“Patient Work Up” refers to the collection of a patient’s administrative information and medical history. These steps may take place at a scheduled time in advance of or immediately prior to the patient’s visit with the clinician. Users should customize this workflow based on their health center’s staffing, as well as funding requirements.

1. **Connect with patient**
   - Confirm patient’s identity; ask patient for code word (if applicable)
   - Communicate the plan for reconnecting if there are technology issues; confirm patient understanding
   - Obtain or confirm patient’s contact information, including a number to call if disconnected

2. **Confirm patient’s device is plugged in or fully charged**
   - Obtain copy of patient’s ID or confirm a copy is on file
   - Obtain or confirm current patient demographic information; document in medical record
   - Includes: Demographic data, income, and family size, Calculate income as a % of the federal poverty level

3. **Confirm reason for visit and preferred language**
   - Obtain or confirm patient’s contact information, including a number to call if disconnected
   - Includes: Confirm patient’s preferred method of communication and confidentiality needs; document in medical record

4. **Is an interpreter needed?**
   - Yes: Access appropriate interpretation method
   - No: Proceed with the workflow without an interpreter

5. **Does the patient have third-party insurance coverage?**
   - Yes: Obtain authorization to bill the patient’s insurance
     - Electronic signature/date: Patient authorizes billing via e-consent software, or patient portal or electronic health record-based form
     - Paper document: Patient prints and signs/dates form and submits to health center in-person or by mail
     - Scanned paper document: Patient prints and signs/dates form
   - No: Proceed without insurance billing
     - Obtain copy of insurance card or confirm copy on file is current

6. **Does the patient’s confidentiality status allow for insurance billing?**
   - Yes: Document need for confidential services in billing record
   - No: Proceed without insurance billing

**Tips and Notes**
- **See Workflow 3 – Connecting to Interpretation Services for steps**
- **Step involves the transmission of digital images and/or forms over the telehealth network**
- **Step necessary for some funding programs (e.g., Title X, state family planning programs)**
- **Because fees typically are based on services provided during the visit, this step may take place at the end of the visit**
SAMPLE WORKFLOW 2

Patient Work Up

How is image obtained?

Electronic image: Patient uploads picture or scanned image
Electronic image: Patient sends picture or scanned image via email or e-fax
Paper copy: Patient makes a paper copy and submits to health center in-person or by mail

Based on income and household size provided, does the patient have charges due?

Yes

Inform the patient that, based on the schedule of discounts and the reason for their visit, the cost of today's visit is $0

How is signed acknowledgement obtained?

Electronic signature/date: Patient authorizes billing via e-consent software, or patient portal- or electronic health record-based form
Scanned paper document: Patient prints and signs/dates form and submits to health center in-person or by mail
Paper document: Patient prints and signs/dates form and submits to health center in-person or by mail

Obtain or confirm payment method

Would the patient like to make a donation today to support the care of others?

Yes

Obtain or confirm payment method

No

Obtain patient's medical and social history; document in medical record

Address and document any health concerns in patient's medical record

Inform the patient they will be triaged to the provider, reminding them of the plan for reconnecting if there are technology issues

Link to provider (if different) and/or disconnect from patient

Review required forms, documents, and consents; confirm in medical record

Obtain or confirm payment method

Process payment

Note: If the payment is not successful, confirm payment method and/or obtain different method

Inform patient how they can access receipt and visit summary

See Workflow 3 – Connecting to Interpretation Services for steps

Step involves the transmission of digital images and/or forms over the telehealth network

Step necessary for some funding programs (e.g., Title X, state family planning programs)

Because fees typically are based on services provided during the visit, this step may take place at the end of the visit

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