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| --- | --- | --- |
| PROCEDURE | IN PERSON VISIT | VIRTUAL |
| Registration for a new patient  |  |  |
| HIPAA notification |  |  |
| Insurance verification |  |  |
| Completing the patient’s medical history at the time of registration |  |  |
| Completing a regular medical consent/consent for treatment |  |  |
| Identifying/triaging patients or conditions appropriate for telehealth |  |  |
| Collecting a visit co-pay |  |  |
| Completing a ROI- release of information for medical records |  |  |
| Obtaining hospital discharge records or ED notes |  |  |
| Scheduling the first visit |  |  |
| New patient- adding medications |  |  |
| Scheduling a follow up visit |  |  |
| Collecting a preferred pharmacy |  |  |
| Verifying patient identification for telehealth visit  |  |  |
| Checking the PDMP |  |  |
| Checking an HIE- CRISP |  |  |
| Pre-visit check list |  |  |
| Obtaining notes from specialists and diagnostic studies  |  |  |
| Updating the medical history prior to each visit |  |  |
| Updating the medication list prior to each visit |  |  |
| Recording a chief complaint |  |  |
| Managing the waiting room  |  |  |
| Tracking Follow up orders(meds, follow-up appointments, other) |  |  |
| Prescribing medications |  |  |
| Documenting the visit (provider notes) |  |  |
| Ordering and scheduling referrals- specialty  |  |  |
| Ordering and scheduling referrals- diagnostic i.e. CT scan, x-ray |  |  |
| Ordering and follow up of labs |  |  |
| Scheduling a follow up visit |  |  |
| Giving patients written visit summary |  |  |
| After visit questions to the provider |  |  |
| Tracking results- notifying the patient with results |  |  |
| Screening for BH conditions i.e. PHQ2/9 or GAD7 |  |  |
| Collecting reliable phone number in case telehealth visit drops and verifying call back plan |  |  |
| Consent for telehealth visit |  |  |
| Documentation of modality for telehealth visit |  |  |