

# **Welcome to the Telehealth ECHO Workflow Best Practices/Integration**

*The session will start in less than 15 minutes*

# Funding

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**For educational and quality improvement purposes,  
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we appreciate and value your participation

If you have questions or concerns, please use the chat or email  
[shanna.peters@kansasaap.org](mailto:shanna.peters@kansasaap.org)

# Housekeeping

- This session will be recorded for educational and quality improvement purposes.
- Please do not provide any protected health information (PHI) during any ECHO session.
- IT Trouble? Chat with Amy Trollinger or email [amy.trollinger@kansasaap.org](mailto:amy.trollinger@kansasaap.org)

**Please turn on your video!**

**Please enter your name and organization in the chat box.**

**Introduce Yourself**



**Please mute your microphone when not speaking.**

**Microphones**



**5 min: Introduction**  
**25 min: Lecture**  
**5 min: QI Review**  
**20 min: Case/Discussion**  
**5 min: Close**

**Agenda**



# Today's ECHO Faculty

- Kristen Stuppy, MD, FAAP
- Kathy Farrell, MD, FAAP
- Stephanie Kuhlmann, DO, FAAP



# Workflow: Best Practices / Integration

Kristen Stuppy, MD, FAAP

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Pediatric Partners in Overland Park

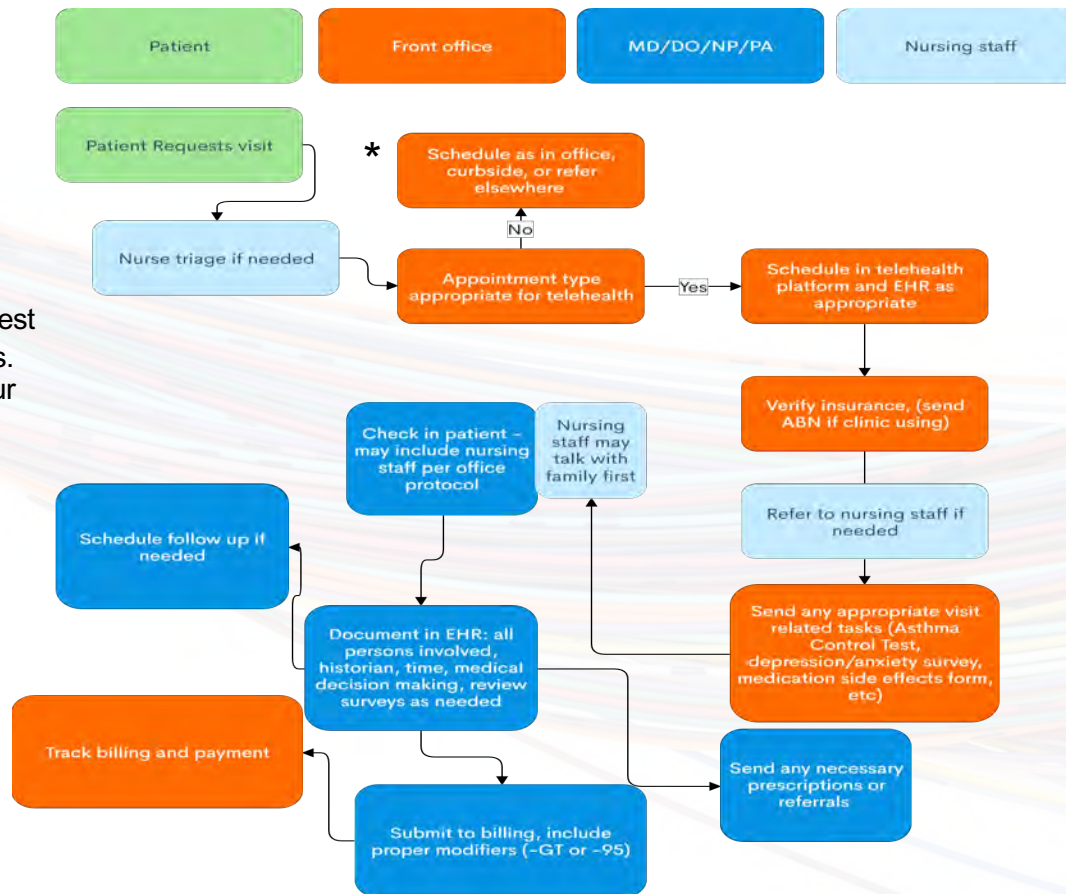
# Disclosure

- I have no relevant financial relationships with the manufacturers(s) of any commercial products(s) and/or provider of commercial services discussed in this CME activity.
- I do not intend to discuss an unapproved/investigative use of a commercial product/device in my presentation.

# Telemedicine

- Synchronous audio-visual means not solely email, phone call, or shared images.





\* Presumes request during office hours. Consider after hour options.

Consider office workflow and base telehealth workflow on that.

Think of each staff's role from scheduling through completion.

# Get Staff Involved

- Survey staff for ideas
- Training
- Communication
- Revisit after a period of time and then regularly

# Scheduling Considerations

Workflow can be very different

- Front office?
- Nursing?
- Can one person take over for another?

On call / after hours?

Telemedicine time block

- Patient scheduling online
- No in office patients scheduled
- Consider need and adjust as needed

Schedule telemed visit and well visit at same time

Calendar Schedule

My ViewOffice View- Overland ParkNURSE ROOMFLU CLINIC

Overland Park

Sun February 14

PROVIDER DAY OFF

Office View- Overland Park

Mon February 15

NO PATIENTS

WALK IN

NO PATIENTS

NO PATIENTS

TELEMED

TELEMED

TELEMED

TELEMED

WELL VISITS

WELL VISITS

SICK VISITS

SICK VISITS

Tue February 16

NO PATIENTS

WALK IN

NO PATIENTS

NO PATIENTS

TELEMED

TELEMED

TELEMED

TELEMED

WELL VISITS

WELL VISITS

SICK VISITS

SICK VISITS

# Preparing for telehealth visits

- When you'll be available for telehealth appointments
- How patients can schedule appointments
- How will audio visual systems be tested prior to the visit
- Are any pre-visit questionnaires needed? How will they be completed and reviewed?
- Who will greet the patient first when they join the visit
  - Front office staff collect insurance and payment information
  - Nurse or medical assistant to ask some initial questions before you join
- How you will support patients with disabilities (hearing or visual impairment) or limited English proficiency
- How you will encourage patient privacy but allow caregiver input
- Notify what to do in case of equipment failure or video disruption



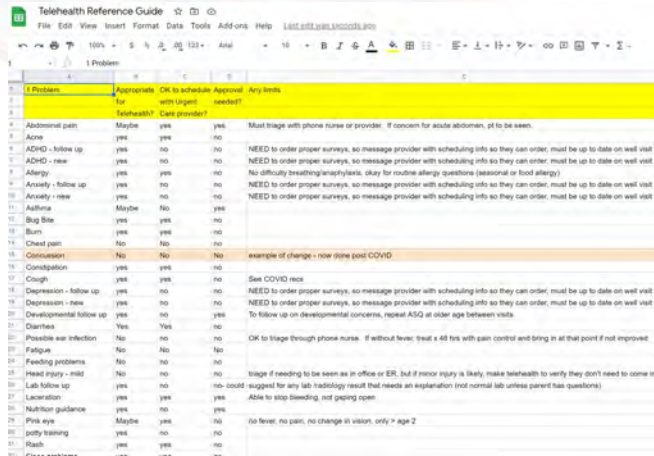
# Conducting telehealth visits

- Identify yourself to new patients
- Confirm the patient's identity
- Create a patient safety and emergency plan in case of a crisis
- Ask if the patient has the privacy they need
- Keep the visit as much like an in-person visit as possible
- Document in medical record, include that it was done through a telemedicine platform



# Types of visits

Individualize for your practice



Problem	Approach	OK to schedule	Approval for urgent	Any limits
1. Problem	Approach	OK to schedule	Approval for urgent	Any limits
2. Abdominal pain	Maybe	yes	yes	Must triage with phone nurse or provider. If concern for acute abdomen, pt to be seen.
3. Acne	yes	yes	no	
4. ADHD - follow up	yes	no	no	NEED to order proper surveys, so message provider with scheduling info so they can order, must be up to date on well visit
5. ADHD - new	yes	no	no	NEED to order proper surveys, so message provider with scheduling info so they can order, must be up to date on well visit
6. Allergy	yes	yes	no	No difficulty breathing/angioedema, okay for routine allergy questions (seasonal or food allergy)
7. Anxiety - follow up	yes	no	no	NEED to order proper surveys, so message provider with scheduling info so they can order, must be up to date on well visit
8. Anxiety - new	yes	no	no	NEED to order proper surveys, so message provider with scheduling info so they can order, must be up to date on well visit
9. Asthma	Maybe	no	yes	
10. Bug Bite	yes	yes	no	
11. Burn	yes	yes	no	
12. Chest pain	no	no	no	
13. Colds/flu	no	no	no	example of change - now done post COVID
14. Constipation	yes	yes	no	
15. Cough	yes	yes	no	See COVID rules
16. Depression - follow up	yes	no	no	NEED to order proper surveys, so message provider with scheduling info so they can order, must be up to date on well visit
17. Depression - new	yes	no	no	NEED to order proper surveys, so message provider with scheduling info so they can order, must be up to date on well visit
18. Developmental follow up	yes	no	yes	To follow up on developmental concerns, repeat ASQ at older age between visits
19. Diarrhea	Yes	Yes	no	
20. Possible ear infection	Yes	no	no	OK to triage through phone nurse. If without fever, treat a 88 hrs with pain control and bring in at that point if not improved.
21. Fatigue	No	No	No	
22. Feeding problems	no	no	no	
23. Head injury - mild	No	no	no	triage if needing to be seen as in office or ER, but if minor injury is likely, make telehealth to verify they don't need to come in
24. Lab follow up	yes	no	no	no - could suggest for any lab results/pt that needs an explanation (not normal lab unless parent has questions)
25. Laceration	yes	yes	yes	able to stop bleeding, not gaping open
26. Nutrition guidance	yes	no	yes	
27. Pink eye	Maybe	yes	no	(no fever, no pain, no change in vision, only > age 2)
28. Dirty nappy	yes	yes	no	
29. Rash	yes	yes	yes	
30. Sick contact	yes	yes	yes	

<http://ow.ly/w1xV50DglQ4>

- Urgent care / acute care
  - URI, cough, COVID questions
  - Rashes, acne
  - Minor injuries
  - Parenting challenges (sleep, behavior, etc)
- Follow up of chronic conditions
  - ADHD
  - Anxiety
  - Asthma
  - Breastfeeding problems
  - Constipation
  - Depression
  - Eczema
  - Sleep problems
  - Weight management
- Medication management
- Test results
- Pre-visit for curbside or in office exams to limit time in the building

# Workflow aides

Available in EHR or Telehealth Platforms

- EHR and telemed platform integration or workarounds
- Telehealth visit templates
  - Telehealth physical exam
- Availability for document sharing and surveys
  - Practice management
    - Advance Beneficiary Notice (ABN)
    - Insurance card
    - Credit card for co pay
    - Consent forms
  - Supporting medical management
    - Images
    - Depression/anxiety screens
    - Medication side effect sheet
    - Vanderbilt
    - Strengths and difficulties questionnaires
    - Social determinants of health
- Visit reminders and link to join visit

**WHERE SHOULD YOU GO?**  
Where is the best place to take care of your child's health issues?

**CERTIFIED CONTENT EXPERT**  
**NCQA**  
**PATIENT-CENTERED MEDICAL HOME**

SCHEDULED VISIT	OUR WALK IN CLINIC	TELEHEALTH WITH US	OUTSIDE URGENT CARE	EMERGENCY ROOM: ER
\$	\$	\$	\$\$-\$\$\$	\$\$\$\$
Medical care at one of our offices includes well visits, sports physicals, mental and behavioral concerns, and most illnesses and injuries. If you want to see a specific physician or nurse practitioner for any well or sick visit, a scheduled appointment is the way to go. Most sports physicals can be combined with your child's yearly check up.	Our walk in clinics are a convenient way for your child to receive care from a familiar face with all of your child's medical records available. We bill at the same rate as typical office visits with the convenience of walking in for illnesses, minor injuries, and moderate difficulty breathing. We do NOT recommend walk in for mental or behavioral health concerns.	Telehealth visits can be used for select issues, such as rashes, pink eye, minor injuries, ADHD, anxiety and depression. Video visits are done through a secure channel, are covered by insurance like office visits, and offer you the convenience of being seen at home or on the go from your laptop or smartphone. Call our office to see if your concern can be handled by video visit.	There are many local urgent care clinics associated with pharmacies or hospitals. Be sure to know the experience of the provider you are seeing. We recommend that you see someone who is specifically trained in pediatric care if possible. We do not recommend these for sports physicals - this form can be completed with your annual well visit in a more cost effective and comprehensive way in the medical home.	Visit the emergency room for life-threatening conditions and concerns that happen after hours and cannot wait until business hours. These include significant difficulty breathing, mental status changes, dehydration, moderate to severe injuries, and illnesses that must be addressed quickly.

# Patient Education

A poster for telehealth visits. At the top, it says 'NOW OFFERING' in white text on a dark background. Below that, 'TELEHEALTH VISITS' is written in large, bold, white capital letters. Underneath, a white box contains the text 'CONVENIENT • EFFECTIVE' in black. The next section, 'WHAT IS THIS', is followed by the text 'SEE ONE OF OUR DOCTORS OR NURSE PRACTITIONERS BY VIDEO FOR FOLLOW UP OF MANY CONDITIONS OR FOR SELECT ACUTE PROBLEMS'. The 'HOW IT WORKS' section lists three steps: '• SCHEDULE AN APPOINTMENT', '• SIGN INTO OUR SECURE VIDEO PLATFORM', and '• WAIT FOR THE PHYSICIAN OR NURSE PRACTITIONER TO START YOUR VISIT'. At the bottom, 'FOR MORE' is followed by 'SEE OUR WEBSITE'S "VIDEO VISIT" PAGE FOR MORE' and the URL 'https://pediatricpartnerskc.com/VideoVisit'.

- Marketing:
  - Availability and how to schedule
  - How payment for co pay will be handled
  - Insurance coverage
  - How to connect
  - Most visits require the patient to be present, just like in the office
- Pre visit:
  - Validate insurance
  - A/V pre-test
  - Pre-visit questionnaires
- After visit:
  - Consider sending resources through portal
  - Schedule follow up

- <https://www.aap.org/en-us/professional-resources/practice-transformation/telehealth/Pages/Getting-Started-in-Telehealth.aspx>
- <https://telehealth.hhs.gov/providers>
- <https://www.ama-assn.org/system/files/2020-04/ama-telehealth-implementation-playbook.pdf>
- <https://www.matrc.org/matrc-telehealth-resources-for-covid-19/>

## Resources



# Coming soon...

**Feb. 23** – Quality Care

**March 23** – Platforms for Telemedicine (and Technical Issues)

**March 30** – Billing, Coding, Reimbursement & Documentation

**April 6** – Confidentiality, Privacy & Etiquette

**April 20** – Practice Management Side (Forms)





# Questions?



# Case Presentation

## Dr. Natalie Sollo, Wichita, KS

### Reason for Case:

- How to increase patient and parent engagement:
  - Patients away from home
  - The parent forgot
  - Child is asleep or playing outside.
- How do we get them to treat this like a real visit?