Telehealth Series Session 1: Telehealth Practice Workflow

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- Re-joined CMA in March after five years running CalHIPSO, the largest federally-designated Regional Extension Center for Health IT in the nation
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- Physician Advocate
- 25 years in the Health Care industry
- Worked in various roles (General Manager, Business Operations Manager) for physician practices in the Inland Empire
Telehealth “Tipping Point” Educational Campaign

Information and resources tailored to the needs of small and medium-sized practices

1. 12-Part Webinar Series (today is #8)

2. Telehealth Resource Center on the CMA Website (Under Construction)
   • Please provide feedback at the end of the webinar on telehealth resources you would find valuable

This project is made possible through the generous support of the California Health Care Foundation.
CMA Needs to Hear from You!

- In order to tailor resources to your needs, **CMA needs your input**
- Questions and comments on this webinar are logged and compiled
- You will receive a brief survey after today’s presentation
- We might reach out to schedule a 1:1 phone call
Telehealth Practice Workflow
What is a workflow?

A workflow is the progression of steps or tasks that make up a work process:

- Physical and/or mental tasks
- Performed by various people
- Over time
- Across roles, teams, or locations
Time Element Considerations

**Scope**: all the work that needs to be done in order to achieve a project's objectives

- *Beginning from start to finish, can we identify all steps in the process?*

**Cycle Time**: time to complete one cycle of work

- *How long does the actual cycle (scope) take to complete?*

**Wasted time**: time spent doing something that is not valued

- *What steps in the cycle provide little or no value?*

**Wait Time**: refers to how long our patients are kept waiting

- *How long do our patients wait for appointments, procedures, referrals and results?*

**Delays**: refers to causing something to take longer or to be late

- *Do these delays negatively impact patient outcomes and quality?*
Sample Practice Workflow

1. Appointment: Patient schedules an appointment

2. Arrival: Patient gets to the office

3. Visit: Patient talks with the doctor

4. Disposition: Patient may be diagnosed, treated and/or prescribed a treatment or treatment plan

5. Discharge: Patient may receive instructions, pay and/or schedule a follow-up

6. Depart: Patient leaves the office

Source: https://www.softwareadvice.com/resources/value-stream-mapping-to-improve-workflow/
Telehealth Practice Workflow

• One of the most requested topics from physicians

• An effective practice workflow increases efficiency and productivity

• COVID-19 required practices to reorganize workflows, sometimes twice (100% telehealth then hybrid model)
Before the Visit - Safety Protocols

• Post the warning sign on your office door in English and Spanish.

• Set up a team: while the majority of your providers and support staff should work from home, the office should be manned by a clerical support person/manager and a provider if possible.
Before the Visit – Safety Protocols (continued)

• Keep all telephone lines open for patient calls

• Maintain one line (cellphone if necessary) for exclusive communications between the office and your providers working from their homes

• All providers should maintain remote access to their EMRs at home if possible, and document in accordance with traditional medical care
• Best Practice: Block “office hours” and “telehealth hours” on your schedule

• In a practice with multiple physicians, consider designating to physicians who see telehealth patients exclusively, or

• Having physicians trade days of the week to come to the office to do telehealth
Sample workflow for conducting remote visits

Completed by clinic staff before visit

- Patient scheduled for phone appointment
- Clinic staff calls to confirm appointment time
- Offer video visit as an option for accepting appointment
  - Yes: Patient responds to request for remote appointment
  - No: Patient scheduled for phone appointment

Completed by provider at time of visit

- Provider calls patient 15 min prior to scheduled time
- Identify provider as a provider by name
- Help patient download Zoom, provide using instructions
  - Yes: Patient responds to request for remote visit
  - No: Provider discontinues in order

Source: UC San Francisco Center for Vulnerable Populations
Patient Scheduling

- Review all upcoming visits to determine who needs to come into the office and who can be seen via telehealth:
  - Does the visit require the patient to be physically present (shots, for example)?
  - To the extent possible, schedule ALL routine office follow-ups including non-COVID-19 visits via telehealth
  - Consider patient preference!
Once it is determined that a patient will be seen via telehealth, it is important to make sure that the patient has access to the technology that you are using.

- This may involve office staff having a pre-visit call with the patient.
- Confirm the patient has a device that can operate the technology.
Patient Scheduling (continued)

• Send patients (either mail, email, or in the patient portal) a checklist with the requirements for a telehealth visit:
  • Be sure device is fully charged
  • Being in a quiet location
  • Turning off other electronics
  • Having a family member available if needed
  • Having medications on hand at the time of visit
Sample workflow for conducting remote visits

Completed by clinic staff before visit

- Patient scheduled for phone appointment
  - Clinic staff calls to confirm their appointment time
    - Offer video visit as an option for accepting appointment
      - Patient interested in online visit?
        - Yes: Patient responds by phone
          - Secure message to offer video visit, provide Zoom instructions
            - Patient responds to online visit
              - Yes: Completed by provider at time of visit
                - Provider calls patient (video provider meeting ID)
                  - Help patient download Zoom, practice using it
                    - Provider calls patient (video visit)
                      - Help patient download Zoom (if not yet done), provide provider leaving ID
                        - Patient has a complaint?
                          - Yes: Conduct telephone visit
                            - Patient discharged from treatment
                            - Contact telephone visit
                          - No: Conduct Zoom video visit
                            - Patient discharged from treatment
                            - Contact Zoom video visit
                  - No: Call provider
                    - Provider discharged from treatment
                    - Contact provider
          - No: Patient responds to online visit
            - Yes: Completed by provider at time of visit
              - Provider calls patient at scheduled time, ensures provider in video meeting
                - Help patient download Zoom (if not yet done), provide provider leaving ID
                  - Patient has a complaint?
                    - Yes: Conduct telephone visit
                      - Patient discharged from treatment
                      - Contact telephone visit
                    - No: Conduct Zoom video visit
                      - Patient discharged from treatment
                      - Contact Zoom video visit
        - No: Provider discharged from treatment
          - Contact provider

Completed by provider at time of visit

- Provider calls patient (video provider meeting ID)
  - Help patient download Zoom (if not yet done), provide provider leaving ID
    - Patient has a complaint?
      - Yes: Conduct telephone visit
        - Patient discharged from treatment
        - Contact telephone visit
      - No: Conduct Zoom video visit
        - Patient discharged from treatment
        - Contact Zoom video visit

Source: UC San Francisco Center for Vulnerable Populations

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The Telehealth Visit

• If possible, use multiple devices

• Three works well:

  1. Office staff “rooms” a patient on one device
  2. Physician sees the patient on the second one
  3. Another staff member receives patients at the end of the visit for scheduling follow up care, billing, etc.
The Telehealth Visit (continued)

• “Rooming” a patient for a telehealth visit:
  • Getting the patient on the phone/video
  • Checking the internet connection
  • Ensuring that the device is charged
  • Confirming that the patient is in an appropriate location
  • Ensuring that the patient has their medications, etc.
The Telehealth Visit (continued)

- Obtain patient consent for telehealth
  - CA Business and Professions Code 2290.5(b)
  - Consent can be written or verbal
  - Suspended during the Public Health Emergency, but still a best practice
Example: Zoom Health Workflow

### Zoom Virtual Visit Workflow

1. **Patient joins Zoom meeting**
   - MA notified that patient is in Zoom Waiting Room
   - MA admits patient into Main Room

2. **Patient is assigned to Intake Breakout Room**
   - MA joins Intake room to complete intake and histories with patient
   - MA moves patient to Provider Breakout Room

3. **Patient is assigned to Provider Breakout Room**
   - Provider is already in breakout room and completes their part of the visit
   - After provider is done, they will notify MA by using Ask For Help feature in Zoom

Prepared by Elevation Health Partners
Another Example: Specialist Referral

Telehealth: General Workflow
Overview of workflow for a typical patient referral to telehealth specialist services. November 9, 2017

PCP
- Referral is ordered

Telehealth Coordinator
- Create referral packet and fax to specialist
- Schedule patient
- Confirm patient two days before
- On-day of, prep room and equipment
- Log off system

Specialist
- Take vitals and fax to specialist
- Log into system and verify connection with specialist
- Room patient
- Interview and examine patient with assistance from TC, if needed
- Discuss findings and recommendations with PCP
- Document visit and send to PCP via

Medical Records
- Transfer records into system and notify PCP

Document visit
- Place orders per recommendations as needed
- Review visit notes and follow up with patient as needed

Prepared by OCHIN
Source: UC San Francisco Center for Vulnerable Populations
After the Telehealth Visit

• Physician passes the device off to staff for scheduling of follow up, billing, etc.

• Documentation is key!
  • Especially if the telehealth platform is not integrated into the EHR
  • Webinar Series #6 (October 29\textsuperscript{th})
  • CMA Telehealth Practice Implementation Guide
Annual Wellness Visit

• GO438
  ✓ Initial Annual Wellness Visit

• GO439
  ✓ Subsequent Annual Wellness Visits
    (after 12 months of enrollment in Medicare Part B)

• GO402
  ✓ Initial Preventive Physical Exam – not allowed by telehealth*
Resources

- UC San Francisco Center for Vulnerable Populations
  https://cvp.ucsf.edu/telehealth#Sample-Clinic-Workflows

- CMA Telehealth Practice Implementation Guide
Resources (continued)

• AMA Telehealth Playbook

• United Health Care Telehealth Patient Checklist
Questions?
CME: COVID Virtual Grand Rounds

• GOAL: Brief clinicians (e.g., front line physicians, nurse practitioners or physician assistants) on the evolving nature of COVID-19 patient management

• Free, monthly & CME-eligible

• cmadocs.org/covidroundsca
Thank You