Overview of workflow for a typical patient referral to telehealth specialist services.

March 20, 2020

This project is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) under the grant number H2QCS30280 “Health Center Controlled Networks”, through the use of funds from the total annual award of $2,730,000.00. The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by HRSA, HHS or the U.S. Government.
Telehealth: Referral and Scheduling for TeleHealth patients

Creating referral for telehealth specialists and scheduling patient for appointment
March 20, 2020

PCP

- Referral is ordered

Telehealth Coordinator

- Review Referral Guidelines for this Specialty
- Create referral packet and fax to specialist, if needed
- Send referral for traditional face-to-face visit

Specialist

- Receive and evaluate patient referral
- Is referral appropriate?
- Are labs/tests needed?

- Yes
- Order labs and/or tests
- Notify provider of requests for labs/tests
- Schedule patient to complete orders
- Receive results and send to specialists
- Call patient about referral and explain telehealth

- No

- Yes
- Yes
- Schedule patient for telehealth appointment
- Yes to show patient site and discuss

- Stress importance of coming to appointment
- Does patient want to see equipment?

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Telehealth: Detailed Telehealth Workflow

Workflow for a typical patient referral to telehealth specialist services from reminder calls through specialist visit.

March 20, 2020

Two days before, look at schedule

Call patient to confirm

Did patient answer?

Leave voicemail to call back to confirm

Did patient call back?

Was this the 2nd attempt?

Cancel patient and schedule another in slot

Reiterate importance of attending appt

On day of: review schedule with PCPs and support staff

Prep room and turn on equipment

See patient has arrived on schedule

Take vitals and escort patient back to waiting room

Fax vitals to specialist

Is this the first appointment of the day at your site?

Check that prior appointment is complete

Log into system and verify connection with specialist

Verify correct patient and vitals were received by specialist

Interview and examine patient with assistance from TC, if needed

Assist specialist, as needed, during visit

Notify TC when ready to speak to PCP

Discuss findings and recommendations with PCP

Document visit and send to PCP site

Place orders per recommendations, as needed

Review visit notes and follow up with patient, as needed

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Workflow for creating a referral for dermatology using Store-and-Forward processes.
March 20, 2020

- **Patient is seen for dermatological issue**
- **Determines dermatology referral is needed**
- **Completes referral questionnaire**
- **Asks medical assistant or nurse to take photos**
- **Takes photos of dermatology issue on designated camera**
- **Drop off camera with medical records department**
- **Uploads photos and questionnaire to send to specialist**
- **Erases photos from memory and cleans camera to return to clinic staff**
- **Follow up appropriately with patient**
- **Reviews specialist’s notes to EHR and sends to PCP**

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<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>Process Start or End</strong></td>
<td>Indicates the start and end points of a process</td>
</tr>
<tr>
<td><strong>Process Step</strong></td>
<td>A specific process step, task or activity that is performed</td>
</tr>
<tr>
<td><strong>Decision Point</strong></td>
<td>A point in the process where a yes/no question is required</td>
</tr>
<tr>
<td><strong>Reference Point</strong></td>
<td>Indicates a reference or connection to another workflow</td>
</tr>
</tbody>
</table>

- **Indicates Meaningful Use Reporting**
- **Indicates UDS Reporting**
- **Indicates a Reference Point that is not part of a Decision Point**