

Phreesia's Coronavirus Disease 2019 (COVID-19) Screening Module and Workflow

For Adult Patients

Last updated: 6/30/2020

Major Updates

The COVID-19 Screening Module will be updated on 7/6/20 to address client feedback regarding symptoms, travel, and COVID-19 testing:

Symptoms: We have added clarifying statements to our symptoms questions to ensure that patients only report symptoms not due to other new or chronic health conditions.

Travel: We will be removing the travel question in this update (both international and domestic). Although travel may increase an individual's chances of becoming infected and spreading COVID-19 – especially when traveling to or from a COVID-19 hotspot – there is evidence of community transmission in all 50 states.

COVID-19 Testing: We will be simplifying the second half of the screening module. Patients will be able to report:

- Whether they have been tested for COVID-19
- The date and result of their test
- The reason why they were tested (regardless of the result)
- We hope to use this information to better target at-risk patients and those who may be infectious, and this will allow us to avoid flagging patients who may have tested positive in the past but have since recovered.

Screening Questions for Adults (patients 18 years and older)

Patients receive the following COVID-19 screening questionnaire, prior to their visit or in the office.

Coronavirus Disease 2019 (COVID-19) has been reported in every state and in countries around the world. COVID-19 can cause respiratory or gastrointestinal illness.

In order to protect you and others, we are asking about symptoms and exposure to COVID-19. Your health is our priority, please answer these questions so that we can direct you to the care that you need as quickly as possible.

Do you have a fever?*

☒ No ☐ Yes

Do you have a new/worsening cough or shortness of breath that is not due to another health problem?*

☒ No ☐ Yes

Are you experiencing any other NEW symptom(s) listed below that is not due to another health problem? Please select all that apply:*

None of the below

☒ None of the below ☐ Chills or shaking ☐ Muscle aches and pains

☐ New loss of taste or smell ☐ Vomiting or diarrhea ☐ Sore Throat

In the past 2 weeks, did you have close contact with someone who has COVID-19?*

☒ No ☐ Yes

Have you been tested for COVID-19?*

Yes, I tested negative

☐ No, I have not been tested ☐ I was diagnosed with COVID-19 but was never tested ☐ Yes, I was tested and am waiting for my results

☐ Yes, I tested positive ☒ Yes, I tested negative

When were you tested for or diagnosed with COVID-19?*

06/22/2020

Why did you get tested? Please select all that apply*

I work in a healthcare facility or am a first responder

☐ I wanted to know my COVID-19 status ☐ I had symptoms of possible COVID-19 ☐ I had close contact with a person who has COVID-19

☐ I was required to undergo testing before a procedure or surgery ☐ I was required to undergo testing before returning to my workplace ☐ I was required to undergo testing for travel

☒ I work in a healthcare facility or am a first responder ☐ I live in a nursing home or assisted living facility ☐ I was enlisted for public health monitoring

Only appears if answer to question 5 is **not** "No, I have not been tested."

Only appears if answer to question 5 is **not** "No, I have not been tested" or "I was diagnosed with COVID-19 but was never tested."


Patient-Facing Alerts – Dependent on Question Answers & Session Type


Educational messages are generated for patients to inform them how to proceed given their responses to the screening questions.

Practices will have more flexibility when it comes to configuring the language and presentation of patient-facing alerts. For example, the patient-facing alerts can be suppressed for telemedicine visits or the language can be adjusted to reflect individual practice's policies (e.g. no visitors or mask policy). The default configuration of these patient-facing alerts states that the patient may be accompanied by only one visitor, but there is an alternative version of these alerts that instructs patients to not bring any visitors to their appointment.

1. Patient completes questions pre-visit; Is symptomatic and/or has an epidemiologic risk factor:

Your health is our priority.





- If you are scheduled for an **in-person visit**, call our office now. Please do not come into the office until you have spoken with someone from our practice.
- If this is a **telemedicine visit**, please continue with the rest of your check-in.

Continue

This includes instances in which a patient reports being diagnosed or tested for COVID-19 in the last 30 days, for reasons of symptoms or contact.

2. Patient completes questions pre-visit; Is asymptomatic, and has no epidemiologic risk factors.

Practices that allow one visitor can use the following alert*:

Thank you for answering these screening questions.

If this is a **telemedicine visit**, please continue with the rest of your check-in.

If you are scheduled for an **in-person visit**, ONLY ONE VISITOR may accompany the patient.

Your health is our priority. Please call our medical team before your appointment if you begin experiencing new symptoms among those listed below, as they may be associated with COVID-19.

- Fever
- Fatigue
- Cough
- Shortness of breath

Please continue with the rest of your check-in.

Continue

Practices requiring mask/cloth face covering for in-office appointments and a no visitor policy can use the following alternative alert:

Thank you for answering these screening questions.

If this is a **telemedicine visit**, please continue with the rest of your check-in.

If you are scheduled for an **in-person visit** please note our new policies to keep you and others safe:

- Patients are required to bring their own mask or cloth face covering to wear over their nose & mouth during their visit.
- We are **NOT allowing any visitors** at this time.

Your health is our priority. Please call our medical team before your appointment if you begin experiencing new symptoms among those listed below, as they may be associated with COVID-19.


- Fever
- Fatigue
- Cough
- Shortness of breath

Please continue with the rest of your check-in.


**default visitor policy configuration*

3. Patient completes questions in-office; Is symptomatic, and/or has an epidemiologic risk factor:


Your health is our priority.



- If you are already in our **waiting room**, please come up to the front desk to discuss your answers. Please make sure you are wearing a mask or cloth face covering when doing so.



- If you are in the **parking lot**, please complete your check-in and our staff will call you when you are done.



- If this is a **telemedicine visit**, please continue with the rest of your check-in.

This includes instances in which a patient reports being diagnosed or tested for COVID-19 in the last 30 days, for reasons of symptoms or contact.

4. Patient completes questions in-office; Is asymptomatic and has no epidemiologic risk factors:

Thank you for answering these screening questions.

Please continue with the rest of your check-in.

[Continue](#)

Dashboard Alerts

If a patient's responses to the COVID-19 screening questions puts him/her in an at-risk status, Phreesia will display an alert to notify staff. The icon will be the same in all scenarios.

The screenshot shows the Phreesia dashboard interface. At the top, there is a navigation bar with the Phreesia logo and four main menu items: Payments, Communications, Analytics, and Reports & Settings. Below this is a 'Checked-in' section with a search bar containing 'Jane' and a list of patient records. The first record is for Jane Green, with a red circular alert icon (a virus) next to her name. The record also shows a green status icon, a checkmark, the date 05/24/1978, and an end time of 10:10AM.

Staff-facing alerts display all of the patient's answers—regardless of whether the screening questions are completed pre-visit or in-office.

Alerts are generated if a patient answers positively to any question on the screening module. This includes instances in which a patient reports being diagnosed or tested for COVID-19 in the last 30 days, for reasons of symptoms or contact.

Pre-Visit Alerts

For example, if a patient completes the screening questions pre-visit and answers “yes” to fever, “no” to cough or shortness of breath, “chills or shaking” under other new symptoms, “no” to recent travel, “none of the below” in reference to any recent doctors' orders or testing of themselves (or someone in their household), and “no” to a recent close contact, the following staff alert will be generated.

The screenshot shows a 'Changed Patient Information' alert. The title is 'Changed Patient Information' with a subtitle 'Review selected patient information'. Below this is a table with three columns: Type, Data on file, and New Data. The table has one row for 'COVID-19 Screening'. The 'Type' column contains 'Coronavirus - Pre Visit Alert'. The 'New Data' column contains the following text: 'Fever: Yes. Respiratory Illness: No. New/Worsened Respiratory Illness: N/A. Other New Symptoms: Chills or shaking. Travel / Exposure: No. Contact: No. Diagnosis / Testing / Quarantine: None of the below. Date: 05/04/2020'. At the bottom of the alert, there are three buttons: 'Export', 'Complete', and 'Edit Patient Record'.

Type	Data on file	New Data
COVID-19 Screening		
Coronavirus - Pre Visit Alert		Fever: Yes. Respiratory Illness: No. New/Worsened Respiratory Illness: N/A. Other New Symptoms: Chills or shaking. Travel / Exposure: No. Contact: No. Diagnosis / Testing / Quarantine: None of the below. Date: 05/04/2020

In-Office Alerts

For example, if a patient completes the screening questions in-office and answers “yes” to fever, “no” to cough or shortness of breath, “chills or shaking” under other new symptoms, “no” to recent travel, “none of the below” in reference to any recent doctors’ orders or testing of themselves (or someone in their household), and “no” to a recent close contact, the following staff alert will be generated.

Changed Patient Information
Review selected patient information

Type	Data on file	New Data
COVID-19 Screening		
Coronavirus - In Office Alert		Fever: Yes. Respiratory Illness: No. New/Worsened Respiratory Illness: N/A. Other New Symptoms: Chills or shaking. Travel / Exposure: No. Contact: No. Diagnosis / Testing / Quarantine: None of the below. Date: 05/04/2020

Export

Complete

Edit Patient Record

Appointments Hub

At-risk patients will appear in the Appointments Hub to be tracked by staff.

Appointment Requests

Cancel/Reschedule Requests

Patient Name

2 reasons

Chart #	Patient Name	DOB	DOB	Source	Reason	U	Appointment	Appt Provider	Appt Location	Entered	Assigned Location	Assigned User	Follow Up	Actions	Status
23536	Michael Brown	01/01/1970	--	Self	COVID19 - In-Office	U	03/22/2020 08:00	Dr Chibul Pandey	Beacon Hill	03/27/2020	Unassigned	None	<div>Send to ED</div>	<div>03/27/2020</div>	<div>Scheduled</div>
32468	Brad Dean	01/04/1960	--	Self	COVID19 - In-Office	R	03/27/2020 10:00	Dr. Lynn V Bass	Beacon Hill	03/27/2020	Unassigned	None	<div>False Positive</div>	<div>03/27/2020</div>	<div>Scheduled</div>
29616	Steve Johnson	05/12/1966	--	Self	COVID19 - Pre-Visit	R	03/23/2020 09:00	Dr. Holly Little	Jamaica Office	03/27/2020	Unassigned	None	<div>Send to Urgent Care</div>	<div>03/27/2020</div>	<div>Scheduled</div>
34158	Kelly Coren	01/01/1998	--	Self	COVID19 - Pre-Visit	R	03/27/2020 13:00	Dr. Harry Brain	Jamaica Office	03/27/2020	Unassigned	None	<div>Unable to Reach</div>	<div>03/27/2020</div>	<div>Scheduled</div>
37351	Jim Clark	01/01/2000	--	Self	COVID19 - In-Office	R	03/30/2020 13:00	Albert Hart	Beacon Hill	03/27/2020	Unassigned	None	<div>MDV IIN to following</div>	<div>03/27/2020</div>	<div>Scheduled</div>
None	Tara Sullivan	08/09/2009	--	Self	COVID19 - Pre-Visit	U	04/01/2020 10:00	Dr. James Pollen	Jamaica Office	03/25/2020	Beacon Hill	None	<div>Patient Contacted</div>	<div>03/25/2020</div>	<div>Scheduled</div>

View 25 Per Page

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Any new COVID-19 alerts that appear in the appointments hub will now have detailed information related to when the patient's scheduled appointment is. In order for Phreesia to properly pull the appointment date, time, location, and provider the reason for visit must include COVID or Coronavirus.

Appointment Requests

Cancel/Reschedule Requests

2 reasons

Chart #	Patient Name	DOB	FA#	Source	Reason	U	Appointment	Appt Provider	Appt Location	Entered	Assigned Location	Assigned User	Follow Up	Updated	Actions	Status
23556	Michael Brown	01/01/1970	--	Self	COVID19 - In-Office	R	03/27/2020 08:00	Dr Chibul Pandey	Beacon Hill	03/27/2020	Unassigned	None	None	None		Scheduled
32448	Brad Dean	01/04/1980	--	Self	COVID19 - In-Office	R	03/27/2020 10:00	Dr. Lynn Y Bass	Beacon Hill	03/27/2020	Unassigned	None	None	03/27/2020		Scheduled
29616	Steve Johnson	05/12/1986	--	Self	COVID19 - In-Office	R	03/31/2020 09:00	Dr. Holly Little	Jamaica Office	03/27/2020	Unassigned	None	None	None		Scheduled
34158	Kelly Coren	01/01/1998	--	Self	COVID19 - In-Office	R	03/27/2020 13:00	Dr. Harry Brain	Jamaica Office	03/27/2020	Unassigned	None	None	None		Scheduled
37551	Jim Clark	01/01/2000	--	Self	COVID19 - Pre-Visit	R	03/30/2020 13:00	Albert Hart	Beacon Hill	03/27/2020	Unassigned	None	None	None		Scheduled
None	Tara Sullivan	09/09/2009	--	Self	COVID19 - Pre-Visit	R	06/01/2020 10:00	Dr. James Pollen	Jamaica Office	03/25/2020	Beacon Hill	None	None	None		Scheduled

View 25 Per Page

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A new button has been created to help staff better sort their alerts to patients with COVID-19 Alerts. This new button will be conveniently located next to the filters icon and will apply a setting to only select COVID-19 reasons for visit (or Coronavirus reasons for visit) in any status other than closed. As needed, additional filters can be layered on top of this auto filter.

Appointment Request Management - COVID-19 Alerts Only

Chart #	Patient Name	Screen	U	Appointment	Appt Provider	Appt Location	Extended W	Assigned Location	Assigned User	Follow Up	Updated	Actions	Status
47220	Victoria Burke	COVID-19	R	Connaught test	Not scheduled	None	None	04/06/2020	7 Hills	None	None	None	Rejected
47220	Victoria Burke	COVID-19	R	Collaborative 1	Not scheduled	None	None	04/06/2020	7 Hills	None	None	None	Request for appt
47220	Victoria Burke	COVID-19	R	Friends/Family COVID19 - In-Office	Not scheduled	None	None	04/06/2020	Rome Office alias	None	None	None	Pending
47294	Victoria Ba	COVID-19	R	Not Listed	Not Listed	04/06/2020 09:30	DOOGLE, L	Rome Office	Unassigned	None	None	None	No show
4834	Victor Bolton	COVID-19	R	Connaught test	Not scheduled	None	None	04/06/2020	Unassigned	None	None	None	No show
14540	Victor Bowl	COVID-19	R	Not Listed	COVID19 - PreVisit	04/06/2020 09:00	DOOGLE, L	Rome Office	Unassigned	None	None	None	Closed
14537	Viva Martin	COVID-19	R	Friends/Family COVID19 - PreVisit	Not scheduled	None	None	04/06/2020 08:00	DOOGLE, L	Rome Office	04/06/2020	None	Cancelled in
50275	Viva Eaton	COVID-19	R	Not Listed	COVID19 - In-Office	04/06/2020 05:00	BUKLEY, R	Rome Office	Unassigned	None	None	None	No show
13764	Viva Adams	COVID-19	R	Not Listed	COVID19 - In-Office	04/06/2020 08:40	BUKLEY, R	Rome Office	Unassigned	None	None	None	Cancelled
12944	Victoria Bringe	COVID-19	R	Patient Self schedu...	COVID19 - In-Office	04/06/2020 10:00	Bukley Chry	Rome Office alias	Unassigned	None	None	None	No show
27379	Viva Gooden	COVID-19	R	Not Listed	Not Listed	Not scheduled	None	None	04/06/2020	Unassigned	None	None	Pending
10443	Victor Bowl	COVID-19	R	Dr Alan Sanders	COVID19 - In-Office	Not scheduled	None	None	04/06/2020	Unassigned	None	None	Closed
47556	Victoria Campbell	COVID-19	R	Not Listed	Collaborative 1	Not scheduled	None	None	04/06/2020	Unassigned	None	None	Request for appt
40764	Victor Clemen	COVID-19	R	Friends/Family COVID19 - PreVisit	Not scheduled	None	None	04/06/2020	Unassigned	None	None	None	Request for appt
36570	Viva Drake	COVID-19	R	Not Listed	COVID19 - PreVisit	Not scheduled	None	None	04/06/2020	Unassigned	None	None	Cancelled
50818	Victoria Nelson	COVID-19	R	Dr Ann Moss	COVID19 - PreVisit	Not scheduled	None	None	04/06/2020	Rome Office alias	None	None	Request needed
3385	Victor Barber	COVID-19	R	Not Listed	COVID19 - PreVisit	04/06/2020 06:30	BUKLEY, R	Rome Office	Unassigned	None	None	None	No show
52944	Victor Bringe	COVID-19	R	Friends/Family COVID19 - In-Office	Not scheduled	None	None	04/06/2020	Unassigned	None	None	None	Rejected
52381	Victor Almonds	COVID-19	R	Self	COVID19 - In-Office	Not scheduled	None	None	04/06/2020	Unassigned	None	None	Cancelled
20002	Viva Key	COVID-19	R	Friends/Family COVID19 - In-Office	Not scheduled	None	None	04/06/2020	Unassigned	None	None	None	Pending
53567	Victor Burt	COVID-19	R	Patient Self schedu...	Collaborative 1	03/17/2020 13:45	Bukley Chris	Rome Office alias	03/17/2020	Rome Office alias	None	None	No show
13567	Victor Burt	COVID-19	R	Patient Self schedu...	Collaborative 1	03/17/2020 15:30	Bukley Chris	Rome Office alias	03/17/2020	Rome Office alias	None	None	No show
53566	Victoria Samuel	COVID-19	R	Patient Self schedu...	Collaborative 1	03/17/2020 14:00	Bukley Chris	Rome Office alias	03/17/2020	Rome Office alias	None	None	No show

Appointment Requests

Cancel/Reschedule Requests

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When a COVID-19 alert is triggered and displayed in the appointments hub, questions and answers for the screener will now be displayed on the View appt request overlay. Staff can access this detailed information by clicking on the magnifying glass to the right of each alert on the hub. All questions and answers can be located at the bottom of this overlay.

Appointment Requests
Cancel/Reschedule Requests

Chart #	Patient Name	DOB	EGB	Source	Reason	U	Appointment	Appt Provider	Appt Location	Entered	Assigned Location	Assigned User	Follow Up	Updated	Actions	Status
33521	Kathleen Stevens	01/01/1980	--	None	COVID19 - In-office	U	03/31/2020 16:15	Adam Bricker	Main Office	03/31/2020	Main Office	None	None	None		Checked-in

View appt request

PATIENT INFORMATION

Full name

Chart #

Date of birth

Gender

BRENDAN BRENDANSON

Not entered

05/05/1980

Male

Street address

123 BRENDAN BLVD.

CONTACT INFORMATION

Mobile phone

Primary phone

Email

555-555-5555

Not entered

bbrendanson@phreesia.com

INSURANCE INFORMATION

Insurance company

Policy ID number

Not entered

Not entered

REQUEST DETAILS

Request source

Referring provider name

Not entered

Not entered

VISIT DETAILS

Reason for visit

Preferred day & time

Preferred locations

Provider to see

COVID19 - In-office

Any day any time

Any, first available

Any, first available

REQUEST COMMENTS

Not entered

ADDITIONAL INFORMATION

Fever Confirmation

Respiratory Illnesses

Other New Symptoms

Chills or shaking

Travel/Exposure

Coronavirus Diagnosis/Testing/Quarantine

Contact with Coronavirus

New/Worsened Respiratory Symptoms

Yes

No

No

Chills or shaking

No

None of the below

No

N/A

Appointments Hub Reason for Visit

- Patient complete questions pre-visit; Is symptomatic and/or has an epidemiologic risk factor (travel, contact): “COVID19 – Previsit”
- Patient completes questions in-office; Is symptomatic, and/or has an epidemiologic risk factor (travel, contact): “COVID19 – In-office”