Workflow varies from organization to organization. The following pages illustrate how a typical telemedicine clinic operates, and are intended to be used as a starting point in developing your own operational protocol. You will find differences and similarities between the duties of the patient site and the specialty site.

The flow charts illustrate how both the patient and specialty site clinics work together as a team to accomplish each patient consult. You will find your operational workflow to differ slightly, but the concept will remain the same.

The appointment scheduling flow chart was included in this document to give you an idea of the most common expectations for scheduling turn-around times. This chart has been used as a communication tool between the specialty site and the patient site, to establish realistic performance expectations.

The referral to billing process flow chart further illustrates the "back office" job duties of the telemedicine team. It also serves as a template for you to use when documenting your own work flow process within your organization.
SAMPLE WORKFLOW

DAY OF CONSULT - Patient Site

(Please refer to the flow chart for event timing and site participation requirement)

1. Telemedicine Coordinator gives their front desk receptionist the appropriate questionnaire packet to hand out when patient arrives (this may also be mailed to the patient prior to appointment). Patient should arrive 30 minutes prior to appointment if filling out a questionnaire is required.
   a. Patient must sign consent form (once per year).
   b. Patient must complete medical history form if not already done.
2. Telemedicine coordinator will prepare exam room and turn on telemedicine unit 30 minutes (or as early as possible) prior to the consultation. If peripheral equipment (derm camera, nasopharyngoscope, stethoscope, etc.) will be used during consult, please turn on and test image/sound prior to consult.
3. Fax completed history, and consent form, and any additional last minute test results to the Specialty site Telemedicine Coordinator.
   a. The specialist requires the completed history and questionnaire prior to the beginning of the consult.
4. Ask the specialist if he/she has received all the necessary information before rooming the patient.
5. Once the patient and the primary care provider are in the room, the site coordinator remains in the room to assist with the equipment as necessary.

AFTER THE VISIT - on the day of consult

1. At this time, the specialist may wish to send (via fax, or other electronic format) written instructions for the patient. Any written Instructions from the Specialist are to be copied and distributed. You may wish to ask the patient to move to the waiting room while waiting for the information.
   - Patient
   - Primary care provider
   - Patient medical record
2. Clean equipment if used (any cameras or scopes that have touched the patient).
3. If another patient is scheduled immediately following the previous appointment, ask the specialist "Are you ready for me to room the next patient?" before proceeding.

AFTER THE VISIT

1. Telemedicine Coordinator receives the specialist's signed dictation, and places it in the referring provider's box for review prior to filing in the patient's medical record.

2. Telemedicine Coordinator reviews the consult dictation from the specialist. If a follow up appointment as well as any further tests are required, work with the primary care provider and the patient to complete the required tests, fax the results to the specialty site, and schedule a follow up appointment.
SAMPLE WORKFLOW

DAY OF CONSULT - Specialty Site

(Please refer to the flow chart for event timing and site participation requirement)

1. Telemedicine Coordinator receives faxed information from the patient site, places it into the patient’s medical record, and places the medical record in the specialist’s box outside the consult room for review.

2. Telemedicine Coordinator asks the specialist if there is any other information he/she may need prior to the consult.

3. Consult begins. Telemedicine coordinator is not present in the room during specialty consults, but remains nearby in the event further information or technical support is needed.

AFTER THE VISIT - on the day of consult

1. At this time, the specialist may wish to send written instructions for the patient. Any written instructions from the Specialist are to be sent (either via fax or other electronic format) by the telemedicine coordinator to the referring site immediately following the consult, and placed in the patient’s medical record at the specialty site.

2. Collect specialist billing and dictation materials.

AFTER THE VISIT

1. After the specialist reviews and signs the dictation, send the original to the referring physician (either via mail or fax), and place a copy in the patient’s medical record.

2. Telemedicine Coordinator reviews the consult dictation from the specialist. If a follow up appointment as well as any further tests are required, work with the patient site coordinator to schedule the appointment after the tests have been completed and received.
Telehealth: General Workflow

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

November 9, 2017

Referral is ordered

Create referral packet and fax to specialist
Schedule patient
Confirm patient two days before
On day of, prep room and equipment
Log into system and verify connection with specialist
Take vitals and fax to specialist

Interview and examine patient with assistance from TC, if needed

Room patient

Discuss findings and recommendations with PCP
Document visit

Place orders per recommendations, as needed

Document visit

Log off system

Transfer records into system and notify PCP

Review visit notes and follow up with patient, as needed
Telehealth: Referral and Scheduling for Telehealth patients

Creating referral for telehealth specialists and scheduling patient for appointment
November 9, 2017

Referral is ordered

Order labs and/or tests

Schedule patient for telehealth appointment

Review Referral Guidelines for this Specialty

Create referral packet and fax to specialist

Notify provider of requests for labs/tests

Schedule patient to complete orders

Stress importance of coming to appt

Call patient about referral and explain

Receive results and send to specialists

Does patient want to see equipment?

Send referral for traditional face-to-face visit

Receive referral for traditional face-to-face visit

Is referral appropriate?

Are labs/tests needed?

Receive and evaluate patient referral

Schedule time to show patient site and discuss

No

Yes

No

Yes

No
Telehealth: Detailed Telehealth Workflow

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

November 9, 2017

Telehealth Coordinator (TC)

Two days before, look at schedule

Call patient to confirm

Was this the 2nd attempt?

Yes

Cancel patient and schedule another in 7 days

Leave voicemail to call back to confirm

Did patient answer?

No

Review visit notes and follow up with patient, as needed

Log into system and verify connection with specialist

Verify correct patient and vitals were received

Give report to specialist, if appropriate

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?

Yes

Check with the specialist that prior appointment is complete

Leave room

Yes

As this a psychiatry or psychology appointment?

Yes

Interview and examine patient with assistance from TC, if possible

Notify TC when ready to speak to PCP

Discuss findings and recommendations with PCP

Document visit and send to PCP site

Make follow-up appointment, if possible

Leave voicemail to call back to confirm

No

Prepare patient for visit

Log off system

No

Check with the specialist that prior appointment is complete

Specialist

Call patient to confirm

Leave voicemail to call back to confirm

Did patient answer?

No

See patient has arrived on schedule

Log off system

No

Check with the specialist that prior appointment is complete

Specialist

Leave room

Yes

As this a psychiatry or psychology appointment?

Yes

Interview and examine patient with assistance from TC, if possible

Notify TC when ready to speak to PCP

Discuss findings and recommendations with PCP

Document visit and send to PCP site

Make follow-up appointment, if possible

Leave voicemail to call back to confirm

No

Prepare patient for visit

Log off system

No

Check with the specialist that prior appointment is complete

PCP

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

Yes

Check with the specialist that prior appointment is complete

Leave room

Yes

As this a psychiatry or psychology appointment?

Yes

Interview and examine patient with assistance from TC, if possible

Notify TC when ready to speak to PCP

Discuss findings and recommendations with PCP

Document visit and send to PCP site

Make follow-up appointment, if possible

Leave voicemail to call back to confirm

No

Prepare patient for visit

Log off system

No

Check with the specialist that prior appointment is complete

PCP
Telehealth: Store-and-Forward Dermatology

Workflow for creating a referral for dermatology using Store-and-Forward processes.

November 9, 2017

- **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**
- **Reviews specialists notes**
- **Receives findings and recommendations from specialists**
- **Uploads specialist’s notes to EHR and sends to PCP**
- **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**
- **Reviews specialists notes**
- **Receives findings and recommendations from specialists**
- **Uploads specialist’s notes to EHR and sends to PCP**
- **Follow up appropriately with patient**