Telehealth Visit Protocol

This document provides a basic format for a telehealth session. The framework can be adapted to any telehealth practice. It is recommended that any public health department/clinic is adapted for telehealth visits, including: confirming clinic appointment, documenting patient arrival time, integrating within the clinic workflow, and obtaining patient consent (if applicable). Further, if telehealth visits occur between two providers, it is recommended that the providers determine which side will take the lead during the visit.

Step 1.

* Test the equipment prior to the first clinic appointment (preferably 20-30 minutes prior to the visit). This should be tested by the Information Technology staff at both sites.

* Connect and test the peripheral equipment.

* Troubleshoot any technology glitches.

* Collect a roster of key staff contacts at each site (including; cell phone numbers, email, and a landline phone number in the event of technical difficulties).

* Ensure that the camera and equipment is ready for use.

Step 2.-

* Document the patient arrival and place patient in the clinic room.

* Obtain a signed consent, if applicable.

* Review the protocol of the telehealth visit and explain what the patient can expect.

Step 3.

* Alert the provider that the patient is ready and send the provider into the room.

* Request that introductions begin at patient site. Include everyone in the room.

* Begin the visit, per protocol.

* Obtain a history and physical exam, as applicable.

* Review medication, applicable.

* Develop a plan of care with the team.

* Identify a follow-up plan.

* Document the visit (both sites).

* Evaluate the visit.

* Conclude visit.

* Process payment.

* Clean and store equipment and peripherals.

Disclaimer: This sample document is provided only as a reference for public health departments/clinics developing their own materials and may be adapted to local needs.