

Phone Visit Guidelines for Residents in Primary Care – Clinic A v4.29.2020

- **General Guidelines**
 - Prechart
 - Review your preceptor/MA pairing (Dr Soleymani will be sending out emails with this information)
 - Log onto Zoom promptly at the beginning of the session and join the huddle
 - Zoom meeting ID: 458 691 888; Link: <https://zoom.us/j/458691888> Password: ov im
 - Review preliminary plans for patients and discuss any *questions* with preceptor prior to calling patients
 - Call patient, confirm 2 identifiers (i.e. name, DOB), obtain HPI, document length of call
 - See below regarding how to use interpreter service and block your number.
 - Discuss plan with patient as previously discussed with preceptor.
 - If patient has new concerns, get history, place patient on hold, discuss with preceptor, then convey plan to patient.
 - Don't put amb com orders or other orders to MA from chart. **Only use Orchid Message to assigned MA for communication**
- **Check in**
 - MAs/clerks will check in all phone visit patients at the beginning of the session
- **Medications**
 - Document Med by Hx and complete Medication Reconciliation.
 - Refill all medications. If unlicensed, remind preceptor to do refills.
 - Consider refill for 1 year (e.g. 3 months with 3 refills) if stable dosing and appropriate labs are up to date
 - For Mail Delivery of Medications from OVMC:
 - Put "**mail Rx today**" (for new meds or refill that pt needs now) or "**mail when due**" (for refills needed later) into the **eRx Note to Pharmacy** -- include this for **EACH** medication
 - Patients can f/u with pharmacy at 747-210-3066 if any issues
- **Labs**
 - If ordering labs, instruct patients when to go to lab
- **Imaging:**
 - Instruct patient to call Rad Dept (747-210-4086) to schedule.
- **Visit Charge**
 - Select appropriate "Telephone/Electronic" visit charge based on time spent on phone with patient
- **Clinic Follow Up Appointment**
 - **Note that we are not booking ANY face-to-face visit appointment with residents (even for f/u) at this time.**
 - You can send Orchid message your assigned MA and CC your preceptor requesting to book for:
 - Phone visit follow up until end of academic year 6/23/20—*MA will use resident resource*
 - Urgent face to face visit in _(within 1 week) for _, approved by preceptor—*MA will use Urgent MD/NP resource*
 - RN phone visit for glucose log check or BP check (if patient has access to BP machine at home)
 - RN face to face visit for BP check (for SBP >160)
 - **Otherwise instruct patients to call 747-210-8000 for any future urgent issues or to make future app as recommended.**
- **Note**
 - Note template: "Phone Visit Note"
 - Note type: "Adult primary care Outpatient Provider Note"
 - Note title: Phone Visit Note - Clinic A Primary Care
- **Check out**
 - After completing visit, go to your home screen and Left Click on "Status" column and click "Check out"
- **No Show**
 - Please call patients back multiple times during the session .
 - If no success, go to your home screen and Left Click on "Status" column and click "No Show"
 - Send "No Show/Broken Appointment" Orchid message to assigned MA (and cc preceptor) with your instructions:
- **Interpreter Set up Instructions**
 - If provider setting up conference call with patient/interpreter from OV phones
 - Call the patient first, have them hold (and press hold button)
 - Press "New Call", dial interpreter line (747-210-3298) and get a hold of your interpreter
 - Click on the conference button (image of 3 people), then click on button to resume call with patient
 - If asking Interpreter services to conference call with provider/patient
 - Dial 747-210-3298 to reach interpreter services
 - When call is answered, press 0 (don't select a language)
 - Provide operator with requested language, your name and department. (access code is not needed)
 - Provide patient's name and telephone number and ask the operator to connect you
- **How to block your number**
 - Dial *67, then phone number to block your number

- Use Doximity App and choose Olive View PAC number 747-210-8000 as the outgoing number