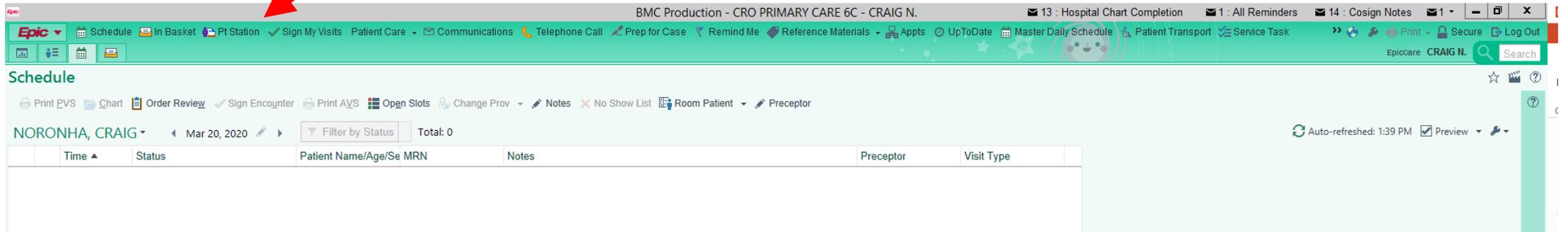


# How to schedule own tele- health visits

Craig Noronha

# Step 1 - Go to patient station



The screenshot displays the Epic EHR interface. At the top, the browser title bar shows "BMC Production - CRO PRIMARY CARE 6C - CRAIG N.". Below this is the Epic navigation bar with various icons and labels: Schedule, In Basket, Pt Station, Sign My Visits, Patient Care, Communications, Telephone Call, Prep for Case, Remind Me, Reference Materials, Appts, UpToDate, Master Daily Schedule, Patient Transport, and Service Task. A red arrow points to the "Pt Station" icon. The main content area is titled "Schedule" and shows a patient selection dropdown for "NORONHA, CRAIG" and a date of "Mar 20, 2020". Below this is a table with columns for Time, Status, Patient Name/Age/Se MRN, Notes, Preceptor, and Visit Type. The table is currently empty. The interface also includes a search bar, a "Filter by Status" button, and a "Total: 0" indicator.

BMC Production - CRO PRIMARY CARE 6C - CRAIG N. | 13 : Hospital Chart Completion | 1 : All Reminders | 14 : Cosign Notes | 1

Epic | Schedule | In Basket | Pt Station | Sign My Visits | Patient Care | Communications | Telephone Call | Prep for Case | Remind Me | Reference Materials | Appts | UpToDate | Master Daily Schedule | Patient Transport | Service Task | Print | Secure | Log Out

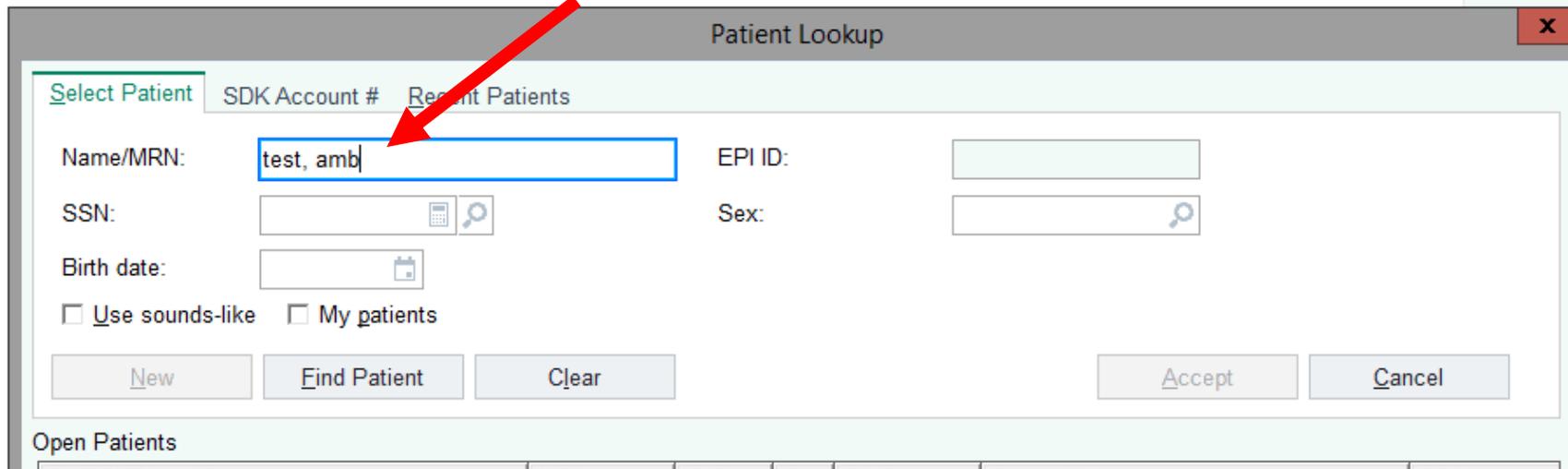
Epicare CRAIG N. Search

Schedule | Print EVS | Chart | Order Review | Sign Encounter | Print AVS | Open Slots | Change Prov | Notes | No Show List | Room Patient | Preceptor

NORONHA, CRAIG | Mar 20, 2020 | Filter by Status | Total: 0 | Auto-refreshed: 1:39 PM | Preview

Time	Status	Patient Name/Age/Se MRN	Notes	Preceptor	Visit Type
------	--------	-------------------------	-------	-----------	------------

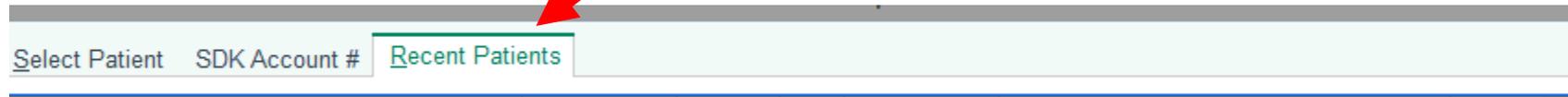
# Step 2- type in patient name



The image shows a software dialog box titled "Patient Lookup" with a close button (X) in the top right corner. The dialog has three tabs: "Select Patient" (which is selected), "SDK Account #", and "Recent Patients". The "Name/MRN:" field contains the text "test, amb" and is highlighted with a blue border. A red arrow points from the top left towards this field. Other fields include "EPI ID:", "SSN:" (with a calculator icon), "Sex:" (with a magnifying glass icon), and "Birth date:" (with a calendar icon). There are two checkboxes: "Use sounds-like" and "My patients", both of which are unchecked. At the bottom, there are five buttons: "New", "Find Patient", "Clear", "Accept", and "Cancel". Below the buttons is a section labeled "Open Patients" with a table that is partially visible.

Open Patients	
.....	.....

Step 2- You can also use the “recent patients” section



# Step 3- select your patient

Patient Select

Search Criteria  
Name/MRN: Test, Amb

Match	Patient Name	MRN	Birth Date	Legal Sex	Street Address
17.12	TEST,AMB TWO	4006382	2/23/1959	F	45 OAK LANE, MILTON VILLAGE MA 02187
16.63	TEST,AMBONE	4119270	6/3/1978	F	54 WEST ST, WEYMOUTH MA 02188
15.84	TEST,AMBER J	3919502	5/22/1975	F	720 harrison ave, BOSTON MA 02118
15.84	TEST,AMBPATIENT A	4028366	3/23/1968	F	12 BLOCK ST, BOSTON MA 02118
15.84	TEST,AMBPATIENT A	4031265	4/5/1956	F	22 WEST ST, WEYMOUTH MA 02188
15.84	TEST,AMBPATIENT B	4028368	4/5/1964	M	33 SUNSET RD, WEYMOUTH MA 02188-0000
15.84	TEST,AMBPATIENT B	4031267	3/21/1981	F	44 WESTERN AVE, WEYMOUTH MA 02188
15.84	TEST,AMBPATIENT C	4028373	8/3/1956	F	77 SUNSET STRIP, WEYMOUTH MA 02188-0000
15.84	TEST,AMBPATIENT C	4031269	3/1/1967	M	453 OAK ST, WEYMOUTH MA 02188
15.84	TEST,AMBPATIENT D	4033362	3/5/1978	M	65 YELLOW RD, BOSTON MA 02128

results loaded: 20

 **Test, Amb Two - 4006382**

-  Born 2/23/1959
-  61 y.o. Female
-  45 OAK LANE  
MILTON VILLAGE MA 02187
-  617-665-5442 (H)
-  No e-mail address on file
-  Heidi Auerbach, MD

SSN: xxx-xx-4434  
Language: English  
Ethnicity: No - Not Hispanic or Latino  
Race: Black / African American

Select Go Back

# Step 4- select "make appt"

own Admit Date: None Infection: None CrCl: None BH Carve Out: No Covera...

Last refreshed: 3/20/2020 1:46:52 PM

Legend Refresh Filter **Make Appt** Appts Review FYI Referral Entry

Some encounters may be hidden based on applied filters. Adjust Filters Reset Filters Hide Message

Encounter	Hosp Acct	Episode	Order	Encounter	Status	Date	Time	Location	Provider	Reason
Admission				03/07/2019 2333	Discharged	03/07/2019	2333	MOA PRE-OP	Daniel Newman, MD	DOWNTIME TEST PA
Surgery (Voided)				03/08/2020 0015	Voided	03/08/2020	0015	MOA OR	Peter Burke, MD	**Canceled** EXPLOI
Admission				02/09/2020 0015	Discharged	02/09/2020	0015	MOA OR	Daniel Newman, MD	test
Surgery (Voided)				02/09/2020 0015	Voided	02/09/2020	0015	MOA OR	Peter Burke, MD	**Canceled** LAPAR
Admission				11/10/2019 0013	Discharged	11/10/2019	0013	MOA OR	Daniel Newman, MD	test
Surgery (Voided)				11/10/2019 0013	Voided	11/10/2019	0013	MOA OR	ANESTHESIA OFFSITE	**Canceled** FACET
Orders Only				10/14/2019 1254		10/14/2019	1254	YAW PEDI DBP	Bmc Tdrdoc1	Appointment
Surgery (Voided)				10/13/2019 0937	Voided	10/13/2019	0937	MOA OR	Jeffrey Kalish, MD	**Canceled** ANGIOE
Orders Only				10/07/2019 0937		10/07/2019	0937	SHA PEDI NEUROLOG	Alberto Torres	Appointment

Loaded 26 of 131. Load All

Demographics

### Patient Information

**Patient Information**

Patient Name	Sex	DOB	SSN
Test, Ambpatient F	Female	2/1/1956	xxx-xx-7744

### Patient Demographics

Address	Phone	E-mail Address
12 BLUE RD BOSTON MA 02118	919-999-9999 (Home) *Preferred*	test@test.com

### Registration Information

**PCP and Center**

Primary Care Provider	Center
None Specified	BMC Moakley

### Registration

EpicCare Patient

# Step 5- fill in Appointment notes

**Make Appointment**

Department: CRO PRIMARY CARE 6C [10175006] Appt notes:  Expand notes  Share notes

Visit type:  PxDx Provider or resource:

PCP  Team

Patient Options

Start search on: 3/20/2020

March 2020

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

Today

Advanced Options

View: All Times, Single Provider

Recur

Auto search

Visits in any order

Schedule at: (Any center)

Use patient prefs

Joint times

Combine depts

Resource requests

Schedule Scanner:

Provider/Resource	Fri 3/20	Sat 3/21	Sun 3/22	Mon 3/23	Tue 3/24	Wed 3/25	Thu 3/26

Display

Search Wait List Clear Cancel



# Step 5- you can use expand notes to fill in more information

**Make Appointment**

Department: CRO PRIMARY CARE 6C [10175006] Appt notes: Check in regarding shoulder pain  Expand notes  Share notes

Visit type:  Provider or resource:

**Schedule Scanner:**

Provider/Resource	Fri 3/20	Sat 3/21	Sun 3/22	Mon 3/23	Tue 3/24	Wed 3/25	Thu 3/26

Display

**Patient Options**

Start search on: 3/20/2020

March 2020

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

**Advanced Options**

View: All Times, Single Provider

Recur

Auto search

Visits in any order

Schedule at: (Any center)

Use patient prefs

Joint times

Combine depts

Resource requests

# Step 5- expanded notes

**Make Appointment**

Department: CRO PRIMARY CARE 6C [10175006] Appt notes: Check in regarding shoulder pain  Expand notes  Share notes

Visit type:  Provider or resource:

**Appointment Notes**

Check in regarding shoulder pain

Accept Restore Cancel

**Patient Options**

Start search on: 3/20/2020

March 2020

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

Today

**Advanced Options**

View: All Times, Single Provider

Recur

Auto search

Visits in any order

Schedule at: [Any center]

Use patient prefs

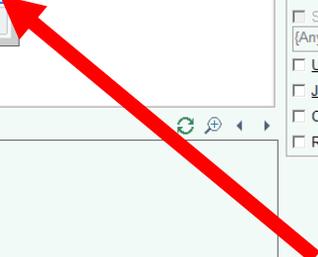
Joint times

Combine depts

Resource requests

**Schedule Scanner:**

Provider/Resource	Fri 3/20	Sat 3/21	Sun 3/22	Mon 3/23	Tue 3/24	Wed 3/25	Thu 3/26



# Step 6- choose visit type by double clicking telephone visit or type 625

## Make Appointment

Department: CRO PRIMARY CARE 6C [10175006]

Appt notes: test

Visit type:

Px/Dx

Provider or resource:

TELEPHONE REMOTE VISIT [625]

### Select Visit Type

#### Specialty List

ANNUAL [33530]  
BEING WELL COUNSELOR [385]  
BEING WELL PHARM VISIT [336]  
BEING WELL RNV [337]  
COUNSELOR ESTABLISHED [411]  
COUNSELOR NEW [412]  
EST IBH GIM [510]  
ESTABLISHED PATIENT [434]  
ESTABLISHED URGENT [111]  
HEP C ESTABLISHED [449]  
HEPC NEW [450]  
HOSPITAL DISCHARGE [525]

#### General List

TELEPHONE REMOTE VISIT [625]

Accept

Cancel

Schedule Scanner:

# Step 7- pick provider

## Make Appointment

Department: CRO PRIMARY CARE 6C [10175006]

Appt notes: test

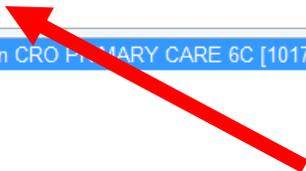
Visit type:

Px/Dx

Provider or resource:

TELEPHONE REMOTE VISIT [625]

NORONHA, CRAIG [3450] in CRO PRIMARY CARE 6C [10175006]



### Expand Instructions

General message for NORONHA, CRAIG [3450]  
BOOK NP M. JACOBS

# Step 7 – to search by both MD and NP Anchor use subgroup

**Make Appointment**

Department: CRO PRIMARY CARE 6C [10175006] Appt notes: test

Visit type: Px/Dx Subgroup:

TELEPHONE REMOTE VISIT [625]

**Record Select**

Search:

Name	ID	Type
BUITRON DE LA VEGA ANCHOR	96	Multiple department
CHEN G ANCHOR	76	Multiple department
D'AFFLITTI ANCHOR	93	Multiple department
HERSHMAN ANCHOR	100	Multiple department
HYLEK ANCHOR	97	Multiple department
LOOBY-GORDON ANCHOR	92	Multiple department
MEDOW ANCHOR	94	Multiple department
<b>NORONHA ANCHOR</b>	<b>91</b>	<b>Multiple department</b>
OBAT Providers	200	Multiple department
PHILLIPS C ANCHOR	95	Multiple department
Primary Care Hep C	48	Multiple department
XIAO ANCHOR	160	Multiple department

Provider  
 Subgroup  
 Department  
 Specialty  
PCP Team  
Advanced Option  
View:  
All Times, Multip  
 Recur  
 Auto search  
 Visits in any o

# Step 8- Pick a date on the calendar

**Make Appointment**

Department: CRO PRIMARY CARE 6C [10175006] Appt notes: Check in regarding shoulder pain Expand notes  Share notes

Visit type: ESTABLISHED PATIENT [434] Provider or resource: NORONHA, CRAIG [3450] in CRO PRIMARY CARE 6C [10175006]

Patient Options: Start search on: 3/24/2020

Calendar: March 2020

Advanced Options: View: All Times, Single Provider

Schedule Scanner:

Provider/Resource	Tue 3/24	Wed 3/25	Thu 3/26	Fri 3/27	Sat 3/28	Sun 3/29	Mon 3/30
NORONHA, CRAIG [3450]	83%	Unav	89%	Unav	No Sch	No Sch	Unav



# Step 9- click “auto-search”

Patient Options ▼

Start search on:  
3/24/2020

◀ March ▶ 2020 ▶

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

Today

Advanced Options

View:  
All Times, Single Provider

Recur

Auto search

Visits in a provider

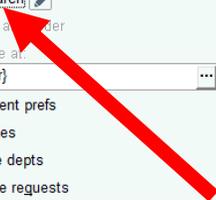
Schedule at:  
(Any center)

Use patient prefs

Joint times

Combine depts

Resource requests



# Step 10- Click “search”

**Make Appointment**

Department: CRO PRIMARY CARE 6C [10175006] Appt notes: Check in regarding shoulder pain Expand notes Share notes

Visit type: Ex/Dx Provider or resource:

ESTABLISHED PATIENT [434] NORONHA, CRAIG [3450] in CRO PRIMARY CARE 6C [10175006]

PCP Team

Patient Options Start search on: 3/24/2020

March 2020

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

Today

Advanced Options

View: All Times, Single Provider

Recur

Auto search

Visits in any order

Schedule at: (Any center)

Use patient prefs

Joint times

Combine depts

Resource requests

Expand Instructions

General message for NORONHA, CRAIG [3450]  
BOOK NP M. JACOBS

Schedule Scanner:

--	--	--	--	--	--	--	--	--	--

Display

Search Wait List Clear Cancel



# Step 11- choose appointment time and date from options be sure to check Multiple solutions

Recommended Solution

03/24/2020 - 04/24/2020  Multiple solutions  Group by center  Visits in any order Patient Options

ESTABLISHED PATIENT  
4/2/2020 (Thu) at 1:00 PM for 20 minutes

Arrive By	Time	Length	Provider	Department	Center
1:00 PM	1:00 PM	20 min	NORONHA, CRAIG	CRO PRIMARY CARE 6C	

Appointment notes: ESTABLISHED PATIENT [434]  Share notes

Check in regarding shoulder pain

Back Up Manual Wait List Edit Visit Settings Previous Next Schedule Cancel

# Step 12- Use “schedule” button to schedule the visit

Recommended Solution

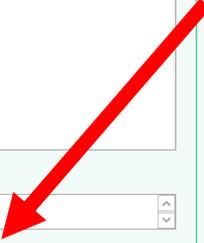
03/24/2020 - 04/24/2020  Multiple solutions  Group by center  Visits in any order Patient Options

**ESTABLISHED PATIENT**  
4/2/2020 (Thu) at 1:00 PM for 20 minutes

Arrive By	Time	Length	Provider	Department	Center
1:00 PM	1:00 PM	20 min	NORONHA, CRAIG	CRO PRIMARY CARE 6C	

Appointment notes:   Share notes

Check in regarding shoulder pain



# Step 13- Use “next” button to find more options

Recommended Solution

03/24/2020 - 04/24/2020  Multiple solutions  Group by center  Visits in any order Patient Options

ESTABLISHED PATIENT  
4/2/2020 (Thu) at 1:00 PM for 20 minutes

Arrive By	Time	Length	Provider	Department	Center
<a href="#">1:00 PM</a>	1:00 PM	20 min	NORONHA, CRAIG	CRO PRIMARY CARE 6C	

Appointment notes:   Share notes

Check in regarding shoulder pain

Back Up Manual Wait List Edit Visit Settings ← Previous → Next ✓ Schedule Cancel



# Things to remember

- For patients needing a follow up before June 15
- Patients requiring a follow up after June 15 send message to front desk pool to schedule in person visit (if timeline changes we will communicate new guidance)
- Only for scheduling telephone remote visits – if patient needs to be seen in person route note to front desk pool
- Schedule only with patient's PCP or NP Anchor
- The system will only return available appointments for when you are scheduled to "see" appointments if you do not have a template on Friday PM, Friday PM appointment time won't be an option
- Do not schedule same day appointment
- Contact Brenda / Alyssa / Sophia with questions