Telehealth Visit Etiquette Checklist

The list below is not comprehensive, but rather some key considerations when preparing for telehealth visits.

First Steps:
- Sign up for a telehealth platform to hold online appointment
- Call your insurers to make sure you understand their reimbursement policies
- Determine what your state's policy is on getting patient consent
- Create your office visit environment

Setting Up Your Environment:
- Ensure your setting/room is private (HIPAA)
- Address the size, location, and layout of exam room or office
- Choose a neutral background such as a gray or a light blue color
- Pay special attention to décor and furniture in the room to make sure it is not too busy and will create a distraction for patients
- Make sure there is adequate lighting for effortless patient triage
- Avoid background noise

Equipment Set Up
- Choose what type of technology you will use – either desktop, tablet, or smartphone
- Have a high-speed internet connection
- Use a headset or microphone to help minimize background noise and ensure clarity
- Use dual screens if possible, for easy documentation of EHR notes
- Minimize and mute all other applications
- Make sure your software is updated
- Check that you have granted access to your computer's camera and audio
- Do a trial run each day before first visit to ensure equipment is working properly

Patient Preparation
- Prepare for the patient visit as you would if the patient were in the office
- Dress with the same level of professionalism
- Review patient complaints and records before beginning the call, not during

Office Visit Communication Best Practices
- Confirm patient name and date of birth
- Adjust webcam to eye level to ensure you have eye contact with your patient
- Pause after patient speaks to allow for transmission delay
- Speak clearly and deliberately
- Choose empathetic language
- Use non-verbal language to signal that you are listening
- Verbalize and clarify next steps, such as follow-up appointments, care plan, or prescription orders
- Allow for questions from the patient and pause between questions
- Send patient survey to new patients and existing patients to improve future appointments