

## iSOAP Simulation Checklist

	Performed	Not Performed	NA
<b>i - Introduction Phase</b>			
<b>1. Established whether a telehealth visit should be conducted</b>			
a. Equipment is functioning appropriately			
b. Patient can participate successfully			
c. Healthcare issue can be addressed using telehealth			
d. Patient consents for the visit/Reason for the visit			
<b>2. Confirms Identity/Security/Privacy</b>			
a. Confirms patient's identity (may include identification)			
b. Assures patient that the platform is secure; HIPAA guidelines followed; session will not be taped			
c. Identifies by name and role everyone on providers side			
d. Identifies by name and responsibility/relationship those at patient's site			
e. Obtains approval from the patient that those other than the provider are ok to be present			
f. Obtains approval from the patient for others to be present during the visit on the patient's side			
<b>3. Provides for Patient's Safety</b>			
a. Identifies patient's location with address			
b. Determines emergency contact (name, phone #)			
c. Assesses environment for safety issues (has patient show room)			
d. Collects information on pharmacy and any other provider			
<b>4. Format of Visit</b>			
a. Described the planned flow of the visit			
b. Outlined the timeline available for the visit			
<b>S - Subjective</b>			
<b>1. Telehealth Etiquette</b>			
a. Maintained good eye contact from looking directly at camera, not into the screen (at least 50% of the time)			
b. Dressed in professional attire in clean, well-lit location with limited background noise and no door visible			
c. Spoke clearly in terms the patient could understand			
d. Demonstrated therapeutic e-communication techniques: Addressed that they may be taking notes during encounter, actively listened, leaned into the camera, used therapeutic silence (i.e., with head nods to convey understanding); chose words that display empathy			
<b>2. Subjective data collection</b>			

a. Collected appropriate social/environmental history, past medical history, family medical history, medication, allergy history, and immunizations.			
b. Obtained review of systems' pertinent positives and negatives			
c. Reviewed previous laboratory and diagnostics results			
<b>O - Objective</b>			
1. Explained physical exam limitations due to telehealth platform			
2. Provided explanations with each step of exam			
3. Critically appraised patient and correctly determined needed examination techniques			
4. Used peripherals appropriately			
5. Demonstrated appropriate examination skills with and/or without peripherals			
6. Demonstrated effective examination skills with everyday household items			
7. Demonstrated effective communication skills with telepresenter			
<b>A - Assessment</b>			
1. Developed appropriate differential diagnoses based on subjective and objective data.			
2. Developed appropriate primary diagnosis and secondary diagnoses			
3. Correctly evaluated asynchronous data			
<b>P - Plan</b>			
<b>1. Primary and Secondary Diagnoses Plan</b>			
a. Developed plan of care based on primary diagnosis or secondary diagnoses			
b. Confirmed pharmacy information to e-prescribe medications			
c. Provided diagnosis specific education			
d. Utilized teach-back method by requesting patient repeat directions or repeat demonstration			
<b>2. Anticipatory Guidance &amp; Health Promotion</b>			
a. Provided anticipatory guidance			
b. Provided age appropriate and condition specific health promotion education			
<b>3. Follow-up &amp; End Visit</b>			
a. Established follow-up appointment (telehealth or with primary care provider)			
b. Documented duration of visit/provided summary through technology			
c. Utilized appropriate telehealth billing and coding			
d. Forwarded telehealth visit details to primary care provider			
e. Ended visit with patient therapeutic communication			