



Checklist for Providers to Conduct a Successful Telehealth Visit

- 1) Use a high-quality webcam and ensure it is set-up at eye level.
- 2) Use quality sound equipment.
- 3) Have a dedicated space for conducting telehealth visits that is quiet and free of distractions.
- 4) Develop a mechanism or workflow within your software platform or EMR that notifies you when your next patient is ready. If that is not possible, is there a phone tree that can be used with nursing staff to alert you?



- 5) Test, test, and test again! Ensure your webcam is working, and your microphone and audio are clear.
- 6) Make sure all your devices are plugged in and use a wired internet connection wherever possible vs. Wi-Fi.
- 7) Close out any unnecessary programs that can impact the quality of your audio and video feed.
- 8) If you are using an online web app, ensure you are using the correct browser.

- 9) Dress appropriately and professionally.
- 10) Adjust your lighting to ensure the image is clear, there is no backlighting from a window, and only overhead light is used.
- 11) Address or read the patient's chief complaint before the visit begins, just as you would in an in-person visit.
- 12) Have a support staff number or contact easily available incase technical issues arise.

- 13) Have the patient history on hand and EMR pulled up.
- 14) Follow the same clinical guidelines you would with an in-person visit.
- 15) Stay engaged! Make eye contact with the patient, use body language that shows acknowledgment of their concerns.
- 16) Explain next steps – thank them for using telehealth. Let them know what they need to do next. Let the patient end the visit!

