updox How to incorporate Telehealth into your daily workflow

STEPS	TRADITIONAL	TELEHEALTH
Schedule appointment	Office Staff collects patient information and schedules visit.	Office Staff collects patient information and schedules visit.
		Office Staff notates in scheduling system that appointment will be performed via Video Chat and patient's contact email address or cell phone number.
	Office Staff sends information to patient to prepare for visit. Appointment reminder Forms to complete	Office Staff sends information to patient to prepare for visit. Appointment reminder Forms to complete Video Chat Patient Quick Guide
Check-in	Office Staff welcomes patient and verifies patient information and appt time. Office Staff collects insurance, payment, paperwork, and patient consent. Office Staff notifies clinical staff that patient has arrived.	Not applicable; occurs during other steps.
Rooming the Patient Video Chat The bits series to your Property of the Charles Under the property of the Charles Welcome to your private video cha To get started, use the salehar to sand.	Clinical Staff brings patient to room.	Clinical Staff sends Video Chat invitation to patient.
	Clinical Staff completes patient intake and documents in EHR. • Medical history • Screenings or questionnaires	Clinical Staff completes patient intake and documents in EHR. Consent to treat Medical history Screenings or questionnaires

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Conduct Visit	Provider enters the patient room.	Provider sends Video Chat invitation to patient.
Remarks of the fact of the fac	Provider conducts visit and documents in EHR. •	Provider conducts visit, documents in Updox using notes and screenshots, and/or documents in EHR.
	Provider concludes visit and notifies staff visit is completed.	Provider ends Video Chat and sends Video Chat summary to Updox Inbox.
Check-out Your chat has ended Surroay West storage of the control of the contr	Office staff checks out patient and if applicable, schedules follow-up appointment, collects payment, and shares paperwork.	Office staff sends VC summary to EHR and if applicable contacts the patient to schedule follow-up appointment, collect payment and/or share paperwork.