**Rubric: Protocol for Establishing and Setting up a Telehealth Visit**

**Group #:**

A protocol that outlines the roles and responsibilities of personnel *in establishing the visit* with the patient is required in order to create an effective and efficient telehealth encounter. This should include each step for establishing the visit. (*How the patient contacts the practice, who takes the call, how they are scheduled, who sets up the room, etc.).* Remember, this is specific for the practice you were assigned to last week.

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| **Required Content** | **Score** | **Comment** |
| Identifies the personnel that will be responsible for offering and scheduling a telehealth visit versus a traditional in-person visit to patients | /.5 |  |
| Identifies how the telehealth visit will be scheduled (i.e., when patient calls to schedule an appointment, when patient is leaving the clinical site, etc.) | /1 |  |
| Identifies the type patient situations that are appropriate for a telehealth visit | /1 |  |
| Discusses how the provider will be notified of the pending telehealth visit | /.5 |  |
| Identifies who will be responsible for setting up the room and equipment for a telehealth visit | /1 |  |
| Describes how will payment be made if the visit is virtual and originating from the home | /1 |  |
| Identifies who is responsible for assuring that a consent has been obtained within the last year | /1 |  |
| Describes how the provider receive necessary information prior to the visit (tests, labs, imaging, previous records) | /1 |  |
| Identifies what will happen if the connection is lost and how the visit will be handled if it is transitioned to phone (billing, coding, etc.) | /1 |  |
| Identifies how follow-up information will be sent to the patient (secure email or text, through EHR portal, etc.) | /1 |  |
| Protocol is clear and easy to follow | /1 |  |