

# Telehealth Clinical Service Checklist

	Presenting Site	Consulting Site
Before Telehealth Clinical Service	<ul style="list-style-type: none"> <li><input type="checkbox"/> Obtain referral summary from referring provider including patient’s history, reason for consultation, and other necessary documentation.</li> <li><input type="checkbox"/> Schedule patient consultation.</li> <li><input type="checkbox"/> Obtain patient data (i.e., labs, x-rays, EKGs), history, and referral form; forward to consulting site immediately upon scheduling consultation.</li> <li><input type="checkbox"/> Use of patient reminders are determined by each site, depending upon each clinic’s preference.</li> <li><input type="checkbox"/> Inform the patient that telehealth technology is being used for the consultation and upon completion, an evaluation form will be requested (If such evaluation is required).</li> <li><input type="checkbox"/> The patient completes registration form, consent to treat and release of information, informed consent form, financial responsibility form for each visit, and any other documentation required by either site.</li> <li><input type="checkbox"/> The telehealth presenter collects clinical data (such as vital signs) for the consulting clinician.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Collect patient data and prepare information for clinic.</li> <li><input type="checkbox"/> Use of patient reminders are determined by each site, depending upon each clinic’s preference.</li> <li><input type="checkbox"/> Ensure consulting clinician has correct patient information including referral information, billing form, progress notes, and evaluation form (if applicable).</li> <li><input type="checkbox"/> Ask consulting clinician for their preference of having telehealth personnel assist with the equipment, or if they wish to manage the equipment by themselves.</li> <li><input type="checkbox"/> Provide appropriate instructions and support for using the equipment.</li> </ul>
During Telehealth Clinical Service	<ul style="list-style-type: none"> <li><input type="checkbox"/> The telehealth presenter manages the patient for the consulting clinician to provide appropriate information, which may include, for some types of healthcare procedure (i.e., palpating the patient or placing electronic stethoscope) under the order of the consulting clinician and according to the procedures and protocols of each telehealth clinical service.</li> <li><input type="checkbox"/> The telehealth presenter manipulates the telehealth equipment, cameras and any necessary peripheral devices.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> The consulting clinician maintains eye contact by looking at the camera and explains to the patient how telehealth technology is used during the consultation, and explains their experience and comfort level in using telehealth technology.</li> <li><input type="checkbox"/> The consulting clinician guides the telehealth presenter through the examination of the patient.</li> <li><input type="checkbox"/> Documentation of the telehealth service is completed in the patient’s medical record by the consulting clinician.</li> <li><input type="checkbox"/> Documentation is processed just as if the patient is present in the consulting clinician’s office.</li> </ul>
After Telehealth Clinical Service	<ul style="list-style-type: none"> <li><input type="checkbox"/> Immediately following the consultation, all documentation is processed at both the presenting site and the consulting site. This documentation and the process for transmission are determined by each site when developing the procedures and protocols for each clinic.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> The consulting clinician completes consultation notes and other documentation.</li> <li><input type="checkbox"/> Immediately following the consultation, findings and recommendations are forwarded to the referring provider.</li> <li><input type="checkbox"/> Documentation of the telehealth service should be captured in the medical records of both the consulting clinician and the referring provider.</li> <li><input type="checkbox"/> Consulting clinicians follow all applicable state and federal laws when billing for telehealth services. For Medicare, POS 02 is used to denote a telehealth service. For Medicaid, POS 02 is used to denote a telehealth service, along with a modifier to denote the patient location. Health Plans should be contacted individually for their billing and coding requirements.</li> </ul>