

Healthcare workflows can be challenging. With DocsInk's telehealth, we allow you to keep your current workflow while taking your practice entirely remote and virtual. This is a 5 step guide. In fact, 2 are optional, so you can probably do it in 3!

If you're on the browser version of the app, click here:

<https://connect.docsink.com/dashboard/chat>

Then Click *Lists > Appointment Reminders*

If you're on the app, just Click *Lists > Appointment Reminders*

**Appointment Reminders**

March 23 0% March 24 67%

Add Filters

List View Calendar View

Patient name	Provider	Appointment Type
Jerry Boberry	Bradly Hinely	Telehealth
bill border	Bradly Hinely	Telehealth
Harrold Jim	Bradly Hinely	Telehealth

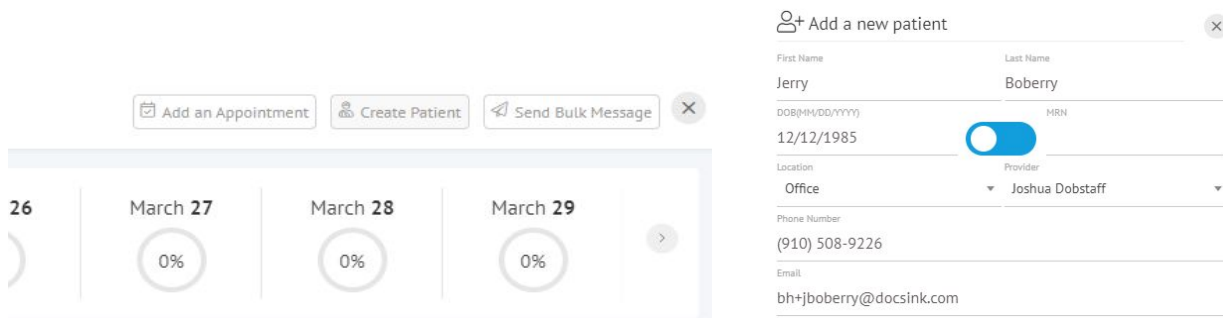
« < 1 > »

**Keep your workflows while virtualizing your practice**

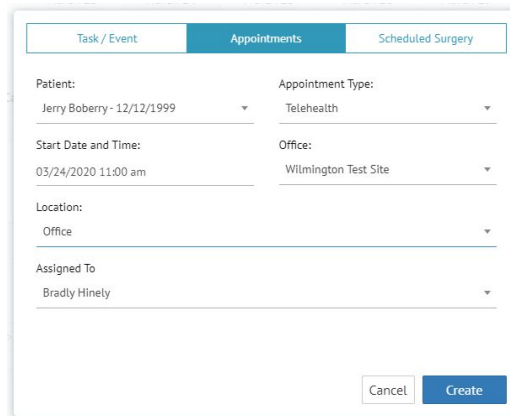
### 1 - Upload your appointments or add them on the fly.

To start off, let's add one on the fly so you get the hang of it. If you have a friend or family member, it's best to create them as a patient to test. Don't use your phone or number, as you'll want to test it without device feedback interruption.

Click Create Patient. Make sure to add their phone number. (assigning a provider isn't required) And click save.



Let's click Add an Appointment. Select the patient, appointment type, start date and time (Put it two hours from now), select the office location and visit location and assign to yourself.



Click Create and you've added your appointment! Now you'll see it on the list. (Contact us at [telehealth@docsink.com](mailto:telehealth@docsink.com) for bulk upload options or integrations.)

**Keep your workflows while virtualizing your practice**

**2 - (OPTIONAL) We send confirmations and reminders automatically to keep your visits efficient.**

Click the down arrow under the Actions column. The phone number of the patient should be in the Sent To field, and Select Appointment Reminder from the Select a Template.

Send Appointment

Send To:  
(910) 508-9226

Choose Template:  
Appointment Reminder

Choose Appointment:  
Select Appointment

Preview:  
Jerry, this is to confirm your appointment on March, 24 2020 at 11:00 am with Wilmington Hospitalist Account. 1 SMS

Cancel Send

Click Send.

Patient name	Provider	Appointment Ty...	Time	Confirmed	Sent	Actions
Jerry Boberry	Bradly Hinely	Telehealth	03/24/2020 11:00...	YES	Yes	⚙️

This will automatically be done for you 24 hours before the appointment, and another hour before the actual appointment to ensure your patients are ready and confirmed, however, you can do this process manually as well with the steps above.

**Keep your workflows while virtualizing your practice**

# D

## Keep your workflows while virtualizing your practice.

### 3 - (OPTIONAL) Have your MA, PA, or RN tap to work up the patient with a session.

Click the Patient's Name and click the Down Arrow to the right of the patient's name on the patient fly-out.

Click Invite to Session > SMS > Send

The screenshot shows a patient profile fly-out menu for Jerry Boberry. The menu is titled "Jerry Boberry's Profile" and includes a close button (X) in the top right corner. The menu items are: Information, Flags, Care Team, Documents, Tasks, BHI History, CCM History, CoCM History, and Channels. A sub-menu is open over the "Information" item, showing three options: "Send a message", "Share", and "Invite to session". The "Invite to session" option is highlighted. The patient's profile information is displayed on the right side of the fly-out, including: First Name (Jerry), Last Name (Boberry), DOB (12/12/1999), MRN, Phone #: (910) 508-9226, Gender (Male), and Email.

**Appointment Reminders**

March 23  
0%

Add Filters

List View Calendar View

Patient name	Provider
Jerry Boberry	Bradly Hinely

**Jerry Boberry's Profile**

- Information
- Flags
- Care Team
- Documents
- Tasks
- BHI History
- CCM History
- CoCM History
- Channels

Send a message  
Share  
Invite to session

First Name: Jerry  
Last Name: Boberry  
DOB (MM/DD/YYYY): 12/12/1999  
MRN  
Phone #: (910) 508-9226  
Gender: Male  
Email

Your personal telehealth invitation link has been sent to the patient, and your telehealth session has started!



## Keep your workflows while virtualizing your practice.

### 4 - Provider - Click Invite to Session and start your telehealth session.

Click the Patient's Name and click the Down Arrow to the right of the patient's name on the patient fly-out.

Click Invite to Session > SMS > Send

The screenshot displays a patient profile fly-out for Jerry Boberry. The fly-out menu includes the following options:

- Information (selected, with sub-menu open)
- Flags
- Care Team
- Documents
- Tasks
- BHI History
- CCM History
- CoCM History
- Channels

The sub-menu for 'Information' contains:

- Send a message
- Share
- Invite to session

The background shows a table of appointment reminders:

Patient name	Provider
Jerry Boberry	Bradly Hinely

Your personal telehealth invitation link has been sent to the patient, and your telehealth session has started!

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## Keep your workflows while virtualizing your practice.

### 5 - Submit your charge for your session.

Click the Charge under the Actions Column on the patient. Click Diagnosis and add your diagnosis. Click CPT and select your CPT. Most likely, you're going to choose: 99203-GT (GT is the telehealth modifier for Medicare patients)

Click the LINK icon in the blue CPT section to open the Modifier Selection option to add GT.

The screenshot displays a medical software interface with three main sections:

- Search for 'gt':** Shows search results for 'GT - Via interactive audio and video telecommunication systems'.
- Search for '99203':** Shows search results for '99203 - New Pt 3' and 'Anterior Cervical Discectomy and Fusion - Anterior Cervical Discectomy and Fusion'. Below this is a table of search results:

Provider	Appointment Type	Time	Confirmed
Bradly Hinety	Telehealth		
Bradly Hinety	Telehealth	03/24/2020 09:00...	YES
Bradly Hinety	Telehealth	03/24/2020 09:00...	

- Patient Record:** Jerry Boberry, DOB 12/12/1999, Gender Male. Location: Office 0, MRN: 9105089226.
- DIAGNOSIS:** 1 ^
- CPT Code:** 1 v  
99203 - New Pt 3 (with link icon) 1 ⊗  
GT - Via interactive audio and video telecommunication systems (with link icon) ⊗
- QUICK LIST:** REFERRING PROVIDER, PRIMARY CARE PROVIDER, QUALITY REPORT (available), NOTES.
- Footer:** Charge for today: 03/24/2020 Patient admit date: 03/24/2020. A large blue SUBMIT button is at the bottom.

Click Submit

You're done! Repeat as needed!