COVID-19 Screening for In-Person Appointments

To ensure the safety of our patients and workforce, it is required that all patients scheduled for an in-person appointment be screened for COVID-19 during multiple checkpoints prior to arrival at the clinic and again when they present for their appointment. This tip sheet outlines this process for scheduling, pre-visit, and check-in and includes scripting for Patient Service Coordinators (PSC).

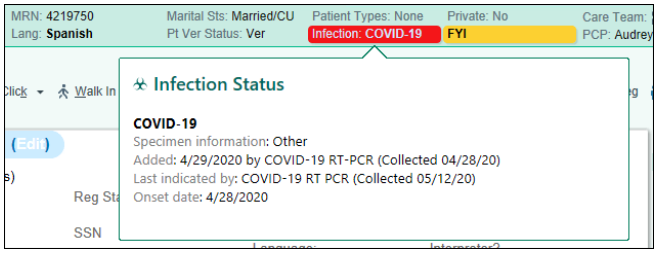
COVID Screening Workflow Overview

Phase	Who	Applies To	When	Workflow
Scheduling	PSC	All patients	Varies	• Schedulers complete a required COVID scheduling questionnaire* that fires in Cadence for all departments. Patient responses to this questionnaire should be entered in Epic and guide next steps. • If scheduling within 72 hours of appt, the Decision Tree screening will populate on the DAR so additional pre-screen doesn't need to happen. • Validate patient's phone numbers in Epic, including cell phone, and ask for consent for texting • Reminder for schedulers to communicate no visitor policy and screening and where to note approved visitor exceptions. *MGB policy has updated the definition of close contact to "spending a total of 15 minutes or more within 6 feet of someone infected with COVID-19". All COVID Screening Questionnaires have been updated. **New**
Pre-Visit (Auto-mated)	PG	Active PG Patients	72 hours out	Patients will be prompted to eCheck-In and complete the COVID Symptom and Exposure Screening questionnaire* prior to in-person appointment (see appendix for complete form). Next steps are based on patient responses to questions - • **No to all** screening questions: patient will be asked to confirm appointment and complete e-check-in • **Yes to any** screening questions: patient is asked to call the practice to discuss best treatment pathway and eCheck-in is suspended *MGB policy has updated the definition of close contact to "spending a total of 15 minutes or more within 6 feet of someone infected with COVID-19". All COVID Screening Questionnaires have been updated. **New**
Pre-Visit (Auto-mated)	TeleVox	DEPs with TeleVox Appt Reminders	72 hours out	Patients will receive a text with appointment reminder and – • PG patients; reminder to complete questionnaire in PG • Non-PG patients; action to call the practice to complete the COVID Screening.
Pre-Visit (Auto-mated)	TeleVox	DEPS with TeleVox Appt Reminders	72 hours out	• All patients: will receive a text with reminder of no visitor policy unless pre-approved by the practice
Pre-Visit (Manual)	PSC	Inactive PG patients &	48 hours out	Patients will be prompted to eCheck-In and complete the COVID Symptom and Exposure Screening questionnaire* prior

MGH ©2017 Partners HealthCare. All rights reserved. Content not managed by Partners eCare.

		unresponsive PG patients		to in-person appointment (see appendix for complete form). Next steps are based on patient responses to questions - • **No to all** screening questions: patient will be asked to confirm appointment and complete e-check-in • **Yes to any** screening questions: patient is asked to call the practice to discuss best treatment pathway and eCheck-in is suspended *MGB policy has updated the definition of close contact to "spending a total of 15 minutes or more within 6 feet of someone infected with COVID-19". All COVID Screening Questionnaires have been updated. New
Pre-Visit (Auto-mated)	Epic	Patients with appt next day	4pm day before	• All patients will receive a text the day before their appointment asking them to complete MGB Pass 1-2 hours prior to their appointment • Depending on completion status and color, it could expedite building access and check-in screening for patient.
Check-In	PSC	All patients	Date of service	• Front desk staff will complete the required COVID-19 Screening questionnaire with the patient when they present for their appointment as part of check-in and instructions will guide next steps before patient is seen. • MGB Prescreen is an automated text from Epic to patients to complete their COVID screening 1-2 hours before their appointment. If patient has a green pass they staff can bypass the COVID Screening at check-in. *MGB policy has updated the definition of close contact to "spending a total of 15 minutes or more within 6 feet of someone infected with COVID-19". All COVID Screening Questionnaires have been updated. New

***NOTE:** Patients with an unresolved COVID status cannot be seen in the practice and must be scheduled in a RACC location. Hover over the Infection status in patient header to view add/onset dates.



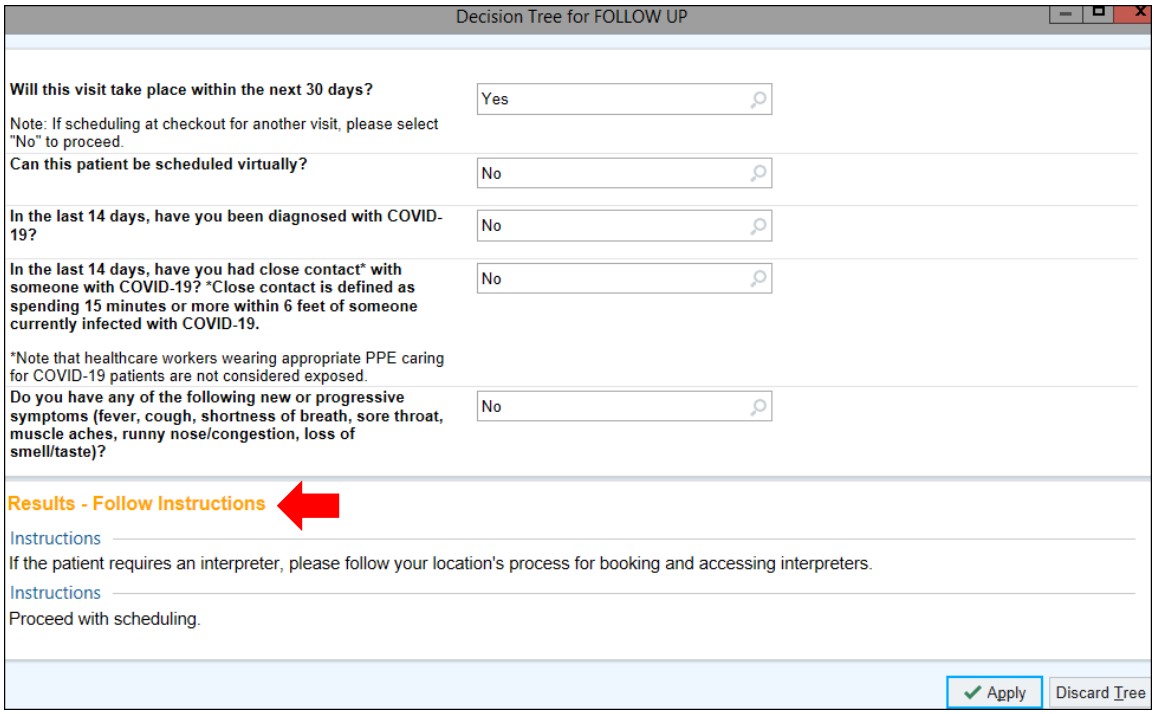
Completing the Scheduling Screening Questionnaire

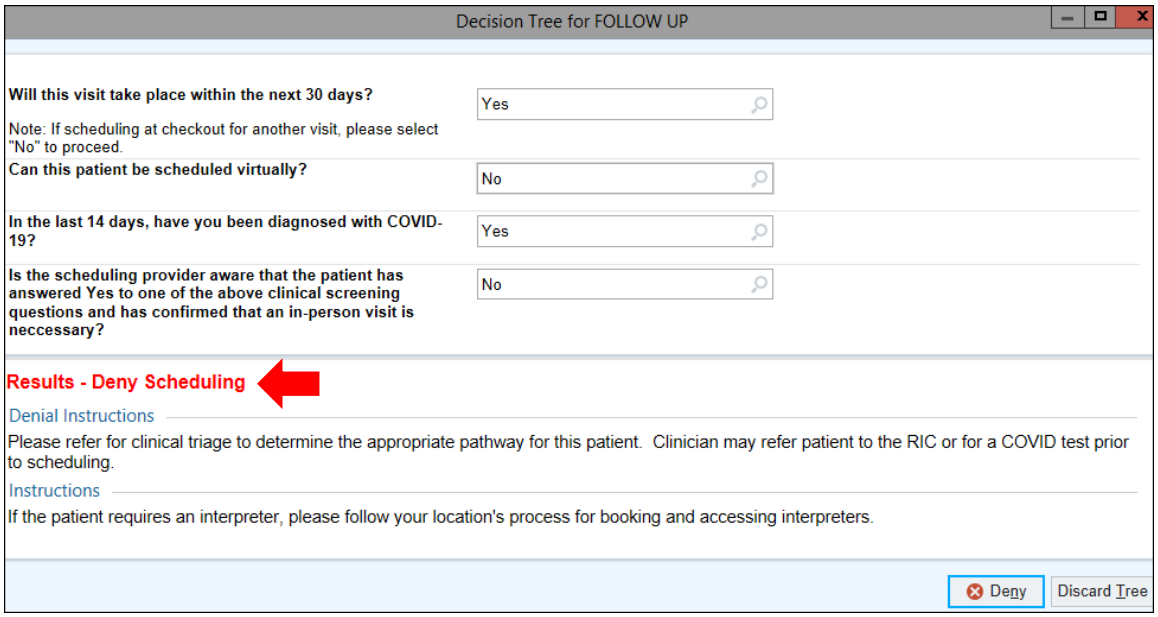
At scheduling, a COVID questionnaire will fire for all departments (see appendix for process diagram). Schedulers must ask the patient each question and enter responses in Epic. At the end, Epic will provide instructions to either proceed with scheduling or to follow specific instructions if/when to schedule. Screenshots can be found below, it is important to follow the instructions precisely. Before reviewing appointment details with the patient, Schedulers should confirm phone numbers with patient in Epic, including cell phone, and ask for consent to text. This will immediately enable texting of appointment reminders, but also guarantee patient can participate in upcoming technology enhancements being rolled out.

NOTE: If scheduling a patient with the Needs Interpreter field set to yes, scheduling instructions will remind scheduler to follow location-specific procedures to book/access an interpreter.

MGH ©2017 Partners HealthCare. All rights reserved. Content not managed by Partners eCare.

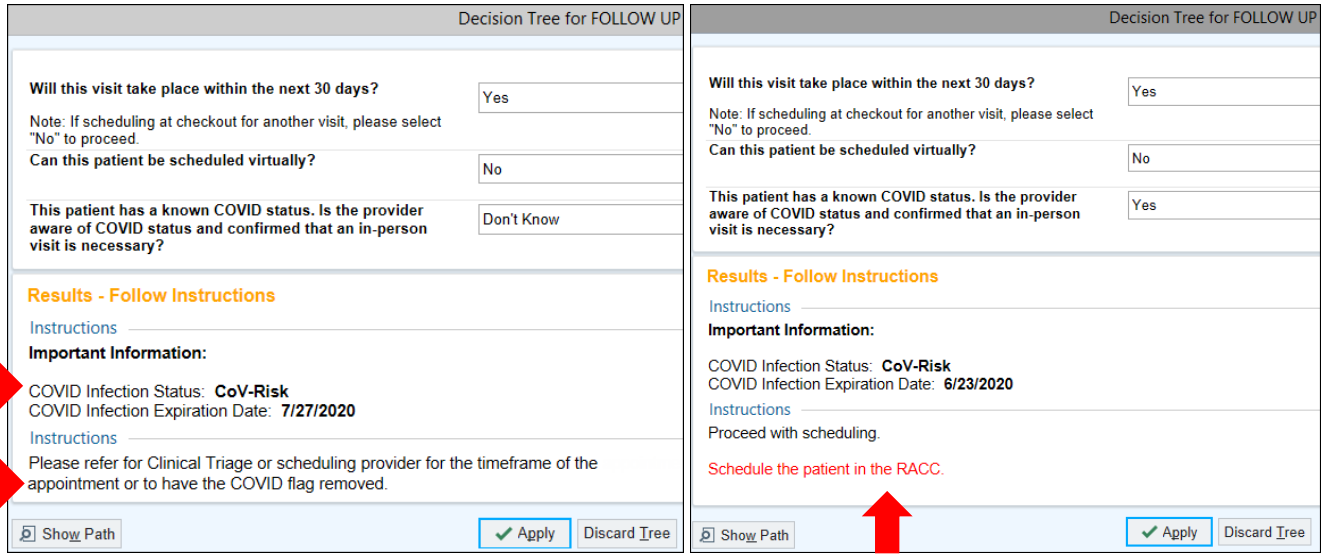
NOTE: If scheduling a follow-up appointment at check-out, enter "No" at the 30 day question, as the patient has already been screened at check-in.





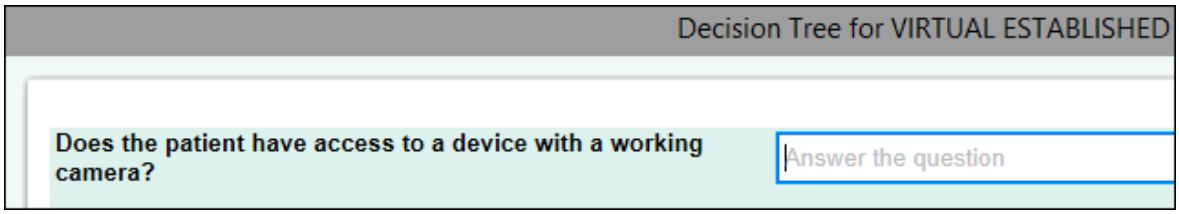
©2017 Partners HealthCare. All rights reserved. Content not managed by Partners eCare.

If the patient has a COVID infection status, an expiration date may display. Read and follow the instructions carefully. Do NOT schedule patient in your practice before an expiration date or if there is no expiration date. Refer to Clinician for next steps or schedule patient in the RACC, if instructed.



Note:

- If scheduling from a referral order, the generic referral order visit type will no longer fire the Decision Tree.
- If scheduling an Epic Integrated virtual visit and the patient has completed an Epic Integrated Virtual visit in the last year, the Decision Tree will not fire to avoid having to ask the patient again if they have the technology for the visit.
- When scheduling an Epic-integrated visit, the first Decision Tree question regarding whether the patient has the technology needed for the visit has been updated to include a device with a working camera.



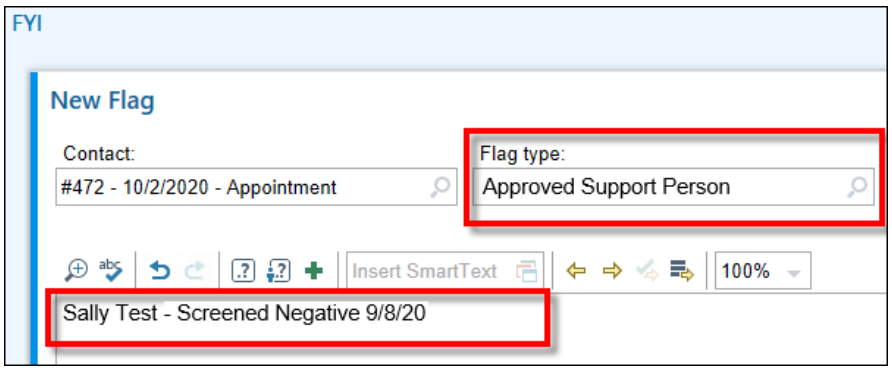
Visitors:

Practices should remind patients during scheduling that we have a no visitor policy and if the patient is getting a ride from someone, that individual can wait in the car. If the patient asks for an exception, refer to the exceptions to the no visitor policy for the approved exceptions to the rule.

If a patient needs to be accompanied (based on the exceptions to the no visitor policy), screen the accompanying visitor for symptoms and exposure and document it in the using the Approved Support Person FYI flag. This flag must be added from the Registration activity for each individual visit. To add:

1. During scheduling (or after), from the Registration activity, click **Patient FYI** *on the toolbar.*
2. In the ***Flag type*** field, select **Approved Support Person**.
3. In the free text field, enter **<visitor name> - <screening status> <Date screened>** (e.g., **Jim Smith – screened negative 11/5/20***).*

©2017 Partners HealthCare. All rights reserved. Content not managed by Partners eCare.



- Any potential visitor that answers "YES" to any of the questions on the Pre-Visit Screening questionnaire may not accompany a patient.

Pre-Visit Screening via eCheck-In & TeleVox Text for PG Patients (automated, 72 hours out)

PG will automatically send a screening questionnaire out to patients enrolled in PG via eCheck-In 72 hours prior to their appointment with an action for patient to complete the COVID questionnaire* (see appendix for full questionnaire).

TeleVox will also send a text message to PG patients to complete the COVID questionnaire on PG. See below for a sample message for PG patients –

Appt Msg: (DATE) Please complete COVID-19 Screening via Patient Gateway eCheck-In before appt.

Pre-Visit Screening TeleVox Text for Non-PG Patients (automated, 72 hours out)

TeleVox will send a text message to non-PG patients to call the practice to complete the COVID questionnaire. See below for a sample message for non-PG patients –

Appt Msg: (DATE) Please call the practice <phone #> to confirm and complete the COVID-19 Screening before appt.

Pre-Visit TeleVox Text for All Patients (automated, 72 hours out)

All patients will also get an automated text with reminder of our no visitor policy and any exceptions need to be approved by the practice.

MGHAPPTS: "You have an appt on <date>. No visitors w/out pre-approval by clinic-Pls contact to confirm.

©2017 Partners HealthCare. All rights reserved. Content not managed by Partners eCare.

Pre-Visit Manual Phone Screening (manual, 48 hours out)

PSCs should run their DAR for 2 days out to (1) identify any patients who completed the screening and answered yes to any questions and require follow-up and (2) call patients who have not completed the screening on their own (includes PG patients who have not completed and any non-PG patients) starting 2 days before the appointment.

Two new columns have been added to the standard PHS CHECK-IN DAR and PHS CHECK IN & CHECK OUT DAR to provide information around the completion of the screening questionnaire and results.

Note: If you're using a private DAR, the columns must be manually added via the DAR report settings window Display tab.

1. Select the **PHS CHECK IN** or **PHS CHECK IN & CHECK OUT DAR** or add the columns below to a private DAR:
    a. CAD PHS COVID PRE SCREENING QUESTIONNAIRE FILLED OUT (Y/N)
    b. CAD PHS COVID PRE SCREEN QUESTIONNAIRE YES RESPONSES) to your private DAR.

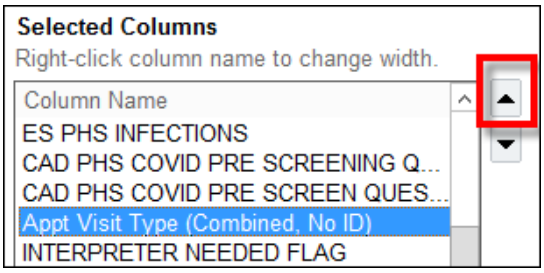
2. **Run for T+2** to for patients with appointments in 2 days out.

Indicates if the screening form was filled out for the specific appt (Yes/blank)

COVID QNR	CVD QNR Response
Yes	!

Displays an icon if any of the responses were entered as 'Yes' within the last 3 days (! or blank)

3. For all DARs (public or private), shift the ***Visit Type*** column next to the ***CVD QNR Response*** column.
    a. From the DAR, click **Settings**.
    b. Click the **Display** tab.
    c. Select **Appt Visit Type (Combined, NO ID)** and then click the **up arrow** to position after CAD PHS COVID PRE SCREEN columns.



If COVID QNR column is blank AND Visit Type is NOT a Telemedicine/ Virtual Visit, contact patient by phone to complete screening.

COVID QNR	CVD QNR Response	Visit Type
		TELEMEDICINE
		FOLLOW UP

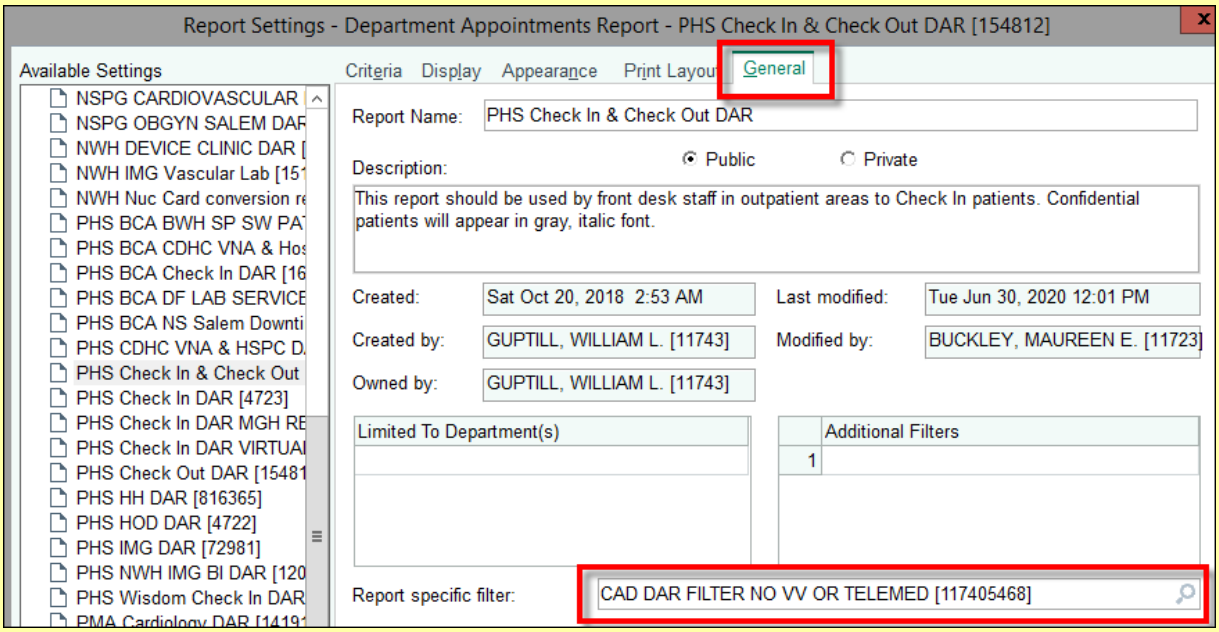
Tip: To make identifying in-person visits easier, you can filter the report to remove all virtual visit types.

a. From a public or private DAR, click **Settings** on the toolbar.
b. On the Report Settings window, click the **General** tab.

©2017 Partners HealthCare. All rights reserved. Content not managed by Partners eCare.

c. In the ***Report specific filter*** field, type **"Cad"** and then press E**nter**. "CAD DAR FILTER NO VV OR TELEMED" displays.

d. Click **Run** or **Save/Save As** to save the report settings.



4. Review the **COVID QNR** and **CVD QNR Response** columns.

If…	Then…	Why?
COVID QNR column = "Yes" and CVD QNR Response = blank	No action required	Patient is cleared to be seen in practice.
COVID QNR column = "Yes" and CVD QNR Response = "!" icon	Refer to clinician	Provider will determine if patient should be deferred, updated to a virtual visit, or scheduled at a RACC location.
COVID QNR column = blank and visit type is not Telemedicine/Virtual	Continue steps below to contact patient for screening	Patient has not completed questionnaire.

5. **Sort DAR by CVD QNR Response column**, locate any patients who have "**!**" (not Telemedicine/Virtual visits).

6. **Follow up with Clinician for next step**s per your department workflow, examples may include -

   a. Send high priority In Basket message
   b. Schedule daily huddle to review patient statuses

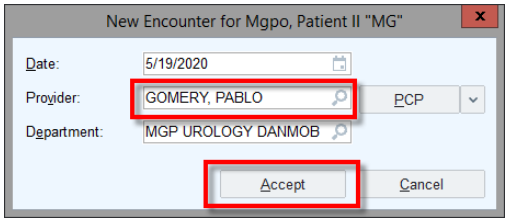
7. Next, **sort COVID QNR column** by blanks. These are the patients you need to call to complete the questionnaire by phone. ***Note:*** You do not need to contact patients with virtual visit types (e.g., VV (alt), Telemedicine Phone, Virtual New, Virtual Established, etc.).

8. Click **Epic** > **Patient Care** > **Telephone Call** to start a telephone encounter.

9. **Search for the patient** and enter the appropriate **provider** in the "New Encounter" window.

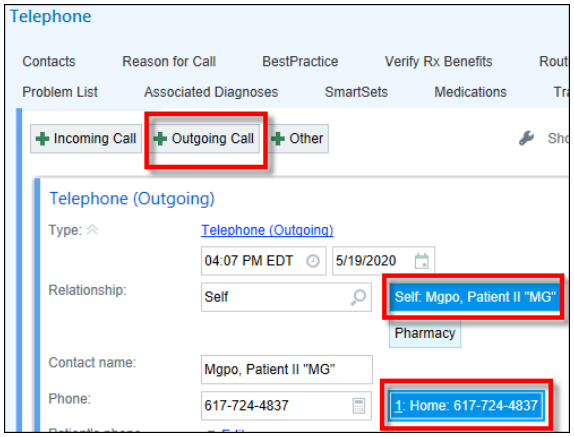
10. Ensure the Department is appropriate and then click **Accept**.

©2017 Partners HealthCare. All rights reserved. Content not managed by Partners *e*Care.

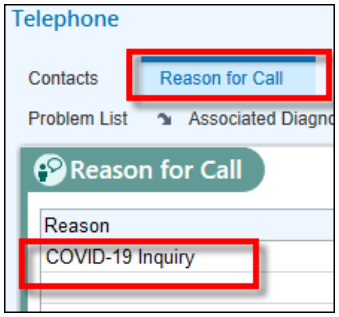


11. If the patient has any open Telephone Call encounters, a window will display these encounters. Check to see if there is an open encounter from a previous COVID phone screen call, otherwise click the **New** button.

12. From the Contacts section, click **Outgoing Call**, select the Patient's name, and then the preferred phone number.



13. Click the **Reason for Call** section and in the ***Reason*** field, type "**COVID-19 Inquiry**."



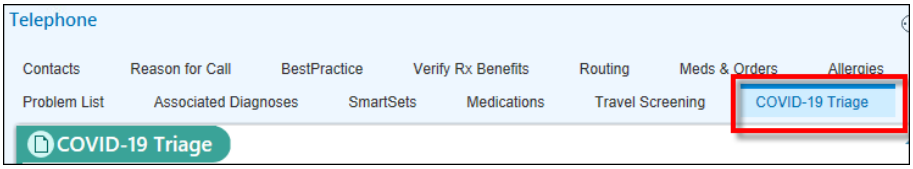
14. Use below scripting based on patient answering the phone or cannot be reached -

Patient Answers the Phone

a. Use standard greeting and scripting –

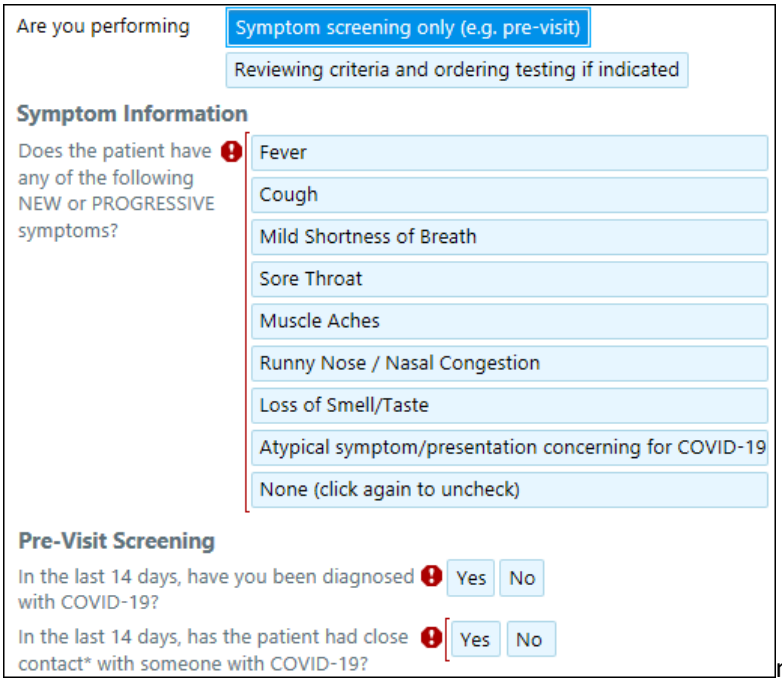
"<Good morning/afternoon>, this is <name> from <practice> calling about your upcoming visit. To ensure we are not putting you and others at risk of COVID infection, we are requesting all our patients with upcoming visits complete a screening questionnaire. May I ask you a few questions now?"

b. Click the **Covid-19 Triage** Smartform from the top toolbar.



©2017 Partners HealthCare. All rights reserved. Content not managed by Partners eCare.

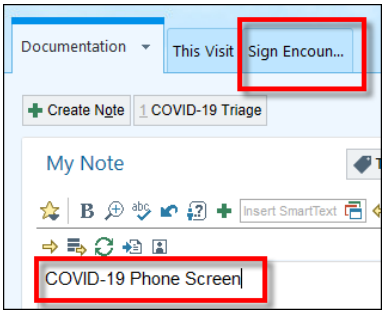
c. Ask the patient all the screening questions and enter the responses (red stop signs indicate required fields). For the first question, PSCs will always choose **Symptom screening only (e.g. pre-visit).**



ms

d. In the My Note section, type: "**COVID Phone Screen**."

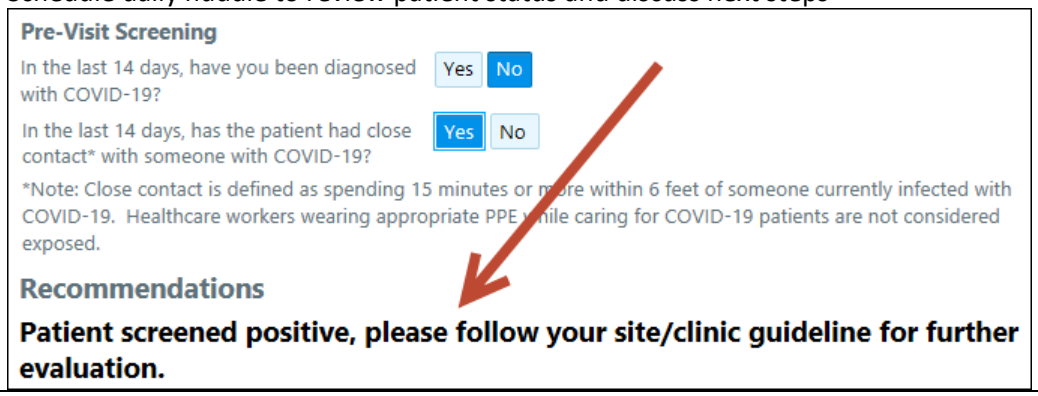
e. Click the **Sign Encounter** tab on the top of the sidebar.



f. For patients who answer "Yes" to any of the screening questions, instructions will appear guiding the user on next steps. Follow up with Clinician for next steps per your department; examples may include -

- Send high priority In Basket message or route the Telephone Encounter to the provider.
- Schedule daily huddle to review patient status and discuss next steps

NEW



©2017 Partners HealthCare. All rights reserved. Content not managed by Partners eCare.

Cannot Reach the Patient

a. Leave a message for the patient to call back prior to visit –

"<Good morning/afternoon>, this is <name> calling from <practice> regarding your appointment on <date>. To ensure we are not putting you and others at risk of COVID infection, we need to complete a brief questionnaire with you prior to your appointment. Please call us back at <insert>. Thank you!"

b. In the My Note section, enter a note (e.g., 1st Attempt COVID Phone Screening, 2nd Attempt COVID Phone Screening).

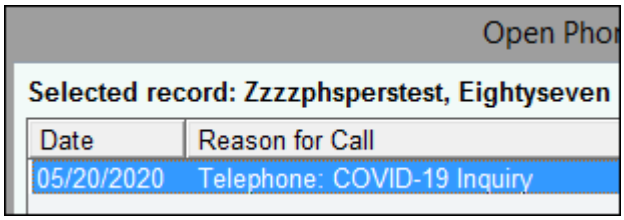
c. Click the **X** on the top tab to close out of the encounter. Encounter would remain open as a reminder to follow up with the patient.

d. If the patient cannot be reached and does not call back to complete the screening, they will appear on the DAR the next day and PSCs should call them again with goal of completing questionnaire prior to patient arriving for their appointment.

If the patient calls back:

a. Access the Telephone Encounter by clicking **Epic** > **Patient Care** > **Telephone Call**.

b. A window appears displaying any open encounters. Click the **Telephone: COVID-19 Inquiry** encounter.



c. Click **Accept**.

d. Click the **COVID-19 Triage Smartform** and ask the patient the screening questions.

e. In the My Note section, type: "**COVID Phone Screen Complete**."

f. Click the **Sign Encounter** tab in the sidebar.

Screening at Check-In

Regardless if the patient has been screened previously via eCheck-In or by phone prior to date of service, PSCs will be required to do a just-in-time COVID screening at check-in before the patient enters the practice. A COVID-19 Screening button has been added to the Registration activity toolbar to perform this screening.

Note: If the patient has more than one appointment on a single day, the screening will only be required at the first visit. Likewise, if the COVID-19 Triage Smartform is completed on the same day as a visit, the screening will not be required during check in. You only need to screen the patient when a new error warning appears.

Scenario 1: Patient Presents with MGB Pass (if not, skip to scenario 2 below)

If patient presents with MGB Pass they may be eligible to bypass additional screening at check-in based on result.

MGB Pass = Yellow

If a patient presents with a yellow MGB Pass, this means "risk" on COVID screening.

MGH ©2017 Partners HealthCare. All rights reserved. Content not managed by Partners eCare.

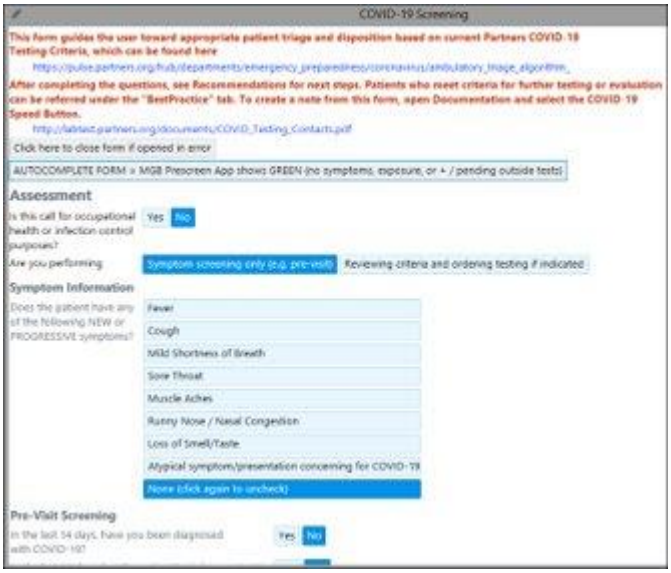
1. Room patient and conduct clinical triage to assess if testing or RIC evaluation is needed

MGB Pass = Green

A patient presenting with a green MGB pass replaces the need for the in-person COVID Pre-Screening at check-in.

1. Confirm patient has **green** **MGB Pass**
2. Click **COVID Screening** button on toolbar
3. Click on **AUTOCOMPLETE FORM button** to bypass screening
4. Click **X** to close the screening window
5. Proceed with standard check-in process

MGH ©2017 Partners HealthCare. All rights reserved. Content not managed by Partners *e*Care.



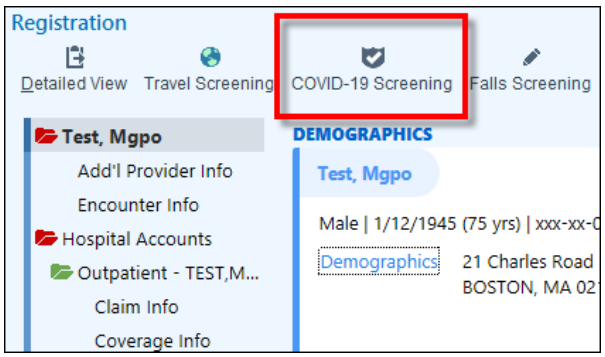
Scenario 2: Patient Presents Without MGB Pass

1. From the DAR, click **Check In**.
2. Before completing any routine check in tasks, click **Continue Check In** on the bottom of the screen.
3. If the below error message appears, the patient has not been screened today and screening must be completed during check in (proceed to next step).

   Note: If you do not get the error message below, screening has already been completed today and does not need to be repeated, so you can proceed with check-in.

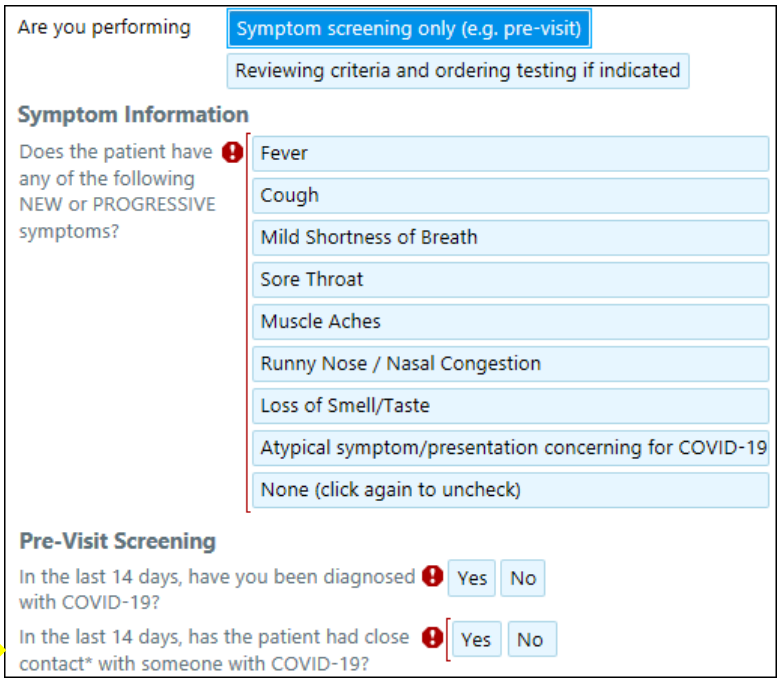
   Note: If the screening has already been completed, clicking 'COVID-19 Screening' on the toolbar will not show the screening answers from the earlier visit/COVID-19 Triage Smartform.

4. On the Registration activity toolbar, click **COVID-19 Screening**.



©2017 Partners HealthCare. All rights reserved. Content not managed by Partners eCare.

5. Ask the patient all the screening questions and enter the responses (red stop signs indicate required fields). On first question, PSCs will always choose **Symptom screening only (e.g. pre-visit)**.



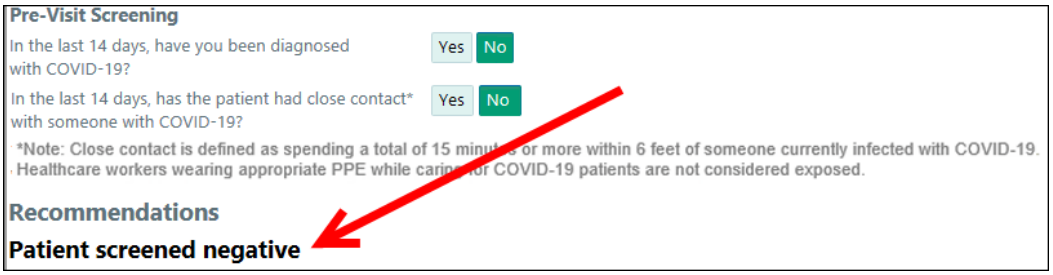
6. Based on the patient's responses, if the patient is –

Cleared (answered "No" to all screening questions)

a. The system displays the message "Patient screened negative." Click the **X** on the top right corner of the screening window to close.

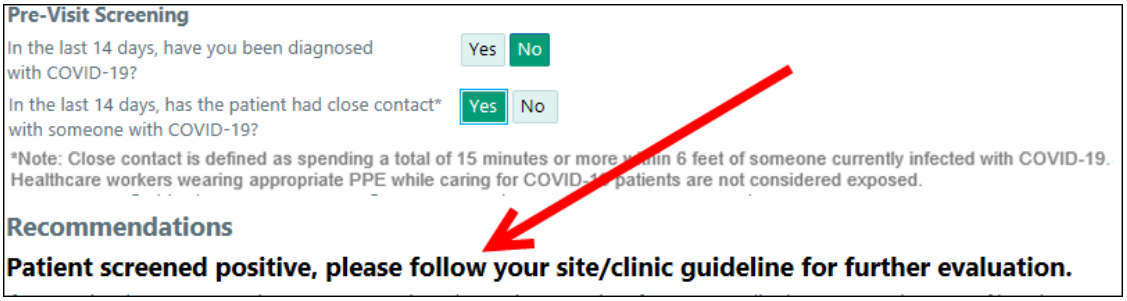
b. Proceed with remaining steps to check in patient.

c. Notify MA to room patient immediately, if possible.



Not Cleared (answered "Yes" to any screening questions)

a. Instructions appear with next steps. Read and follow the instructions.



b. Click the **X** on the top right corner of the screening window to close.

©2017 Partners HealthCare. All rights reserved. Content not managed by Partners eCare.

c. Proceed with remaining steps to check in patient.

d. Follow immediate steps for patients identified with symptoms consistent with a Viral Respiratory Illness –

   a. Have the patient don a mask immediately if not already wearing one

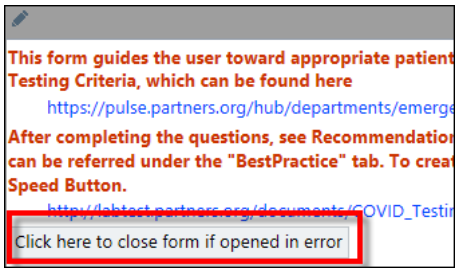
   b. Ensure that patient remains masked while in the clinic.

   c. Limit the number of clinic staff in contact with patient.

   d. Room immediately and keep the door closed. If not possible to room immediately, seat patients at least 6 feet apart, with physical barriers between patients if possible.

Exiting Out of Screening (Only if Viewing Reg Details Prior to Check In or Access Patient in Error)

If you access the patient in error, you can exit out of the screening questionnaire by clicking the **Click here to close form if opened in error** button and then clicking the **X** on the top right corner of the window. The error will present itself again at check in for the patient after 5 minutes. Use of this button will be monitored and should only be selected when the patient is accessed in error.



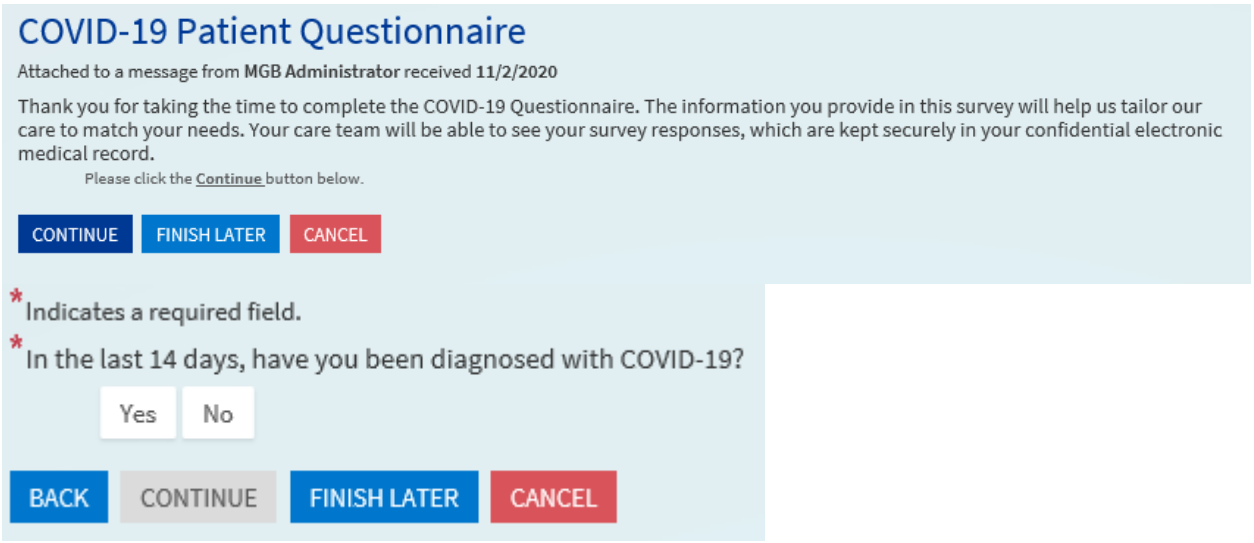
©2017 Partners HealthCare. All rights reserved. Content not managed by Partners *e*Care.

APPENDIX

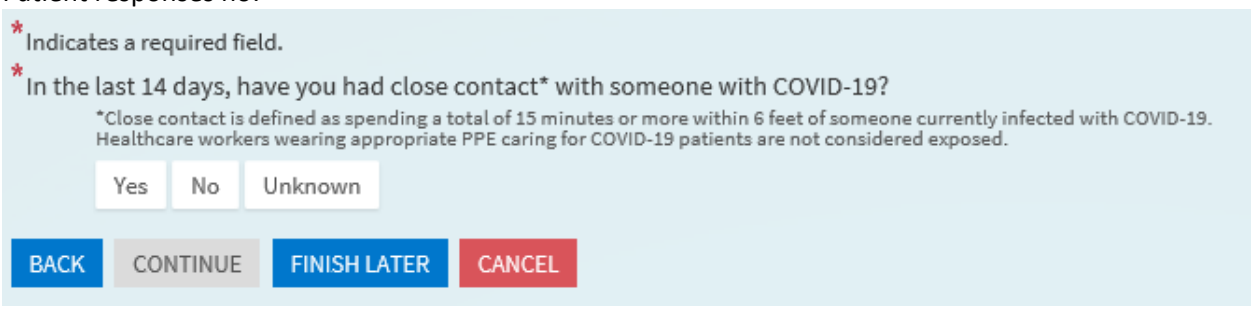
COVID-19 PG Patient Questionnaire Sent Via eCheck In

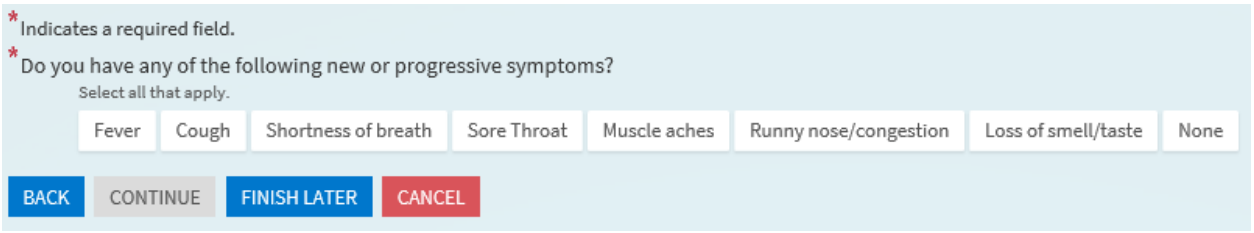
Below is the COVID Pre-visit Symptom & Exposure Screening Questionnaire in Partners Patient Gateway, which patient must complete during eCheck-In for in-person appointments. The questionnaire is also available in Spanish.

- If patient selects **yes to any** of the symptoms, it will mark as **(!)** on DAR
- If patient answers **yes to any** screening questions, patient is asked to call the practice to discuss best treatment pathway and eCheck-in is suspended.



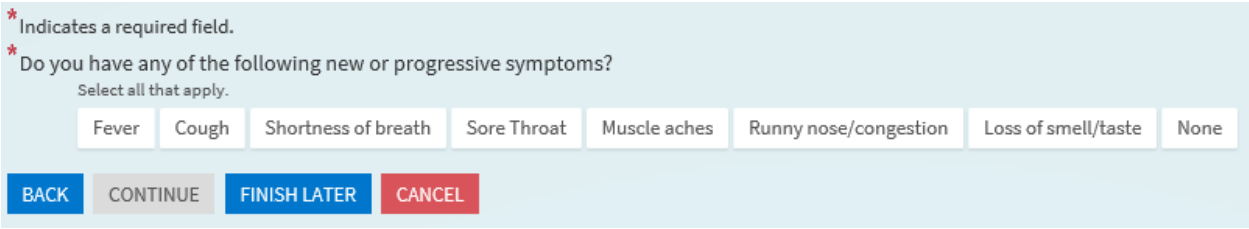
Patient responses no:





©2017 Partners HealthCare. All rights reserved. Content not managed by Partners eCare.

Patient responses yes to In the last 14 days, have you been diagnosed with COVID-19?:



MGH ©2017 Partners HealthCare. All rights reserved. Content not managed by Partners *e*Care.