

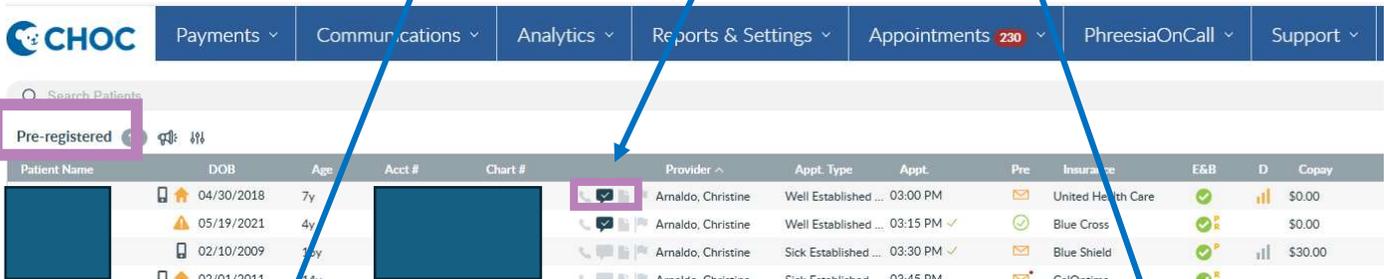


PCN Telehealth Workflow

FOR THE SCHEDULING TEAM

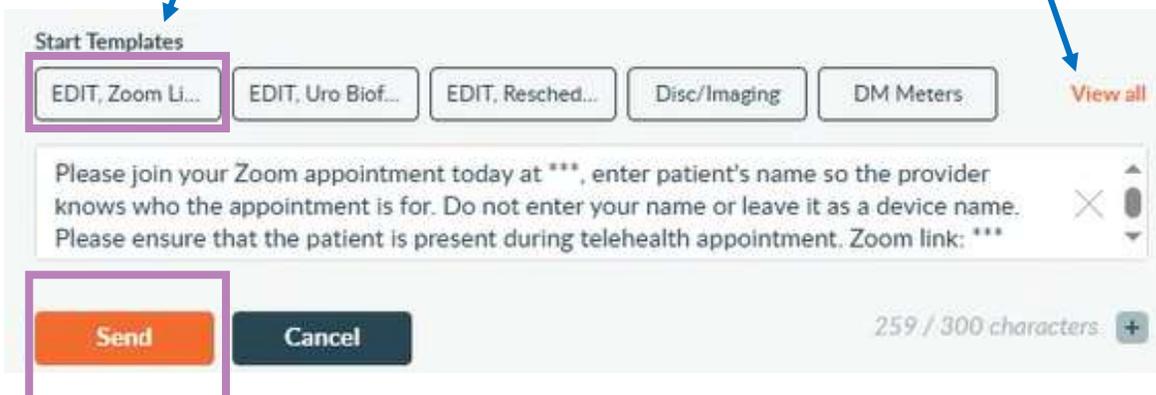
Telehealth Scheduling Steps-

1. *In Revenue Cycle- Scheduler will place the patient in a "Telehealth Primary Care CPM" visit with a provider.
2. The scheduler will explain to the family-
 - a. They will be receiving a text message through Phreesia with the invitation to the ZOOM telehealth appointment.
 - b. If this is the first time they are using ZOOM, they will be asked to create a username and password.
 - c. Once the account is created, the link will connect them to the provider's waiting room.
 - d. Ask the parent to log in a few minutes early for the scheduled telehealth appointment and that they will be in a virtual waiting room until admitted by the provider or staff.
3. *In Phreesia-
 - a. The scheduler left clicks on patient messages.
 - b. Navigate to "Start Templates" towards bottom of window and click on "EDIT, Zoom.."
 - i. If you do not see templates here, click on **view all**
 - c. Add in time of appointment and Zoom link number
 - d. Hit send



The screenshot shows the CHOC patient management interface. A search bar at the top left is labeled "Pre-registered". Below it is a table of patients. The first row is highlighted. A blue arrow points from the "Pre-registered" label to the "Start Templates" section in the screenshot below. Another blue arrow points from the "View all" link in the "Start Templates" section back to the patient list table.

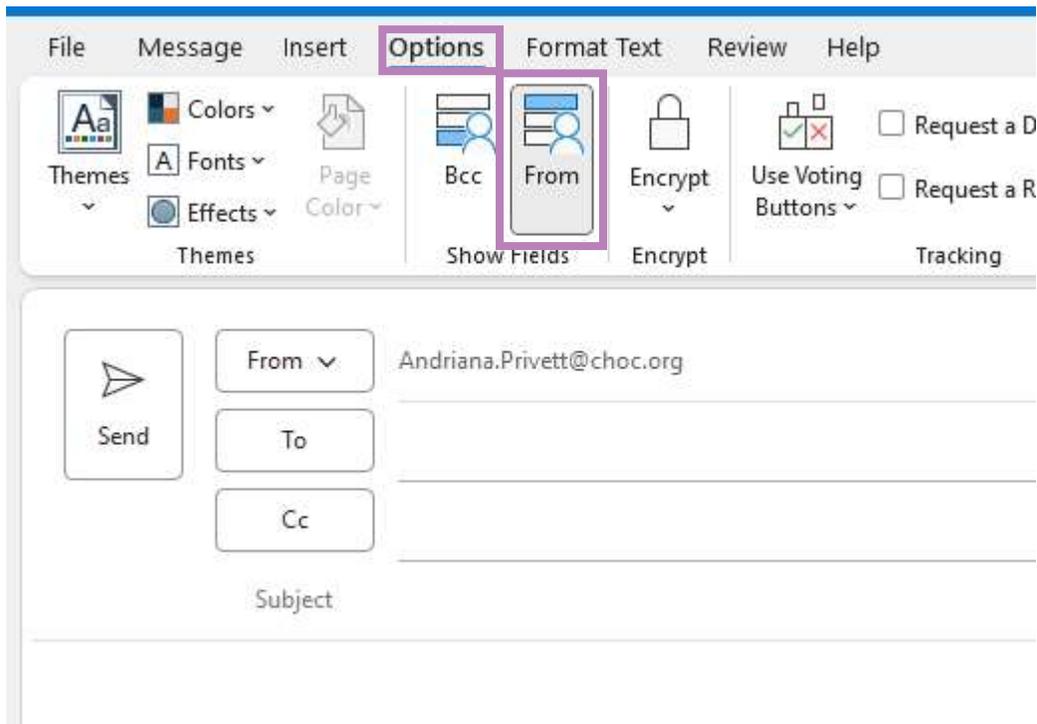
Patient Name	DOB	Age	Acct #	Chart #	Provider	Appt. Type	Appt.	Pre	Insurance	E&B	D	Copay
[Redacted]	04/30/2018	7y	[Redacted]	[Redacted]	Arnaldo, Christine	Well Established ...	03:00 PM	[Redacted]	United Health Care	[Green Check]	[Green Check]	\$0.00
[Redacted]	05/19/2021	4y	[Redacted]	[Redacted]	Arnaldo, Christine	Well Established ...	03:15 PM	[Green Check]	Blue Cross	[Green Check]	[Green Check]	\$0.00
[Redacted]	02/10/2009	10y	[Redacted]	[Redacted]	Arnaldo, Christine	Sick Established ...	03:30 PM	[Green Check]	Blue Shield	[Green Check]	[Green Check]	\$30.00



The screenshot shows the "Start Templates" form. The "EDIT, Zoom Li..." button is highlighted with a purple box. The "View all" link is also highlighted with a purple box. Below the buttons is a text input field with a placeholder message: "Please join your Zoom appointment today at ***, enter patient's name so the provider knows who the appointment is for. Do not enter your name or leave it as a device name. Please ensure that the patient is present during telehealth appointment. Zoom link: ***". At the bottom, the "Send" button is highlighted with a purple box. A character count "259 / 300 characters" is visible at the bottom right.



4. If the parent can't access link through Phreesia, the link can be sent through Outlook.
 - a. Open Outlook App
 - i. **Please note** this will NOT work if accessed from OWA internal or external
 - b. Open blank email
 - c. In the to line, type the family email
 - d. In the from line, click on "from" and select "other email address and enter choctelehealth@choc.org. Doing this ensures that the scheduler's personal email isn't tied to the visit.
 - i. **If the from line is missing**- navigate to options and click from



- e. Type Telehealth Appointment with the date scheduled in the subject line
- f. Copy and paste the information from the Phreesia message containing telehealth visit details
- g. Press send



PCN Telehealth Workflow



The screenshot shows an email composition interface. A purple box highlights the 'Send' button. Another purple box highlights the 'From' field, which contains 'Andriana.Privett@choc.org'. A third purple box highlights the 'Subject' field, which contains 'Telehealth Visit 6/5'. Below the 'From' field, there is a dropdown menu with 'Andriana.Privett@choc.org' selected, and other options include 'Osopeds@CHOC.org' and 'Other Email Address...'. The 'To' field contains 'Andriana.Privett@gmail.com;'. The 'Subject' field is highlighted with a purple box.

Please join your Zoom appointment today at 6/5/2025, enter patient's name so the provider knows who the appointment is for. Do not enter your name or leave it as a device name. Please ensure the patient is present during the telehealth appointment. Zoom link: zoomexample1234

On Day of Visit

1. Check in patient on schedule
2. If a patient has a co-pay or deductible, please call the patient prior to the appointment time to collect or collect during the appointment per office protocol.

FOR THE PHYSICIAN / NP / PA

Utilizing Zoom

1. The telehealth visit is viewable in Powerchart Ambulatory Organizer (provider schedule) as a Telehealth visit.



New meeting ▾

2. Providers access ZOOM and click on "New Meeting".



PCN Telehealth Workflow

When the patient arrives, they will be in the waiting room until the provider “Admits” them into the virtual meeting room.

Note: The meeting will time out after 2 hours of inactivity.

3. When the visit is done, the provider will close the Zoom app which closes down the virtual waiting room for all in the room. Or the provider can remove the patient/parent from the waiting room if they are planning to stay on Zoom.

EHR Documentation

Documentation and orders if generated will occur within PowerChart as with any other visit, with several notable highlights for telehealth specifically:

1. The Chief Complaint field must be completed per usual. This is usually completed by the MA/nurse and will be completed by the provider for telehealth visits.
2. The nurse intake form will not routinely be completed. If the provider wants to enter vital signs, they can access the nurse task list on the dark menu under Nurse Task List.
3. The Physical exam will be limited
4. Note creation: Choose Sick Visit (Telehealth) Note type
(If you do not see it at the bottom left of the workflow, click on "More" to view additional options)
5. Billing: Go to PCN Quick Orders and choose either Outpatient Established or New for Telehealth Billing.

Special Topics

The provider can use ZOOM from any electronic device (computer/laptop, ipad, smartphone).

You can minimize ZOOM and Powerchart so that you can use both simultaneously on your laptop/computer.

If challenges occur:

6/5/25- 6/19/25: Please engage your practice Administrator/ Manager and they can communicate with the telehealth team via the Zoom Rollback Telehealth chat.

After 6/19/25: Please call the help desk at 714-509-4457 or create an incident ticket at <https://choc.service-now.com/sp?id=index>