Conducting a Telephone Visit – Agnostic

Workflow for a provider to complete a phone visit with a patient.
March 20, 2020

Check-In
- Call patient at time of phone visit
- Document outgoing phone call information
- Complete check-in/registration
- Transfer phone call

Provider
- Log into workstation
- Open encounter/visit
- Connect with patient
- Enter chief complaint
- Review and update patient history
- Interview and assess patient
- Document progress note
- Document diagnosis and other pertinent information
- Complete check-in/registration
- Complete visit and sign encounter
- End phone visit

Indicates Operational Decision to be made by Member

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.
<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Start or End</td>
<td>Indicates the start and end points of a process</td>
</tr>
<tr>
<td>Process Step</td>
<td>A specific process step, task or activity that is performed</td>
</tr>
<tr>
<td>Decision Point</td>
<td>A point in the process where a yes/no question is required</td>
</tr>
<tr>
<td>Reference Point</td>
<td>Indicates a reference or connection to another workflow</td>
</tr>
<tr>
<td>Indicates Operational Decision to be made by Organization</td>
<td></td>
</tr>
<tr>
<td>Indicates a Reference Point that is not part of a Decision Point</td>
<td></td>
</tr>
</tbody>
</table>