

Patient Appointment Day Checklist: Complete a Successful Telehealth Visit



This checklist is completed the day of the patient's scheduled appointment and helps the patient complete a successful telehealth visit on your videoconferencing platform. Remember this appointment is scheduled to begin 30 minutes prior to when their provider logs in for the patient's encounter.

1. Admit the patient to the meeting/appointment scheduled on the VCP.
 - a. If the patient is unable to log in, troubleshoot to find an alternative that works.
 - b. This time is to ensure the patient can log in and everything below is complete so they are prepared for their telehealth encounter with their provider.
2. Confirm the patient's identity.
3. Complete outstanding registration information and confirm patient will be billed for their co-pay (if applies).
4. Confirm the phone number the patient would like the provider to use to re-establish contact if technology or connectivity challenges prohibit the visit from being completed on your VCP.
 - a. Ask the patient to keep their phone with that number nearby.
 - b. Remind the patient that the **provider will reach out to the patient** if the video connection is lost during the visit.
5. Collect and document patient's verbal consent to participate in the telehealth visit.
6. Communicate the expectations to the patient for during the visit.
 - a. A private and quiet area in the home with limited distractions and clear of power cords is ideal.
7. Complete rooming workflow.
8. Collect patient's vitals prior to the appointment if possible and complete meds review.
 - a. Let patient know that this is not a requirement if they do not have the tools needed.
 - b. Vital signs that might be reportable by patients from home include:
 - Temperature (note type of thermometer used)
 - Blood pressure (note type of BP cuff used and proper protocol followed)
 - O2 level oximetry (pulse oximeter)
 - Pulse (manual wrist counting for 30seconds, smart watch, phone app, pulse oximeter)
 - Height and weight
 - Other Smartwatch and activity data