**Convert Appointment to Phone Visit**

Pull up the schedule for the day you are working on.

Highlight the patient and open their appointment desk

Contact patient via telephone to inform of change to phone consult \*\*\* see script below

If they refuse phone consult, then cancel or reschedule appointment for future dates

If they confirm phone consult, then right click on the appointment and select change appointment

Change visit type to “Phone Consult [219]” and then select change and accept

Confirm patient’s demographics and contact information – this will be the phone number used to call patient at the time of their scheduled phone consult - then accept.

Update appointment notes to include number to contact patient

Review patient insurance information and make any needed updates and hit finish

**Script for Phone Consult Conversion**

May I speak with {patient}?

This is {your name} from {your office}. I was calling about the appointment we have scheduled for you to see {DR} on {date} at {time}. With the recent threat of the coronavirus and the CDC’s recommendation for distancing ourselves from others, we need to get your follow up appointment changed over to a phone consult rather than having you come into the office. Just so you are aware, your insurance will be billed for the consult with your provider over the phone. Your insurance may charge copays or coinsurance for these visits; however, most have waived these charges because of the current situation.

🡪Patient says ok – move forward

🡪Patient says no thanks – cancel or reschedule, sir/ma’am, I can reschedule your appointment; however, I can’t promise that we won’t have to change that one to a phone consult also. Are you sure you don’t want to go ahead and talk to the provider on {appt date}?

I need to verify your information because on the day of your appointment, we are going to call you at the number you give us to begin your appointment. Can you please verify what number we should call to reach you? Remember this is the number that the provider will be talking to you on so you need to be available to answer.

🡪Update to make sure phone number in their chart is the number they want you to call. Edit the appointment notes to include the phone number that needs to be used on the date of the appointment.

Thank you for your understanding. We will talk to you soon.

**Day of Visit – Front Desk**

Confirm visit type is phone consult. If not, refer to “Convert Appointment to Phone Visit” instructions

Call patient at the time of the phone consult (verify nurse/provider is ready to perform consult)

Select Check In once patients answers

* Have patient verify 2 identifying demographic points to confirm the correct patient is on the line (DOB, last 4 of SSN, etc)

Complete the check in process as normal (during COVID-19 measures, most copays are waived so do not collect except for on old balances)

Transfer call to nurse (speak with nurse directly to verify they are on the line before completing transfer)