Documenting and Billing Phone/Telehealth Visits in NextGen – Instructions with Images

Confirm visit before opening a telehealth template

- Wait to set up a visit template until you have made contact and confirmed that the patient is able to participate in a full televisit.   (To count as a visit, the call needs to go 11 minutes or longer.)
- If you can't reach the patient or will not do a telehealth visit, use a Communication Template to document discussion, plans, or concerns, as needed.

Set up the visit template

- Click on the encounter (folder icon) with the date of today's visit.
- If you do not see an encounter folder – check with an attending to make sure your NextGen viewing settings are correct. Do not create a new encounter folder.
- Click the template icon at the bottom of the Patient History pane and select Telehealth.
- Choose Telehealth from the Visit Type drop-down list.*

    * To add Telehealth to your list of Preferred templates, go to Tools – Preferences at the top of the page. Click on the Templates tab. Select Telehealth and use the green add arrow to include it on your list. Click Apply or OK.

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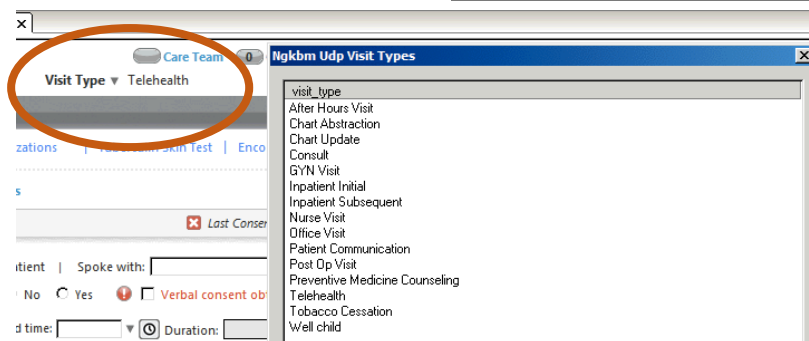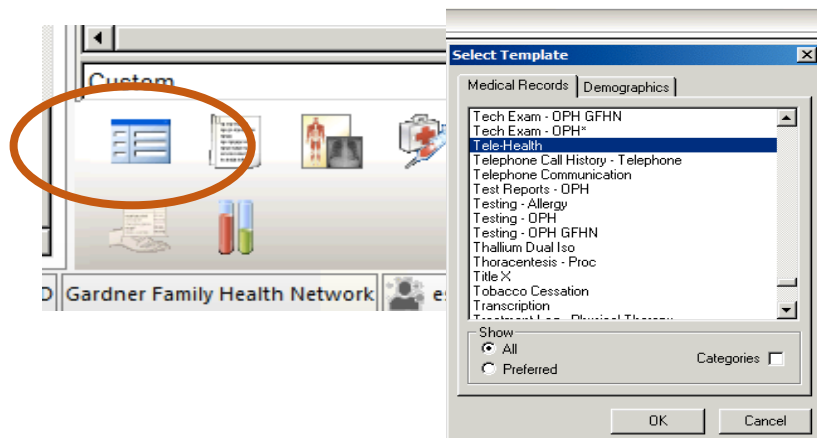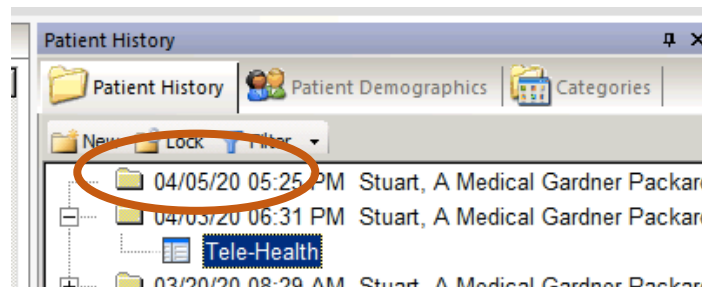
Complete the General section
- Established vs. new patient
- Video yes/no
- Consent for telehealth
- Click the clock icon to record the visit start time.   When you finish the visit, click the clock icon to enter the visit end time. This is needed for billing.
- If entering times manually, use standard time (non-military) and include AM or PM.

Begin documenting as you usually would
- For modified WCC calls, the starburst icon should bring up the usual list of templates, even though the visit is marked Telehealth.
- If the GPCHC WCC templates are not available, change the visit type temporarily to Well child, select a WCC template, then change the visit type back to Telehealth.
- If using WCC templates, please be sure to DELETE SECTIONS NOT DISCUSSED

Submit finished chart/note to attending:
- After documenting, go to the Provider Sign-off section at the bottom of the Telehealth template
- Click Submit to Supervising provider for review – select the correct attending's name, add it to the Task Recipients field, and click OK.
- Your note will generate automatically.
- Do not use the E&M coding button. It will create a Finalize billing template and a redundant note.

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Converting from telehealth to in-person

- If you start a visit as Telehealth and need to bring the patient in for an in-person encounter, speak with one of the nurses or front desk staff to set up the in-person encounter.
- Use a telehealth template to document the telehealth part of the visit.
    - In the HPI section– document that the patient was brought in for an in-person encounter.
    - Submit to the attending for billing.
- For the in-person visit, use a SOAP template to document.
    - Make sure that Office Visit is selected as the encounter type in the drop-down list.
    - Submit to the attending for billing when you are done.

What to if you don't really have a complete telehealth visit

	Did not reach patient at all OR very brief contact without discussion of concerns	Discussed patient concerns, but did not need 11 minutes	Decision to convert to in-person visit
Resident, student	Open a **communication template** in a NEW encounter folder, separate from the encounter folder that has been set up by the front desk. Document your attempt to call Change the patient status to NO SHOW	Document as usual, including start and end times for the visit	See above - Document telehealth in Telehealth template; Document in-person in SOAP. Submit both to attending for billing.
Attending	No billing	Submit telehealth template billing • Click the blue Additional Codes • Select G0071 • Click Submit Code, then Save and close	Submit telehealth template billing for initial telehealth visit • Click the blue Additional Codes • Select G0071 • Click Submit Code, then Save and close
Attending of the day	Confirm status has been changed to NO SHOW		

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