Digital E/M Workflow

Workflow may vary depending on who is involved in process; providers may manage entire Digital E/M workflow. During National Public Health Emergency, portal may be replaced with email, text, or other platform.

**FRONT DESK**
- Receives patient or provider request for routine visit
- Assesses technology, suggests connecting through portal
- Obtains and documents Consent¹
- Insurance verification
- Provides instructions for sending initiating message

**MA/NURSE**
- Review incoming message
- Opens chart & starts encounter/note (copy and paste communication from portal)
- Initial triage with patient (requests brief history, obtains vitals as available, briefly reviews medications)
- Warm handoff to provider

**PROVIDER**
- Receives warm handoff
- Opens encounter/note, reviews chart
- Records message to patient in EHR, records time spent, pends note
- Handoff to nurse

**MA/NURSE**
- Receives handoff
- Sends message through portal
- Monitors for response from patient
- Copies response into encounter/note
- Warm handoff to provider

**MA/NURSE**
- Receives warm handoff
- Adds Addendum to note with patient message and time spent
- Closes note/visit, records total time spent, drops bill
- Hand off to nurse

- Sends final message through portal
- Provides education as needed
- Schedules follow-up or enrolls in care management as appropriate

**In RHC/FQHC settings, G0071 can be billed**

¹Consent must include notification of cost-sharing; verbal consent is sufficient. Once consent for Communication Technology-Based Services (CTBS) has been obtained, it will cover all CTBS for one year.

**Suggested Citation:**