Telephone and Virtual Visits: Operational Considerations

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Why Use Telephone and Virtual Visits?

- The health and safety of our members, patients, employees and communities remains our priority.
- As the COVID-19 situation rapidly advances, the demands on the health care system threaten to exhaust our supplies, equipment, and our people.
- We must take steps to ensure we can continue to provide the high-quality care our members need while also preparing for the oncoming increase in the number of patients with COVID-19.
- To allow our patients to stay at home if they want, or out of necessity, while increasing the number of patients we can treat, healthcare providers are offering more video and phone visits to increase member access to ambulatory care.
- Allowing people to stay home and still get great care will also help address the community spread of COVID-19 and ease the global shortage of personal protective equipment (PPE)— masks, gowns, and gloves.

Operational Considerations

When operationalizing Telephone and Virtual Care visits at your organization, you may need to provide additional guidance for staff.

The list below captures common decision points and OCHIN recommendations:

- **When should patients be scheduled with a Virtual Visit or a Telephone Visit?** Follow your organization’s guidelines. OCHIN recommends delivering care as a Virtual Visit whenever possible to provide the added benefit of a face-to-face connection between the provider and patient.

- **What is your organization’s process for clinical triage when scheduling appointments?** When scheduling appointments, if the patient has clinical or symptom questions that a scheduler cannot assess or answer, OCHIN recommends following your organization’s existing clinical triage process or create a routable Telephone Encounter for a nurse or provider to return a call to the patient. Remember to provide the patient an expected call-back timeframe.

- **What if the patient is late to the appointment?** If the patient is more than five minutes late for the visit, OCHIN recommends attempting to call the patient at the primary phone number listed in the patient’s Electronic Health Record

- **What if the provider will be late to the appointment?** If a provider will be late for the visit, the patient should be notified by a nurse, MA, or other clinical support staff person. Similar to an in-person visit, consider giving the patient the option to reschedule.
Organizational Roles

The following key roles may need to be involved in the implementation of telehealth/virtual care at your organization:

- **Clinical Champion**: The Champions drive the Telehealth growth and adoption. Champions stimulate enthusiasm, offer guidance to providers who want to learn about telehealth and generally act as cheerleaders for the process. Champions become role models, coaches, and act as mentors for new telehealth users. Champions bridge the gap between management, IT and clinical associates, helping to ensure that all ‘sides’ understand the needs of the others.

- **Telehealth Coordinator**: The Telehealth Coordinator is the main point of contact for telemedicine program activities. They serve as the primary contact for scheduling, organizing on-site training, providing or arranging for basic technical support, including coordinating and ensuring the systems are tested and problems and equipment needs are addressed. They are responsible for working with appropriate site staff to bill for telemedicine services. They also assist in data collection, report generation and act as a liaison between departments as needed.

- **IT Lead**: Identify one or more members of the IT team to lead telehealth support efforts. They will install, configure, maintain, and test video conferencing hardware/software and assist user and other team members in diagnosis and correction of problems encountered during and after implementation.

- **Admin and Billing Lead**: Establish one or more members of the admin and billing teams to take a lead on telehealth support efforts. Just like with IT, your organization already has a team of administrative and billing specialists. It is very beneficial to identify a lead on these teams to serve as a main point of contact for the telehealth program. Though they may not be involved in the day-to-day operations of the program, admin and billing leads should attend any trainings that address telehealth clinical operations and stay up-to-date with reimbursement and billing policies.

Providers: Prepare to Deliver a Virtual Visit

When providing care to a patient in a virtual visit keep the following in mind:

- While in a virtual visit, **every movement you make is in the patient’s view** and magnified more than if you were in the same room with them. The first impression (initial 20 seconds) is critical.

- **Facial expressions and where you direct your eyes are important**: they are magnified on the patient’s screen. These give patients clues to your thoughts and attitudes during the visit.

- **Use language that allow patient to share their primary concern**: They may have some anxiety about the video visit. Consider phrases like “What worries you the most?”

- **Protect Patient PHI during the visit**: Use headphones to protect audio from being overheard. Verbally disclose if you share an office. Close the door and consider using a “Do Not Disturb” sign to notify others.

- **Be Aware of your Environment**: Check your surroundings that may be visible to the patient. Remove personal items and clutter from view and straighten pictures, diplomas, etc. Use appropriate lighting and avoid being backlit. Adjust camera so that it is eye level. Don’t drink or eat during your video visit.

Consider the patient’s experience:

- Look into the camera and smile. By clicking, you are opening the door to the exam room.

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• Sit in a forward-leaning position. Speak clearly and naturally.
• Let the patient know that you have their medical record in front of you.
• Look into the camera, not the monitor so that you don’t appear to be looking above, below or to the side.
• Let the patient know if you turn away to document.
• There might be a slight delay when speaking or receiving information. Count to three before and after speaking to allow for the patient to hear and respond to you. Check with the patient to ensure understanding.
• Be clear about the next steps for the patient:
  o “What questions do you have for me before we disconnect the call?”
  o “Tell me what you’ve heard so far.”
• Close by reinforcing the value of the video visit:
  o “I’m glad that we were able to accomplish (insert what was accomplished) in our visit today.”
Scheduling Staff: Talking Points and Scripting

- **Script #1** - Reception and Call Center Script
- **Script #2** - Scheduling staff receiving *phone call from* patient not on your EHR’s patient portal
- **Script #3** - Rescheduling staff Face-to-Face to phone/virtual making *phone call to* patient not on your EHR’s patient portal
- **Script #4** - Scheduling staff receiving *phone call* from patient on your EHR’s patient portal
- **Script #5** - Rescheduling staff Face-to-Face to phone/virtual making *phone call* to patient on your EHR’s patient portal
- **Script #6** - Incoming Patient Portal Message → Phone Encounter
- **Script #7** - Incoming Patient Portal Message → Virtual/Video Visit
- **Script #8** - Face-to-face Clinic Walk-in
- **Script #9** - Provider script
- **Script #10** - Support staff script when provider is running late
- **Script #11** - Messaging for Billing Staff

These scripts support clinical support staff in care delivery roles to:

- Perform efficient patient triage during the COVID-19 outbreak
- Seamlessly divert patients to telephone/virtual care alternatives
- Emphasize safety and convenience; reduce fear and anxiety
OCHIN Reception and Call Center Script #1

1. Reception (walk-in)
   - Greet patient in a culturally competent manner. Treat each patient with compassion.
   - “Hello, welcome to ABC Health Center. How are you today? How may I help you?”
   - Address the request by offering to schedule an appointment that is appropriate for the type of visitor;
   - If the patient is showing symptoms of COVID-19, implement any procedures put into place by your center and ask the patient to be seated in the designated area while a clinical staff member is notified (MA, RN).
   - Remain calm and do not alarm the patient or staff.
   - Be aware of your surroundings and do not share PHI inappropriately; HIPAA still applies.

2. Call Center
   - Greet patient in a culturally competent manner. Treat each patient with compassion. “Thank you for calling ABC Health Center, this is John Doe. How may I help you?”
   - Address the request by offering to schedule an appointment that is appropriate for the type of visit;
   - If the patient is experiencing symptoms of COVID-19, explain the process your service area has established for patient visits, whether in person, by phone, or virtually. Follow that process and schedule the patient visit or forward the patient to the appropriate clinical staff member for telephone triage.
   - If the request is for a telephonic or virtual visit, confirm that the patient has the necessary technology.
   - Remain calm and do not alarm the patient or staff.

3. Your EHR’s patient portal Auto-reply message:
   - “Thank you for contacting ABC Health Center. We are committed to responding to your message within 24 hours (or whatever time your services area has established), and we encourage you to call 911 (or the number your center has designated) if this is an urgent need.

Live reply message:

Greet patient in a culturally competent manner. Treat each patient with compassion.
“Thank you for contacting ABC Health Center. We are scheduling appointments based on urgency. We will be happy to assess your needs via [insert patient portal platform here] and schedule an appointment or provide advice by phone. If you are experiencing symptoms and would like to speak with a nurse, please call us now at 555-555-5555”

- If the request is for a telephonic or virtual visit, confirm that the patient has the necessary technology.
- Remain calm and do not alarm the patient or staff.
OCHIN Telephone and Virtual Care Script #2

Scheduling staff receiving incoming phone call from patient not on your EHR’s patient portal

When a patient calls the clinic for an appointment, reception or the call center (see Script #1) directs the patient to triage.

Triage staff are clinically trained to screen patients and direct them to care options on the basis of urgency and symptoms.

Follow Coronavirus decision tree prompts and the travel screening popup (if applicable for your EHR).

Consult HCCN portal for additional resources

Begin script:

Staff: Hello [patient name], thank you for your patience. For verification, may I please have your [date of birth]? What number can I call you back at if our line gets dropped? [***dial back #***]  

Protecting your health and safety during the coronavirus outbreak is our priority. What are your concerns today? [***refer to 911 or ED if appropriate, otherwise proceed to triage Qs***]

May I ask a few questions to enable us to offer swift, safe, and convenient options?

- Do you have known contact with Coronavirus (COVID-19)?
- Have you traveled to anywhere with Coronavirus cases?
- Do you have a fever?
- Do you have a dry cough, shortness of breath, congestion, or a sore throat?

If HIGH RISK

Staff: Given your symptoms, please hang up and immediately dial 911 or go to the nearest hospital Emergency Department for evaluation.

If MEDIUM RISK

Staff: Given you are at moderate risk for COVID-19, please stay at home and wait for a call from your local public health agency for further instructions [*** insert local public health department contact phone number ***]

If LOW RISK

Staff: You are at low risk for COVID-19, but I understand you are not feeling well, and would like an appointment. For your safety and convenience, we are offering patients the option of visits with their doctor by telephone or video visit. Would you be interested in one of these options?

YES
Staff: Great!

With virtual care, you will still receive the best possible care from your doctor with the added safety of staying in your own home.

Are you calling from a mobile device or a landline?

Great.

Option #1 Phone Consult

We can set up a phone appointment right now.

We have got you scheduled for a phone visit on [time and date]. Please be ready to receive a call from your doctor at that time.

If the phone call gets dropped in the course of your appointment, hang up and wait for your doctor to phone back and resume the call.

Thank you for your understanding during this time. Your health is a priority for us. We look forward to talking with you then.

END

Option #2 Virtual Visit

NOTE: Depending on the functionality of your patient portal this may not be a viable option

If you prefer a video virtual visit, we can do that too if you have a mobile device or desktop computer with a camera and Internet access. I see you do not yet have an account.

In order to schedule you for a video appointment, we will quickly set up your [use name of patient portal] account right now. It is very quick and easy.

(See workflow for your specific EHR to activate patient portal)

Patient activates Patient Portal account.

Staff: It is better to use your mobile device (smartphone or tablet) for video visits. The camera quality is generally better than a desktop computer.

Staff: You will receive a visit reminder [***days***] before your phone consult/virtual visit.

Video Visit instructions: See workflow for your specific Patient Portal to provide the patient with a quick overview of what the phone consult/virtual visit will entail.

Do you have any questions?

We look forward to seeing you on [time and date].

Thank you for calling [clinic].

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OCHIN Telephone and Virtual Care Script #3

Rescheduling staff Face-to-Face to phone/virtual making phone call to patient not on your EHR’s patient portal

**Staff:** Hello, my name is [***] and I am calling from [clinic name] regarding the appointment you have scheduled on [appointment date] with [***].

In response to the growing concerns in our community over the coronavirus, Dr. [name] would like to reschedule this appointment as a phone or [insert patient portal platform here] Virtual visit.

Do you mind changing your appointment?

*Consult your EHR’s workflow to convert an appointment to a virtual or phone visit*

**Option #1 Phone Consult**

We can set up a phone appointment right now.

We have got you scheduled for a phone visit on [time and date].

Please be ready to receive a call from your doctor at that time.

If the phone call gets dropped in the course of your appointment, hang up and wait for your doctor to phone back and resume the call.

Thank you for your understanding during this time. Your health is a priority for us. We look forward to talking with you then.

**END**

**Option #2 Virtual Visit**

*NOTE: Based on the functionality of your EHR/patient portal this may not be an option*

Great. There are a few things that need to be in place to ensure that this works well. Let’s review the requirements. This will take just a couple minutes.

Do you have an account? [No]

In order to schedule you for a video appointment, we will quickly set up your account right now. It is very quick and easy.

See Patient portal activation workflow for your specific EHR

Patient activates patient portal account.

*Refer to your EHR specific patient portal workflow to provide the patient with an overview of what the virtual visit will entail/what they should expect.*

Do you have any questions?
Thank you for your understanding and cooperation during this time.

We look forward to seeing you on [time and date].

END

OCHIN Telephone and Virtual Care Script #4

Scheduling staff receiving incoming phone call from patient on Patient Portal

When a patient calls the clinic for an appointment, reception or the call center (see Script #1) directs the patient to triage.

Triage staff are clinically trained to screen patients and direct them to care options based on urgency and symptoms.

Follow Coronavirus decision tree prompts, the travel screening popup (if applicable for your EHR), and reference the generic Coronavirus template (if provided by your EHR).

Consult the HCCN Portal for additional resources.

Begin script:

Staff: Hello [patient name], thanks for calling today. For verification, may I please have your date of birth?

What number can I call you back at if our line gets dropped?

Thank you.

What are your concerns today? [refer to ED if appropriate; otherwise ask to schedule a virtual visit or phone consult]

Protecting your health and safety during the coronavirus outbreak is our priority.

May I ask a few questions to enable us to offer swift, safe, and convenient options?

[reference phone triage template]

- Do you have known contact with Coronavirus (COVID-19)?
- Have you traveled to anywhere with Coronavirus cases?
- Do you have a fever?
- Do you have a dry cough, shortness of breath, congestion, or a sore throat?

If HIGH RISK

Staff: Given your symptoms, please hang up and immediately dial 911 or go to the nearest hospital Emergency Department for evaluation.

If MEDIUM RISK

Staff: Given you are at moderate risk for COVID-19, please stay at home and wait for a call from your local public health agency for further instructions [*** insert local public health department contact phone number ***]
If LOW RISK

Staff: You are at low risk for COVID-19, but I understand you are not feeling well, and would like an appointment.

For the safety of our patients, staff, and community during the evolving COVID-19 spread, we are suggesting all visits possible be conducted virtually. You will still receive the best care we can give, with the added safety of staying in your own home. Would you like to schedule a phone consult or Virtual Visit?

Option #1 Phone Consult

Staff: Ok, we can get you scheduled for a phone visit. You will receive a call at [time and date].

Is this the best phone number you to reach you at?

We have got you scheduled for a phone visit on [time and date]. Thank you for your understanding and cooperation during this time. Your health is a priority for us. We look forward to talking with you then.

Option #2 Virtual Visit NOTE: Based on the functionality of your EHR/patient portal this may not be an option

Staff: Great. There are a few things that need to be in place to ensure that this works well. Let’s review the requirements. This will take just a couple minutes.

Do you have a patient portal account? [Yes]

Refer to your EHR specific patient portal workflow to provide the patient with an overview of what the virtual visit will entail and what they should expect.

Do you have any questions?

Thank you for your understanding and cooperation during this time.

We look forward to seeing you on [time and date].

END
**OCHIN Telephone and Virtual Care Script #5**

Rescheduling staff **making phone call to patient on your EHR’s patient portal**

Staff: Hello, my name is [your name] and I am calling from [clinic name] regarding the appointment you have scheduled on [appointment date].

In response to the growing concerns in our community for the coronavirus, Dr. [name] would like to reschedule this appointment as a phone or Virtual visit.

Do you mind changing your appointment?

*See your EHR’s workflow to reschedule an in-office visit as a phone or Virtual visit.*

**Option #1 Phone Consult**

Ok, we can get you rescheduled for a phone visit. You will receive a call at [time and date].

Is this the best phone number you to reach you at?

We have got you scheduled for a phone visit on [time and date]. Thank you for your understanding during this time. Your health is a priority for us. We look forward to talking with you then.

**END**

**Option #2 Virtual Visit** **NOTE: Based on the functionality of your EHR this may not be an option**

Great. There are a few things that need to be in place to ensure that this works well. Let’s review the requirements. This will take just a couple minutes.

Do you have a Patient Portal account? [Yes]

Refer to your EHR specific patient portal workflow to provide the patient with an overview of what the virtual visit will entail/ what they should expect.

Do you have any questions?

Thank you for your understanding and cooperation during this time.

We look forward to seeing you on [time and date].

**END**
OCHIN Telephone and Virtual Care Script #6

Incoming Patient Portal Message ➔ Phone Consult

Dear [patient],

Thank you for requesting an appointment with Dr. [***].

In the interest of patient safety and convenience during the Coronavirus outbreak, Dr. [***] would like to conduct your appointment via phone. With virtual care, you receive the best possible personalized care from your doctor with the added safety of staying in your own home.

We have on file (*** xxx-xxxx).

If there is another number you would like Dr. [***] to use, please let us know at your earliest convenience.

Please be available to take a call at this number on [date, time].

If you are disconnected during your call, please hang up, and wait for Dr. [***] to call you back.

Thank you for your understanding and cooperation.

Your Care Team
OCHIN Telephone and Virtual Care Script #7

Incoming Patient Portal Message → Virtual Video Visit

Dear [patient],

Thank you for requesting an appointment with Dr. [***].

In the interest of patient safety and convenience during the Coronavirus outbreak, Dr. [***] would like to conduct your appointment on [***date/time***] via a [insert patient portal platform here] Virtual Video Visit rather than in the office. The [insert patient portal platform here] Virtual Visit is a secure videoconferencing platform.

With virtual care, you receive the best possible personalized care from your doctor with the added safety of staying in your own home.

Prior to your appointment, please download the free [insert patient portal platform here] app for Apple or Android to your mobile device (smartphone or tablet). (if applicable to your patient portal platform)

You may also conduct a Virtual Visit via a desktop computer with a camera.

For optimal video quality, we recommend using a mobile device rather than a desktop computer and camera.

How to Prepare for Your Virtual Visit with Dr. [***]

Refer to your EHR specific patient portal workflow to provide the patient with an overview of what the virtual visit will entail and what they should expect.

Please let us know if you have questions.

Thank you for your understanding and cooperation.

Your Care Team

END

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OCHIN Telephone and Virtual Care Script #8

Face-to-face Clinic Walk-in

Reference Script #1- Reception and Call Center Staff

Triage may use the OCHIN Travel Screening tool, the OCHIN Phone Coronavirus Phone Triage Template, or CDC-recommended process to stratify risk and direct patients to the most appropriate level of care.

**If the patient is displaying acute symptoms** such as respiratory distress, fever, and congestion, call 911 or direct the patient to the nearest emergency department.

**If the patient screens positive for COVID-19 exposure, and/or is symptomatic**, the CDC recommends that patients with suspected or confirmed COVID-19 should be asked to wear a surgical mask as soon as they are identified and be evaluated in a private room with the door closed. Healthcare personnel entering the room should use **Standard and Transmission-based Precautions**.

**If the patient screens positive for COVID-19 exposure, but is asymptomatic**, monitor the patient in accordance with [CDC guidance](https://www.cdc.gov). If the patient does not have a Patient Portal account, it can be useful to use instant auto-activation before the patient leaves the clinic. This will more quickly streamline patient access to virtual care options.

**If the patient is at elevated risk for contracting COVID-19 (70+ years; immunosuppression, compromised pulmonary function, diabetes, CHF COPD, asthma), and has an unrelated acute need that cannot be treated by phone or Virtual Video Visit**, schedule the patient to be seen, and room immediately.

**If the patient is not at elevated risk for contracting COVID-19, but has an unrelated acute need that cannot be treated by phone or Virtual Video Visit**, schedule the patient to be seen, and room immediately.

If the patient seeks an appointment for nonurgent issues or elective procedures, postpone care and offer virtual care alternatives.
OCHIN Telephone and Virtual Care Script #9

Provider Script

The purpose of this script is to:

- help put providers and patients who are new to virtual care at ease
- strengthen relationship between provider and patient
- underscore the secure virtual platform
- emphasize the convenience and safety benefits of receiving treatment from the comfort of home

When the provider signs on to a Virtual Video Visit

Start script:

Hello, [patient name]. I am Dr. [***].

Is this your first time doing a video visit?

Before we get started, please confirm that you can see and hear me clearly. Give me a wave and a thumbs-up.

Thank you.

If at any time during the visit, the video drops, don’t worry! You can simply click the camera icon again and log right back in. We can pick up where we left off. You have a few minutes to log back on.

Please let me know if you have questions.

I can see you. I have your chart open on the screen in front of me. If I’m looking over in this direction, it’s so I can read information in your chart.

I am talking to you from a [secure location/clinic].

(if applicable) I am here with my scribe, [***] who will be taking notes during our visit so that I can give you my undivided attention.

(if applicable to your specific virtual visit platform) After our visit, I will send you an After Visit Summary via your patient portal account that reviews the medical concerns we cover during today’s visit, instructions, medications, and when I’d like to have you return for a follow-up visit – or another video visit.
So, tell me what is concerning you today?

I’d like to review your current medications/allergies/problem list.

Which pharmacy do you prefer?

[conduct exam]

Do you have enough Rx medication to shelter in place?

I would like you to [follow-up instructions]

I would like to see you again [date]. I will have the care team schedule your next appointment.

Before we sign off for today, do you have any questions?

If you think of something after our visit, please feel free to send a message via [insert patient portal platform]

Thank you. It was good to see you today.

END
OCHIN Telephone and Virtual Care Script #10

Support staff script when provider is running late

The purpose of this script is to:

• ease anxiety for patients who are new to virtual care
• strengthen relationship between provider and patient
• underscore the secure virtual platform
• emphasize the convenience and safety benefits of receiving treatment from the comfort of home

Start Script

Hello, [name]!

You have a Virtual Video Visit with Dr. [***] today at [time].

Is this your first time doing a video visit?

We are so happy to be able to see you today.

Patient safety, convenience, and continuity of care with your own doctors is really important. We’re so glad to have this option to offer the best possible care while keeping you safe and comfortable in your own home.

I wanted to let you know [your provider] is running a few minutes behind.

Please log on to your appointment following the instructions.

Do not be alarmed if it takes a few minutes for the [provider] to join you on video.

If for some reason the video drops, don’t worry. Just log back in. You are given a generous window of time to log back in so you can take your time as you follow the instructions.

Please let us know if you have questions or need to reschedule.

Thank you,

Your Care Team

END