Getting Started with Telehealth: Your Organization’s Checklist

Ensuring the Best Experience for Your Clients When Using Telehealth

☐ Choose a HIPAA-compliant telehealth software that is right for your practice/office

☐ Train all staff on chosen telehealth software

☐ Train administrative staff on what to do if clients have connection difficulties

☐ Create workflows so all staff members know how to process new and existing clients via telehealth

☐ Ensure staff have the right tools to conduct telehealth appointments:
  ☐ Silent keyboard
  ☐ Noise-cancelling headphones
  ☐ Laptop/computer that can connect to EHR, telehealth software, etc.
  ☐ Strong internet or WiFi connection
RESOURCES

An Everyday Telehealth Checklist for Providers

Before Each Session

☐ Login and test your telehealth software (Skype, FaceTime, or other platforms) before your first session of the day, including your speakers and microphone

☐ Test your WIFI connection

☐ Close unnecessary computer programs that are running in the background

☐ Check your video background—“What’s behind you is what you wear to work”

☐ Check your lighting—use overhead lighting, if possible

☐ Check your camera placement so that you aren’t ‘looking down’ at your clients; maintain good eye contact

☐ Have noise-cancelling headphones ready to use, if needed

☐ Make sure your laptop charger is close-by, if needed

☐ Dress as you would for an in-person appointment

☐ Tidy your desk or workspace

☐ Make sure client is comfortable with conducting their session via telehealth

During Session

☐ Confirm that the client is in a “comfortable and private space”

☐ Verify client’s identify and document it, if needed

☐ Confirm session back-up plan if your or their internet connection fails

☐ Maintain good eye contact

☐ If you have two monitors, mention that you might look down or away to take notes, but you’re still listening

☐ Leave time for client to ask questions about telehealth or their session

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