

# Telehealth Appointment Documentation

## Dynamic Documentation Users

### I. Documenting a Telemedicine Visit

- a) Access the patient's chart via Ambulatory Organizer. The Details column indicates which appointments are Telehealth:

Time	Duration	Patient	Details	Status (as of 1
10:00 AM Ball, Eric MD	15 mins	ZTESTESIGN, N 4 Years, Male	Telehealth Primary Care CPM	Seen By Phy SOCPA Waiting Roo
10:15 AM Ball, Eric MD	2 hrs 30 mins	No appointments		
12:45 PM Ball, Eric MD	15 mins	ZTESTESIGN, Y 20 Months, Female	Telehealth Primary Care CPM	Ready SOCPA Waiting Roo

- b) When you are ready to document, choose your note and template type from the Documentation tab of your menu. Feel free to save the template as a favorite by clicking the star on the left:

The screenshot shows the 'Documentation' menu interface. On the left, there is a 'New Note' section with fields for 'Note Type List Filter' (set to 'All'), '\*Type:' (a dropdown menu), 'Title:' (containing 'Telehealth Note'), '\*Date:' (3/17/2020), and '\*Author:' (Test, Physician Advanced M.D.). The main area displays a list of 'Note Templates' with columns for 'Name' and 'Description'. The 'Telehealth Note' template is highlighted in blue at the bottom of the list. Other templates include 'Discharge Visit Summary Sensitive Note', 'Print Tagged Images', 'Procedure Note', and various 'Progress Note' templates.

\*Primary Care Network users can find a link to a **Sick Note- Telehealth** at the bottom of the workflow along with the other notes to select\*

c) Please note the fields unique to the Telemedicine template:

- Like other Dyn Doc fields that are empty, they will disappear once signed if there is no content

Telehealth Note x List

Tahoma Size

~~Patient Name: ZTECTESIGN, N MRN: 3767071 FIN: 7120651043 Age: 4 Years Gender: Male DOB: 06/17/2015~~

**Telehealth Note**

Visit Date: 03/17/20  
Primary Care Physician: PCP Not On, List  
Note will be sent to primary and referring provider(s)

Originating Site

Patient Location

Originating Site MR#

Referred By

Reason for Referral

- The bottom of the note includes a mandatory consent statement:

\*Patient verbally consented to a telehealth encounter after patient was informed of visit limitations with the use of technology and technical failures that may interrupt or stop the video connection during the course of the encounter. Patient was informed of their right to withhold or withdraw their consent to the use of telehealth in the course of their care at any time.

d) Document in your note and click sign when finished.

## II. Billing & Follow-Up Orders

On the Quick Orders page, there is a new Telehealth Billing component where you can drop your visit charges, as well as a Return to Telehealth order for future appointments:

**Telehealth Billing**

- ▶ Inpatient Initial Billing
- ▶ Inpatient Subsequent Billing
- ▶ Outpatient Specialist Consult Billing
- ▶ Outpatient New Patient Billing
- ▶ Outpatient Established Billing
- ▶ Special Services

**Ambulatory Discharge Instructions**

- Return to Office
- Return to Telehealth Visit
- Print Ambulatory Check-Out Instructions
- Return to Adolescent Medicine