Virtual Consultations

# Many practices are conducting some version of patient consultations or a patient intake process by phone or online meeting. Done correctly, this increases the overall capacity of the treatment schedule and helps the practice better prepare for patient appointments.

# This approach assumes that a treatment coordinator or other team member is being scheduled with appointments (in his/her own provider column in the patient schedule) and that appropriate time is set aside for the call or online meeting with the patient.

# Below are the recommended steps for a virtual consultation from first patient contact through the administrative conclusion of the process.

# **Patient Coordinator (PC):**

* Gathers initial referral or receives patient inquiry (call, email, appointment request, message, etc.)
* Schedules the patient for the intake interview
* Sends the online patient registration (OPR) and video conference link (Zoom meeting invitation) in the same email to the patient while on the initial call
* Gathers the patient’s insurance information
* Has the patient take a picture and text or email the referral form from the general dentist
* Requests images from referring practices
* Ensures the office has the following 2 days before intake interview:
  + Online patient registration (OPR) or patient forms
  + Referral form
  + Images
* Provide all information to the doctor for evaluation

# **Doctor:**

* Completes the evaluation and diagnosis
* Shares the evaluation and diagnosis information with the Treatment Coordinator (TC)

# **Treatment Coordinator (TC):**

# **\*Please note, patient appointments are scheduled in an independent provider column**

* **Before Appointment**
  + Creates all the electronic documents to review with the patient:
    - treatment plan
    - financial arrangement
    - consent forms
* **During Appointment**
  + Meets with the patient via Zoom
* Confirms the patient understands why they were referred
* Reviews the patient’s health history
* Review’s the patient’s medication history and status
* Discusses the patient’s concerns about medications
* Explains the patient’s diagnosis determined by the doctor
* Explains the doctor’s recommendations for treatment
* Answers questions about the patient’s diagnosis and procedure
* Shares their screen to show the patient images
* Shares the patient’s treatment plan and cost
* Explains the patient’s insurance coverage
* Provides information about the patient’s out-of= pocket expense
* Provides the patient with the amount due the day of surgery
* Makes financial arrangements with the patient
* Answers questions about finances
* Makes adjustments to the electronic forms during the appointment if needed
* Explains pre-op care
* Explains post-op care
* Schedules the patient for treatment
* Emails all documents to the patient
  + Consent
  + Pre-op instructions
  + Post-op instructions
  + Treatment plan
  + Financial arrangements
* Explains that the documents will be signed during the Zoom meeting via DocuSign or other platform
* Has the patient sign the documents
* Ends meeting with patient
* **After Appointment**
  + Enters information into Case Acceptance File
  + Enters Notes into EMR
  + Emails all copies of signed documents to the patient

It is important to remember that addressing these points in sequence and with proper attention to detail streamlines our office processes and makes our virtual consultations more efficient. When the patient experience rolls out smoothly, we can focus on the treatment patients need and provide the excellent customer service they deserve.