

## INSTRUCTIONS FOR PREPARING A VIDEO PATIENT "ROOMING PROCESS"

1. Start new encounter (encounter time will not match appt. time like it does with office appts.)
2. Choose Visit Type=Non Face to Face from pop up box
3. Click the blue link "Non Face-to-Face Visit Details" found on SOAP/Intake/Home Page upper left corner
4. Choose Tele and Video bullet
5. Choose Room (Iowa or Illinois) your location
6. Click Send SMS to send text message to pt. to start the video visits (click on the phone number to see more phone number options if there is a special request to use another phone number, for example if the spouse has the smart phone and is listed as an alternate number.
7. Once video is connected on the doxy.me tablet, verify the pt. name and birthdate (If there is no response after 2 texts and a phone call, it will be a "no show".)
8. Verify the pt's location and fill in the state of pt. and provider (do not proceed if outside of the states IA/IL)
9. Obtain verbal consent for the video visit and check off box
10. Click blue button to Check In Appt.
11. Verify insurance in top toolbar (if different, must notify reception staff ASAP after visit to update)
12. Click Demographics link in the top toolbar to verify/update preferred pharmacy
13. Click Advance Directives to verify Living Will/POA etc. (Click Reviewed under Status)
14. Go to Intake tab
15. Verify/update Allergies and Click one of these: No known allergies, Reviewed- updated, Reviewed- no changes. If a change needs to be made, click the Update button or open the Allergy module with the flower pollen icon on top toolbar.
16. Review and reconcile medications and Click one of these: No medications this encounter, Medications reconciled. If a change needs to be made, click Add/Update button, or open the med module with the red RX icon on top toolbar.
17. Go to Histories tab
18. Review Medical Surgical history (any changes since seen last), update as needed
19. Family History, update as needed
20. Social History- Click Add button. Review Tobacco, update. Click Reviewed box.
21. Review/update alcohol/caffeine use.
22. If home BP or weight was done, enter in Vital Signs (found on Intake or SOAP)
23. Proceed with normal Provider visit- assessment, documentation, billing