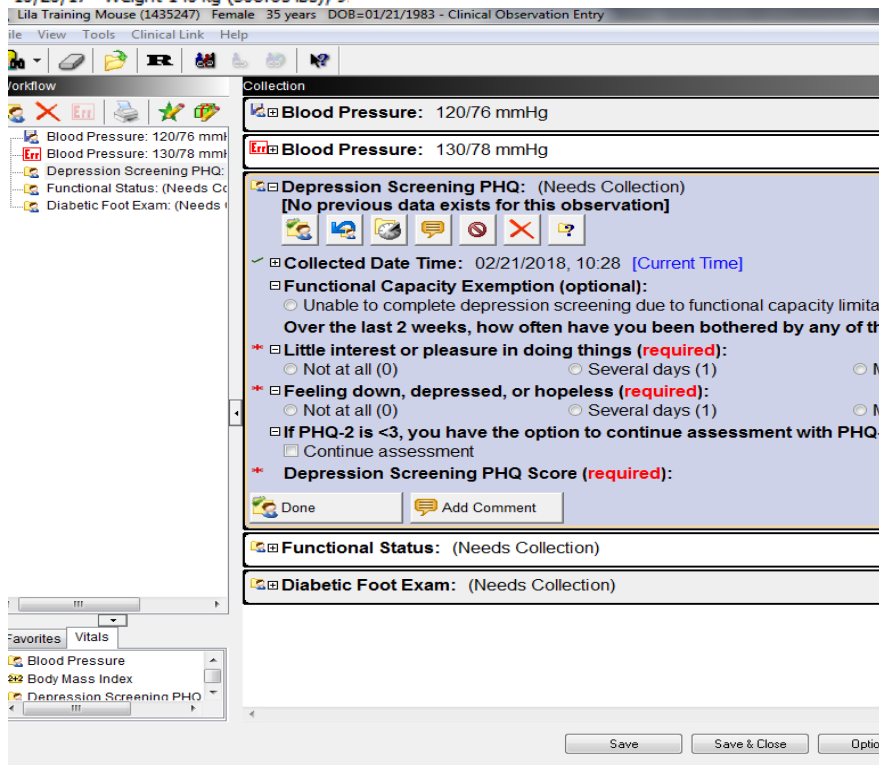
10/20/17 Body Mass Index 71.7 kg/m²
Recommended

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'

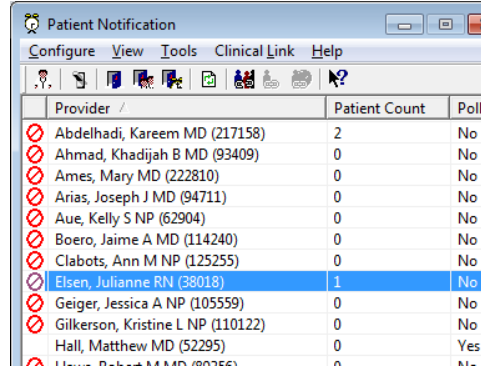


When document is printed it becomes an uncontrolled copy. Please refer to DCS system for most current version.

PROCEDURE

3.7. Provider Patient Notification Check In

- a. Provider's patient notification  will shake when patient is checked in through Soarian for the 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 Telehealth facility fee portion for visit

- a. Click on the Mecca icon 
- b. Follow [Telehealth Facility Dual Tickler MECCA](#) guide to complete charges.

PROCEDURE

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
3.0	Refer to Version History
4.0	DCS Checklist; updated title per DCS titling schematic. Per Julianne Elsen, document was updated.

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: Castellano, James B on: 2/17/2021 6:27:07 AM

This document has been electronically signed and approved by: Simon, Tammy A. on: 2/17/2021 1:39:49 PM

This document has been electronically signed and approved by: Krueger, Kori K MD on: 2/19/2021 7:54:43 AM

Live

PROCEDURE