



**Epic Community Connect**

**Tips & Tricks Title:** How to Schedule Telephone E&M Encounters

**Application:** Prelude/ Cadence

**End User Support:** Front Desk

**Date Created/Updated:** 3/26/2020, Version 1



## Background

Notification was sent out Tuesday, 3/17/20, from CMS that Telephone Encounters, now called "Virtual Phone Check-Ins" will be reimbursed with no cost sharing to patient. Within Epic, these encounters are referred to "Telephone E&M Encounter" or "Scheduled Telephone E&M Encounter." This tip sheet outlines the front desk scheduling workflow for the Epic Scheduled Telephone E&M Encounters.

CMS Definition of Virtual Phone Check-Ins: A brief (5-10 minutes) check in with your practitioner via telephone or other telecommunications device to decide whether an office visit or other service is needed. A remote evaluation of recorded video and/or images submitted by the patient. This is only available to established patients, should be patient initiated, and cannot result from or lead to an E/M service.

Please be sure to reference current CMS guidelines for up to date information regarding these services.



## Try It Out

### SCHEDULING A PATIENT WITHOUT AN EXISTING APPOINTMENT

**STEP 1:** From the Make Appointment activity, schedule an appointment using the "Virtual Phone Check In-Est Pat" visit type.

**Make Appointment**

Department: HFCC FAMILY PRACTICE [2060010001] Appt notes:

Visit type: Ex/Dx Provider or resource:

VIRTUAL PHONE CHECK IN-EST PAT [21062]

ZZAP, MD, MD [E1073] in HFCC FAMILY PRACTICE [2060010001]

**STEP 2:** Once the time slot has been selected, the visit length will display by default based on your department’s schedule. The length of the visit can be manually updated as needed in the field high-lighted below. Select Schedule.

Date	Provider	Arrive By	Appt Time	Len
3/26/2020	ZZAP, MD [E1073] in HFCC FAMILY PRACTICE [206001000]	7:00 p	7:00 p	15

## CHANGING AN EXISTING APPOINTMENT

**STEP 1:** From the appointment desk, right-click on the patient’s upcoming appointment.

**Patient Summary (Edit)**  
**Test, Amelia**  
 345 Flyer Rd  
 Jackson MI 49201

Reg Status: Update  
 SSN: xxx-xx-9999  
 Home: 517-555-2635

Acct Status: [Preve](#)  
 DOB: 7/4/1967  
 Preferred Language:  
 Mobile:

Preferred Name: Test, Amelia (52 yrs)  
 Temporary Address:

**Guarantor Accounts**

Account Name	Acct Ver Status	Acct #	Serv Area	Type
Test,Amelia	Elapsed	418881	CHASS	P/F
Payor/Plan	Cvg Ver Status	Subscriber		
MEDICAID/MEDICAID	Message Sent	Test,Amelia		

**Future** | Admissions | Past

Encounter	Date	Time	Appt Visit Type	Provider	Dept	Contact #	Appt Notes	ORD	RFL
	3/26/2020	Thu 7:00 P	30 OFFICE VISIT [20002]	ZZAP, MD [E1073]	HFCC FAM [2060010001]	39			

**STEP 2: Select Change Appointment.**

The screenshot shows the 'Appointment Desk' interface. At the top, there are navigation icons for 'Make Appt', 'Walk In', 'Schedule', 'Request', 'Reports', 'Patient Options', 'Printing', 'Referral Entry', and 'New Rg'. Below this is the 'Patient Summary' for 'Test, Amelia', including her address (345 Flyer Rd, Jackson MI 49201) and preferred name. A context menu is open over the appointment table, with 'Change Appointment' highlighted in red. The appointment table shows an appointment on 3/26/2020 at 7:00 PM for 30 minutes, with visit type 'OFFICE [20002]' and department 'HFCC FAM [2060010001]'. Other menu options include 'Check In', 'Cancel Check In', 'Check Out', 'Sign In', 'Cancel Sign In', 'Cancel/Reschedule', 'Add Appt to Wait List', 'Reg Appointment Contact', 'Edit Appointment Info', 'Edit Appointment Notes', 'Edit EOD Status List', 'No Show/Reschedule', 'Order Entry', and 'Order Review'.

**STEP 3: Update the Visit Type to “Virtual Phone Check In-Est Pat.” Additional information such as visit length and appointment notes can also be updated. Select Change.**

The 'Change Appointment' dialog box is shown. It includes a checkbox for 'Use patient preferences' and a 'Current department' dropdown set to 'HFCC FAMILY PRACTICE [2060010001]'. The 'Visit type' dropdown is set to 'VIRTUAL\_PHONE\_CHECK\_IN-EST\_PAT [21062]'. Other fields include 'Date' (3/26/2020), 'Arrival time' (07:00 PM), and 'Start time' (07:00 PM). A 'Notes' text area is present. Below is a table with columns for Department, Provider, Time, and Length. The table contains one row: Department 'HFCC FAMILY PRACTICE [2060010001]', Provider 'ZZAP, MD [E1073]', Time '07:00 PM', and Length '30'. There are 'Add Row' and 'Delete Row' buttons. At the bottom, there are 'Change reason' and 'Comments' fields, and 'Change', 'Manual', 'Undo', and 'Cancel' buttons.

**STEP 4:** Accept the appointment change confirmation.

