# Document for Students at Telehealth Sites

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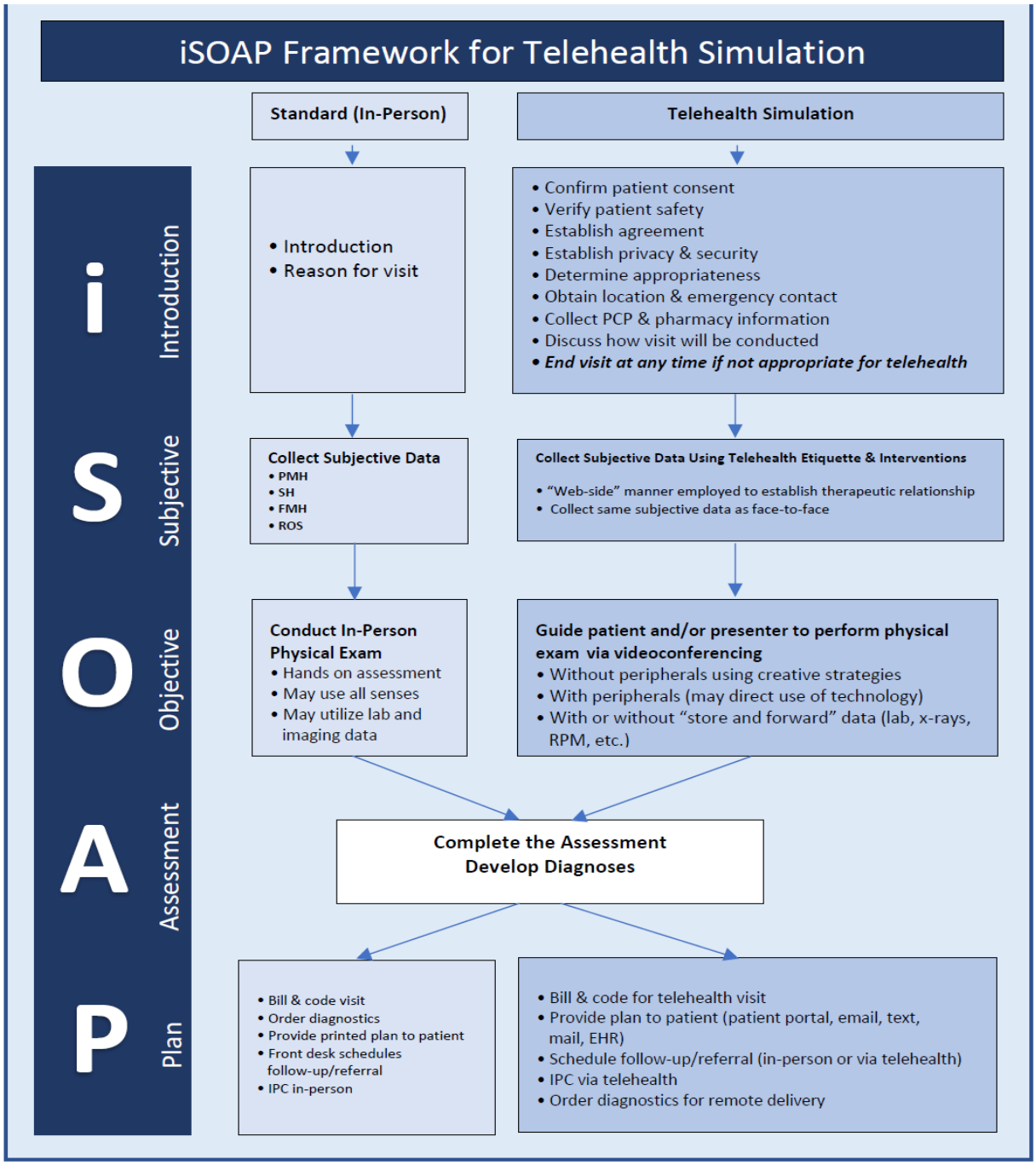
This Template is used for Simulations but also applies to actual patient encounters using telehealth.




**Abbreviations:** PCP = primary care provider; PMH = past medical history; SH = social history; FMH = family medical history; ROS = review of systems; CGMS = continue glucose monitor system; RPM = remote patient monitoring; IPC = Interprofessional Collaboration

# Student Telehealth Checklist

***The purpose of this checklist is to aid the NP student who is beginning a telehealth visit with patients. Students should have a working knowledge/experience prior to supervised practice with telehealth.***

## Please Note:

- ❑ Visits should be tailored to chief complaint for focused exam or follow up visit of chronic illness.
- ❑ Visits should be customized, depending on whether both student, preceptor and patient are in remote location or if the visit will occur with the student and preceptor in a shared location with the patient in a remote setting.
- ❑ Student should be very familiar with selected video conferencing platform as well as common troubleshooting procedures.
- ❑ The student is expected to be actively involved in all parts of the telehealth visit. If the student is unable to actively participate, the student should discuss it with the preceptor and, if necessary, the faculty.

## Standards for all visit types:

- ❑ Students should dress in professional attire as indicated by the practice with identifying name tags as required by State laws.
- ❑ Computer with front facing camera and audio capabilities. Precheck for working order.
- ❑ Internet capability with secure connections – HIPAA Compliant.
- ❑ Remote, quiet location for visit to take place without external interruptions.
- ❑ Back drop subtle and without distraction.
- ❑ Confirm how documentation of the telehealth visit will be done.
- ❑ Review Telehealth Etiquette
    - ODU Etiquette Video Link
    - ODU Strategies for Telehealth

## Prior to Telehealth Visit with Client:

- ❑ Review chief complaint and appropriateness for telehealth type of visit.
    - Consider emergency situations and resources available for patient in their location. For example, many rural communities do not have emergency services within their county.
- ❑ Consider tools that the patient may have on hand for exam purposes, such as spoon or flashlight for pharyngeal view, smart watch or phone for pulse monitor, thermometer for temperature assessment.
- ❑ Consider whether a family member will be needed to assist with exam depending on type of complaint or need for difficult positioning, view of the site of complaint, ie., skin, posterior view, palpation of abdomen, etc.
- ❑ Review patient record to determine what past history may contribute to disease processes or whether current medications may contribute to symptoms.
- ❑ Establish who will make initial contact with patient: Nurse or MA
    - Trouble shoot connection issues with patient.

- Explain telehealth process and consents.
  - Verify consents.
- Patient should be instructed to have medication bottles available for review.
- Answer any questions patient may have about the visit.
- If needed, verify patient approves student involvement in encounter.

## Telehealth Visit with Client:

- ❑ Introduce self and anyone else in the room to the patient and confirm patient identity.
  - Remind patient that preceptor will be involved in the visit and how this will be done.
    - Established method for preceptor involvement.
- ❑ Reaffirm consent for telehealth visit and confirm that the visit will not be recorded in any manner.
- ❑ Determine if patient is appropriate for telehealth visit.
  - Can they hear/see well enough to conduct the visit?
  - Are they mentally and physically stable enough for the visit?
- ❑ Ask patient who is in the room with them and if they are comfortable with continuing the visit with other people present.
- ❑ Verify emergency contact information and location of patient during visit.
- ❑ Communicate how visit will be completed if issue occurs using technology (completed by phone, etc.).
- ❑ Verify Chief Complaint and begin ISOAP Process
  - HPI, ROS, Histories (social, family, etc.), Allergies, Current Medications, and other needed screenings.
  - Conduct physical exam as possible using any needed peripheral equipment.
  - Remember to assess body language of patient with considerations for safety, stability (physical and mental), interaction with others in the room (abusive environments).
    - If concerns, consider ending visit and notifying authorities, if appropriate.
  - After developing plan:
    - Electronically Prescribe any needed medications or renewals of medications after verifying pharmacy.
    - Review instructions for patient and be sure they comprehend all areas.
      - Relate how written copy of instructions will be given to the patient.
  - Review method for follow up appointment.
    - How will office handle making follow up appointment?
- ❑ Thank patient for their participation and answer any further questions.

Document encounter as appropriate in the medical record.

## Links to Student Content

- ODU Etiquette Video Link
- ODU Strategies for Telehealth
- AMA Resources on Telemedicine
- APA: Building Rapport with Youth via Telehealth