

Patient Scheduling Checklist: Confirm Patient for Telehealth Visit



This checklist helps ensure patients are consistently screened for telehealth visits (two-way, interactive videoconferences that occur in real-time) based on clinical and technology/connectivity criteria, and their interest in giving telehealth a try to promote safe and continued access to healthcare during the COVID-19 public health emergency (PHE). Complete the checklist during the telephone call to schedule patients' appointments. Clinic safety protocols will help you determine whether telephone or clinic visits are viable options for patients unable to be "seen" via telehealth using your videoconferencing platform (VCP).

1. Patient need aligns with "Criteria, Conditions and Appointment Types for Telehealth-Appropriate Encounters" or patient's provider has determined requested appointment is appropriate for telehealth.
2. Confirm patient received and reviewed letter/inserts describing transition to telehealth for the duration of the COVID-19 public health emergency.
 - a. Answer any questions and address patient concerns
3. Patient has access to a computer, tablet and/or smartphone.
4. Patient has means to connect via WIFI or an appropriate amount of data on their cell phone to avoid extra charges to their monthly bill (such as an unlimited data plan).
5. Patient wishes to proceed with a telehealth visit with their provider.
6. Confirm the phone number the patient would like the provider to use to re-establish contact in the case of a videoconferencing difficulty. Explain to the patient that the **provider will reach out to the patient** if the video connection is lost during a visit.
7. Patient appointment scheduled 30 minutes prior to their encounter with their provider.
8. Complete registration.
 - a. Verify demos.
 - b. Verify insurance/complete MPSQ/confirm co-pay will be billed (if applies).