

Southwestern Health Resources



Documenting Virtual Visits in eClinicalWorks

There are two ways to document a “virtual visit” within eClinicalWorks. The **first way** is via the TeleHealth Visit feature within eCW via the Healow. Please note that there is an additional fee to utilize this service as well as additional setup required.

The **second way** is to utilize the “virtual visit” option within a telephone encounter. There is no additional fee to utilize this option, and no setup is required. Simply review the screenshots below, and you can begin documenting at no additional charge.

**If you do not use eClinicalWorks and use another EMR, please use the screenshots below as well as the video as a reference for proper documentation per CMS guidelines for appropriate reimbursements. However, your workflow for documentation will be different. If you have questions on how to recreate the workflow below in your current EMR, please reach out to your vendor.*

PLEASE NOTE: Medicare refers to these visits as either Telehealth Visits or Virtual Check-ins. Virtual Check-ins are brief check ins (5-10 minutes) over telephone or other telecommunications device and are patient initiated. Both Telehealth visits and Virtual Check-ins need a verbal consent from patient to be documented in the note.

Step 1: Open a new telephone encounter from the patient's hub

The screenshot displays the Patient Hub interface for a patient named ZZZTEST, ACO 72Y, F. The interface includes a navigation sidebar on the left with icons for Labs, DI, Procedure, Imm/T.Inj, Referral, Allergies, Encounters, CDSS, Rx, and Notes. The main content area is divided into several sections:

- Patient Information:** Shows the patient's name, address (123 ANY STREET, DALLAS, TX-75253), phone number (555-555-5555), email (karen.oduwole@utsouthwestern.edu), and date of birth (06/29/1947). It also lists Account No: 36666, Web Enabled: Yes, healow Tracker Data: No, and MRN: 91753480.
- Advanced Directive:** Lists Insurance, PCP (Willis, Amy), and Rendering Pr.
- Billing:** Displays Patient Balance (\$0.00), Collection Balance, Account Balance (\$0.00), Collection Status, and Assigned to. It includes buttons for Billing Alert, Guarantor Balance, Account Inquiry, and Billing Logs.
- Structured Data:** A table listing various patient attributes such as Veteran, Seasonal, Migrant, Homeless, Limited English Proficiency, Public Housing, Disability, and Hearing Impaired.
- Summary Metrics:** A grid of circular icons representing counts for Labs (0), DI (0), Referrals (0), Actions (0), Tel Enc (2), Web Enc (0), Docs (1), and P2P (0).
- Appointments:** Shows the Last Appointment (03/23/2020 03:30 PM) at UT Southwestern Medi, with fields for Facility, Next Appointment, and Facility.
- Action Buttons:** A row of buttons for Progress Notes, Patient Docs, Action, New Tel Enc, Medical Summary, Devices, Logs, New Web Enc, Medical Record, Consult Notes, Letters, and Send Message.

[Type here]

Step 2: Fill in information at the top, and then click on 'Virtual Visit'

Telephone Encounter

ZZZTEST, ACO ,72Yrs FEMALE 06/29/1947 Yes RxElig: Acc#: 36666 555-555-5555

Answered By	z zzEvans, Jaclyn, UT	Date/Time	03/23/2020 03:47 PM	Facility	UT Southwestern Me
Caller	Patient	Assigned To	z zzEvans, Jacly	Pharmacy	
Reason	Cough	Provider	Willis, Amy AW	Status	<input checked="" type="radio"/> Open <input type="radio"/> Addressed <input type="radio"/> Addressed and Docs Reviewed
<input type="checkbox"/> High Priority					

Messages Rx Labs/DI Notes Addendum Log History **Virtual Visit**

Messages ab ... Complaints

Action Taken ab Messenger Reply to Patient Time Stamp Action Taken

Step 3: Click on Progress Note at the bottom of the screen, and a full view of the progress note will open as if you were seeing the patient in office.

Telephone Encounter

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<input type="checkbox"/> High Priority					

Messages Rx Labs/DI Notes Addendum Log History **Virtual Visit**

Fax

Patient: ZZZTEST, ACO **DOB:** 06/29/1947 **Age:** 72 Y **Sex:** Female **Telephone Encounter:**
Phone: 555-555-5555 **Primary Insurance:** Self Pay
Address: 123 ANY STREET, , DALLAS, TX-75253
Encounter Date: 03/23/2020
Provider: Amy Willis TEST

Answered by z zzEvans, Jaclyn UT Date: 03/23/2020
Time: 03:47 PM

Print Script Send Rx Print Report **Progress Note** Document OK Cancel

[Type here]

Step 4: Document the encounter as you would an in office visit.

ZZZTEST, ACO , 72 Y , F INFO HUB ASK EVA

123 ANY STREET , DALLAS, TX75253
06/29/1947 | 555-555-5555
karen.oduwole@utsouthwestern.edu

Wt: 12/10/19:130 lbs.
Appt(L): 03/23/20 (AW)
PCP: Willis, Amy
Lang: Spanish
Trans: Yes

Ins: Self Pay
Acc Bal:\$ 0.00
Guar: ACO ZZZTEST
Gr Bal: \$0.00

Medical Summary CDSS Labs DI Procedures Growth Chart Imm T.Inj Encounters Patient Docs Flowsheets Notes Patient

CP [Icons] 03/23/2020 Cou... UpToDate

Subjective:
Chief Complaint(s):
Cough

HPI:

Current Medication:

Medical History:

Allergies/Intolerance:

Gyn History:

OB History:

Surgical History:

Hospitalization:

Family History:

Social History:
ROS:

Step 5: There is a billing section of the progress note as well. Please check with your billing company on how to properly code these visits.

Billing Information:

Visit Code:

Procedure Codes: