

Phone Consultations

Appointment Book – If a patient chooses to do a Phone Consultation with the Provider instead of coming into the office, change the Event name in the Appointment Book to “Phone Consultation”. Select “Changed to Phone Consultation” as the rescheduling reason.

Check In Process

- At the beginning of the day, the secretary should check in all Phone Consultations as usual
- Be sure to attach insurance to the encounter
- Open the HomePage in EMR and select the Visit Type called “Phone Consultation”

Provider Documentation

- Provider should open the patient’s chart and click on the correct encounter date
- Click on the tab called “Phone Consultation”
- Document the time that the patient was called
 - Patient checked in at _____ am/pm
- Check the Virtual Check consent box if patient gave consent for the Phone Consultation
- Provider can document any free text in the Comment box
- Provider must submit at least one diagnosis
- Providers can use the Assessment template but are not required to add an Assessment
- Providers can use the Cardiac Orders to place further orders
- If future tests or appointments are needed, Provider should task the template to their secretary to schedule by clicking the yellow Task button
- Provider will check the appropriate billing code
 - G2012 = Virtual Check In
 - G2010 = Remote Evaluation of Video/Images Est Pt
- Provider will sign template which will submit billing codes and generate the Phone Consultation document
- If Provider was unable to contact the patient, check the box “Unable to contact patient”.

Secretary Follow Up

- If secretary received a task to schedule future appointments or tests, the secretary should contact the patient and schedule the appropriate follow ups and tests
- The secretary will create the Orders document in NextGen if Tests or Labs were ordered

