



Tip sheet: Provider check in /  
out process for televisits

## Find encounter on schedule

GO BUILDER, PHYSICIAN		Total: 1		Auto-refreshed: 2:43 PM		 	
Status	Events	Time	Patient	DOB	Has Note' Age/Sex	MRN	Type
Exam-Rm (Sch)		1:00 PM	Jja, Test	5/23...	41 y.o. / M	5214674	TELEVISIT

Prior to opening the visit determine whether the patient is available.

- If yes, continue with encounter.
- If patient is unavailable, then use the “No Show” button to indicate that patient did not make the appointment.

Open up “Pre-Charting” for a scheduled patient and select “Start the Visit”

Patient Message... Isolation: None Health Care Prox... Ht: 1.93 m (6'... CrCl/La... HM Due: Tdap/TD I...  
Lang: English Infection: None HHC Care Team... Wt: 132 kg (2... BPA: None  
Allergies: No Kno... Code Status: No... BMI: 35.31 k... My Sticky Note: +  
Adv Dir: None PHQ: 0

### Pre-Charting

**ⓘ Patient Not Arrived Yet**

✓ Welcome to the Pre-Charting workspace, where you can get a head start on your work for this visit! This screen includes tools that are helpful before the patient arrives. If the patient arrives while you're here, click Start the Visit to see your full toolset. Here are some other helpful tips:

- Any notes that you write before the patient checks in are accessible to only you and other clinicians who work in this encounter. Other clinical staff can't find these notes elsewhere in the chart.
- Any notes or orders that you don't sign, and communications that you don't send, are deleted by the system a set number of days after the appointment if the patient never arrives. You can view any notes that you write before the system deletes them and copy those notes forward to a visit within that time frame.
- Any orders that you sign are carried out regardless of whether the patient arrives for the scheduled appointment. If the patient no-shows, cancels, or reschedules the visit, you need to cancel any orders that you don't want to remain active.

[→ Start the Visit](#)

Problem List Visit Diagnoses BestPractice Meds & Orders

#### Problem List

+ Care Coordination Note

Show:  Past Problems

Search for new problem [+ Add](#) [DxReference](#)

Diagnosis ▲

Atrial fibrillation (HCC) [Change Dx](#) [Resolve](#) [Visit](#)

Once encounter is open, it will have identical encounter menus as an office visit encounter.

The screenshot displays a medical software interface with a sidebar on the left and a main content area on the right. The sidebar contains navigation options: 'Chart Review', 'Synopsis', 'Intake' (highlighted in blue), 'Flowsheets', and 'Notes'. The main content area is titled 'Intake' and features a top navigation bar with tabs: 'Interpreter Use', 'Consult Orders', 'Visit Info', 'Medications', 'History', 'Goals', and 'Nursing Notes'. The 'Interpreter Use' section is active, showing a '+ New Reading' button and the text 'No data found.'. The 'Consult Orders' section shows 'Orders resulted during the current encounter: None' and 'Referring provider: None'. The 'Visit Information' section shows 'Reason for Visit: None'.

**Intake**

Interpreter Use    Consult Orders    Visit Info    VI  
Medications    History    Goals    Nursing Notes

**Interpreter Use** ✎

+ New Reading

No data found.

**Consult Orders** ✎

Orders resulted during the current encounter:    None  
Referring provider:    None

**Visit Information** ✎

Reason for Visit \_\_\_\_\_  
None

Document the visit using the “Televisit” note template which includes a televisit disclaimer.

When you are documenting, use SmartText - **HHC AMB STANDARD TELEVISIT NOTE [11415]** – to pull in the televisit note template. **NOTE:** You must indicate the **duration of the call** in your note in order to bill for the visit. There is a placeholder for “call duration” in the template

The screenshot shows a 'Notes' window with a 'SmartText Lookup' panel. The search term is 'hhc amb|stand televisit'. A match is found: 'HHC AMB STANDARD TELEVISIT NOTE'. The preview of the template includes the following text:

**Ambulatory Tele Service:**

Is this telephone visit being provided due to medical ne infection, including COVID-19? {YES:21994}

Prior to this visit, the patient agreed to conduct this end

Review of Systems

**Assessment/Plan:**

{Assess/Plan SmartLinks:21044::0}

**Call duration:** {Time; 15 min - 1 hour:21256::0}

Televisit note template “quick button” coming soon!

## Determine whether televisit is billable before selecting billing code

- Telephone conversations qualify as a billable visit when ALL the following criteria are met:
  - The provider is an empaneled PCP, NP, or PA who provides an evaluation and management (E/M) service over the phone
  - Service is not related to an E/M service provided within the previous 7 days **AND** not related to a procedure that will be done within the next 24 hours or at the soonest available appointment
  - Clinical documentation supports that the conversation addressed the **assessment and management of a medical problem and a *medical decision* is made** (e.g., medication management for chronic disease patients). Only relaying normal laboratory results or renewing prescriptions does not qualify.
  - **Duration of the call** must be included in the clinical documentation.

Mark the appropriate “Level of Service” based on televisit duration and sign the encounter.

**Level of Service**

EST1	EST2	EST3	EST4	EST5
NEW1	NEW2	NEW3	NEW4	NEW5
NEW 18-39	NEW 40-64	NEW 65+	EST 18-39	EST 40-64
EST 65+	<b>PRO-ONLY</b>			

LOS:

**Billing code  
“quick  
buttons”  
coming soon!**

- **For billable visits** - Providers should enter the following LOS CPT codes:
  - **99441**: 5-10 minute medical discussion
  - **99442**: 11-20 minute medical discussion
  - **99443**: 21-30 minute medical discussion
- **For non-billable visits** - Providers should select the LOS CPT code: **PRO-ONLY 99999**

To mark visit as complete and ready for check out, select "Events"

Schedule

Open Slots Chart Order Review Enc Summary Sign Encounter Print AYS Change Prov No Show Notes Events

Mar 20, 2020 Today Resident Total: 10 Auto-refreshed: 8:56 AM Preview

	Status	Events	Time	Patient	DOB	Has	MRN	Type	Notes	My S	Pt Language	Provider
	Scheduled		9:20 AM					REVISIT	TELEPHONE		English	Alvar Pelaez
	Not Seen No Show		1:20 PM					TELEVISIT	CONVERT TO TELEVISIT		Spanish	Kyle MD
	Scheduled		1:20 PM					TELEVISIT	9AM - Convert to telephone visit (pt work...		English	Aaron MD
	Scheduled		1:40 PM					TELEVISIT	please convert to telephone visit; medicare		English	Alvar Pelaez
	Scheduled		2:00 PM					REVISIT	CONVERT TO TELEVISIT		Spanish	Kyle MD
	Scheduled		2:00 PM					TELEVISIT	Convert to telephone visit		English	Aaron MD
	Scheduled		2:40 PM					REVISIT	NO ANSWER, LEFT A VOICEMAIL		English	Kyle MD
	Scheduled		2:40 PM					REVISIT	TELEPHONE		Spanish	Aaron MD
	Scheduled		3:00 PM					TFI FVISIT	please convert to telephone		Spanish	Alvar

Dept: BE PRIMARY CARE

+ Create

My Schedule  
BE PRIMARY CARE

Then select "Patient Ready for Discharge"

The screenshot displays a medical scheduling interface. At the top, a blue banner contains the text "Then select 'Patient Ready for Discharge'". Below this, the interface is divided into several sections:

- Calendar:** A calendar for March 2020 is shown on the left, with the 20th of March highlighted.
- Resident Schedule Table:** A table with columns for Status, Events, Time, and Patient. The table lists several scheduled visits for a resident, with the 1:20 PM visit selected.
- Events Dropdown Menu:** A dropdown menu is open over the selected visit, listing various event types. The option "Patient Ready for Discharge" is circled in red.
- Visit Details Panel:** On the right, a panel shows details for the selected visit, including visit type (TELEPHONE), notes, patient language (English), and provider (Alvar Pelaez).

Status	Events	Time	Patient
Scheduled		9:20 AM	
Not Seen	No Show	1:20 PM	
Scheduled		1:20 PM	
Scheduled		1:40 PM	
Scheduled		2:00 PM	
Scheduled		2:00 PM	
Scheduled		2:40 PM	
Scheduled		2:40 PM	
Scheduled		3:00 PM	

Events dropdown menu items:

- Ready for Physician
- Ready for Resident/Fellow
- In with Physician
- In with Resident/Fellow
- Ready for nurse
- Patient Ready for Education
- Patient Ready for Discharge**
- Ready for sign visit
- Patient Waiting for Counseling
- Previsit Planning Complete
- In With Nurse
- Ready for PCA
- Patient Ready for Lab
- Patient in Lab
- Patient in Intake
- Sent to X-Ray
- Pt Went to East Coast
- In with Care Manager
- Ready for Care Manager
- Ready for SW
- Ready for dietitian
- In with dietitian
- Ready for Mental Health
- In with SW
- Undo
- Event Log

If the patient is not available, proceed  
with the “no show” workflow

# Select patient and click the "No Show" button

The screenshot shows the Epic EHR interface. At the top, there is a navigation bar with various icons and a search bar. Below this, the 'Schedule' section is visible, including a calendar for March 2020 and a list of scheduled appointments. A red circle highlights the 'No Show' button in the top navigation bar. The appointment list includes columns for Status, Events, Time, Patient, DOB, Has MRN, Type, Notes, My S Pt Language, and Provider.

Status	Events	Time	Patient	DOB	Has MRN	Type	Notes	My S Pt Language	Provider
Scheduled		9:20 AM				REVISIT	TELEPHONE	English	Alvar Pelaez
Scheduled		1:20 PM				TELEVISIT	CONVERT TO TELEVISIT	Spanish	Kyle MD
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Scheduled		3:00 PM				TFI FVISIT	please convert to telephone	Spanish	Alvar Pelaez

Write “no show” in comment section, then select “Accept”

No Show Documentation

9:10 AM appointment on 3/13/20 with Be Safety Net in BE PRIMARY CARE  
Work #: Unknown | Home #: 000-000-0000 | Mobile #:

Date	Time	Action	Outcome	Comment (F3 to enlarge)	User
03/20/2020	12:10 PM	Called home			GNUDSEN, JANINE [...]

Dial Restore

At the end of the session, all patients should be marked as either “not seen” or “ready for discharge”

**Schedule**

Open Slots | Chart | Order Review | Enc Summary | Sign Encounter | Print AVS | Change Prov | No Show | Notes | Events

Mar 20, 2020 | Today | Resident | Total: 10 Auto-refreshed: 8:57 AM | Preview

	Status	Events	Time	Patient	DOB	Has	MRN	Type	Notes	My S	Pt Language	Provider
	Scheduled		9:20 AM					REVISIT	TELEPHONE	+	English	Alvar Pelaez
	Not Seen							TELEVISIT	CONVERT TO TELEVISIT	+	Spanish	Kyle MD
	No Show		1:20 PM					TELEVISIT	9AM - Convert to telephone visit (pt work...	+	English	Aaron MD
	Scheduled	Patient Ready for Discharge (8:57 AM)	1:20 PM					TELEVISIT	please convert to telephone visit; medicare	+	English	Alvar Pelaez
	Scheduled		1:40 PM					REVISIT	CONVERT TO TELEVISIT	+	Spanish	Kyle MD
	Scheduled		2:00 PM					TELEVISIT	Convert to telephone visit	+	English	Aaron MD
	Scheduled		2:00 PM					REVISIT	NO ANSWER, LEFT A VOICEMAIL	+	English	Kyle MD
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	Scheduled		2:40 PM					REVISIT	TELEPHONE	+	Spanish	Aaron MD
	Scheduled		3:00 PM					TFI FVISIT	please convert to telephone	+	Spanish	Alvar

Dept: BE PRIMARY CARE

+ Create

- My Schedule
- BE PRIMARY CARE

Clinic Staff should then review the schedule at the end of the session or the following day, and check in/out all visits that were completed.

Patients that were marked as no-show do not need to be checked in/out. Epic will automatically default them to a no-show in the back end after 3 days.