

Phone Visit Guidelines for Residents in Primary Care (MV)

- **General Guidelines**
 - Pre-chart
 - Check in with your CMA at **(818) 627-3268 (Do not give this number to patients)**
 - If teleworking, log onto Teams promptly at the beginning of the session to meet your attending
 - OV IM Preceptorship → Primary Care @MV
 - Review preliminary plans for patients and discuss any questions with attending prior to calling patients
 - Call patient, confirm 2 identifiers (i.e. full name, DOB), document length of call
 - See below regarding how to use interpreter service and block your number.
 - Conduct visit (HPI, med reconciliation, create problem list for this visit) then place on hold and discuss with attending
 - Discuss plan with patient and complete visit
- **Check in:** CMAs/clerks will check in all phone visit patients at the beginning of the session and proceed with an intake. If you are going to start calling a patient before the CMA has done the intake, please notify your CMA that you are doing so.
- **Medications**
 - Document Med by Hx (if the CMA has not already done so) and complete Medication Reconciliation.
 - Refill all medications (so patient does not have to call/come in for refills). If unlicensed, remind attending to do refills.
 - Pharmacy preference is for mail delivery at MV. Patient to f/u the status by calling pharmacy at **(818) 904-5500**
- **Labs:** If ordering labs, instruct patients when to go to lab. Remind them no appointment is needed.
- **Imaging:** Explain to patient whether they need to come to clinic (for plain films) or call to schedule. (If non-urgent, radiology will generally call patient to schedule)
- **Visit Charge:** Select appropriate “Telephone/Electronic” visit charge based on time spent on phone with patient
- **Clinic Follow-Up Appointment**
 - Order Clinic f/u for appropriate time frame (specify In Person or Phone Visit). CMA will call patient back to schedule if within 5 weeks. If f/u is longer, instruct patient to all back for appointment at **818-627-3000**
- **Documentation**
 - Note type: “Adult Primary Care Outpatient Provider Note”
 - Note title: Delete the title and rename it “MV IM Phone Visit”
 - Note template: “Phone Visit Note”
- **Check out:** After completing visit, go to your home screen and left click on “Status” column and click “Check out”. CMA’s will only call patient again if you need them to provide patient with instructions you were unable to give. Send “Amb Com” with your instructions to CMA.

- **No Show**
 - Please call patients around time of appt and call multiple times during the session (increases chance of them picking up)
 - If no answer, leave voicemail that you will call back.
 - If no success after multiple attempts, go to your home screen and left click on “Status” column and click “No Show”
 - Send ORCHID message to assigned CMA and choose “**Patient Scheduled as Phone Visit: patient not contacted**” from drop down menu and document your attempts to reach patient, messages left and instructions to the CMA:
 - Call patient and schedule for another phone visit *or*
 - Send a letter of missed appointment and ask patient to call us for phone visit *or*
 - Wait for patient to call for appointment

- **Interpreter Set up Instructions**
 - If asking Interpreter services to conference call with provider/patient
 - Dial **(855) 887-3354** to reach interpreter services
 - Once interpreter on the line, ask them to call the patient and they will conference you in once they’ve reached the patient.
 - If patient does not answer, instruct interpreter to leave voicemail that you are calling for phone visit and will try again later.
 - If interpreter unable to set up conference call, call CMA to set up conference call with interpreter and patient.

- **How to block your number**
 - Dial *67, then phone number to block your number
 - Use Doximity and choose Mid-Valley main number 818-627-3000 as the outgoing number