TRAINING OUTLINE for the Healthcare Virtual Assistants (HVAs')

Training Focuses on:
1.) EMR portal
2.) Faxing
3.) GOAL: Increase the # of patients
4.) Advertisements
5.) Templates for documentation
6.) Patient balance monitoring

Daily routines:
1. Attend to the concerns of their assigned patients
2. Setting up the patient encounters/ chart
3. Double-checking the encounters before signing by the provider
4. Upload medications on the chart
5. Texting/emailing/ calling the patients, pharmacy, other facilities etc.
6. Scheduling patients
7. Process the Labwork and other paperwork
8. Process Prior authorization
9. Marketing: Sending flyers and calling practices for coordination of care specific to the provider

WEEK 1

Monday

8:00 am – 12:00 pm PST (4 hours)	Orientation **c/o Jasper**
	About Visionary Psychiatry
	Virtual Staff and contact information
	-Patient intake team
	-Insurance verification team
	-Billing team
	Observation with Carmen while seeing patients

Tuesday

8:00 am – 12:00 pm PST (4 hours)	Spreadsheet for patient monitoring and other notes/
	Account setup for RXNT
	c/o Jasper

Wednesday

8:00 am – 12:00 pm PST (4 hours)

Part 1: EHR and Scheduler navigation and other notes
Creating of accounts: Phone system (recommended Vonage), Cover my meds (prior authorization), Creyos, ePDMP, freedAI, practice GMAIL, Hushmail (encrypted emails)
Routines:
-Checking in patients/Checking patients out
-Scheduling patients and follow-up intervals.
-Chart prep for readiness to streamline provider time
-Initial appointment and follow-up encounters
-Ketamine and Spravato
-FreedAI documentation
-Med rep/MSL contact information and communications

Notes: Stopping refill of medications if the patient has canceled follow-up visits in X months, notifying the patient of the need/rationale for follow-up,
-other protocols
c/o Amy

Thursday

8:00 am – 12:00 pm PST (4 hours)

Part 2: EHR and Scheduler navigation and other notes
Creating of accounts: Phone system (recommended Vonage), Cover my meds (prior authorization), Creyos, ePDMP, freedAI, practice GMAIL, Hushmail (encrypted emails)
Routines:
-Checking in patients/Checking patients out
-Scheduling patients and follow-up intervals.
-Chart prep for readiness to streamline provider time

-Initial appointment and follow-up encounters
-Ketamine and Spravato
-FreedAI documentation
-Med rep/MSL contact information and communications

Notes: Stopping refill of medications if the patient has canceled follow-up visits in X months, notifying the
patient of the need/rationale for follow-up,
-other protocols
c/o Amy

WEEK 2
Monday
8:00 am – 12:00 pm PST (4 hours

-Referrals (Psych Today, Zocdoc, WebMD, Visionary
Psychiatry website) and other forms of patient intake
-Visionary Psychiatry protocol for new patient intake
c/o Era

Tuesday
8:00 am – 12:00 pm PST (4 hours)

Intake forms: (Provider and Visionary Psychiatry
Disclosures, ROI, patient portal registration, PHQ-9, GAD-7, MDQ)
Customer service:
-Patient's communication
-Sending of plan of care
-Sending of after-appointment summary
-Sending of meds sent to the pharmacy
-Attending to patients' concerns
c/o Amy

Wednesday
8:00 am – 12:00 pm PST (4 hours)

Before patient appointment:
-Checking of CC on file, balances and charge slips.

-Addressing patient balances over $150.00, or the preferred office limit, and not allowing a follow-up visit until the balance is paid

Patient monitoring:
-Credit card on file
-Balances
-In-person visits vs tele visits
-Last follow-up visit

Late Cancellation/Missed Visits/No Show
-Rates
-Documentation and
-Submission of fees for billing
c/o Jasper

Thursday
8:00 am – 12:00 pm PST (4 hours)

Texting patients:
-Appointment reminder, initial appointment, communicating with patients if
not online for tele or in the office at the appointment time
-Templates of verbiage to communicate with patients
-Genoa Pharmacy
-Medication uploads and refills

Cover my meds: Prior authorizations processing
c/o Era

<mark>WEEK 3</mark>

Monday
8:00 am – 12:00 pm PST (4 hours)

Documentation and write-up:
-Creyos write-up
-Scales testing write-up (including: ASRS, GAD-7, PHQ 9, MDQ, PCL-5, AQ, AUDIT and DAST)
-99215 documentations for testing/evaluation.

-Documentation requirements to link to chart from texts/faxes/phone calls/emails and templates to use for such documentation
-Checking and uploading of faxes in patient's chart
-Lab reports
-Paperwork: Family Medical Leave Act (FMLA), Short Term Disability (STD), Return to work letter etc.
c/o Era

Tuesday
8:00 am – 12:00 pm PST (4 hours)

Marketing: Flyers making for advertisement – Canva
Referrals (faxing to facilities) – Looking up for facilities, etc. Working vertical markets to further revenue growth and generation
Account creation: Facebook, Instagram, X, TikTok
c/o Jasper

Wednesday
8:00 am – 12:00 pm PST (4 hours)

Marketing: Creation of a personal website for the provider if still doesn't have one.
Labcorp order/request navigation
c/o Jasper

Thursday
8:00 am – 12:00 pm PST (4 hours)

Billing discussion:
-list of accepted insurances
-In Network (IN)
-Out of Network (ONN)
-Copay
-Deductible
-Coinsurance
-Insurance verification (this will be done by Visionary Psychiatry staff but for additional learnings of the trainees)
-Discussion of CPT codes and commonly used

ICD-10 codes

-Patient aging reports (A/R)

Reports and monitoring:

-Spreadsheet report for provider

-Tracking of New Patients/ No -show rate/ # of patients per week and month/ # of active patients/ # of termed patients

-Day-End reporting

-Weekly reports

-Monthly reports

c/o Jasper