Telehealth Workflow

Workflow may vary depending on who is involved in process; providers may manage entire Telehealth E/M workflow. While staff can support delivery of services, only provider time can be counted towards billable service.

**FRONT DESK**
- Receives patient or provider request to schedule routine telehealth E/M visit
- Assess technology
- Schedules telehealth visit
- Obtains and documents Consent¹
- Insurance verification
- Prepares patient for visit²

**VIRTUAL VISIT SET-UP**
- Connects to patient/platform
- Check-in to visit in EHR (open encounter)
- Confirm patient identity
- Checks sound, lighting, patient ability to see/hear
- Prepares patient for exam
- Places patient on hold, warm hand off to MA/Nurse

**MA/NURSE**
- Opens visit template
- Completes & records typical intake paperwork, brief history, vitals as available, and medication reconciliation or review
- Prepares patient for provider visit
- Places patient on hold, completes documentation
- Warm hand off to provider

**PROVIDER**
- Receives warm hand off
- Opens visit & reviews chart
- Connects to patient
- Exam & Treatment
- Places patient on hold, warm handoff to nurse
- Finishes note & drops bill

**MA/NURSE**
- Connects to patient
- Completes education, answers questions
- Enrolls in care management, if appropriate
- Places patient on hold

**FRONT DESK/VIRTUAL VISIT CLOSURE**
- Connects to patient
- Completes “check out”
- Schedules follow-up
- Answers remaining questions, gives instructions for disconnecting
- Disconnects

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.

²Patient should be instructed on how to prepare for a telehealth visit. See Patient Instructions for a Successful Telehealth Visit for further guidance.

Suggested Citation: