

Important Content Update Message

We are currently updating the OP Help Center content for the release of OP 20. We appreciate your patience as we continue to update all of our content. To locate the version of your software, navigate to: **Help tab > About**.

Telehealth Well Visits: Practice Guidance

Last Modified on 05/28/2020 1:42 pm EDT

Version 20.3

Please read this complete article **before** accessing the Telehealth Well Visit Template Package **here**.

Overview

Many insurance policies are now paying for child/adolescent Well Visits performed via Telehealth during the COVID-19 public health emergency. In order to facilitate incorporating preventive medicine services performed virtually, the standard Well Visit templates have been adapted for Telehealth use.

The adaptations are critical to appropriate documentation and to withstand an audit, but **there are portions of the Well Visit that remain the responsibility of the practice.**

Before importing well visit templates...

Here are some key things to understand before importing well visit templates:

1. Workflow items will have to be customized to what YOUR practice does at Well Visits.
2. If you have different default ICDs associated with your templates, you may have to alter those imported on the template.
3. If you have customized your Well Visits significantly from the default OP templates, you may decide to remake your own set based on your current Well Visit templates.
4. If you have customized your ages/default minimum ages for your templates, you will have to adjust any imported templates.
5. Be sure to remove/adapt any language that refers to care that is not possible to perform during a Telehealth visit.
6. Consider renaming the visits if you find the current nomenclature (TM-) difficult to find when applying templates or searching for them.
7. Create an Appointment Type for these visits. Understand the "purpose" of the Appointment Type is linked to zones in your calendar. So, you should decide whether you want to schedule Telehealth Well Visits in your usual well zones, or have them separated into Telehealth zones. For example:

Appointment Types	Appointment Zones	Zone Purpose	Patient Tracking Stages	Rooms/Resources	Schedule Tabs	Patient Status
Visit Type	Description	Duration	Sort	Appt Line Color	Department	Purpose
EXTRA TIME SICK	EXTRA TIME SICK VISIT	20	2	Orange	Doctor	Non-Preventive Encounter
EST WELL	ESTABLISHED WELL CHECK-UP	20	3	Aqua	Doctor	Preventive Encounter
EST TEEN WELL	ESTABLISHED TEEN WELL VISIT	30	4	Gray	Doctor	Preventive Encounter
EXTRA TIME WELL	EXTRA TIME WELL CHECK-UP	30	5	Yellow	Doctor	Preventive Encounter
NURSE VISIT	IMMUNIZATION	5	6	Lime	Nurse	Nurse-Only Encounter
NP SICK	NEW PATIENT SICK VISIT	20	8	Red	Doctor	Non-Preventive Encounter
NP WELL	NEW PATIENT WELL CHECK-UP	30	9	Blue	Doctor	Preventive Encounter
NP TEEN WELL	NEW PATIENT TEEN WELL	30	10	Olive	Doctor	Preventive Encounter
PHONE VISIT	PHONE ENCOUNTER	10	11	Yellow	Doctor	Non-Preventive Encounter
VIRTUAL VISIT	TELEHEALTH ENCOUNTER	20	12	Purple	Doctor	Telehealth Encounter
PRENATAL	GROUP PRENATAL VISIT	60	13	Green	Doctor	Consultation
CONSULT	CONSULTATION	20	14	Brown	Doctor	Consultation
GROUP VISIT	OFFICE GROUP VISIT	60	15	Dark Green	Doctor	Consultation
FLU CLINIC	FLU CLINIC	10	20	Purple	Doctor	Flu Clinic
TM WELL VISIT	TELEHEALTH WELL ENCOUNTER	20	21	Purple	Doctor	Preventive Encounter
TM TEEN WELL	TELEHEALTH TEEN WELL	30	22	Purple	Doctor	Preventive Encounter
HOME VISIT SICK	HOME VISIT SICK EXTRA TIME	30	30	Purple	Doctor	Non-Preventive Encounter

8. Add the Visit Type this will be, according to your practice naming convention and consistent with the Appointment Types you created above.

Visit Information

Visit date/time: 05/13/2020 04:08 PM 24h

Date written: 05/13/2020 04:08 PM

Place of service: **Telehealth**

Appointment type: SICK VISIT, EST

Accompanied by: **Mother**

Entered by: 102

Nurse/assistant:

Rendering provider: Hetal K. Dhruva, MD

Supervised by:

Staff chaperone:

Telehealth:

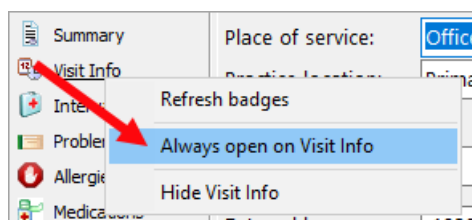
Provider location: Office

Patient location: **Home**

9. It is important to document the following information in the Visit Info window.

- Who is accompanying the patient on the Telehealth visit.
- Provider and Patient location in the Telehealth section. Once the Provider location and Patient location fields are completed, the **Place of Service** field updates to **Telehealth**.

10. Users may find it useful to change their preference to open on Visit Info, by default. This will remind them to complete this information. This can be accomplished by right-clicking on Visit Info in the Window Navigation Panel.



Note: Setting the preference to open on the Visit Info will be applied to all Well Visit notes, and is not exclusive to Telehealth Well Visits.

What's Included in the Templates

1. Wording emphasizing why this Well Visit is being performed via Telehealth:

Virtual Well Visit performed during COVID-19 public health emergency

History reviewed and exam considered with limitations acknowledged due to the nature of virtual visit through a synchronous telecommunications system

- Since the current Well Visits do not have a place for documentation for the “endpoints” of the visit, the following has been included as text in the Interval History: **Telehealth Provider Location: Office or Other***, **Telehealth Patient Location: Home**

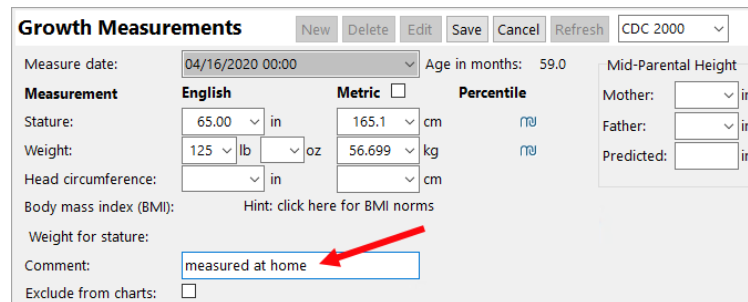
**Providers will need to edit this field to document if they are doing this virtual visit from their office or from their home/other location*

Aligning documentation for Sick and Well Visit templates with this information included in the visit details is being considered for a future release.

- Wording explaining that any vital signs recorded were not taken directly by an office team member has been included in the Plan section.

Any vital signs/growth measurements reported were done so via patient/caregiver measurements and reported to provider, and interpreted as home measurements.

In addition, notation should be made in the Comment section of each vital sign:



Growth Measurements [New] [Delete] [Edit] [Save] [Cancel] [Refresh] CDC 2000

Measure date: 04/16/2020 00:00 Age in months: 59.0 Mid-Parental Height

Measurement English Metric Percentile

Stature: 65.00 in 165.1 cm

Weight: 125 lb 56.699 kg

Head circumference: in cm

Body mass index (BMI): Hint: click here for BMI norms

Weight for stature:

Comment: measured at home

Exclude from charts:

- Wording regarding vaccines in the Plan was changed to include:

which we will arrange to do when safe/appropriate in current environment to do so

- Additional wording regarding when face-to-face would be appropriate was added to the Plan:

Discussed under what circumstances a face-to-face office visit would be appropriate to address any identified problems.

- Wording has been added to document that the provider has:

- Identified what components were missing from a comprehensive preventive medicine visit that was performed virtually
- That those gaps were discussed with the patient/caregiver
- That you have discussed how to close those gaps in the future

Identified gaps from performing comprehensive well visit in virtual environment, discussed with patient/caregiver including how to close those gaps when safe to do so in an in-person follow-up office visit.

- Items of the physical exam that cannot be performed virtually have been removed (for example: checking red reflexes, for hip range of motion, any auscultation or palpation language).

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7. Create an Appointment Type for these visits. Understand the “purpose” of the Appointment Type is linked to zones in your calendar. So, you should decide whether you want to schedule Telehealth Well Visits in your usual well zones, or have them separated into Telehealth zones. For example:

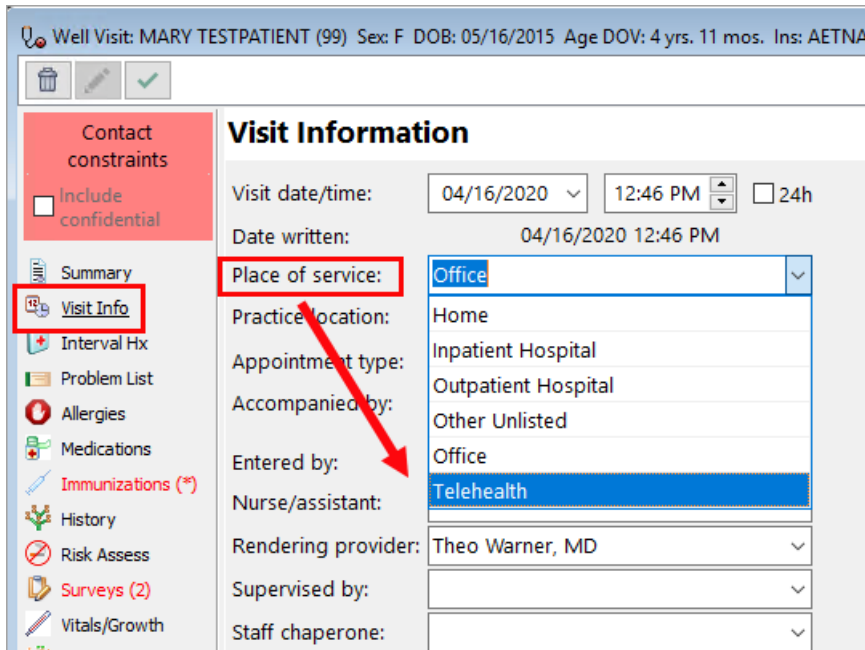
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HOME VISIT SICK	HOME VISIT SICK EXTRA TIME	30	90	Purple	Doctor	Non-Preventive Encounter	



Warning: If your practice is recognized as PCMH or working toward recognition for PCMH, be sure to use the **Originating** and **Distant** Appointment Types so that the Telehealth visits are accurately calculated for AC06.

8. Add the Visit Type this will be, according to your practice naming convention and consistent with the Appointment Types you created above.

- Since there is currently no place on the Well Visit templates to document Place of Service (consideration for future improvement), users will need to remember to document this information on the Visit Info.



Well Visit: MARY TESTPATIENT (99) Sex: F DOB: 05/16/2015 Age DOV: 4 yrs. 11 mos. Ins: AETNA

Visit Information

Visit date/time: 04/16/2020 12:46 PM 24h
 Date written: 04/16/2020 12:46 PM

Place of service: Office

Practice location: Home

Appointment type: Inpatient Hospital

Accompanied by: Outpatient Hospital

Entered by: Office

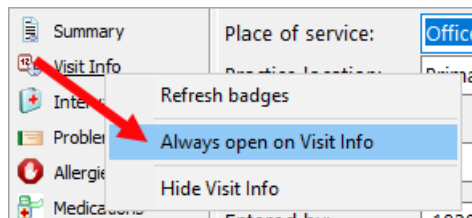
Nurse/assistant: Telehealth

Rendering provider: Theo Warner, MD

Supervised by:

Staff chaperone:

- It is also important to document who the patient is accompanied by in the Accompanied by field of the Visit Information.
- Users may find it useful to change their preference to open on Visit Info, by default. This will remind them to complete this information. This can be accomplished by right-clicking on Visit Info in the Window Navigation Panel. Note, this preference will be applied to all Well Visit notes, and is not exclusive to Telehealth Well Visits.



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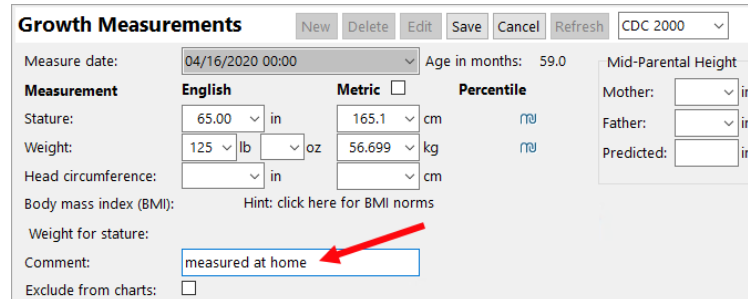
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the Plan section.

Any vital signs/growth measurements reported were done so via patient/caregiver measurements and reported to provider, and interpreted as home measurements.

In addition, notation should be made in the Comment section of each vital sign:



Growth Measurements [New] [Delete] [Edit] [Save] [Cancel] [Refresh] [CDC 2000] [v]

Measure date: 04/16/2020 00:00 [v] Age in months: 59.0 Mid-Parental Height

Measurement **English** **Metric** **Percentile**

Stature: 65.00 [v] in 165.1 [v] cm [v]

Weight: 125 [v] lb [v] oz 56.699 [v] kg [v]

Head circumference: [v] in [v] cm

Body mass index (BMI): [v] Hint: click here for BMI norms

Weight for stature: [v]

Comment: measured at home [v]

Exclude from charts:

Mother: [v] in
Father: [v] in
Predicted: [v] in

4. Wording regarding vaccines in the Plan was changed to include:

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